



FACILITIES MAINTENANCE & PROJECT MANAGEMENT PLAN

**OFFICE OF THE CITY MANAGER
FACILITIES MANAGEMENT DIVISION**



1.0	INTRODUCTION	1
2.0	PURPOSE	1
3.0	OBJECTIVES.....	1
4.0	ROLES AND RESPONSIBILITIES	1
4.10	MAINTENANCE AND PROJECT ROLES AND RESPONSIBILITIES	2
4.11	FACILITIES & PROJECT MANAGER	2
4.12	FACILITIES MANAGEMENT SUPERVISOR	3
4.13	ADMINISTRATIVE SUPPORT AND CONTRACT MANAGER.....	3
4.14	PART-TIME ADMINSTRATIVE STAFF SERVICES SUPPORT	4
4.15	TECHNICAL STAFF	4
4.16	CUSTODIAL STAFF	4
4.17	ADDITIONAL RESOURCES.....	4
5.0	PROCEDURES	5
5.1	MAINTENANCE STANDARDS	5
5.2	CATEGORIES.....	6
5.3	MAINTENANCE & PROJECT MANAGEMENT STRATEGIES.....	6
5.4	FUNDING RESPONSIBILITIES.....	7
5.5	FACILITIES ASSESSMENT	7
5.6	PROCUREMENT.....	7
5.7	PRIORITIES.....	8
5.8	WORK CONTROL CENTER.....	9
5.9	MAINTENANCE PERFORMANCE MANAGEMENT	10
5.10	PROJECT PERFORMANCE MANAGEMENT	10
5.11	CHARGES FOR PROJECT SERVICES	11
5.12	FACILITIES & PROJECT MANAGEMENT STRUCTURE	12
6.0	GLOSSARY	13
	APPENDIX A – FUNDING RESPONSIBILITIES	14
	APPENDIX B – FUNDING FOR TYPES OF PROJECTS.....	16
	APPENDIX C - REQUESTS AND AFTER HOURS WORK FLOW	17
	APPENDIX D - AR 12-3-R1 BUILDING MODIFICATIONS.....	18
	APPENDIX E – AR02-1-R3 BUILDING SECURITY	19
	APPENDIX F – MAJOR PROJECT MANAGEMENT STRUCTURE	20
	APPENDIX G –MINOR PROJECT MANAGEMENT STRUCTURE	21
	APPENDIX H – THREE WEEK PROJECT SCHEDULE.....	22



FACILITIES AND PROJECT MANAGEMENT

1.0 INTRODUCTION

The City of Medford (COM) owns and operates an extensive portfolio of buildings and utility assets. This document provides the framework to ensure effective project management and that these assets are properly maintained to support the City of Medford's objectives. The purpose of the Facilities Management Division (FMD) of the City Manager's Office is to provide consistency in the maintenance and project management of all COM buildings, associated utilities, and the roles and responsibilities of Facilities Management staffing.

2.0 PURPOSE

The purpose of this document is to outline the roles and responsibilities of FMD, define project and maintenance funding allocation, and the responsibilities to achieve effective maintenance and project management for the lowest life cycle cost of City of Medford assets.

3.0 OBJECTIVES

The objectives of this policy are to:

- (a) Clarify maintenance and project management responsibilities for building assets;
- (b) Specify the minimum requirements for the asset maintenance;
- (c) Ensure that assets are adequately maintained;
- (d) Ensure that associated risks are effectively managed;
- (e) Statutory compliance (equipment serviced in accordance with legislative requirements);
- (f) Ensure that building assets perform effectively and efficiently throughout their service life;
- (g) Appropriate decisions are made in selecting maintenance and project strategies; and
- (h) Ensure that a sound basis exists for the allocation of maintenance and project management funds.

4.0 ROLES AND RESPONSIBILITIES

FMD is the sole provider of maintenance and project management services for all COM facilities, except for the Water Reclamation Plant and all landscape services. As the COM is the owner of land and building assets, FMD is responsible for:

- (a) Maintenance of all building assets and associated utility management for compliance with statutory and regulatory building requirements;
- (b) The maintenance, repair, and project management of utilities, equipment and services set out in Column 2 of Appendix A and also Appendix B of this document; and
- (c) Setting up maintenance and project management contracts where additional services are required.



Building occupants are responsible for:

- (a) Ensuring that personal spaces are kept in a safe and tidy condition;
- (b) Reporting building related faults to FMD through an electronic request system;
- (c) Ensuring all requests are in accordance with AR12-3 R1 and AR02-01 R3
- (d) Funding building related work that falls outside the scope of routine maintenance; and
- (e) Individually assigned equipment owned by COM.

4.1 Maintenance and Project Roles and Responsibilities

The specific roles and responsibilities for the Facilities Management Division (FMD) of the City Manager's Office have been tailored for maintenance and project management operation. These are not meant to be job descriptions, but rather a summary of the responsibilities for each role. The responsibilities are also based on actual project staffing available. Consequently, multiple roles have been assigned to a single position. The descriptions below describe the roles and responsibilities for the function of maintenance and project management. Supporting the roles and responsibilities described herein and attached to this document as Appendix F is a diagram for Minor Project Management. Also attached is Appendix G, which is a diagram for Major Project Management.

4.1.1 Facilities & Project Manager

The Facilities & Project Manager (FPM) is responsible for the overall Facilities Management operation, staffing, and budgets for the Facilities Management Division of The City Manager's Office. Responsibilities include administrative staff, short and long range planning, staffing development, efficiency of the operation, utility management, and overall management of the division.

The FPM is also responsible for planning, directing and overseeing Facilities projects, and ensuring that all deliverables and functionality of the design are achieved. The FPM is also responsible for the management of all resources assigned to the project, serves as the primary liaison between the project and executive staff, and mitigates escalating issues as needed. The FPM reviews and resolves project issues not resolved at lower levels, and directs the project management functions. The FPM acts as the principle interface to the contractors unless delegating to the Facilities Management Supervisor.

The FPM oversees the development of the RFP, RFQ, ITB, and other solicitation documents. The FPM may delegate specific projects and development to the Facilities Management Supervisor but the FPM is ultimately responsible for integrating all the pieces and ensuring consistency and continuity throughout the entire procurement process, while also conforming to procurement standards, rules, and regulations. This responsibility also includes preparing and maintaining procurement schedules, coordinating contract negotiations, and managing evaluation of proposals, award, and contractor selection.



4.1.2 Facilities Management Supervisor

The Facilities Management Supervisor (FMS) is responsible for the day-to-day operation of the Facilities Management Division of The City Manager's Office, staffing, and has both development and supervisory responsibilities for the operational budget. Responsibilities include management of both technical tradespersons and janitorial staff employed by the department, short and long range planning, staff development, efficiency of the operation, utility management, and overall supervision of the division. Responsibilities also include management of a citywide keycard access system.

The FMS is also responsible for supervision of the facilities management and preventative maintenance program for all City buildings outlined in this document. Responsibilities include operations and maintenance of all aspects of City owned building structures and associated utilities, including all mechanical, electrical, plumbing, and Energy Management Systems (EMS). The FMS also provides the FPM with operational reporting from data collected through the Computerized Maintenance Management System (CMMS), EMS, and keycard access system.

The FMS serves as the primary liaison between the project and the requesting department for all projects assigned and is integral in the development of the RFP, RFQ, ITB, and other solicitation documents. The FMS provides capital improvement and building modification in accordance to this plan, Oregon Building Code, and Administrative Rule (AR) 12-3 R1.

4.1.3 Administrative Support and Contract Manager

The Administrative Support and Contract Manager are accountable to the FPM for all the project office management related activities. The Administrative Support Manager plans, guides, and oversees the day-to-day internal activities that support the Project Office, and assists in the development of the master project schedule and all other project work plans. The Administrative Support Manager is accountable for the development, maintenance, and adherence to the project office infrastructure and supporting methodologies (e.g. processes, procedures, standards, and templates) that are in compliance with the City of Medford Strategic Plan and best practices and policies.

In addition, the Administrative Support Manager directs the part-time administrative support staff, coordinates tools and services training, ensures that the administrative staff adhere to processes and policies, leads the cost management effort including: operational budget tracking activities, facilitating communication on fiscal status, and ensuring the project cost tool and supporting documentation is maintained. The Administrative Manager also provides reports, recommendations, and status on the project budget and expenditures, e.g., planned vs. actual reports, initiates corrective action, and re-planning activities.

The Administrative Support and Contract Manager is also responsible for supporting the FPM assisting in the tracking of project budget/costs, coordinating/preparing budgetary documents, e.g., special project reports and change order proposals, reviewing budget/contract expenditures, and collecting and reporting financial metrics. This includes reconciling the accounting and cost management processes in accordance with City of Medford financial management policies and



procedures. The Administrative Support and Contracts Manager also provide support in project solicitations, evaluations, and award processes.

4.1.4 Administrative Staff Services Support

The Administrative Staff Services Support is responsible for supporting the FPM by providing staff services-related activities; acting as the help desk liaison between the project and project stakeholders; serving as personnel liaison to Facilities maintenance staff and the computerized maintenance management system. The Administrative Staff Services Support also assists the FPM by providing support for asset management oversight, making preparation for contract arrival and staff orientation, providing clerical/secretarial support, maintaining project meeting calendars and distribution lists, and managing incoming/outgoing mail.

4.1.5 Technical Staff

The Technical staff of the FMD is a cohesive team that performs technical and licensed trade services for maintenance and minor projects. Technical staff directly report to the Facilities Management Supervisor (FMS). The Technical Staff primarily provide technical services to maintain City assets; however, the FPM also assigns technical staff to projects according to each individual's professional skill set.

Performing licensed trades services "in-house" saves the City of Medford considerable project dollars that can then be redirected into the current maintenance operation or subsequent projects. Technical staff assists the FMS in the following: tracking and managing the requirements for new systems installation and any changes to the requirements, educating project stakeholders on new technologies and processes relevant to the project, and providing technical training of new technologies implemented for future maintenance purposes.

4.1.6 Custodial Staff

The Custodial staff of the FMD is a cohesive team that performs janitorial services for the cleanliness and safety of City buildings and parking structures. Custodial staff directly report to the FMS. The Custodial Staff primarily provide janitorial services to maintain City assets; however, the supervisor also assigns custodial staff routine or remedial building maintenance tasks according to each individual's professional skill set. The operational expectation of custodial staff for City facilities can be found in the Standard Operating Procedures for Custodial Services Manual and is on file with Facilities Management.

4.1.7 Additional Resources

Consultants or professional engineers will be utilized on a project when staff does not possess the necessary qualifications for specific trade disciplines or the services are of an urgent or temporary nature. The process for acquiring consulting contractors or professional engineers is directed by the City of Medford procurement policy. Determining additional resources begins with the development of the Statement of Work (SOW) and by determining the minimum and desired



qualifications. The project manager will coordinate with the City of Medford purchasing office and select the appropriate contract vehicle, solicit proposals or offers from the bidder community, coordinates the proposal or offer reviews, schedule vendor interviews, and participate in the final vendor selection. The type of contract vehicle selected (e.g., Request for Proposal, Request for Quote, Exemption from Competitive Bidding, etc.) depends on the specific specialty need and direction given by the project manager.

5.0 PROCEDURES

Maintenance and project funds will be used to achieve the greatest benefit for COM buildings and associated infrastructure. COM facilities will be maintained to the best standard possible while meeting statutory obligations and the operational needs of the organization. Prioritization between competing demands for these funds can be difficult when considering increased costs through a growth in building assets, increasing utility costs, and an increasing ratio of office space to service space.

Maintenance funding is prioritized within budget levels and will be allocated in consideration of the following factors:

- (a) Workplace health and safety;
- (b) Statutory compliance;
- (c) Risk management;
- (d) Asset life cycles;
- (e) Utility costs;
- (f) Public appearance; and
- (g) Property loss/damage.

5.1 Maintenance Standards

Each facility will be allocated an Importance Rating of 1-5. Maintenance standards will vary depending on the importance of the facility as per the guide below:

- Level 1 Carry out only essential maintenance
- Level 2 Defer non-essential maintenance where possible
- Level 3 Carry out maintenance based on risk assessment
- Level 4 Maintain to the best standard that resources allow
- Level 5 Maintain to a very high standard

In regard to rating 5, there will always be some buildings and facilities which, because of their importance, their prominence, aesthetic value or historical significance, must be maintained at a higher standard than that prevailing elsewhere in the City.



5.2 Facilities and Project Categories

- (a) **Preventive maintenance** is maintenance which is carried out to prevent an item failing or wearing out by providing systematic inspection, detection and prevention of incipient failure. Preventative maintenance is usually programmed.
- (b) **Statutory maintenance** is when equipment such as elevators, fire systems, fume hoods and air conditioning systems are serviced and maintained in accordance with legislative requirements.
- (c) **Corrective maintenance** can be defined as maintenance that is required to bring an item back to working order when it has failed or exceeded the expected life cycle.
- (d) **Backlog maintenance** is maintenance that is necessary to prevent the deterioration of an asset or its function but which has not been carried out.
- (e) **Project Management** is all capital and minor project management involving building and utility asset modification, rehabilitation, and new construction.

5.3 Maintenance and Project Management Strategies

- (a) **Preventive Maintenance** - Preventative maintenance tasks are programmed and work orders are automatically generated for the relevant trade supervisor as required. Preventative maintenance work is prioritized to undertake intervention action and reduce premature failure of utilities and equipment during the anticipated asset life cycle. The preventative maintenance schedule is reviewed by the supervisor and new items added as new buildings, utilities, and equipment are commissioned.
- (b) **Statutory Maintenance** - Various Federal, State Acts, and Local Government regulation require specific tasks that ensure facilities are kept safe and functional. Statutory maintenance is generally outsourced under comprehensive maintenance contracts for liability and documents of compliance are provided to FMD verifying that the tasks have been correctly performed.
- (c) **Corrective Maintenance** – This is handled via FMD’s work request system within the operation budget if less than \$5,000. Larger jobs will be funded from other programs. Prioritization of corrective maintenance work will be as per Maintenance Standards 5.1.
- (d) **Project Management** - A three biennium or six year planned capital improvement program involving all city departments. This program is designed to address project management for all major building repairs, replacement, or capital improvement projects.
- (e) **Backlog Maintenance** - The City’s backlog maintenance liability is estimated each year by FMD. An annual deferred maintenance program will be set up to address high priority backlog maintenance items.



5.4 Funding Responsibilities

FMD is responsible for funding building repairs and maintenance that is due to “normal” wear. Where applicable, maintenance work resulting from misuse and vandalism will be charged to the appropriate department or non-city entity. Work identified as “normal” maintenance items will be prioritized and scheduled according to work type and funding levels. Should building occupants require the work expedited sooner than normal maintenance schedules can provide, additional funding may be needed to cover expenses of outsourcing the request.

Although managed by FMD, building and utility Capital Improvement Projects (CIP) is funded by the requesting department. Funding is budgeted in cooperation with FMD to effectively capture all costs associated with the project and its management. Appendix A provides examples of funding responsibilities. Appendix B illustrates how maintenance requests and capital projects are normally funded.

5.5 Facilities Assessment

A facilities audit will be carried out by FMD on City owned facilities each year in accordance with this policy. The audit scope will encompass assessment of compliance with statutory requirements, condition of the facility, functionality, and safety. Where resources are available, audits will be carried out as follows:

Level 3	Detailed audit
Level 2	Walk through audit
Level 1	Desktop audit

Each facility will undergo a Level 2 or Level 3 audit every 5 years and a Level 1 audit each intervening year. Level 3 audits are usually undertaken by consulting agencies to provide a comprehensive report for maintenance and to provide a basis for rehabilitation projects.

Building deficiencies identified will be placed on an appropriate work program (e.g. Corrective Maintenance, Deferred Maintenance, Rehabilitation, Capital Project, Minor Work, etc.).

5.6 Maintenance & Project Procurement

All statutory, preventive maintenance and CIP services will be procured in accordance with the COM Purchasing Policy. Maintenance and professional contracts are to have measurable performance indicators and established performance reviews carried out on a regular basis. Service contracts for project management will be combined where possible to achieve optimum pricing and reduce the indirect costs associated with processing multiple contracts. The six year planned CIP program is an essential component to contract bundling for project management.

Corrective and deferred maintenance are predominantly carried out by FMD staff. Private contractors are also used for specialist work or for where internal resources cannot deliver the work within a reasonable time frame. Private contractors are procured in the open market and in accordance with state and COM purchasing policies.



5.7 Maintenance Priorities

All work requests received by the FMD work control center are assigned a priority rating. The work control center determines the priority based on information received from the requestor. Priorities are allocated according to the category of work the requested best matches.

Each priority has a response time which has been outlined below. A response time is the time it takes maintenance to first respond to the work request and is not the actual work completion time. Completion of a work request may be affected by a number of factors, for example, parts may need to be ordered, or equipment may need to be taken to another location for repair. Response and completion times may also be affected by the volume received by the specific trade, for example, during the months of summer air conditioning technicians can receive over 500 work requests. Along with priority level, trades staff is assigned work requests by the type and location of the work to better maximize response time through efficient work flow in areas or zones.

Priorities are listed on a 1-4 rating, with 1 being the highest priority and 4 being the lowest priority. Table 1 below is a list of each priority with the categories outlined.

Table 1

<p>Priority 1 Response: Within 30 minutes (during normal working hours)</p> <p>Within 60 minutes (after hours) Categories are: Serious safety or environmental hazard/incident Irreplaceable/catastrophic loss to essential services Serious asset damage (e.g. fire / major leaks which may include water, gas) Widespread loss of power</p> <p>The objective for priority 1 is: Make safe and minimize damage. In all cases FMD will attend ASAP.</p>
<p>Priority 2 Response: Within 2 working days</p> <p>Categories are: Low risk safety hazards Replaceable loss to essential services Malfunction of equipment</p>
<p>Priority 3 Response: Within 5 working days</p> <p>Categories are: Asset requires maintenance – not urgent Minimal risk to essential services</p>
<p>Priority 4 Response: Within 14 working days</p> <p>Categories are: Routine maintenance Programmed work Work scheduled as per agreement with customer</p>



5.8 Work Control Center

All maintenance requests/faults for the buildings and areas listed below are to be reported through the computerized “Work Request System” and all urgent requests to the FMD Work Control Center (WCC) via Extension 2688:

- Service Center
- Building A (1&2)
- Building B
- Building C
- Building D
- Building E
- Building F
- Building G
- Building H
- Building I
- Building J
- City Hall
- Lausmann Annex
- Carnegie
- Santo Community Center
- Middleford Parking Garage
- Evergreen Parking Garage
- Aquatic Facilities
- Park Buildings & Lighting
- Fire Station 2
- Fire Station 3
- Fire Station 4
- Fire Training Building
- Fire Station 5
- Fire Station 6
- Police Station
- Police Garage

The normal business hours of the WCC are from 7:30am to 4:00pm Monday to Friday. Outside normal business hours, an after-hours service provider receives all phone requests and if necessary, will call out the relevant on-call staff member as specified by the FMD.

The maintenance work flow is summarized in the attached flow chart in Appendix C. Customers are able to follow-up the status of work requests by calling the WCC on the numbers listed above or request a higher access level to the work request system.

The WCC is committed to maintaining a high level of customer service. Feedback is welcomed through an annual customer services questionnaire or by contacting the Facilities Management Division at ext. 2688 or email facilities@cityofmedford.org.



5.9 Maintenance Performance Management

Key Performance Indicators (KPIs) will be monitored to ensure that the delivery of maintenance services meets desired standards. These KPIs are detailed in Table 2.

Table 2

KPI	Measure	Target
Response Time	Time responded as per Table 1	Achieve minimum of 90% of specified response times.
Outstanding Work Orders	No. over 30 days No. over 60 days No. over 90 days	15% total work orders 10% total work orders 5% total work orders
Maintenance Index	% of maintenance budget/ total asset replacement value (ARV)	No less than 1.0%
Condition Auditing	% of buildings audited by due date.	100%
Maintenance Customer Service Rating	% score from customer surveys.	Minimum 85% satisfaction

5.10 Project Performance Management

Standardized scheduling, budget review, and project milestones will be provided to the requesting department at standard three week intervals; more frequently delivered for smaller projects. As part of the cost management process an active budget summary is kept for each project and provided at each project review. For reference of project deliverables and active scheduling, Appendix H is the standard Three Week Project Schedule.

An end of project meeting and survey will also be provided to each department requesting project services. The purpose is to measure key performance areas of customer service, project delivery, areas of improvement, and also data for reporting successes.

The project manager will also track the following KPIs for overall effectiveness and reporting to executive staff:

- (a) Percent of scheduled projects for which design is completed on schedule (target of at least 90%)
- (b) Percent of scheduled projects as designed, measured in terms of dollars delivered (target of at least 100%; values are often greater than 100% because delayed projects are replaced by other projects that are completed early)
- (c) Actual time for contract completion, excluding weather days, expressed as a percentage of the original allotted days at the time of the contract award (target of less than 110%)
- (d) Number of projects delivered within their approved amount, calculated as the contractor's bid amount expressed as a percentage of the amount estimated in the approved CIP documents for each project (target range of 85 to 100%)



- (e) Proposed final estimate for projects completed in a fiscal year, measured as a percentage of award allotment value (target of less than 100%)
- (f) Final estimate for projects finalized in a fiscal year, measured as a percentage of the proposed final estimate of those projects (target of less than 103%)
- (g) Construction support work for projects with proposed final estimates in a fiscal year, measured as a percentage of the total construction support cost estimated in the programming documents for those projects (target range of 80 to 100%)

The following formulas are used to translate the program-level performance measures into reporting indicators that inform department wide performance measures:

- (a) **Capital cost growth indicator:** Final estimate for all projects divided by total approved dollars (target range of 85 to 100%). This composite index combines three program-level performance measures to indicate the department's overall success in planning and delivering projects within budget over the entire project life cycle.
- (b) **Time growth indicator:** Number of projects completed in a fiscal year divided by number of projects scheduled for completion (target of at least 90%)
- (c) **Support cost indicator** (if tracking is necessary): Actual project development support costs plus actual construction support costs, divided by approved project development support costs plus programmed construction support costs (target range of 80 to 100%). This index is a weighted average of two program-level performance measures used to indicate the division's overall success in keeping total support expenditures within project support budgets

5.11 Charges for Project Services

Charges will apply for services provided by FMD that fall outside the parameters of scheduled and planned projects. Appendix A details funding responsibilities for project related work.

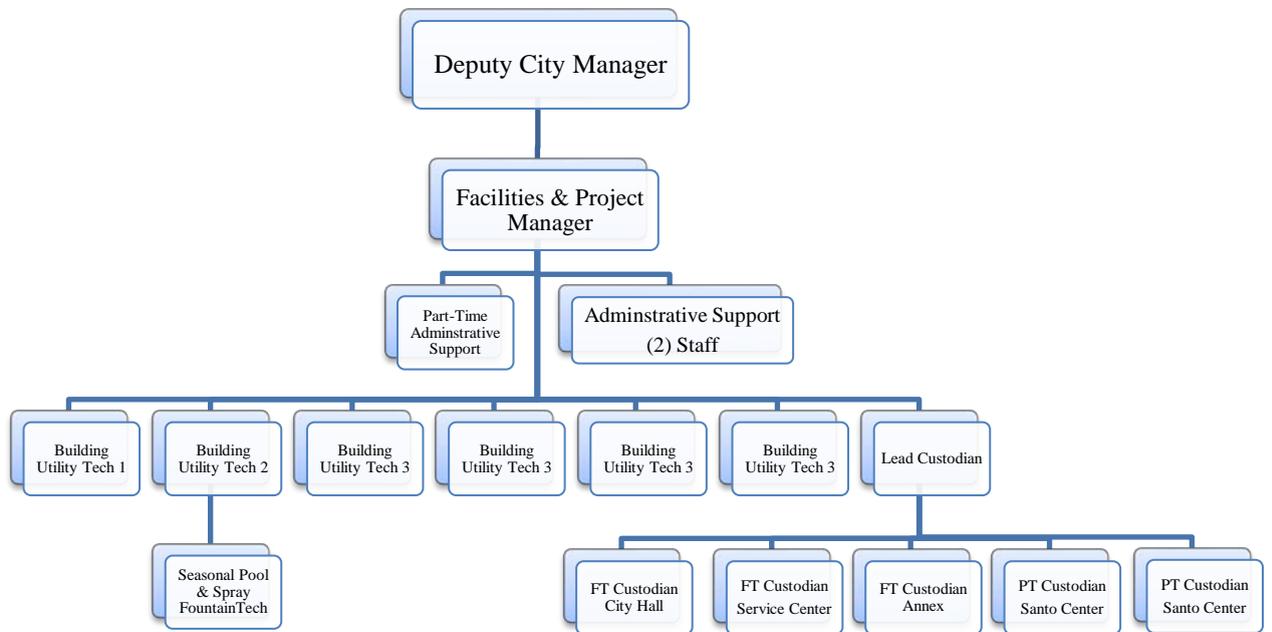
Maintenance and project services will be delivered either in-house or assigned to a qualified contractor. For unplanned project requests carried out by FMD maintenance staff, a flat hourly rate could be applied. This rate is reviewed periodically at the FPM's discretion.

In the instance a service contractor is used, project work will be charged to the requesting department at cost with no mark-up. The cost of supervisory staff utilized in the delivery of work, external to this policy, are not included in recovery unless they are actually providing the labor to undertake the task.

All new building modification requests outside planned capital improvements must be accompanied by a completed request form as outlined in City of Medford Administrative Rule 12-3, Building Modification Requests. The administrative rule and form is attached to this document as Appendix D for review.



5.12 Facilities and Project Management Division Structure





6.0 Glossary

Asset Management – A systematic approach to the procurement, maintenance, operation, rehabilitation, project management, and disposal of one or more assets; which integrates the utilization of assets and their performance with the organization’s requirements.

Facility – For simplicity of financial, operational, maintenance, or other purposes “facility” represents a single management unit for a complex of buildings, structures, and associated equipment, such as administrative buildings, service buildings, and park building structures.

Maintenance Index – Recurring maintenance expenditure as a percentage of asset value.

Preventive Maintenance – The actions performed to retain an item or asset in its original condition as far as practicable by providing systematic inspection, detection and prevention of incipient failure. Preventive maintenance is normally programmed, for example as “predetermined preventive maintenance”.

Corrective Maintenance – The actions performed, as a result of failure, to restore an item or asset to its original condition, as far as practicable. Corrective maintenance may or may not be programmed.

Deferred Maintenance – Maintenance which is due to be carried out in the current financial year but which will not be carried out because of a shortage of funds or unavailability of parts. Deferred maintenance should be added to the backlog of maintenance items awaiting attention.

Backlog Maintenance – Maintenance that is necessary to prevent the deterioration of an asset or its function but which has not been carried out.

Statutory Maintenance – Maintenance that must be carried out to meet statutory requirements.

Normal Wear - Reasonable use of the building and fixtures by the occupants and the anticipated wear imposed due to normal operation.



Appendix A

FUNDING RESPONSIBILITIES FOR MAINTENANCE SERVICES

Funding Responsibilities			
Funding Account	FMD	Requesting Department	Comments / Examples
Building Element			
Sub-structure	<input checked="" type="checkbox"/>		Building footings, in-ground services located under building.
Building structure	<input checked="" type="checkbox"/>		
Internal Fixtures -Portable		<input checked="" type="checkbox"/>	Photo frames, clocks, mirrors, internal plants, whiteboards, pin boards.
Fixed	<input checked="" type="checkbox"/>		Curtains, drapes, blinds.
Internal Fittings/Public Areas	<input checked="" type="checkbox"/>		Soap dispensers, paper towel dispensers
Internal Finishes	<input checked="" type="checkbox"/>		Toilet roll holders, carpets, floor coverings, painting, wall coverings, vinyl, and painting. <i>(All items due to normal wear).</i>
Fixed Furniture		<input checked="" type="checkbox"/>	Anchored workstation new or relocation
Other Department Furniture		<input checked="" type="checkbox"/>	Filing cabinets, bookshelves, chairs, etc.
Loose Furniture/Seating		<input checked="" type="checkbox"/>	
Service Elements			
Fixed Electrical Lighting	<input checked="" type="checkbox"/>		
Portable Lamps		<input checked="" type="checkbox"/>	Desk lamps
Fixed Power Outlets	<input checked="" type="checkbox"/>		
Portable Power Outlets	<input checked="" type="checkbox"/>		Power boards
Power Generators Fixed	<input checked="" type="checkbox"/>		
Portable	<input checked="" type="checkbox"/>		For building operations only
Electrical Lighting and Power Systems	<input checked="" type="checkbox"/>		
Building Reticulated Services	<input checked="" type="checkbox"/>		Chilled water, electricity, gas, water



Funding Responsibilities

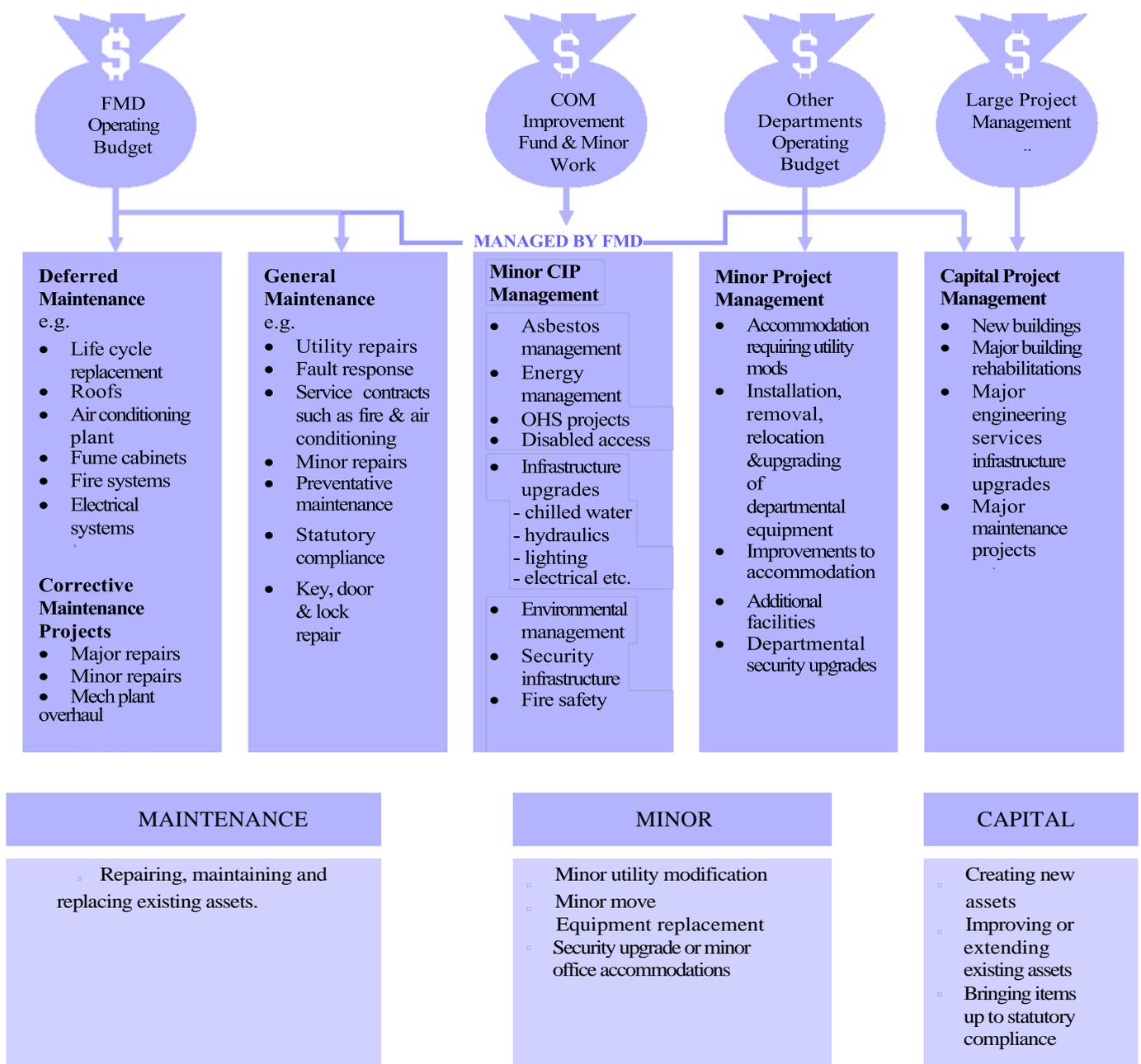
Funding Account	FMD	Requesting Department	Comments / Examples
Hot Water Infrastructure Portable		<input checked="" type="checkbox"/>	
Fixed	<input checked="" type="checkbox"/>		Commercial dishwashers, process chillers, water tanks and pumps, water heaters.
Air conditioning/ventilation	<input checked="" type="checkbox"/>		Where installed in building and not portable
Fire Protection Systems	<input checked="" type="checkbox"/>		
Security Systems	<input checked="" type="checkbox"/>		
Asbestos Materials Portable			
Fixed	<input checked="" type="checkbox"/>		
Automatic Doors	<input checked="" type="checkbox"/>		
Elevators	<input checked="" type="checkbox"/>		
Lock Repair Portable		<input checked="" type="checkbox"/>	Except for padlocks keyed to city
Fixed	<input checked="" type="checkbox"/>		
Lock Replacement Portable		<input checked="" type="checkbox"/>	Except for padlocks keyed to city
Fixed	<input checked="" type="checkbox"/>		
Key Replacement Portable		<input checked="" type="checkbox"/>	Except for padlocks keyed to city
Fixed	<input checked="" type="checkbox"/>		
Site Elements			
Site Work	<input checked="" type="checkbox"/>		Lot striping, sidewalks, etc.
External Structures	<input checked="" type="checkbox"/>		Equipment fences, such as a/c, etc.
External Services	<input checked="" type="checkbox"/>		Power distribution
Outdoor Equipment Fixed	<input checked="" type="checkbox"/>		Generators, building compressors
Other			
Department Specialized Portable Equipment		<input checked="" type="checkbox"/>	Fire Department SCBA, pressure tank regeneration equipment, radio and gear, etc.
Department Equipment – Fixed		<input checked="" type="checkbox"/>	Biohazard units, workshop equipment, Police property control equipment (non-building related)
Telephones & Data, AV Equipment, new TV outlet installation, antennae, satellite		<input checked="" type="checkbox"/>	
Signs Fixed Directional	<input checked="" type="checkbox"/>		Replacement due to wear, safety, vandal
Parking Garage Traffic Signage	<input checked="" type="checkbox"/>		Replacement due to wear, safety, vandal
Kitchen equipment		<input checked="" type="checkbox"/>	



Appendix B

FUNDING FOR BUILDING WORK

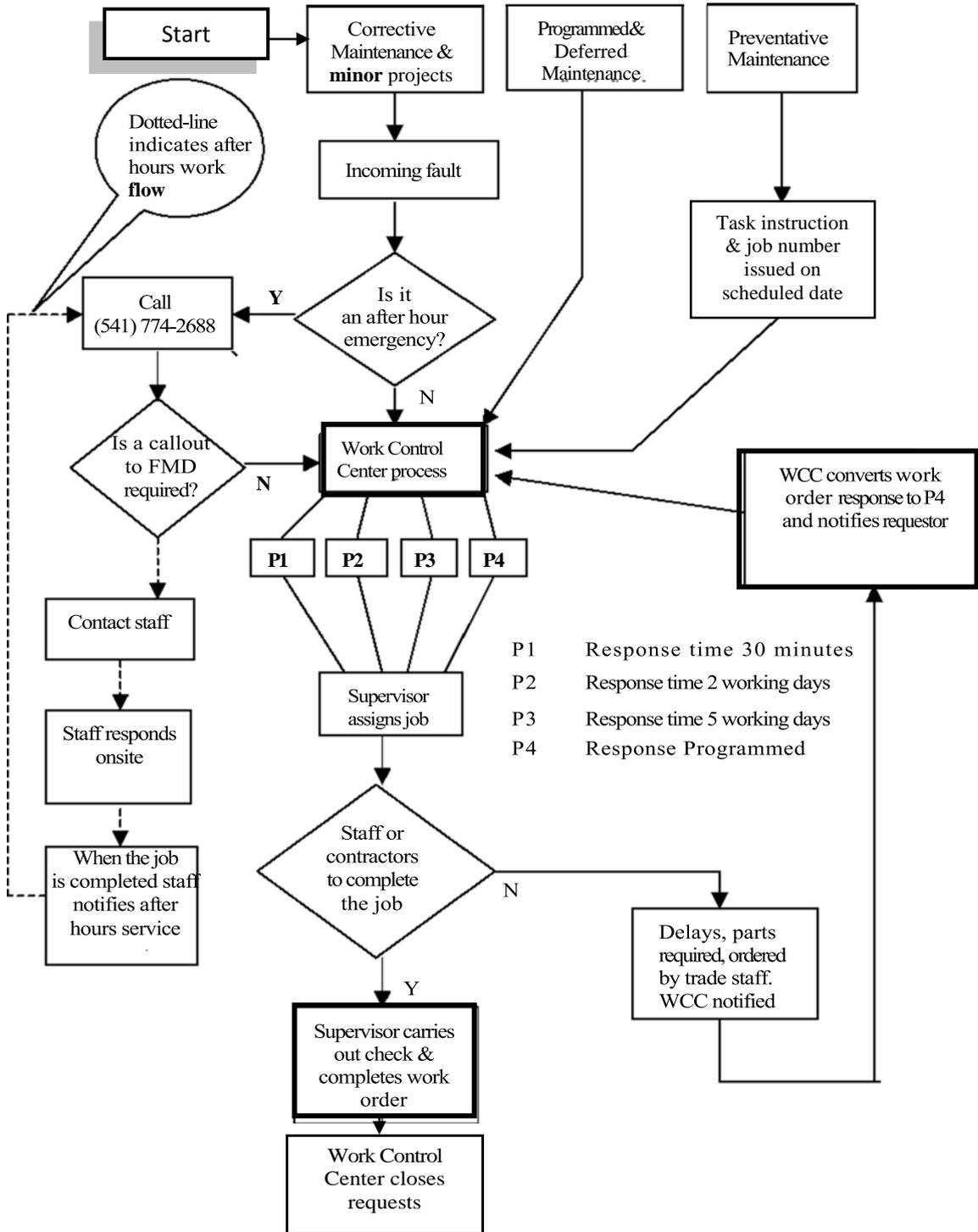
The funding for facilities and project related work can sometimes be confusing as different types of work is funded from different sources. This confusion often creates conflict as various groups compete to obtain funds for their particular areas and interests. The main areas of conflict are the differences between maintenance and projects (capital and minor projects), and an understanding between FMD and other department funded projects. To help overcome this problem, the model below illustrates how funds are allocated in relation to building work and projects managed by FMD.





Appendix C

MAINTENANCE WORK FLOW LOGARITHM





Appendix D



City of Medford
Administrative Regulation

Regulation No.: 12-3-R1
Page: 1 of 3
Subject Area: Building Modification
Date of Issue: September 28, 2015
Supersedes: 12-3

Title: Building Maintenance & Modification Requests

Purpose

The purpose of this policy is to establish and implement procedures for facility management on City of Medford facilities and permanent assets, to facilitate and manage building modifications, and to implement procedures for routine and preventative maintenance of city operated facilities and related building equipment.

Definitions

The following definitions are terminologies specifically referencing the key portion of this policy.

1. *City*: City of Medford Facilities.
2. *Facilities*: City owned buildings; rooms, park building structures, service facilities, or area requiring maintenance of such structures, utilities, and related equipment.
3. *Facilities Management*: A division of the City Manager's Office responsible for building maintenance, building utilities, and project management for all park facilities, aquatic facilities, Service Center compound, Santo Community Center, Lausmann Annex, City Hall, Carnegie building, Police station, Fire stations and parking structures.
4. *Equipment*: City of Medford property permanently attached to the building structure, including all city-owned maintenance equipment.
5. *Work Request*: An electronic form used to communicate a requested repair or service to the Facilities Management Division. Work requests are part of a computerized maintenance management system (CMMS).
6. *Preventative Maintenance*: Maintenance which is performed in order to prevent an item from failing or wearing out by providing systematic inspection, detection and prevention of incipient failure. Preventative maintenance is usually programmed and scheduled.
7. *Response Time*: A response time is the time it takes Facilities to first respond to the work request and is not the actual work completion time. Completion of a work request may be affected by a number of factors, for example, parts may need to be ordered, or equipment may need to be taken to another location for repair. Response and completion times may also be affected by the volume requests received.
8. *Emergencies*: Building structure or facility problems after normal business hours that require immediate attention and are unable to wait until the next business day.
9. *Billable Services*: Any project or activity that is not considered "routine maintenance" (for which Facilities Management receives budget funds).

-
10. *Non-Billable Services:* Any routine repair or activity in which the Facilities Management Division is normally funded to perform.
 11. *Utilities:* Essential services required to operate a facility (electricity, natural gas, water, and sanitation).
 12. *Statutory Maintenance:* When facilities mechanical system such as lifts, fire systems, elevators, and air conditioning systems are serviced and maintained in accordance with legislative requirements.
 13. *Building Modification:* Alterations made to facilities that change the design or purpose of allocated space, equipment, or utility designed for facility operation.

Policy Objective

The Facilities Management Division is the sole provider for maintaining all building, building utilities, and project management for all park building facilities, aquatic facilities, Service Center compound, Santo Community Center, Lausmann Annex, City Hall, Carnegie building, and parking structures. The division is also the sole source for facilitating and managing modifications to City of Medford facilities or permanently affixed building equipment. No activities by external contractors are permitted on the structures and utilities identified above without prior approval and involvement of the City Manager's Office/Facilities Management Department. This will assure the following objectives are obtained:

1. Ensuring assets are adequately maintained.
 - a. Ensuring associated risks and facility projects are effectively managed.
 - b. Ensuring that building assets perform effectively and efficiently throughout their service life cycle.
2. Maintenance funds will be used to achieve the greatest benefit for City buildings and associated infrastructure. Within the constraints of available resources, City facilities will be maintained to the best standard possible while meeting statutory obligations and the operational needs of the organization.

Procedures

1. All building and utility modification requests must be submitted on a Request for Building Modification Form (attached) for all park facilities, aquatic facilities, Service Center compound, Santo Community Center, Lausmann Annex, City Hall, Carnegie building, Police station, Fire stations and parking structures. All work and facility modification requests received by the Facilities Management Division will be assigned a priority rating. The Facilities Management Supervisor determines the priority based on information received from the requestor. Priorities are allocated by the category the work requested falls into.
2. All general maintenance and repair requests must be submitted on an electronic service request form. The electronic service request link is located on the City of Medford intranet site. Please contact the City Technology Services department at ext. 2050 for assistance locating the service request link on the city's intranet site.

3. Billable Services

- a. Charges will apply for services provided by Facilities Management that fall outside the parameters of this maintenance policy and the funding responsibilities are the requesting department(s). Billable services are identified in the following Procedure 3.b.
- b. Maintenance services will be delivered either in-house or assigned to an external service contractor(s). For work carried out by Facilities Management staff, a flat hourly rate will be applied. In the instance a service contractor is used, maintenance work and materials will be charged at cost. The cost of supervisory staff utilized in the delivery of work requests external to this maintenance policy are not included in recovery unless they are actually providing the labor to undertake the task.

Facilities Assessment

1. A facilities audit will be carried out by Facilities Management Services on City of Medford owned facilities each year. Audits will be carried out in accordance with guidelines for strategic asset management. The audit scope will encompass assessment of compliance with statutory requirements, condition of the facility, functionality and space utilization. Where resources are available, audits will be carried out as follows:

Level 3	Detailed audit
Level 2	Walk through audit
Level 1	Desktop audit
2. Each facility should undergo a Level 2 or Level 3 audit every 5 years and a Level 1 audit each intervening year. Level 3 audits are usually undertaken by consultancies to provide a comprehensive report for maintenance and to provide a basis for rehabilitation projects.
3. Building maintenance deficiencies will be identified and placed on appropriate works programs (e.g. Corrective Maintenance, Deferred Maintenance, Rehabilitation, Capital Management Plan, Minor Works etc.).

Approved:

/s/John W. Hoke
John W. Hoke, City Manager (Pro-Tem)

September 28, 2015
Date

**CITY OF MEDFORD FACILITY MANAGEMENT
BUILDING MODIFICATION FORM – AR: 12-3 R1**

This form is to be used for all CIP projects that have not been included in the approved biennial budget. This work includes items such as; remodels, carpet replacement, new construction, etc. or that have not been budgeted for preventive or corrective maintenance covered by the Facilities Management Division of the City Manager’s Office. The requesting department must provide a Billable Account Number in the field provided in order for the request to be processed.

Deadline: Requests can be submitted anytime during the fiscal year, however requests must be submitted to Facilities Management no later than the 1st of March within the budget year the work is to be completed. This will allow time to obtain quotes and process all necessary Supplemental Budget Adjustments. No exceptions will be made.

Please complete the top portion of this form and send to Facilities Management. We will provide an estimate of cost and scheduling and return the form to you. The Department Director or authorized signer will need to complete the bottom portion of the form and return it to Facilities Management. Costs exceeding **\$10k** will also require a signature from the City Manager to authorize work. If you have any questions, please call the Facilities and Project Manager at 774-2657.

Please note: Unless mutually agreed upon prior to commencement of work, Facilities Management labor costs will not be charged to the building modification. Facility Management staff labor is charged to your department through the maintenance budget and does not show as part of the estimate for the improvement request. For all outsourced services, actual costs of services rendered will be charged to your department.

Project Contact Person:		Phone:	Fax:
Department:	Department Division:	Billable Account:	Date:
Project Title:	Project Location:	Dept. Priority : Choose an item.	Scheduling: Choose an item.
Description of Project: Include sketch on back if needed:		Other departments affected:	
		<input type="checkbox"/> TS (Data or Phone Line Changes)	
		<input type="checkbox"/> Other:	

I acknowledge that I am an authorized signer for the department requesting the work. I am authorizing the Facilities Management Division to obtain an estimate for the cost of work. This is not an authorization to perform the work.

Requesting Department Director’s Signature: _____ (Required)

RESERVED FOR USE BY FACILITY MANAGEMENT STAFF	ESTIMATED COSTS	
Recommendations & Scheduling:	Plans/Engineering Construction Materials Labor Other	
	TOTAL COST	\$

I acknowledge that I have reviewed the request. The amount is an estimate only.

Facilities/Project Manager’s Signature: _____ (Required)

I acknowledge that I am an authorized signer for the department requesting the work. If the form is marked "Approved", I agree to reimburse Facility Management for the cost of the work requested.

APPROVED per estimated cost and scheduling

DECLINED _____

_____ Date: _____
Requesting Department Director's Signature

APPROVED

DECLINED _____

_____ Date: _____
City Manager's Signature



Appendix E



City of Medford
Administrative Regulation

Regulation No.: 02-01-R3
Page: 1 of 6
Subject Area: Building Security
Date of Issue: Sept. 28, 2015
Supersedes: 02-01-R3

Title: Policy on Issuance and Return of City-owned Property

Purpose

This policy establishes procedures and guidelines that control the issuance and return of keys and City-owned portable, personal property to employees. City-owned and issued equipment includes, but is not limited to, lap top computers, pagers, cell phones and hand-held palm computer devices.

Definitions

The following definitions are terminologies specifically referencing the key portion of this policy.

1. *City*: City of Medford facilities.
2. *Facilities*: City owned buildings, rooms, parks, aquatic facilities or area to which access is controlled by a key or by a device restricting access.
3. *Restricted Facilities, Areas or Spaces*: City buildings, rooms, parks, aquatic facilities or area to which access is controlled by a department head and for which special arrangements for access must be arranged through that department head.
4. *Equipment*: All City of Medford property protected by a lock or security device including all city-owned maintenance equipment.
5. *Key*: Any device used to gain access/entry to any city space or equipment. This includes but not limited to: mechanical keys, card access, lockboxes, combination-locks, or any specialized manual/mechanical or electrical push button locks with or without key over-ride.
6. *Key holder*: Person to whom keys are issued.
7. *Terminating employee*: An employee who either leaves the employment of the city or who transfers to another department within the City of Medford.
8. *Grand Master Key*: Opens all doors and pad-locks in two or more city buildings or park facilities.
9. *Building Master Key*: Opens all doors in a city building.
10. *Sub-Master Key*: Opens more than one door or pad-lock in a portion of a city building or park facility.
11. *Change Key*: Opens a door or pad-lock within a city building or park facility.
12. *Outside Door Key*: Opens an exterior door of a city building.

Key Responsibility

The Facilities Management Division of the City Manager's Office is the sole source for duplicating and manufacturing keys to City facilities and equipment on the city keyway and card access system. The Facilities Management Division has discretionary authority for delegating responsibility for duplication, manufacture, and issuance of keys.

1. New buildings and facilities are keyed under the technical direction of the Facilities Management Division. All new locking hardware and the re-keying of all existing locking and security hardware is the responsibility of the Facilities Management Division.
 - a. Where practical, multiple keys to the same lock are serially numbered.
 - b. Commercial locksmiths are prohibited from working on City of Medford facilities and equipment except as directed by the City Manager.
2. Once requested keys have been issued to the department head or designee by the Facilities Management Division, the department head or designee is responsible for all keys issued by their department to employees and temporary staff. The department head or designee is responsible for maintaining accurate records of all keys issued.
3. At the request of a department head, the Facilities Management Division can produce quarterly reports on departmental and building key activity.
4. Access to Restricted Facilities, Areas, or Spaces
 - a. Department heads must provide to the Facilities and Project Manager a memorandum of justification and reasons for designating a facility or portion thereof as restricted. The memorandum must list the names of individuals who are authorized to possess keys.
 - b. The department head or designee is responsible for ensuring that supervision is provided to any non-key-carrying persons who have legitimate reasons to enter the restricted area. Departments are financially responsible for damage to facilities and equipment caused by delayed access to restricted areas.
 - c. The Facilities and Project Manager or designee is authorized to issue keys to maintenance employees who must enter restricted spaces in order to perform their duties when the regularly assigned user of the space is absent. At the request of a building, park, or area manager, the Facilities and Project Manager will furnish a list of maintenance employees with access to the affected building, park, or spaces therein. To minimize risk of damage or loss due to cleaning and/or maintenance activities, it is recommended that building occupants store sensitive items in locked desks, filing cabinets, or cupboards. Keys to such equipment are not issued to maintenance employees except at the specific written request of the department head or building manager.

- d. Department heads, directors, or building managers who believe they require access to building and utility areas that are restricted to service and operating maintenance employees should provide written request to the Facilities and Project Manager for Facilities Management.
5. Persons to whom keys are issued are prohibited from duplicating or loaning those keys to any other person.

Employees violating the City of Medford key policy are subject to disciplinary action including ineligibility to possess city-owned keys. Such disciplinary action will be the decision of the department head.

Issuance of Keys

The Facilities Management Division issues keys to eligible employees, seasonal staff, and to temporarily authorized persons (such as contractors) on a need to have basis. Only one key type or numbered key is issued to any one person. Exceptions can be requested through the Facilities Management Division.

Employees shall request keys from the City Manager's Office/Facilities Management Division as follows:

1. Employees shall submit a completed "Key Request Form" (copy attached) to the Facilities Management Division signed by their department head or designee authorizing the level of key to be issued. Alternately, an intranet or email memo from one of the above supervisors may be used.
 - a. Police Department employees shall bring a "Key Request Form," signed by the Administrative Support Lieutenant, Deputy Chief, or Chief, authorizing the level of key to be issued. Alternatively, an intranet memo or email memo from one of the above mentioned supervisors may be used.
 - b. The Facilities Management Division processes key requests within 24 hours or advises the department if additional time is required.
 - c. The key holder signs the key request form acknowledging receipt and responsibility for the keys.
2. The City Manager's Office / Facilities Management Division shall request that a "Key Check-out and Return Agreement" (copy attached) be signed by the employee at the time a key is issued. This form shall be retained by the City Manager's Office/Facilities Management Division.
3. Any full-time employee or councilmember may request a key to the Annex main doors, which allows use of the exercise facilities in the basement.

-
4. Requests for building master keys shall be based on a key authorization list approved by the City Manager or his designee. Only the City Manager or his designee may make changes to this list.
 5. All proximity I.D. cards will be issued by the Human Resources Department and tracked in the same manner as keys through the City Manager's Office/Facilities Management Division, including those for the Medford Water Commission within City operated buildings.
 6. There shall not be a charge for replacing lost keys or keyless entry cards. However, an employee who does not act in a responsible manner with regard to keys and keyless entry cards may be subject to progressive discipline.
 5. Low level department keys, which are not part of the Facility Master Key System, may be issued and tracked by the relevant department.

Retrieval of Keys

Note: This section applies to terminating, lost and found keys, as well as transferring employees.

1. Lost Keys
 - a. Key holders must promptly report lost keys to their department head, building manager, and the Facilities Management Division. Where appropriate and upon receipt of an approved key request card, replacement keys are issued.
 - b. Immediately following the report of a missing key; the Facilities Management Division evaluates the significance of the loss and determines the degree of re-keying required to maintain security of facilities. The staff assigned reports its recommendation to the building manager, department head, and the Facilities Management Supervisor. Costs of re-keying are the responsibility of the affected department.
 - c. When the loss of a key justifies re-keying the locks involved, the department head must initiate the request. Previously issued keys to the compromised lock or area are exchanged at no cost to the current key holders. The costs of re-keying are the responsibility of the affected department.
2. Found Keys and Key Turned-In
 - a. All found keys must be submitted immediately to the Facilities Management Division. The Division will return all City-owned keys to the authorized key holder.
 - b. Employees who terminate employment or who transfer to another department or who possess keys that are no longer needed must return their keys to the Facilities Management Division. Staff will verify return of the keys and issues a signed receipt.

-
- c. It is the responsibility of each department head or designee to verify the proper return of keys issued to a terminating employee.
 - d. Key turn-in for service personnel, contractors, and others who are not employees of the City of Medford is the responsibility of the issuing authority. At the time keys are collected and returned to the Human Resources Department. Facilities Management staff will issue a signed receipt.
 - e. Keys issued to individuals must also be returned upon the request of the City Manager, appropriate building manager, or department head.
3. Departments shall direct terminating and transferring employees to return keys/proximity I.D. cards to the Human Resources Department. The terminating or transferring employee's "Key Check-Out and Return Agreement" will be updated; and their "Property Check-Out and Return" form (copy attached) completed.
 4. In the case of terminating employees, the "Return of City Property" form must be completely signed off by all relevant departments prior to release of the final paycheck.

Schedule of Charges

1. Buildings Serviced by Facilities Management Division
 - a. When, due to normal wear and tear, cylinder re-pinning is necessary as a maintenance activity, the cost is paid by Facilities Management Division.
 - b. If, due to of security, convenience, or other considerations, re-keying is necessary, such re-keying is paid by the requesting department.
2. Buildings Not-Normally Serviced by Facilities Management Division
 - a. When, due to normal wear and tear, cylinder re-pinning is necessary as a maintenance activity, the cost is covered by the requesting department.
3. In the case of compromised security, a completed Work Request form approved by the building manager or department head to re-key the facilities is submitted by the department head to the City Manager's Office/Facilities Management Division (see Service Request tab on City intranet web page). Facilities Management verifies the request with the building manager.
4. The costs for re-keying due to loss of or failure to return keys are assessed to the department of the key holder by the Facilities Management Division. Actual re-keying costs are billed to the appropriate department.

Issuance of City-Owned Portable Personal Property

1. Department heads shall retain the discretion as to which items of portable, personal property are needed by employees in the discharge of their official duties.
2. Each department shall maintain a “Property Check-Out and Return” form (copy attached) for each employee in the department. Employees shall affix their signature to the appropriate section of the log upon sign out of equipment.
3. There shall not be a charge for replacing lost portable, personal property. However, an employee who does not accept responsibility for secure custodianship of City-issued portable, personal property can be subject to progressive discipline.

Retrieval of City-Owned Portable, Personal Property

1. This section applies to terminating, as well as transferring employees.
2. Departments shall inventory item(s) returned, comparing them to the issuance log. The supervisor shall affix his/her signature at the appropriate section of the log upon return of equipment.
3. The completed “Check-Out and Return of City Property” form shall be forwarded to the Human Resources Department for inclusion in the employee’s permanent employment file.
4. In the case of terminating employees, the Check-Out and Return of City Property form must be completely signed off by all departments prior to release of the final paycheck.

Approved:

/s/John W. Hoke
John W. Hoke, City Manager Pro-Tem

Sept. 28, 2015
Date

CITY OF MEDFORD
Check-Out and Return of City Property Form

EMPLOYEE NAME	DEPARTMENT

The employee must bring a completed “*Check-Out and Return of City Property Form*” to the department issuing their final check. This form will then be forwarded to the Human Resources Department.

Keys issued for the City Hall Complex must be returned to the Human Resources office.

Keys for the Service Center Complex must be returned to issuing department.

Keys returned? Yes _____ No _____ N/A _____

Proximity I.D. Card returned? Yes _____ No _____ N/A _____

“Key Check-Out Form” completed? Yes _____ No _____ N/A _____

Human Resources Official Signature: _____ Date: _____

CITY ISSUED PROPERTY

DESCRIPTION	SERIAL #	DATE ISSUED	EMPLOYEE SIGNATURE	DATE RETURN	SUPERVISOR'S SIGNATURE
Lap top computer					
Tool Box / Set					
Cell Phone / Smart Phone					
Credit Card					

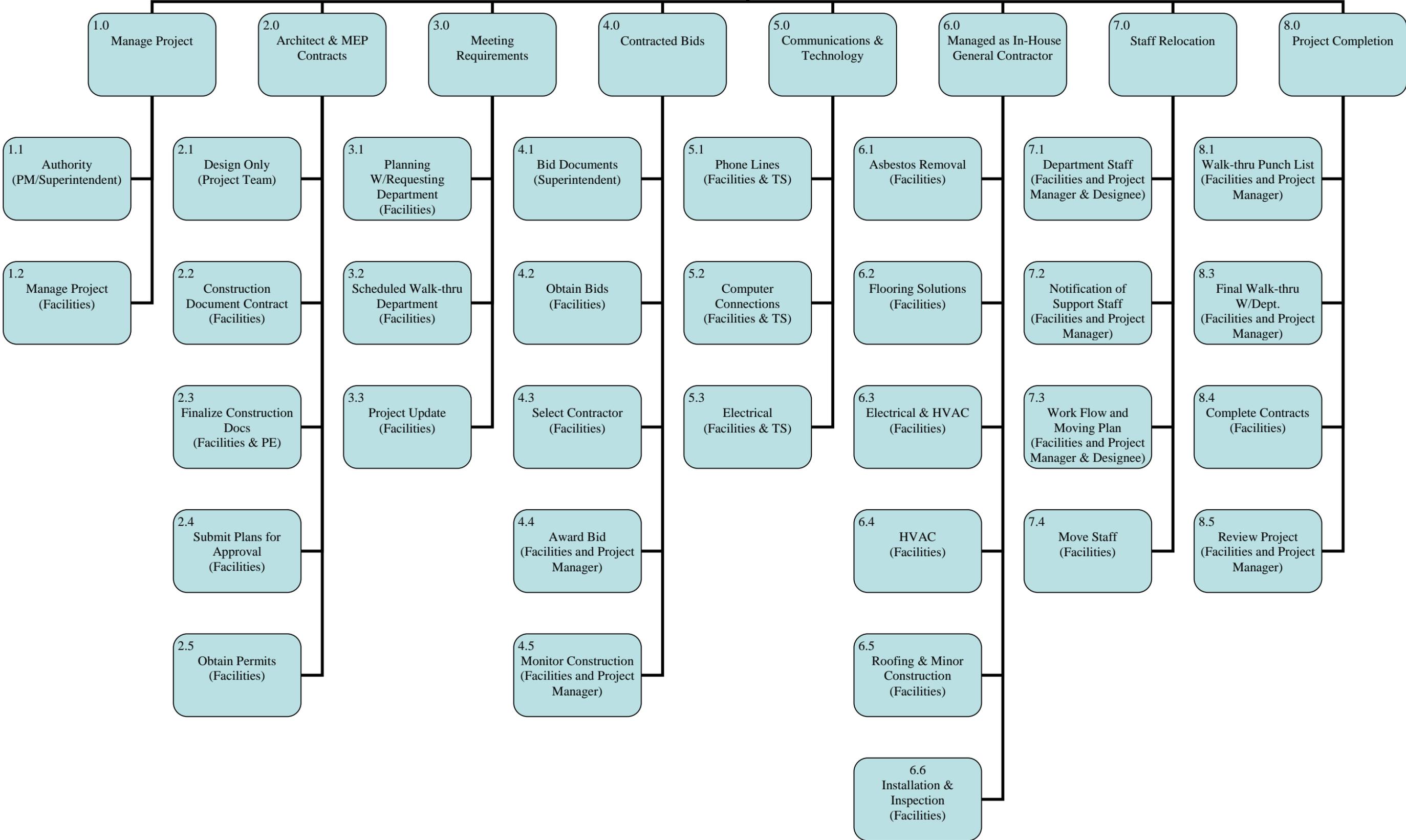


Appendix F



Appendix G

**Minor
Building CIP
Responsibilities**





Appendix H

Major Building CIP Responsibilities

