



Orleans Parish School Board Facility Procedures Handbook

2018-2019





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OVERVIEW OF REQUIRED FACILITY SERVICES

The purpose of this Facility Procedures Handbook is to establish and communicate the facility maintenance requirements contained in charter school lease agreements. Those requirements are grouped into the three main categories shown below. The actions listed beneath each category are necessary in order for the building, its systems, and its equipment to perform the functions for which they were designed, installed, or built, and to provide a safe and healthy environment for students and staff.

OPSB will require submission of maintenance contracts and documentation as detailed in the Administrative and Operating Procedures section of this document; schedule and conduct periodic inspections of all facilities; and require periodic submission of maintenance logs.

In accordance with Orleans Parish policy, Section HD, *“A charter school shall promptly notify the Superintendent or his/her designee if it receives a citation from a regulatory agency (such as the Office of the State Fire Marshal, the Office of Public Health, the Department of Environmental Quality, Department of Safety & Permits, etc.) which would disrupt operations or close the building.”*

CODE & REGULATORY COMPLIANCE	CLEAN & SECURE SCHOOLS	FACILITY PRESERVATION
Asbestos Management	Custodial Services	Building Automation Systems (B.A.S.)
Boiler Inspections	Grounds/Landscaping	Elevators & Lifts
Elevator Monitoring & Inspection	Information Technology Maintenance	Food Service Equipment
Fire Alarm Monitoring & Inspection	Pest Management	General Building Maintenance
Fire Extinguisher Certification & Inspection	Playground Maintenance	Generator Maintenance & Testing
Fire Sprinkler System Testing & Inspection	Security Alarm Systems	HVAC
F.O.G. (Fats, Oil, Grease) Discharge Inspections and Permit	Waste Management	Roof
Integrated Pest Management Plan		Termite Control
Kitchen Hood Fire Suppression System Inspection		
Stationary Engineer		





CODE & REGULATORY COMPLIANCE



CODE AND REGULATORY COMPLIANCE

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It is the responsibility of the charter operator be aware of all applicable federal, state, and local regulations, and to work with each governmental body or regulatory agency to maintain compliance with regulatory requirements, such as those issued by the Occupational Safety and Health Administration (OSHA), the Environmental Protection Agency (EPA), the Louisiana Department of Health and Hospitals (DHH), Louisiana Department of Environmental Quality (LDEQ), Louisiana State Fire Marshall (LSFM), National Fire Protection Association (NFPA) the City of New Orleans, etc.)

ASBESTOS MANAGEMENT

<i>Purpose</i>	To inform charter schools regarding on-site responsibilities related to asbestos management plans and documentation requirements.
<i>Requirements</i>	<p>In accordance with Louisiana Department of Environmental Quality (LDEQ), Louisiana Air Quality Regulations, LAC 33:III, Subchapter M, Section 5151 and LAC 33:III, Chapter 27, every school is required to have an updated Asbestos Management Plan in their front office <u>at all times</u>.</p> <ul style="list-style-type: none">• LDEQ conducts a number of randomly assigned Asbestos Management Plan inspections per year.• Each school is to be re-inspected both by LDEQ and an accredited independent inspector every three years.<ul style="list-style-type: none">– The charter operator will be responsible for contracting the performance of the independent inspection• Custodial staff are required to have a two hour awareness training every two years (or within 60 days of hire) to teach them about asbestos.<ul style="list-style-type: none">– Training must be conducted by accredited trainers and is not provided through LDEQ.• A “designated person” must be assigned at each school.<ul style="list-style-type: none">– This can be a person identified within each charter management organization.– The designated person must perform a walk through every six months to check the condition of the asbestos in the school.– Documentation of this walk through must be kept with the Asbestos Management Plan in the school’s front office.• There must be a notification to parents/guardians/staff either in the school handbook or on the school website that notifies parents that the Asbestos Management Plan is available for review in the school office.

Additional resources: <http://www.deq.louisiana.gov/portal/tabid/2883/Default.aspx>



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BOILER INSPECTIONS (INCLUDING GAS WATER HEATERS)

<i>Purpose</i>	To inform charter schools regarding on-site responsibilities related to annual boiler inspections and documentation requirements.
<i>Service Requirements & On-site Responsibilities</i>	<ul style="list-style-type: none"> Boiler must be inspected annually by third party hired by OPSB Office of Risk Management on behalf of the State Fire Marshal's office, in accordance with LAC 55:V, Chapter 50. Third party vendor must apply for certificate of inspection from City of New Orleans. Charter school is required to pay the fees associated with the boiler inspections. Charter school must post the boiler inspection certificate

Additional resources: <http://www.doa.louisiana.gov/osr/reg/0707/0707RUL.pdf>

ELEVATOR MONITORING & INSPECTION (IF APPLICABLE)

<i>Purpose</i>	To ensure that elevators are properly functioning, and to comply with certification, inspection, and testing requirements.
<i>Certification & Inspection Requirements</i>	<ul style="list-style-type: none"> Annual certifications will be performed by the City of New Orleans. All services must be in compliance with federal, state, and local laws regarding elevator monitoring and inspection.
<i>Service Requirements</i>	<ul style="list-style-type: none"> Monitoring <ul style="list-style-type: none"> Phone line should be directed to a call center for monitoring 24 hours per day, 7 days a week. Inspections will include complete examination and operation of: <ul style="list-style-type: none"> Car and hoist way doors Machines and motors Brakes Hoist way equipment Panels All other equipment in accordance with appropriate ANSI codes

Additional resources: http://www.nola.gov/safety-and-permits/documents/governing-policies/2007-2008_mechanical/; www.asme.org; [https://ansi.org/](http://ansi.org/)



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FIRE ALARM MONITORING, CERTIFICATIONS & INSPECTION

<i>Purpose</i>	To ensure that fire alarms are properly functioning to protect students and staff, as well as comply with certification and inspection requirements.
<i>Certification & Inspection Requirements</i>	<ul style="list-style-type: none">• Annual certification (must be performed by a properly trained, qualified, and certified professional)• Obtain all permits and inspection certificates as required by the City of New Orleans, Orleans Parish and the state of Louisiana• Monthly inspections (can be self-performed)• Inspection, testing, and maintenance programs shall satisfy the requirements of this Code and conform to the equipment manufacturer's published instructions (NFPA 72, 14.2.2.1.1).
<i>Service Requirements</i>	<ul style="list-style-type: none">• Monitoring<ul style="list-style-type: none">– 24 hours per day, 7 days per week monitoring on fire alarms and appropriate dispatch response to the alarm.– Must be monitored by two separate analog phone lines.– Maintain call down lists for each facility and perform call downs upon receipt of the alarm.• Maintain monthly report to include:<ul style="list-style-type: none">– Fire drills– Service dates– Noted problems and solutions with the Fire Alarm system– Any outstanding issues with the Fire Alarm system

Additional resources: http://sfm.dps.louisiana.gov/doc/pub/pub_firealarm.pdf, www.nfpa.org

Additional Fire Safety Tips:

- Review NFPA 101: Life Safety Code for important information regarding general fire code compliance (i.e., means of egress, educational occupancies, etc.).
- Avoid the following common fire safety violations:
 - Blocked means of egress
 - Cluttered storage rooms
 - An excess of paperwork on walls and/or windows
 - Non-compliant locking mechanisms (e.g., chained doors, padlocks, etc.)
 - Sprinkler heads connected to the Fire Sprinkler system covered by paint
 - Storing items underneath stairwells is prohibited
 - Storing items in mechanical and electrical rooms is prohibited



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FIRE EXTINGUISHER CERTIFICATION & INSPECTION

<i>Purpose</i>	To ensure proper functioning of fire extinguishers for the safety of students and staff, as well as to comply with inspection and certification requirements.
<i>Certification & Inspection Requirements</i>	<ul style="list-style-type: none"> • Annual certification (must be performed by a properly trained, qualified, and certified professional) • Monthly inspections, in accordance with the manufacturer's design, installation, and maintenance or owner's manual (may be self-performed)
<i>Service Requirements</i>	<ul style="list-style-type: none"> • At a minimum, monthly inspection shall include verification of the following (NFPA 10, 7.2.2): <ul style="list-style-type: none"> – The extinguishing system is in its proper location – The manual actuators are unobstructed – The tamper indicators and seals are intact – The maintenance tag or certificate is in place – No obvious physical damage or condition exists that might prevent operation – The pressure gauge(s), if provided, has been inspected physically or electronically to ensure it is in the operable range – The nozzle blowoff caps, where provided, are intact and undamaged – The hazard classification has not changed, including replacement, modification, and relocation of protected equipment • Placement (NFPA 10, 6.1.3): <ul style="list-style-type: none"> – Fire extinguishers shall be conspicuously located where they are readily accessible and immediately available in the event of fire. – Fire extinguishers shall be located along normal paths of travel, including exits from areas. • Develop fire extinguisher maps • Records must be kept to demonstrate the monthly inspections performed during the previous 12 months.

Additional resources: http://sfm.dps.louisiana.gov/doc/sfm/title55v_chptr30.pdf, www.nfpa.org



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FIRE SPRINKLER SYSTEM CERTIFICATIONS, TESTING & INSPECTION

<i>Purpose</i>	To ensure that fire sprinklers are properly functioning to protect students and staff, as well as to comply with certification, inspection, and testing requirements.
<i>Certification & Inspection Requirements</i>	<ul style="list-style-type: none">• Annual certification (must be performed by a properly trained, qualified, and certified professional)• Annual testing and report (must be performed by a properly trained, qualified, and certified professional)
<i>Service Requirements</i>	<ul style="list-style-type: none">• Sprinklers shall not show signs of leakage; shall be free of corrosion, foreign materials, paint, and physical damage; and shall be installed in the correct orientation (NFPA 25, 5.2.1.1).• Maintain the required number of spare sprinkler heads and necessary repair equipment.• Provide repairs to sprinkler heads by a qualified professional, as needed.• Maintain report to include:<ul style="list-style-type: none">– Service dates– Noted problems and solutions– Any outstanding issues

Additional resources: http://sfm.dps.louisiana.gov/doc/sfm/title55v_chptr31.pdf

F.O.G. (FATS, OIL, GREASE) DISCHARGE INSPECTIONS AND PERMIT

<i>Purpose</i>	To protect the environment through annual grease trap inspections, permitting, and evacuation requirements.
<i>Requirement</i>	<ul style="list-style-type: none">• Grease traps are inspected annually by a master plumber, and an application is submitted by charter school to SWBNO to obtain a permit for each grease trap on site.• Manual grease trap evacuation every 90 days.• Charter school must keep grease trap evacuation records on-site for three years.• A charter school may apply for a waiver from SWBNO to allow for less frequent cleaning of grease traps if their kitchen is used less frequently.

Additional resources: Plumbing Code Section 16.5, Subsection A; <http://www.nola.gov/onestop/business/food/food-alcohol/grease-trap-and-or-interceptor-discharge-permit/>



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INTEGRATED PEST MANAGEMENT PLAN

<i>Purpose</i>	To provide a safe and sanitary environment for teaching and learning.
<i>Requirement</i>	<ul style="list-style-type: none"> Follow Louisiana Department of Agriculture & Forestry requirements for integrated pest management (IPM). The Louisiana Department of Agriculture requires annual submission of an IPM plan for each school.

Additional resources:

<http://www.ladaf.state.la.us/ladaf-programs/pesticide-environmental-programs/school-integrated-pest-management-ipm>.

KITCHEN HOOD FIRE SUPPRESSION SYSTEM CERTIFICATION (including systems located in areas other than cafeteria kitchen)

<i>Purpose</i>	To ensure that cooking fires will be properly suppressed for the safety of staff and students, as well as to comply with inspection and certification requirements.
<i>Certification & Inspection Requirements</i>	<ul style="list-style-type: none"> Annual certification and testing (must be performed by a properly trained, qualified, and certified professional acceptable to the authority having jurisdiction) Semiannual maintenance (must be performed by a properly trained, qualified, and certified professional)
<i>Service Requirements</i>	<ul style="list-style-type: none"> Maintenance of the fire-extinguishing systems and listed exhaust hoods containing a constant or fire-activated water system that is listed to extinguish a fire in the grease removal devices, hood exhaust plenums, and exhaust ducts at least every 6 months (NFPA 96, 11.2.1). All actuation and control components, including remote manual pull stations, mechanical and electrical devices, detectors, and actuators, shall be tested for proper operation during the inspection in accordance with the manufacturer's procedures (NFPA 96, 11.2.2). The specific inspection and maintenance requirements of the extinguishing system standards as well as the applicable installation and maintenance manuals for the listed system and service bulletins shall be followed (NFPA 96, 11.2.3). If, upon inspection, the exhaust system is found to be contaminated with deposits from grease-laden vapors, the contaminated portions of the exhaust system shall be cleaned by a properly trained, qualified, and certified person (NFPA 96, 11.6.1).

Additional resources: http://sfm.dps.louisiana.gov/doc/sfm/title55v_chptr30.pdf, www.nfpa.org



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STATIONARY ENGINEER REQUIREMENT

<i>Purpose</i>	To inform charter schools regarding city code requirements for stationary engineers.
<i>Requirement</i>	<ul style="list-style-type: none">• Charter schools are required to adhere to this and all other City codes and requirements• Charter schools are responsible for adhering to the existing City code or providing all needed document to OPSB to participant in an appeals process.

Additional resources: New Orleans City Code (M.C.S., Ord. No. 22939, § 9, 12-20-07, M.C.S., Ord. No. 25920, § 1, 6-19-14); http://cityofno.granicus.com/MetaViewer.php?view_id=3&clip_id=1831&meta_id=245241



CLEAN & SECURE SCHOOLS



CLEAN AND SECURE SCHOOLS

CUSTODIAL SERVICE

<i>Purpose</i>	To ensure that the school facility is clean and safe.
<i>Guidelines & Expectations</i>	<ul style="list-style-type: none">• Create a detailed work plan that specifies each task delineated by frequency of activity (i.e., daily, weekly, monthly, and summer duties).• Provide custodial staff with proper training to ensure that the facility is cleaned according to the required specifications (e.g., floors are cleaned with a solution that is non-damaging to the finish).• Only use acceptable, non-toxic cleaning solutions.• Educate staff regarding acceptable locations to store cleaning supplies and equipment.• Abide by <i>Louisiana Title 51: Public Health Sanitary Code</i> (see link below).• A sample custodial worker job description can be found in Appendix A.

Additional resources: <http://nces.ed.gov/pubs2003/2003347.pdf>

GROUNDS/LANDSCAPING/OTHER EXTERIOR MAINTENANCE

<i>Purpose</i>	To maintain all outdoor areas, plants, athletic fields, playgrounds, and parking lots, in order to ensure that these areas are clean and safe.
<i>Guidelines & Expectations</i>	<ul style="list-style-type: none">• Create a detailed work plan that specifies each task, delineated by frequency of activity (i.e., weekly, monthly, seasonally, etc.) A sample scope of work for grounds-keeping and landscaping can be found in Appendix B.• Abide by all City of New Orleans ordinances regarding maximum grass height and other regulations. (See Chapter 66, Code of the City of New Orleans).• Avoid planting invasive, noxious, or poisonous species of plants.• Maintain detention/retention basins and surroundings, if applicable, in accordance with type of basin. Recommended activities can be found at Appendix E.• Store equipment and supplies in appropriate and secure areas only. Chemical products must be stored in clearly labeled, sealed containers.• Abide by warranty requirements related to landscaping and lawn care, if applicable.

Additional resources:

https://www.municode.com/library/la/new_orleans/codes/code_of_ordinances?nodeId=PTIICO_CH66EN,
http://www.wlf.louisiana.gov/sites/default/files/pdf/publication/34725-invasive-plants-low-res/invasive_plants_low-res.pdf,
<http://www.cpsc.gov/PageFiles/122149/325.pdf>,
<http://dhh.louisiana.gov/assets/oph/Center-PHCH/Center-PH/tuber/LouisianaAdministrativeCodeTitle51PublicHealthSanitaryCodeJan2010.pdf>,
http://www.deq.louisiana.gov/portal/Portals/0/permits/lpdes/General%20Permits%20Word/Bayou_Land_Guidance_NO_BMP.pdf



CLEAN AND SECURE SCHOOLS

INFORMATION TECHNOLOGY MANAGEMENT

<i>Purpose</i>	To ensure the information technology infrastructure is properly maintained for the purposes of high performance and longevity.
<i>Guidelines & Expectations</i>	<ul style="list-style-type: none"> • Maintain information technology network and equipment to be fully functional, including periodic updates, equipment cleaning, parts replacements, and other designated tasks as needed. <ul style="list-style-type: none"> – Clean and maintain interactive whiteboards following the manufacturer's recommended schedule. Repair or replace components, as needed, to ensure continued functionality. • Provide end-user Information Technology support on a regular basis. • Ensure Children's Internet Protection Act (CIPA) compliance. • Upon termination of the lease agreement, the Information Technology infrastructure that was in place at the time of move-in must be fully functional and/or systems replaced as needed.

Additional resources: <http://www.usac.org/sl/>; <http://www.fcc.gov/guides/childrens-internet-protection-act> ; <http://www.stopbullying.gov/laws/louisiana.html>

PEST MANAGEMENT

<i>Purpose</i>	To safeguard the school facility against pest infestations.
<i>Guidelines & Expectations</i>	<ul style="list-style-type: none"> • Follow Louisiana Department of Agriculture & Forestry requirements for integrated pest management (IPM). <ul style="list-style-type: none"> – If a school employee is applying <u>any</u> pesticide on school grounds, they must be certified as a non-fee commercial applicator in Category 7D or under the direct supervision of a 7D non-fee commercial applicator. The City of New Orleans offers this training. • All chemicals and pesticides used must comply with requirements of the Louisiana Structural Pest Control law. • Contractor must be licensed with the Department of Agriculture and must possess technician certification with the Louisiana State Department of Agriculture.

Additional resources: <http://www.ldaf.state.la.us/ldaf-programs/pesticide-environmental-programs/>, <http://www.ldaf.state.la.us/ldaf-programs/pesticide-environmental-programs/school-integrated-pest-management-ipm>

**CLEAN AND SECURE SCHOOLS****PLAYGROUND MAINTENANCE**

<i>Purpose</i>	To ensure the play areas and playground equipment are maintained to meet a high standard of quality and safety for the well-being of all students.
<i>Guidelines & Expectations</i>	<ul style="list-style-type: none">• Refer to the links provided above for acceptable playground standards, equipment, surface material, and other specifications.• Provide an approved type of surface material and maintain at an acceptable depth.• Abide by the “use zone” and spacing requirements for all play equipment.• Maintain equipment to be free of splinters, cracks, protrusions, sharp edges, and deterioration.• Avoid entrapment, entanglement, and trip hazards.• Provide age-appropriate play equipment and guardrails that are the appropriate height for the population being served.• Upon termination of the lease agreement, the play areas and equipment must be well-maintained and in their original condition, or improved as needed.• Guidelines for scope of work for playground area and equipment maintenance can be found in U.S. Consumer Product Safety Commission publication “<i>Public Playground Safety Handbook</i>.”• Install playground equipment in accordance with manufacturers recommendations. Equipment shall be dimensionally and otherwise age-appropriate for the intended users.• Refer to City of New Orleans ordinances for guidance regarding playground compliance with applicable DHH regulations and Americans with Disabilities Act (ADA) provisions. (see Chapter 106, Code of the City of New Orleans).

Additional resources: <http://www.cpsc.gov/PageFiles/122149/325.pdf>; http://www.nrpa.org/uploadedFiles/nrpa.org/Professional_Development/Certification/CPSI/Dirty-Dozen-Playground-Hazards.pdf

SECURITY ALARM SYSTEMS

<i>Purpose</i>	To maintain the security alarm system in good working order at all times for the safety of students and staff, as well as the security of the school facility and property contained therein.
<i>Guidelines & Expectations</i>	<ul style="list-style-type: none">• Repair security systems and components as needed.• Provide intrusion alarm monitoring 24 hours per day, 7 days per week.• Maintain call down lists in case the alarm is triggered, in order to notify the appropriate individuals in a timely manner.• Upon termination of the lease agreement, the Security Alarm must be fully functional or in the same condition as existed at the time of move-in.

Additional resources: http://www.ncef.org/pubs/low_cost_measures.pdf



CLEAN AND SECURE SCHOOLS

WASTE MANAGEMENT

<i>Purpose</i>	To manage the disposal of school waste in a sanitary and unobtrusive manner, while abiding by all local laws and requirements.
<i>Guidelines & Expectations</i>	<ul style="list-style-type: none"> • Abide by all Department of Health & Hospitals (DHH)requirements and City of New Orleans ordinances. • Comply with the Litter Abatement Program (for new and renovated schools only). • Participate in/comply with recycling program, if possible.

Additional resources: <http://www.nola.gov/sanitation/ordinances/>



FACILITIES PRESERVATION



FACILITIES PRESERVATION

OPSB Policy HD addresses the parameters around facility maintenance, repairs and capital improvement. The purpose of this requirement is to provide a safe and healthy environment throughout the facility, to promote the longevity of buildings and equipment, and respond to facility emergencies.

Each charter operator is responsible for procuring and paying for comprehensive preventive and corrective maintenance services for its facility and its systems and components. Those systems and components are grouped into the categories below. Each school shall determine, at its discretion, how to implement these facility services; however, the OPSB requires that each school prepare and submit a maintenance plan for each of its major equipment systems.* Equipment maintenance plans shall be developed in consultation with the appropriate professionals and in accordance with the [equipment] manufacturers' specifications and requirements.

PREVENTIVE MAINTENANCE

Preventive maintenance is activity that is regularly performed on a piece of equipment to lessen the likelihood of it failing; is performed while the equipment is still working so that it does not break down unexpectedly; is planned so that required resources are available; is scheduled based on a time or usage trigger; and/or is typically performed on equipment that has a critical operational function. Preventive maintenance is intended to minimize equipment deterioration, prevent premature obsolescence, extend equipment life, and prolong efficient use of the equipment.

Preventive Maintenance is required for the following systems/areas:

- Heating, ventilation & air conditioning (HVAC)
- Electrical (including generators)
- Plumbing (including boilers and gas water heaters)
- Kitchen equipment
- Elevators, escalators, and lifts
- Roof
- Building Automation Systems (BAS)
- General building & grounds maintenance (including pest & termite control)
- Information technology (IT) & communications systems

**OPSB reserves the right to require that certain tasks be performed by a trained and/or certified professional only.*



FACILITIES PRESERVATION

BUILDING AUTOMATION SYSTEM (BAS)

Overview

Each charter operator who occupies a facility containing a Building Automation System (BAS) is responsible for implementing preventive maintenance services on this equipment. The purpose of these maintenance tasks is to promote the functionality and longevity of the BAS. A Building Automation System is the automatic centralized control of a building's heating, ventilation and air conditioning, lighting and other systems. The objectives of building automation are to extend equipment life, thereby extending facility life; reduce unscheduled shutdowns and repairs; improve occupant comfort; provide safe, efficient, and functional operation of building systems that meet the design intent; as well as to reduce energy consumption and operating costs. *Note: Not all buildings currently have an OPSB installed BAS. Please contact the OPSB Facilities office if you have any questions.*

Task and Services

- All repairs and maintenance shall be performed by an authorized vendor certified to work on the manufacturer's BAS or Direct Digital Controls (DDC) equipment. Contractor shall provide service technicians that are factory trained and certified to work on the installed manufacturer controls systems.
- Contractor shall request prior approval before performing any modification to the BAS controls, hardware and software. The Facility Alteration Request Form can be found here: <https://opsb.us/departments/facilities>.
- This includes, but is not limited to: all sensors, devices, engineered settings on equipment such as boilers, Air Handling Unit (AHU) or Roof Top Unit (RTU) pages, Dedicated Outdoor Air Systems (DOAS), enthalpy wheels, Variable Refrigerant Flow (VRF), lighting controllers or associated sensors, chiller discharge temperatures or engineered settings. These actions require a Facility Alterations Request to be submitted and approved in advance. A copy of the Facility Alterations Request form can be found in Appendix G and on OPSB.org.
- BAS service providers must respond to all service requests within 24 hours of the initial notification during weekdays (Monday through Friday) and within 48 hours on weekends (Saturday and Sunday).
- *OPSB Document Review* – The charter operator must submit a BAS Preventive Maintenance contract with a qualified vendor.

Project Requirements

The following tasks shall be performed on a quarterly basis except where it is otherwise indicated:

- Review alarms and system notifications for potential issues. Identify any critical alarms that are not responding to resets (should be done more frequently if nuisance issues occur).
- Calibrate all field devices including Carbon Dioxide, water Differential Pressure (DP), flow, humidity and other devices requiring calibration. Devices that cannot be calibrated shall be brought to the attention of the charter operator and OPSB in the quarterly report.
- All site Direct Digital Controls shall be reviewed on an annual basis including Variable Frequency Drives (VFD), Chillers, Boilers, Lighting, metering, and third party controlled mechanical equipment. If any equipment requires programming or other technical support, the vendor shall provide these services at no additional cost.
- Visually inspect all mechanical rooms and associated equipment for visible damage (i.e., wall mounted sensors, valve actuators, unitary controller, VFDs, etc.).
- Provide quarterly reports on reviews, calibrations, nuisance alarms and programming changes to controls systems or controllers on the system trunk (e.g., BacNet/IP Broadcast Management Device (BBMD), Jace, any third party devices, etc.).
- Repair and troubleshoot all DDC control issues, as needed.
- Perform software updates as needed. Software upgrades and firmware provided by the manufacturer shall be included on an annual basis in order to ensure that the system meets new technical standards for BacNet and other enhancements.
- Provide ongoing training to the Charter School Designee. The OPSB recommends at least 16 hours of training on an annual basis.



FACILITIES PRESERVATION

ELEVATORS & LIFTS

Overview

Each charter operator that occupies a school facility which contains an elevator is responsible for procuring Elevator Preventive Maintenance and Testing services from a qualified vendor. The purpose of this service requirement is to ensure the safety and functionality of all elevators. The tasks described in this document must be performed by a contracted service provider.

Tasks and Services

- The selected vendor must be able to implement a maintenance and testing program for the identified facility or facilities, including the ability to perform the following functions:
 - The vendor must obtain the City of New Orleans inspection report from the Charter School Designee to determine if any deficiencies have been identified. If deficiencies exist, the vendor must correct these immediately.
 - Provide the necessary supplies and equipment used to perform the required functions.
 - Provide work schedules and project schedules based on American Society of Mechanical Engineers (ASME) requirements and the elevator manufacturer's recommendations.
 - Provide on-demand cost estimates for major repairs that are needed beyond the scope of this service contract for elevator repair services.
 - Maintain a Maintenance Control Plan that reflects the tasks and services performed throughout the year, and make this information available to the City of New Orleans inspector.
- If the elevator is under warranty, ensure that the maintenance tasks that are performed meet the warranty requirements.
- *OPSB Document Review* – The charter operator must submit a Elevator Preventive Maintenance and Testing contract with a qualified vendor.

Project Requirements

- Perform regular preventive maintenance with adherence to ASME requirements and the elevator manufacturer's recommended tasks and schedule. Tasks shall include, but are not limited to, the following:
 - Lubrication of the various moving parts.
 - Regular cleaning and inspection of door lock contacts (exposed contacts are susceptible to dirt and corrosion).
 - Routine inspection of the various rotating machinery belts and couplings for wear.
 - Repair or replace all worn or defective components, as necessary.
- Perform regular testing with adherence to ASME requirements and the elevator manufacturer's recommendations. Tests shall include, but are not limited to, the following:
 - Relief valve and no-load cylinder pressure tests (hydraulic elevators)
 - No-load governor safety devices tests (traction elevators)
 - Di-electric breakdown tests on all motor generators
 - Emergency power operation tests
 - Tests of fire fighters service phase I and II on emergency power and normal power
 - Kinetic energy and door pressure
 - Door opening and door closing speeds
 - All other tests in accordance with appropriate ANSI codes



FACILITIES PRESERVATION

FOOD SERVICE

Overview

Each charter operator is responsible for procuring comprehensive Kitchen Preventive Maintenance services that include the specifications outlined in this document. The purpose of these requirements is to promote the longevity, safety, and cleanliness of equipment. The tasks described in this document may be performed by a contracted service provider, in-house charter school staff, or a combination of both, depending on the complexity of the task.

Tasks and Services

- A systematic maintenance schedule should be prepared in accordance with the specific kitchen equipment contained in the facility, following the manufacturer's recommendations.
- In the event that a charter operator chooses to procure off-site food preparation services, all of the preventive maintenance tasks listed in this document must be performed annually, except for the tasks that pertain to equipment used for on-site food service. This exception will only be made if the food service contract is submitted to the OPSB for review with a list of kitchen equipment used by the vendor, and there must be no evidence of cooking and food preparation being done upon inspection of the kitchen equipment. All kitchen equipment used by the food service provider must be maintained in accordance with the Project Requirements listed in this document.
- *OPSB Document Review* – The charter operator must submit a Kitchen Preventive Maintenance contract/scope of work in place with a vendor, and/or a detailed work plan describing how these tasks will be performed in-house. If any tasks will be performed by in-house charter school staff, please also submit the qualifications of the staff member who will carry out these functions. OPSB reserves the right to restrict certain tasks to be performed by a trained and/or certified professional only.

Project Requirements

- Refrigeration
 - All condenser coils cleaned and inspected semiannually.
 - Condenser fan motors checked and oiled if applicable. Fan blades checked and cleaned semiannually.
 - All evaporator coils cleaned and inspected semiannually.
 - Refrigerant levels checked and filled to the appropriate level annually.
 - Drain lines blown clear semiannually.
 - Suction lines must have the insulation checked for damaged spots and repaired where accessible annually.
 - Gaskets checked semiannually.
 - Doors checked for proper opening/closing/sealing operation semiannually.
 - Perlick glycol systems must have the coolant levels checked for volume and quality. The pump motors must be oiled if they have oil caps. Inspection of pipe insulations. (if applicable)
 - Defrost timers and defrost heaters checked for proper operation semiannually.
- Hood ventilation
 - Belts on roof inspected and replaced quarterly, if necessary.
 - Bearings greased quarterly.
 - Semiannual cleaning, at a minimum.
- Ranges/Grills/Flattops: all actions to be performed annually
 - All standing pilots checked for strength and adjusted to proper size.
 - Calibrate thermostats on flat tops.
 - Gas pressures checked and adjusted according to factory specifications.



FACILITIES PRESERVATION

- Steamers
 - Steamers de-limed and descaled according to factory recommendations, typically once a week.
 - Elements will have amperage checked if unit is electrically heated annually.
 - Gas pressures checked and adjusted to factory specifications annually.
 - Boiler/generator inspected for any safety issues and brought to the Charter School Designee's attention annually.
 - Safety relief valves checked for safety and operation annually.
- Steam kettles and/or Tilt Skillets: all actions to be performed annually
 - Vacuum gauges checked and vacuum will be pulled if necessary and leaks will try to be isolated.
 - Elements checked for proper amperage.
 - Safety relief valves checked for safety and operation.
- Ovens: all actions to be performed annually
 - Oven temps checked and thermostats calibrated.
 - Convection ovens must have switches inspected and blower wheels checked for foil and debris and removed.
 - Doors and door springs checked and adjusted if adjustable.
 - Gas pressures checked and adjusted to factory specifications.
- Hot wells and steam tables: all actions to be performed annually
 - Heating elements checked for proper amperage.
 - Drains inspected and blown clear.
 - Wiring to infinite switches checked for loose connections.
- Grease Traps (for additional information see New Orleans Plumbing Code, Section 16.5, Subsection A. *Rules Governing the Discharge into the Public Sanitary Sewerage system from Grease Traps and Grease Interceptors*)
 - Obtain a FOG (fats, oil, and grease) Discharge Permit annually. *The application for obtaining this permit can be found in Appendix J on page 94.*
 - Provide quarterly cleaning of grease traps at each location. Records of these cleanings must be kept on site at the school for three years.
 - Less frequent grease trap cleanings may be acceptable for schools that do not cook or prepare food on-site. This exception will only be approved if a waiver is obtained by the Charter School through the Sewerage and Water Board of New Orleans waiver process.
- Miscellaneous inspections and/or procedures
 - All gas regulators wiped clean and ventilation caps inspected.
 - Gas supply lines checked for gas leaks with leak detector.
 - Missing fasteners (nuts, bolts, screws) replaced, and loose fasteners tightened.
 - Poor electrical connections must be addressed and repaired on all equipment serviced.
 - Handles and knobs must be checked and secured and missing ones will be brought to the Charter School Designee's attention.



FACILITIES PRESERVATION

GENERAL BUILDING MAINTENANCE

Overview

Each charter operator is responsible for ensuring that the Facilities Preventive and Corrective Maintenance services outlined in this document are performed. The purpose of these facility maintenance requirements is to promote the longevity of equipment and buildings, provide well-maintained learning environments to students, and respond to facility emergencies. The tasks described in this document may be performed by a contracted service provider, in-house charter school staff, or a combination of both, depending on the complexity of the task.

Tasks and Services

- The following information is provided as general guidelines regarding facility maintenance expectations:
 - Preventive/Scheduled Maintenance: Regularly scheduled maintenance on all mechanical/electrical systems (with the exception of HVAC) within or on school property that are used for day-to-day operations. This type of maintenance includes the inspection of equipment to ensure long term operating condition.
 - Corrective Maintenance: The repairs to school property that have deteriorated, been broken, or worn out and cannot be used for the intended purpose.
- *OPSB Document Review* – The charter operator must submit a Facility Preventive and Corrective Maintenance contract/scope of work that is in place with a vendor, and/or a detailed work plan describing how these tasks will be performed in-house. If any tasks will be performed by in-house staff, please also submit the qualifications of the charter school staff member who will carry out these functions. OPSB reserves the right to restrict certain tasks to be performed by a trained and/or certified professional only.

Technical Requirements

- Emergency Service – A maintenance professional should be available to provide emergency services 24 hours a day, 365 days a year. The maintenance professional shall respond to any and all emergency service requests from Charter School Designee as soon as possible (not to exceed two hours).
- Personnel – Maintenance vendor and/or charter school staff shall provide high quality facilities maintenance services, operations involving major plumbing and pipe preventive maintenance and repairs, minor roof leakage, floor and wall repair and/or replacement, and major electrical repair from incoming electrical panels throughout the facility.
- Repairs – Any replacement of equipment and/or materials must be of like kind, or comparable for the intended use.

Project Requirements

The selected maintenance professionals shall undertake the necessary maintenance activities. These activities are planned for the normal functioning of all maintenance processes needed to maintain dependable performance of all mechanical, electrical and plumbing equipment, during normal hours of operation and emergency response. A minimum acceptable basic guideline of trades activities and services is provided below. These tasks must be performed by a qualified professional, on an as needed basis.

- General Notes
 - All persons performing work shall be properly licensed and certified as required by state and local codes and meet manufacturer's requirements to perform service.
 - When replacing parts/components, "like kind" parts and components shall be used.
 - Replacement parts/components shall not be used if it voids the manufacturer's warranty and/or performance of the equipment.
 - If any equipment is found to be defective due to improper care, use, or maintenance, the operator will be responsible for damages



FACILITIES PRESERVATION

- Electrical:
Repair/replace/ maintain all electrical components on the secondary side of the main service , including but not limited to the following:
 - Transformers
 - Surge protection (secondary side)
 - Motors and motor controls
 - Receptacles, switches, dimmers etc.
 - Distribution panels, sub panels and disconnects
 - Branch circuit wiring and related components
 - Electrical conduits, raceways and related components
 - Interior and exterior lighting, controls, lighting automation and related components
- Plumbing:
Repair/replace/ maintain all plumbing related equipment and components from the owner's side of the utility connection, including but not limited to the following:
 - Piping and valves up to 4 inches in diameter including removing blockages
 - Backflow preventer and related components including required certification by and approved S&WB contractor
 - Domestic and waste water pumps, ejection/lift stations and related components and controls
 - Plumbing fixtures including water fountains, sinks, valves, lavatories, faucets, showers, toilets, urinals, ground sprinklers etc.
 - Traps, including but not limited to clay, drum type, catch basins etc.
 - Water heaters and related components
 - All drains including but not limited to roof and sub-surface, clean outs and related components
 - Gas piping, valves, regulators etc. and all related components
- Non-HVAC Related Mechanical:
Examples include, but are not limited to, exhaust fans, science hoods, ceiling fans, rolling gates, motors and pumps, lab room mechanical components and emergency disconnects, etc.
 - Carry out general lubrication quarterly.
 - Repair or replace motors and pumps.
 - Adjust or repair belts.
- Carpentry and General Maintenance:
 - Repair or replace windows, doors, weatherizing materials, and associated hardware.
 - Repair or replace floor tiles, baseboards, or carpeted areas.
 - Repair or replace blinds and shades, including motorized shades.
 - Repair or replace damaged ceiling tiles.
 - Repair or replace built-in shelving.
 - Replace broken mirrors.
 - Minor repair to furniture.
 - Repair or replace signage.
 - Hang pictures, wall hangings, maps and other instructional materials.
 - Repair or replace toilet partitions, and associated hardware.
 - Repair or replace dispensers.



FACILITIES PRESERVATION

- Carpentry and General Maintenance, continued
 - Repair, replace, and annually clean dryer vents.
 - Repair or replace tile work.
 - Repair fences and gates.
- Paint and Plaster:
 - Repair damage to sheet rock, plaster, and paint; restore and touch up appearance throughout the building.

GENERATOR MAINTENANCE & TESTING

Overview

Each charter operator that occupies a school facility with a generator on the premises is responsible for procuring Generator Preventive Maintenance and Testing services from a qualified vendor. The purpose of this service requirement is to ensure the safety, reliability, and longevity of all generators.

Tasks and Services

- Regular maintenance must be performed by trained and qualified professionals.
- Maintenance schedules for individual devices should be based upon the manufacturer's recommendations for this equipment (i.e., circuit breakers, meters, fusible switches, etc.).
- *OPSB Document Review* – The charter operator must submit a Generator Maintenance & Testing contract that is in place a vendor.

Project Requirements

- A thorough maintenance check should be performed on the switchboard, following the manufacturer's recommended schedule.
- Full-load test performed annually by a qualified professional.
- Perform weekly exercise and fluid checks on all generators. Weekly exercise is automatically programmable for some generators and not others. Your maintenance provider can advise you regarding the automated and/or procedures to perform this task manually.



FACILITIES PRESERVATION

HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)

Overview

Each charter operator is responsible for procuring comprehensive HVAC Preventive Maintenance and Repair services, which includes HVAC maintenance operations as well as the management of such operations. The purpose of this service requirement is to promote the longevity of equipment and provide a healthy environment throughout the facility, while paying particular attention to temperature, humidity, and indoor air quality. The tasks described in this document may be performed by a contracted service provider, in-house staff, or a combination of both, depending on the complexity of the task. Some of the project requirements may also be accomplished by separate vendors, such as air filter replacements, chilled water treatment, etc.

Task and Services

The selected vendor and/or charter school staff shall implement an HVAC maintenance management program that will provide service to include, but not be limited to, the following:

- Vendor and/or charter school staff shall implement and maintain effective programs for the standardization of maintenance operations of HVAC systems and equipment at the designated school facility.
- Provide all management, production, and technical personnel as may be required to efficiently and expressly perform the HVAC maintenance duties.
- Provide the necessary supplies and equipment for the maintenance staff to use in proper performance of their duties as part of the HVAC maintenance program.
- Provide the Charter School Designee with work schedules and project schedules based on the inventory of current HVAC systems.
- Provide on-demand cost estimates to the Charter School Designee for major repairs that are needed beyond the scope of this service contract for HVAC repair services.
- Vendor and/or charter school staff shall respond to requests for repair services in a timely manner. Response times for service requests are defined below:
 - Emergency – This type of repair work request communicates that failure to act immediately will endanger people or the operation. Immediate response is required.
 - Urgent – Response for urgent corrective action must be within the same day of notification.
 - Routine – This type of maintenance work request is such that the main function of the operation or people will not be significantly affected. Response time will be seventy-two hours or less.
- Vendor and/or charter school staff shall perform required HVAC maintenance on facilities, considering the following guidelines:
 - Preventive Maintenance: Vendor and/or charter school staff shall perform scheduled maintenance based on equipment manufacturers' recommendations on all HVAC systems within or on school property. Preventive maintenance services shall also include, but not be limited to, replacing and/or adjusting belts as needed, lubricating bearings, replacing filters, cleaning coils and drains, adjusting thermostats, and inspecting functional operations of equipment to assure long term operations. (See Appendix F for additional information about preventive maintenance.)
 - First Response and Identification of Warranty Repair by Others: The vendor and/or charter school staff shall provide identification of problems associated with equipment under warranty by others.
 - Corrective Maintenance: For new facilities/equipment repairs will be accomplished under warranty by the original equipment manufacturer and/or installing vendor during the warranty period. Any items that require repair that are not covered under warranty shall be performed by the vendor and/or staff.



FACILITIES PRESERVATION

- **HVAC Inspections:** During the course of performing preventive maintenance, the vendor and/or charter school staff shall provide inspection services on the HVAC systems. These services include, but are not limited to, the following:
 - Testing for excessive vibration, motor winding resistance, refrigerant charge, safety controls operations, combustion and draft and proper operation of HVAC control systems.
 - Inspecting for worn, failed or doubtful parts, mountings, drive couplings, oil level, rotation, soot, flame composition and shape, pilot and igniter, adequate oil and refrigerant levels.
 - Testing, inspection, and preventive maintenance services shall be scheduled and performed, based on the equipment manufacturers' recommendations.
- **Code Compliance:** The vendor and/or charter school staff shall be thoroughly familiar with local, state and federal requirements and make recommendations to the Charter School Designee concerning compliance issues. The vendor and/or charter school staff shall not disable any safety device to manually make any equipment operate, with the exception of troubleshooting activities.
- **OPSB Document Review** – The charter operator must submit a HVAC Preventive Maintenance and Repair contract that is in place with a vendor, and/or a detailed work plan describing how these tasks will be performed in-house. If any tasks will be performed by in-house staff, please also submit the qualifications of the charter school staff member who will carry out these functions. OPSB reserves the right to restrict certain tasks to be performed by a trained and/or certified professional only.

Technical Requirements

- **Emergency Service** – Vendor and/or charter school staff shall be available to provide emergency services 24 hours a day, 365 days a year on a Task Order basis. Vendor shall respond to any and all emergency service requests from the charter operator.
- **Equipment Decommissioning** – Vendor and/or charter school staff shall not decommission any equipment unless permission is obtained from the OPSB.
- **Personnel** – Adequate staffing must be maintained at all times to ensure high quality HVAC maintenance services operations. Only those personnel who have been properly trained shall perform the tasks described herein. Vendor's personnel, including sub-contracted personnel, and/or in-house charter school staff performing maintenance on HVAC equipment shall be trained to perform such maintenance:
 - This includes all types of HVAC systems and control systems.
 - Assurance of such training shall be incorporated into the vendor's proposal and/or charter operator work plan, and documentation of such training shall be submitted to the charter operator and/or OPSB.
 - It is required that only qualified and licensed service providers work on equipment.



FACILITIES PRESERVATION

Project Requirements

The vendor and/or charter school staff shall undertake HVAC maintenance and operations activities. These activities are those planned for the normal functioning of all maintenance processes needed to maintain dependable performance of each school's HVAC equipment, during normal hours of operation and emergency response during other times. The objective for adhering to the following items is to provide a safe and comfortable learning/working environment, maximize the useful life of the equipment, and operate systems in an energy-efficient manner. At a minimum, the following actions are required

- HVAC Electrical:
 - Maintain HVAC motors, starters, relays, digital controls (DDC) and Building Automation Systems.
 - Maintain Variable Frequency Drives (VFD).
 - Maintain necessary electrical wiring, controls (including thermostats), and electrical/electronic systems for the function of HVAC equipment
- HVAC Mechanical:
 - Repair/replace/maintain all HVAC equipment and components, including but not limited to the following:
 - Controls, timers, sensors, thermostats, wiring etc. including building automations system (BAS) controls and related equipment
 - Motors, pumps, controllers drives and related components
 - Air distribution and exhaust equipment and related components including but not limited to, VAV's, air handlers, air exchangers, etc.
 - Required manufacturer's maintenance and/or replacement and lubrication of all HVAC equipment and related components including but not limited to belts, pulleys, bearings, idlers, motors, pumps, dampers, collection screens/filters etc.
 - Required Maintenance and inspection and cleaning of boilers, chillers, cooling towers, condensers, evaporators, and related components at least annually or as needed and required by the manufacturer
 - Maintain and provide chemical water treatment on all chillers, cooling towers, evaporators, boilers including chemical ejection system and related components
 - Air filters
 - Units installed or updated since 2006: Return air filters shall be a minimum efficiency of Merv 8 and replace quarterly or more frequently as needed. Outdoor air filters shall be a minimum efficiency of Merv 13 and replaced monthly or more frequently if needed.
 - Units or systems installed prior to 2006: Follow manufacturer's recommendations using a pleated/fabric type filter. Filters shall be replaced at least quarterly or more frequently if needed.
 - All filters shall be marked legibly with the date of installation.
 - Maintain, repair or replace all HVAC system piping and insulation as needed.
 - Maintain, repair or replace drain pans to include using chemicals to prevent corrosion and biological growth



FACILITIES PRESERVATION

ROOF

Overview

Each charter operator is responsible for procuring comprehensive Roof Preventive Maintenance services that include the specifications outlined in this document. The purpose of these maintenance requirements is to promote the durability and longevity of the roof, control costs, and respond to roofing needs after severe weather. The tasks described in this document may be performed by a contracted service provider, in-house charter school staff, or a combination of both, depending on the complexity of the task.

Task and Services

- All roof repairs are to be performed by trained and qualified roofing professionals only.
- Records must be archived to reflect all roof inspection results, and any recommendations for repair.
- A systematic maintenance schedule should be developed, as well as the implementation of a periodic inspection regimen. These tasks may be performed by trained and qualified in-house charter school staff or a selected vendor.
- *OPSB Document Review* – The charter operator must submit a Roof Preventive Maintenance contract/scope of work that is in place with a vendor, and/or a detailed work plan describing how these tasks will be performed in-house. If any tasks will be performed by in-house charter school staff, please also submit the qualifications of the staff member who will carry out these functions. All roof repairs must be performed by a contracted roofing professional. The charter operator must also submit the most recent roof inspection report.

Technical Requirements

- Non-scheduled: Emergency response to storm damage or other needs that arise. A plan should be in place to immediately stop any water that is found to be entering the roof system/building.
- Scheduled: Repairs should be done by a licensed and bonded roofing contractor who is familiar with the roof system types used on the facilities.
- If the roof is under warranty, the vendor must be authorized by the roofing manufacturer who issued the warranty on the roof system.

Project Requirements

- Inspection
 - Establish a semiannual inspection regimen.
 - These inspections should occur before the roofs pass through the most severe weather cycles in late fall and early spring.
 - Additional inspections should be made immediately following severe weather events.
 - Inspection reports filled out chronologically, including digital photographs, records of any construction changes made to the roof and a record of rooftop equipment service.
 - Create a comprehensive inspection checklist designed for use on the type of roof system that is installed. All notes should be made on the checklist to establish a record of an ongoing evaluation of the roof conditions. See Appendix C—Sample Roof Inspection Checklist for more detail.



FACILITIES PRESERVATION

- Inspection, continued
 - During each inspection, the following aspects must be reviewed:
 - Exterior walls
 - Interior/underside of roof deck
 - Ceilings
 - Interior walls
 - Roof edge
 - Fascia/Coping
 - Expansion joints
 - HVAC
 - Penetrations
 - Drainage system
 - Field of roof
 - Base flashings
 - Metal
 - Ponded water areas, oil deposits and vandalism
- Maintenance activities should include the following:
 - Clear the roof surface of any debris
 - Clean and unclog roof drains and gutters
 - Trim overhanging tree limbs away from buildings, as needed
 - Keep rooftop equipment in good repair
 - Minimize foot traffic



FACILITIES PRESERVATION

TERMITE CONTROL

Overview

Each charter operator is responsible for procuring comprehensive Termite Control services at all school facilities. The purpose of these requirements is to ensure ongoing building integrity and safety for occupants. The tasks described in this document must be performed by a contracted service provider.

Task and Services

- The vendor shall provide an initial written report listing problem areas describing current conditions and recommended solutions to the Charter School Designee.
- Special services may be requested during the nights or weekends to avoid contact with students and staff. Services shall be provided at times approved by the Charter School Designee to ensure no interference with the educational environment.
- The vendor shall maintain a logbook that remains on the school site for each building and the land area. The logbook(s) shall contain their service schedule for that building and the land area, the inspection dates and times, unscheduled visits, all quantities of chemicals used, all completed forms concerning the facility and a place for comments/service requests from the Charter School Designee.
- The vendor shall respond to all non-scheduled service calls from the Charter School Designee within twenty-four (24) hours after receipt of notice. The vendor shall maintain a pesticide license and be in compliance with all Federal, State and Local laws.
- The vendor must be Integrated Pest Management compliant and must be licensed to perform the duties described herein.
- *OPSB Document Review* – The charter operator must submit a Termite Control contract that is in place with a vendor.

Technical Requirements

- The vendor shall perform full inspections of the buildings and the land area two (2) times per year. The vendor shall provide a written report listing problem areas, describing current conditions and recommended solutions to the Charter School Designee.
- All chemicals, pesticides and insecticides must be used and stored in accordance with Federal, State, and Local requirements. Termite Baiting systems using Hexaflumuron (e.g., Shatter), Noviflumuron (e.g., Sentricon), or Novuluron (e.g., Advance) shall be utilized at all locations, and installed per the manufacturer's recommendations. After the initial inspection and bait installation, the vendor shall perform quarterly perimeter bait inspections and exterminate all termites (includes all possible termites for the area). Spray treatment shall be applied as required. Termidor termiticide/insecticide shall be used for internal and external spot treatments. The vendor shall provide a written report listing problem areas describing current conditions and recommended solutions to the Charter School Designee.



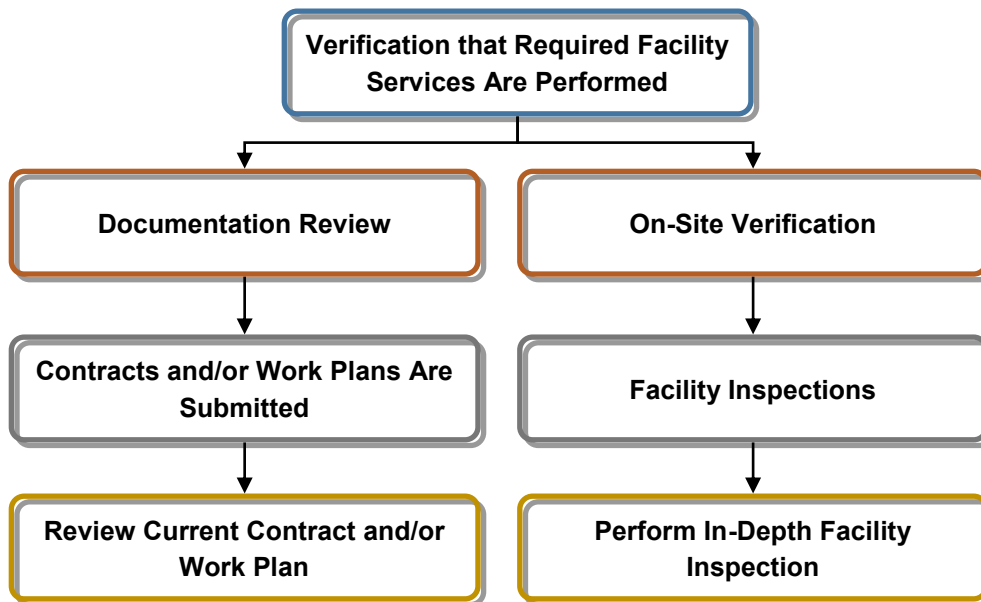
ADMINISTRATIVE PROCEDURES



ADMINISTRATIVE PROCEDURES

ACCOUNTABILITY & DOCUMENTATION

The following chart illustrates the accountability and documentation process for the verification that facility service requirements are being met by all charter school lessees.



Accountability & Documentary Responsibilities

Charter Actions	OPSB Facility Inspection	OPSB Document Review
<ul style="list-style-type: none">• Provide a list of all facility service providers.• Submit vendor contracts and/or detailed work plans annually for each school facility.• Archive all current maintenance records.• Archive Inspection Records (on-site):<ul style="list-style-type: none">– Fire Systems– DHH Inspections– Elevator Inspections– Boiler Inspections– Asbestos Inspections	<ul style="list-style-type: none">• Perform physical inspections of all facilities.• Review code compliance (see section 1).• Inspect for unapproved building alterations.• Inspect quality of all facility services being performed.• Archive facility inspection reports.• Review Inspection Records:<ul style="list-style-type: none">– Fire Systems– DHH Inspections– Elevator Inspections– Boiler Inspections– Asbestos Inspections	<ul style="list-style-type: none">• Review all contracts, work plans, and maintenance records to ensure the prescribed facility service requirements are being performed.• Maintain a list of all facility service providers for each building in case of emergencies.• Maintain all executed lease documents and renew as needed.• Maintain a copy of the following:<ul style="list-style-type: none">– Boiler Inspections– Asbestos Management Plans



ADMINISTRATIVE PROCEDURES

Overview

The accountability process will outline the necessary actions performed by charter school operators and the OPSB to verify that the required facility services are being implemented.

The techniques used to verify that the required facility service activities are being implemented will be twofold.

- Documentation Review – the following information must be submitted annually according to the schedule established for each charter operator:
 - Annual submission of procured service contracts, other facility documentation and/or information about work being performed by in-house charter school staff members.
 - Procured Service Contracts – Provide the approved contract with each required service provider ensuring that the following information is included: timeline of contract, scope of contract, and all agreed upon preventive maintenance schedules.
 - Work Performed In-House – Define which types of required services are being implemented by in-house staff members. The implementation plan should identify all tasks being performed by in-house staff. For work that requires a high-level of training, also provide any relevant certification(s) held by the staff members performing the work.
 - Documentation and/or vendor information must be provided for each facility service included in the Overview of Facility Services found on page 5. This information will be communicated by the charter operator through the OPSB Facility Services Implementation Plan Template, which will be provided to schools annually.
 - The documentation that is submitted to the OPSB must meet all of the criteria that have been set forth throughout the Facility Handbook for each type of facility service requirement.
 - Maintenance and repair logs for any facility service may be requested by OPSB for review at any time. The expectation is that routine maintenance activities, such as changing air filters, checking belt tension, or performing a roof inspection, will be recorded each time they are performed. The maintenance logs will apprise OPSB of the activities and frequency of those activities that are essential to preserve the life of the building systems.
- On-site Verification
 - Facility inspections will be performed throughout the year. This thorough facility inspection will seek to verify that the required facility services are being performed. The facility inspection will also provide the opportunity for the OPSB to serve as a resource for guidance on facility management practices.
 - Facility Inspection Process
 - An initial facility inspection date and time will be scheduled with each charter school.
 - The Facility Inspector will perform the inspection with the Charter School Designee. If a Charter School Designee is not available to join the Facility Inspector, the inspection will still be conducted on the agreed upon date. Facility inspections may take multiple days to complete depending on the school size and availability of areas that need to be inspected.
 - The Facility Inspector will perform an in-depth analysis of the quality of facility services that are being performed, as well as review the overall condition of the facility. The inspection criteria will align with the facility service requirements that have been distributed.
 - A Facility Inspection Report along with a Corrective Action Plan (CAP) will be generated and distributed to the Charter School Designee. The Corrective Action Plan will indicate both “Critical” and “Non-Critical” facility deficiencies identified during the inspection. If no deficiencies are indicated, the inspection is complete.



ADMINISTRATIVE PROCEDURES

- If facility deficiencies are identified in the inspection report, critical and non-critical follow-up inspections will be scheduled. All facility deficiencies must be corrected by the date of the follow-up inspections. Minimum follow-up timelines will be as follows:
 - Critical Items: charter operator will be given at least 14 days to correct deficiencies, unless the deficiency presents an immediate risk to equipment, the facility and/or its occupants.
 - Non-Critical Items: charter operator will be given at least 30 days to correct deficiencies.
- A final inspection report will be generated and distributed to the Charter School Designee, after the follow-up inspections have been performed. This final report will indicate if the facility deficiencies were corrected, or if further action must be taken.



ADMINISTRATIVE PROCEDURES

ISSUE RESOLUTION: Types 1, 3, and 3B Charter Schools

Issue resolution processes have been developed in order to create clear procedures that will be employed in the instance of non-compliance with the facility service requirements that have been set forth.

The following steps explain the actions that will be taken by each party to resolve issues related to facility service requirements.

Issue 1: Lack of Required Services and/or Documentation

- Step 1: Document Review – The OPSB determines that the documentation submitted by the charter operator, or lack thereof, does not meet the facility service requirements that have been set forth.
- Step 2: Initial Notice and Corrective Action – The OPSB notifies the charter operator that the facility service requirements are not being met and indicates the deficiency or deficiencies that must be corrected. This Initial Notice includes a Level 1 Notice of Non-Compliance from the OPSB Office of School Performance. The charter operator is given 30 days to submit the relevant facility services documentation. If compliant documentation is submitted within 30 days of the Initial Notice, no further action will be taken.
- Step 3: Notice of Breach – If the OPSB does not receive the relevant compliant documentation within 30 days after the Initial Notice was communicated, the charter operator is notified that they are in breach of the Lease Agreement due to noncompliance with the OPSB facility service requirements. This Notice of Breach includes a Level 2 Notice of Non-Compliance from the OPSB Office of School Performance. According to provisions in the lease, OPSB will withhold funds from the charter operator for the purpose of rectifying the critical deficiency or deficiencies.

Issue 2: Level of Facility Services Being Performed is Deficient (upon facility inspection)

- Step 1: Initial Notice and Cure Period – The OPSB notifies the charter operator through the updated Corrective Action Plan (CAP) that the deficiencies identified have not been corrected by the stated deadline. This Initial Notice includes a Level 1 Notice of Non-Compliance from the OPSB Office of School Performance. The OPSB will determine the level of urgency in the facility deficiency or deficiencies and will assign a final cure deadline.
 - Critical Items – Immediate action must be taken if there is immediate risk to the health or safety of the students and staff, or potential damage to the building or equipment. It is at the discretion of the OPSB to determine the amount of time in which these items must be corrected.
 - Non-Critical Items – If the deficiency is not urgent, the charter operator will be given 30 days to correct the issue(s) that have been identified.
 - Extensions to the cure period may be given to the charter operator in certain instances, including Charter School staff turnover, long lead items, vendor delays, or if a purchase order has been issued. It is the responsibility of the charter operator to communicate in writing to the OPSB these circumstances and to show evidence that progress is being made toward correcting the deficiency.
- Step 2: Verification of Repairs —The charter operator must provide documentation to the OPSB that the deficiency or deficiencies have been corrected prior to the cure period deadline. This verification may include photos, invoices, service reports, completed work orders, or other form of documentation provided by the vendor. If appropriate verification is submitted, no further action will be taken.
- Step 3: Notice of Breach – If the corrective action described in Steps 1 and 2 are not taken, the OPSB will notify the charter operator that they are in breach of the Lease Agreement, and the OPSB will engage with a vendor to correct the deficiency. This Notice of Breach includes a Level 2 Notice of Non-Compliance from the OPSB Office of School Performance. According to provisions in the lease, OPSB will withhold funds from the charter operator for the purpose of rectifying the critical deficiency or deficiencies.



ADMINISTRATIVE PROCEDURES

ISSUE RESOLUTION: Types 2 Charter Schools

Issue resolution processes have been developed in order to create clear procedures that will be employed in the instance of non-compliance with the facility service requirements that have been set forth.

The following steps explain the actions that will be taken by each party to resolve issues related to facility service requirements.

Issue 1: Lack of Required Services and/or Documentation

- Step 1: Document Review – The OPSB determines that the documentation submitted by the charter operator, or lack thereof, does not meet the facility service requirements that have been set forth.
- Step 2: Initial Notice and Corrective Action – The OPSB notifies the charter operator and its authorizer that the facility service requirements are not being met and indicates the deficiency or deficiencies that must be corrected. The charter operator is given 30 days to submit the relevant facility services documentation. If compliant documentation is submitted within 30 days of the Initial Notice, no further action will be taken.
- Step 3: Notice of Breach – If the OPSB does not receive the relevant compliant documentation within 30 days after the Initial Notice was communicated, the charter operator is notified that they are in breach of the Lease Agreement due to noncompliance with the OPSB facility service requirements. The charter operator will be billed for the cost of remedying these facility service deficiencies.

Issue 2: Level of Facility Services Being Performed is Deficient (upon facility inspection)

- Step 1: Initial Notice and Cure Period – The OPSB notifies the charter operator and its authorizer through the updated Corrective Action Plan (CAP) that the deficiencies identified have not been corrected by the stated deadline. The OPSB will determine the level of urgency in the facility deficiency or deficiencies and will assign a final cure deadline.
 - Critical Items – Immediate action must be taken if there is immediate risk to the health or safety of the students and staff, or potential damage to the building or equipment. It is at the discretion of the OPSB to determine the amount of time in which these items must be corrected.
 - Non-Critical Items – If the deficiency is not urgent, the charter operator will be given 30 days to correct the issue(s) that have been identified.
 - Extensions to the cure period may be given to the charter operator in certain instances, including Charter School staff turnover, long lead items, vendor delays, or if a purchase order has been is-sued. It is the responsibility of the charter operator to communicate in writing to the OPSB these circumstances and to show evidence that progress is being made toward correcting the deficiency.
- Step 2: Verification of Repairs —The charter operator must provide documentation to the OPSB that the deficiency or deficiencies have been corrected prior to the cure period deadline. This verification may include photos, invoices, service reports, completed work orders, or other form of documentation provided by the vendor. If appropriate verification is submitted, no further action will be taken.
- Step 3: Notice of Breach – If the corrective action described in Steps 1 and 2 are not taken, the OPSB will notify the charter operator that they are in breach of the Lease Agreement, and the OPSB will engage with a vendor to correct the deficiency. The charter operator will be responsible for all costs associated with the implementation of facility services or repairs by the OPSB, in accordance with the charter operator's lease requirements. The charter operator will be billed for the cost of remedying the deficiency.



ADMINISTRATIVE PROCEDURES

FACILITY REPAIRS

OPSB Policy HD (Charter School Facility Management) addresses the details of the charter operator's responsibility for facility repairs. According to Policy HD, "A repair is considered an improvement that keeps property in efficient operating condition; restores the property to its previous condition rather than improving the quality of the property. For example, repairing a section of a roof would be a repair item. Replacing the entire roof would be a capital improvement."

OPSB Policy FJ (Orleans Parish School Facility Preservation Program) identifies the parameters under which funding may be available for repairs as well as capital improvements.

Requirements

- The need for a repair must not be the result of inadequate or neglectful maintenance on the part of the charter school lessee or their contractors/subcontractors. If a charter operator has a proven history of complying with preventive maintenance requirements and a piece of equipment breaks down, that history will help to inform decisions about whether the needed repair is a result of inadequate or neglectful maintenance. All issues of this sort will be reviewed and resolved with full participation by both OPSB staff and the charter operator.
- The cost of repair must not be due to a deficiency that could have been remedied for a lower cost if it had been addressed upon initial damage or failure.
- The charter operator will be responsible for payment of the first \$10,000 for all repairs.
- Capital improvement/repair costs may include investigation, mitigation to prevent further damage, and permanent repair costs. If temporary services are needed for school operations, they may be added to the capital improvement/repair cost at the discretion of the OPSB, in consultation with the charter operator.
- The cost of the repair must not be bundled with other items.
- The OPSB will not pay for work that has already been completed. No reimbursements will be made.

Process

The following steps must be completed by the charter operator in order for a repair request to be considered by the OPSB:

- Identify the need for a facility/equipment repair.
- Obtain a quote for the identified repair work from a qualified vendor.
 - The qualified vendor must be registered with the State of Louisiana and have any necessary licenses that are required to perform the type of repair work being addressed (i.e., electrical, plumbing, etc.).
 - The quote should only include costs for investigation, mitigation and the permanent repair. Temporary services should only be included if already approved by the OPSB.
- Submit all relevant information using the following form: <https://opsb.us/departments/facilities/>
- The following information will be required:
 - Overview and description of the deficiency that necessitates repair or replacement.
 - Written quote from a qualified vendor.
 - Overview of any actions taken by the charter school to stabilize or remediate the damage upon initial identification of the need for a repair.
 - Provide any additional information requested by the OPSB that is needed to make a final decision.



ADMINISTRATIVE PROCEDURES

Final Determination

- OPSB will obtain at least two additional quotes for the repair identified.
- OPSB will provide written notification to the charter school to indicate approval or denial of the repair request.

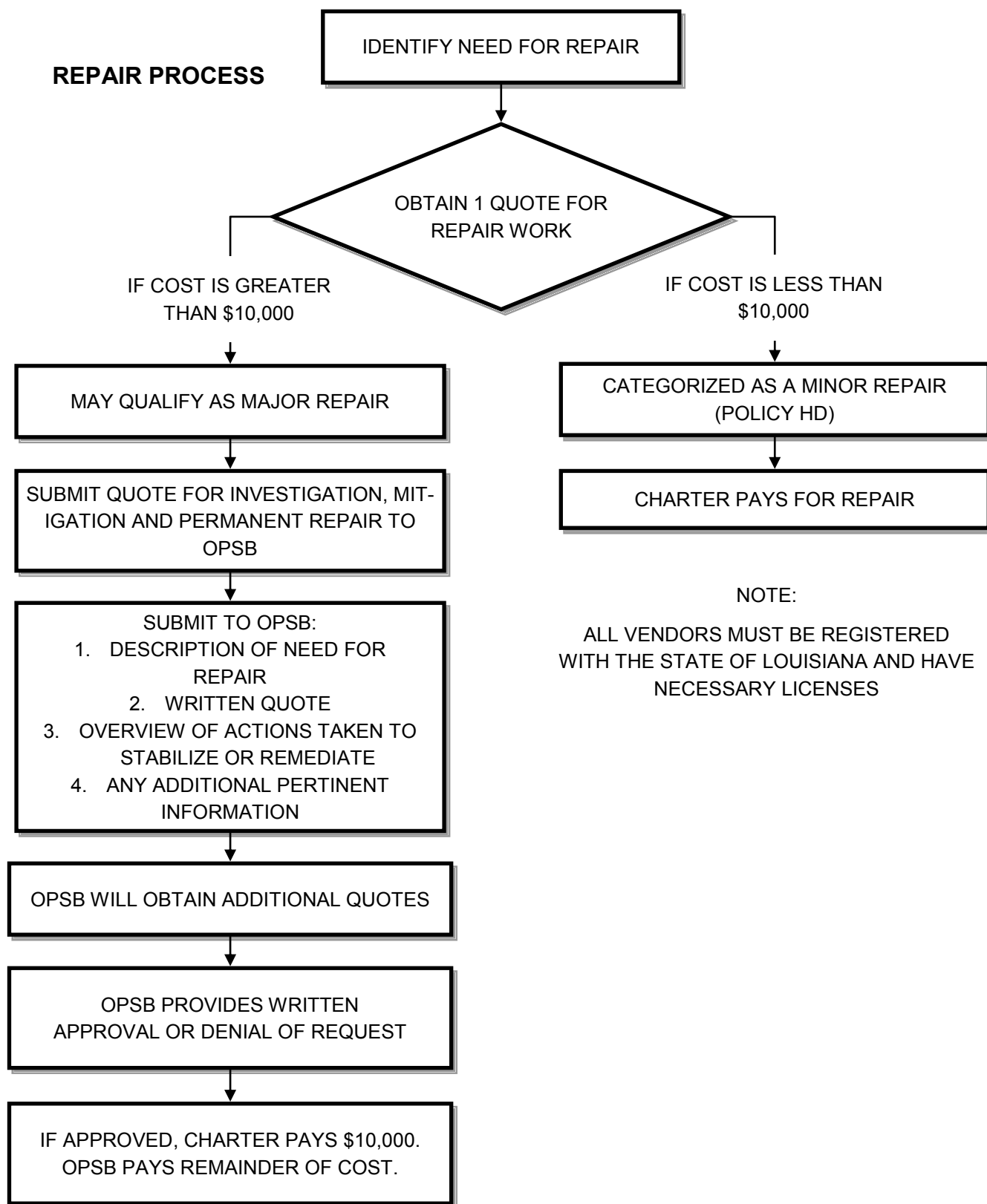
If the project is determined to be an approved repair, the charter operator will be billed by OPSB for the first \$10,000 of project costs, and OPSB will fund the remainder of the project.

Change Orders

- Change Orders may be additive or deductive.
- A change order that puts a repair cost above \$10,000 may be approved by the OPSB if:
 - All of the above requirements are met; **and**
 - Three quotes obtained for original scope of work are submitted; **and**
 - Justification for the cost now exceeding \$10,000 is submitted.
- If a project initially qualifying as a repair has a change order that puts the total cost below \$10,000, payment for the entire project will become the responsibility of the charter operator.



ADMINISTRATIVE PROCEDURES





ADMINISTRATIVE PROCEDURES

CAPITAL IMPROVEMENTS

According to Policy HD, "A capital improvement creates an addition, physical enlargement or expansion of a building; creates an increase in capacity, productivity or efficiency; rebuilds property after the end of its economic useful life; replaces a major component or structural part of the property; improves the quality of the property; and/or adapts property to a new or different use...."

OPSB Policy FE, Facilities Planning, states that a School Facilities Master Plan shall be developed every five years and approved by the School Board. The School Facilities Master Plan would identify needed Capital Improvements at each school site. An Implementation Plan, addressing needs along with potential funding sources, is to be included in the School Facilities Master Plan. The Implementation Plan is to be adjusted annually to align funding sources with projected needs.

OPSB Policy FJ (Orleans Parish School Facility Preservation Program) identifies the parameters under which funding may be available for repairs as well as capital improvements.

OPSB staff will work with charter operators to develop capital improvement project scopes for sites as funding becomes available. Capital improvements will be paid for and projects will be managed by OPSB.



ADMINISTRATIVE PROCEDURES

OPERATIONS & MAINTENANCE DOCUMENTATION/WARRANTIES

Charter schools are responsible for preventive maintenance and repairs to building systems and materials within the framework identified in the facility lease agreement.

When a new school or renovation project is complete, a number of documents are turned over to the owner by the contractor. For the first year after the new construction or renovation, OPSB facilities staff/program manager will be responsible for addressing warranties and resolving warranty items. A copy of the Operations & Maintenance (O & M) Manuals, Warranty Manuals, and a set of the “as built” construction drawings will be delivered to the charter operator so that charter operators have the information necessary for the appropriate preventive maintenance and maintenance of building systems and materials after the initial 12-month period.

It is the charter operator’s responsibility to be familiar with the operations, maintenance, and warranty requirements so that the Preventive Maintenance Plan (PMP) developed by the charter operator fulfills criteria outlined by the manufacturers of the various building systems and materials.

Damages to equipment due to the failure to comply with manufacturer’s requirements will be the responsibility of the charter operator to rectify. Manufacturer’s requirements found in O & M Manuals and manufacturer’s warranties supersede task frequencies found throughout this document (including Appendix F).

For the systems that have not been recently built/replaced there are no O & M Manuals/Warranty Manuals. For those school sites the guidance in the Facility Procedures Handbook and in Appendix F provide suggestions for minimum requirements.

Manufacturer’s Warranty Requests

Process – the following steps must be followed for all Manufacturer’s Warranty Claim Requests:

- Contact an authorized vendor to diagnose the building issue(s) and obtain a written report stating the need for repair.
- Review the warranty documentation for the facility to determine if the equipment or system experiencing issues is covered under a manufacturer’s extended warranty.
- Submit the Warranty Ticket Request Form in detail. Attach the written report obtained from the vendor. This form can be found here: <https://opsb.us/departments/facilities/>.
- OPSB staff will review all Warranty Ticket Requests and determine if the OPSB or the Charter School will be responsible for managing the warranty claim.

For **major** building components and systems (including but not limited to HVAC and BAS, building envelope, other mechanical systems), the OPSB will move forward with contacting the manufacturer to submit a warranty claim, based on the information submitted by the charter school.

- The OPSB will coordinate a site visit between an OPSB Facility Inspector, a Charter School Designee, and the manufacturer’s representative.
- The OPSB Facility Inspector will oversee the warranty work through completion and close out.

For all other warranty items, the OPSB will review the Warranty Request Form and notify the Charter School Designee that they should move forward with contacting the manufacturer directly in order to submit a warranty claim. The Charter School Designee should proceed with having the warranty work completed and contact their OPSB Facility Inspector if additional assistance or guidance is needed.



ADMINISTRATIVE PROCEDURES

FACILITY ALTERATIONS

All work that involves the physical construction, alteration or improvement to OPSB owned, leased or occupied facilities, or any improvements to land owned or leased by the OPSB must be performed with the full knowledge and formal consent of the OPSB.

Facility alterations shall enhance and support educational activities and must not compromise the safety, structural integrity or design flexibility of the facility and learning environment. Alterations may not diminish in any way the monetary value of the facility, its grounds, or other property.

OPSB will consider facility alteration requests submitted by charter school lessees. As stated in OPSB Policy HD, alterations with an estimated cost of \$500,000 or more require approval by the School Board. Once completed, all approved alterations will become an asset to the leased property, and will therefore remain with the facility at the end of the lease agreement.

Planned alterations and improvements requiring OPSB approval include, but are not limited to, the following:

- All minor construction; changes in facilities configuration; fabrication, modification, removal, or installation of doors, walls, ceilings, hardware and equipment; fixed interior signage; erection, relocation, or removal of partitions, doors, and windows; and changes in type of finishes and flooring materials.
- Renovation that is required to restore, upgrade, or otherwise improve the general condition of facilities.
- Structural/physical changes to interior space such as demolition or new construction that includes installation of fixed equipment or furniture requiring utility, electrical, laboratory exhaust or HVAC connections; fire alarms and fire suppression systems; taps into building utilities or HVAC systems; plumbing; involvement of any hazardous materials or life safety issues such as propane, natural gas, chemicals, fumes, and/or ventilation.
- Work performed on any building utility system other than maintenance or like-kind replacements, including electrical, plumbing, ventilation, air conditioning, control systems, fire alarms, fire sprinklers, security systems, laboratory fume hoods, and telecommunication equipment, as well as cabling.
- Altering access to spaces through new or modified locksets, doors, hardware, keypads, and/or operators.
- Exterior changes to the building and all exterior signage.
- Any site or grounds improvements, such as additions or changes to roadways, sidewalks and pavement installation.
- Recreational areas (e.g., athletic fields, playgrounds, sport courts).
- Access or alterations to utility services including electrical, gas, telecommunications, water, or any other aspect of the infrastructure that is integral to the functional use of the facility and/or property.
- New external structures (e.g., bus shelters, benches, bike racks, special fencing, artwork/sculptures, picnic, recreation shelters, and flagpoles).
- Alteration or penetration of corridors, ceilings, or roofs.
- Certain alterations of walls, furniture, equipment items, bookshelves, casework that may potentially impede required egress, fire safety systems, and/or relocation and access to existing electrical and communications outlets.



ADMINISTRATIVE PROCEDURES

Facility Alteration Requests

- Process – A Facility Alteration Request and Approval Form must be completed and submitted to the OPSB. The Facility Alteration Request Form can be found at <https://opsb.us/departments/facilities/>
- If the facility alteration estimate is greater than or equal to \$500,000, the request must be submitted by the OPSB staff to the School Board for approval. Once approved by the School Board, the implementation process is described below.
- For alterations estimated to cost less than \$500,000, OPSB staff will provide written notification to the charter school to indicate approval or denial of the requested alteration(s) within 15 business days following the receipt of all pertinent documents relating to the request. Review and approvals will be expedited to the greatest extent possible, particularly for those alterations pertaining to life/safety issues. Once approved, alteration activities will be monitored by the OPSB facilities staff for safety and quality of workmanship.
- Requirements
 - Facility alterations must not compromise the safety, structural integrity or design flexibility of the facility and learning environment.
 - The value of the facility and property must not be decreased by facility alterations. All relevant building permits must be procured and submitted to OPSB.
 - Identify the educational need and justification for a facility improvement or reconfiguration.
 - Provide a detailed Scope of Work.
 - If walls, windows, and/or structural components are being reconfigured, removed, or added, develop and attach a floor plan showing building modifications to the request form. Indicate if the alteration affects Life/Safety, ADA, or involves removal of hazardous materials.
 - Submit a list of all building materials, finishes, and fixtures that would be used in the proposed plan.
 - Once the vendor/contractor is selected, submit the name, qualifications, certificate of insurance, and licensing of the vendor(s)/contractor(s) that would be hired to perform the work.
- All facility alterations will become an asset to the leased property, and will therefore remain with the facility at the end of the lease agreement unless otherwise agreed by both parties in writing.

Facility Alteration Request Implementation

- The selected vendor must be licensed with the State of Louisiana, have the necessary credentials to perform the proposed work, as well as being insured and bonded. A copy of the contractor's Certificate of Insurance must be submitted to OPSB. OPSB must be named as Additional Insured on the insurance certificate.
- Once approved, additional vendor/contractor information (qualifications, certificate of insurance, and licensing) will need to be forwarded to the OPSB Deputy Chief of Facilities prior to work commencing.
- All facility alterations will be monitored by the OPSB facilities staff for safety as well as quality of workmanship.
- Once the Scope of Work is approved, any changes to the original Scope of Work must be submitted to OPSB for approval. Work related to Change Orders is not to be performed prior to approval.

Unapproved Facility Alterations

If alterations are made to the leased property without prior written authorization from OPSB, the charter school lessee will be responsible for restoring the property to its original condition at the expense of the charter school.



ADMINISTRATIVE PROCEDURES

CONTENTS/INVENTORY TRACKING

Furniture, fixtures, and equipment are included in the properties that OPSB leases to charter operators. All movable and fixed assets, e.g. technology items, furnishings, and equipment, owned by the School Board with an original purchase price greater than \$5,000 will be included in an inventory that the charter operator and OPSB staff will jointly verify when a charter takes occupancy of an OPSB-owned building and moves out of an OPSB-owned building. This inventory will be verified annually. The charter operator will be held responsible for replacing missing items. When items are no longer useful and need to be taken out of service, or when a charter operator wishes to relocate items from one facility to another, the charter operator should fill out the Fixed Assets Inventory Disposition Form (found in Appendix H and at <https://opsb.us/departments/facilities/>) and contact OPSB to pick up and dispose of the property when applicable.

TRANSFER OF PROPERTY AT LEASE TERMINATION

When a charter operator enters into a lease with OPSB, the facility is accepted in “as is” condition. Throughout the lease, the charter operator is responsible for ensuring the facility is functional and operational. The expectation is that the facility be returned in the same or better condition when the lease ends, normal wear and tear excepted.

OPSB has developed the following procedures for both incoming and outgoing charter operators:

- Incoming Charter Operators:
 1. Prior to occupying a building, a representative of the incoming charter operator and a representative of OPSB will perform a facility inspection.
 2. OPSB will develop a Corrective Action Plan with the purpose of communicating facility repairs and maintenance that the outgoing charter operator is responsible for prior to moving out of the facility.
- Outgoing Charter Operators
 1. If the charter operator moves from the building, a facility inspection will be conducted by the OPSB prior to move out.
 2. The charter operator will be provided a Corrective Action Plan and shall be responsible for correcting all facility deficiencies prior to the end of the lease. Any facility deficiency not corrected will be subject to the Issue Resolution procedure detailed on page 42 and 43.
 3. The charter operator should retain all facilities alteration approvals for use during the post-occupancy walk-through.



ADMINISTRATIVE PROCEDURES

PROPERTY INSURANCE

OPSB obtains and maintains insurance on district-owned properties and contents. Charter operators are responsible to obtain insurance for property that they own.

Charter operator shall be responsible for insurance deductible amounts as specified in its facility lease with OPSB.

The following is the protocol for claims reporting/submission with OPSB:

- The charter operator will:
 - Assess damage
 - Immediately mitigate any future damage to property
 - Obtain one (1) quote for repairs
 - If the cost to repair is over the deductible limits identified in the facility lease with OPSB, charter operator will provide OPSB with the quote.
 - Provide the OPSB facilities team with an incident report and photos for record keeping purposes and possible claims submission.

OPSB will file with the carrier, and a claim will be opened. The insurance carrier will have damages assessed by their claims adjuster. An amount will be assigned to the claim. The charter operator will be responsible for cost/charges up to the deductible amounts specified in the facility lease with OPSB.

A sample claim form can be found in Appendix G. Claim forms can also be found at <https://opsb.us/departments/facilities/>.

INSURANCE PROCEDURE

Charter operator shall provide duly executed certificates evidencing such types and limits of insurance (which shall evidence the insurer's waiver of subrogation of general liability, auto, and workers' compensation claims against OPSB and provide that notice of cancellation shall be provided to OPSB in accordance with policy provisions.)

Such certificates shall be deposited with OPSB's Office of Risk Management on or before the date that the lease is executed and not less than thirty (30) days following renewal of the policy or policies.



APPENDICES



Appendix A: Sample Description for a Custodial Worker

The following is a sample job description for a custodial worker that an educational organization can refer to as it develops its own job descriptions. Some of the duties and responsibilities listed may not be applicable to all education organizations. This list is presented only as a resource, and does not represent a standard or agreed-upon convention.

General Responsibility

The Custodian is responsible for keeping assigned building(s) clean, safe, functional, and secure in accordance with prescribed codes and established district policies and standards. A custodial worker must maintain all assigned building(s) in a state of operational excellence such that they present no interruptions, distractions, or obstacles to the education program.

Essential Duties and Responsibilities

- Perform regular custodial duties in assigned area(s) of building(s).
- Accept instructions from head custodian/supervisor verbally or in writing.
- Provide services as necessary to support curricular and extracurricular events and activities.
- Maintain inventory of custodial/maintenance supplies and equipment.
- Restock disposable custodial/maintenance items and provide head custodian/supervisor with inventory usage data.
- Clean and preserve designated spaces, equipment, furniture, etc. in the building(s).
- Assist visiting members of the public who are utilizing the facilities.
- Maintain work related records and prepare work reports as directed.
- Project a positive image for the school district with his/her team, whenever the public, guests, or visitors are in the building.
- Work closely with the head custodian/supervisor and/or building administrator(s) to be prepared for scheduled evening activities and unscheduled events as needed.
- Maintain building and grounds security by opening/closing the building each school day and during special events as directed.
- Work on call as needed at any time for emergency repairs, equipment monitoring, overtime, or special needs falling outside of normal working hours.
- Identify and schedule work to be performed during summer, winter, and spring break.
- Accept other duties as assigned.

Daily Duties

- Check daily activities schedule to see if any special equipment must be set up.
- Perform general cleanup—any and all incidents as they arise.
- Inspect entrances and sidewalks for damage, clutter/dirt, malfunction, or other hazards.
- Vacuum all entrance mats, outside mats, and clean sidewalk up to 10 feet from entrance.
- Wet mop inside of entrances if wet or in bad condition.
- Sweep all stairways.
- Machine vacuum all carpeted corridors, walkways, and 10 feet in from doorway of each room.
- Clip all carpet sprigs as necessary.
- Remove all spots from carpet.
- Extract soiled areas on carpets as needed.
- Remove gum from all surfaces.
- Dust mop and sweep corners of all tiled classrooms and adjacent rooms. Wet mop if needed.
- Spot vacuum all classrooms, offices, and other carpeted areas. Pick up any paper left on floor.
- Make sure rooms appear orderly.
- Empty all trash cans (rinse or wash if needed).
- Put all trash in dumpsters and provide support with recycling duties.
- Remove all marks from walls and lockers nightly.



Appendix A: Sample Description for a Custodial Worker, continued

Daily Duties, continued

- Wash all main entrance windows.
- Thoroughly clean all surfaces in restrooms.
- Clean all drinking fountains.
- Lock all doors as directed by the director of facilities/administration or his/her designee and lock all outside doors as soon as daily activities are over.
- Close and lock windows.
- Clean all equipment after use (e.g., mop buckets and custodian's service sink).
- Hang up brooms, dust mops, and wet mops. Do not stand them against wall.
- Clean and straighten janitor's closet.
- Keep shelves and supplies in neat order and stocked with supplies.
- Turn in any items or articles found to the Lost and Found Department.
- Check entire area for vandalism and report to the director of facilities/administration or his/her designee.
- Assist other employees with cleanup after large activities (e.g., after a basketball game).
- Accept other duties as assigned.

Weekly Duties

- Sweep under all entrance mats (both inside and outside).
- Dust mop and sweep out corners of all the tiled areas that are not covered under daily routines.
- Vacuum all carpets thoroughly in all classrooms and work areas according to schedule.
- Wet mop tiled areas. Wax, if needed.
- Wash all desktops, chairs, and furniture according to schedule.
- Dust everything in rooms and corridors according to schedule.
- Make sure all lockers are dusted and marks removed.
- Wash all hallway door windows.
- Clean cove molding and edges thoroughly.
- Wash all dry erase boards according to schedule.
- Wash display case glass, if needed.
- Check the furniture once a week for breakage and either repair it or report it to the head custodian/supervisor.
- Check all playground equipment for damage or unsafe conditions and inform Plant Service of repair needs.
- Accept other duties as assigned.

Monthly Duties

- Vacuum or clean all intakes and exhaust ventilating louvers in ceiling of every room.
- Clean out all storage rooms.
- Accept other duties as assigned.

Winter and Spring Break Duties

- Light-scrub and re-wax all hard tile floors. Strip, if needed.
- Extract carpeted rooms as needed.
- Extract entrance mats.
- Lightly dust all rooms.
- Wash all desktops.
- Wash inside of all windows.
- Scrub floors and clean all walls and partitions in restrooms.
- Make sure all sinks, urinals, and stools are cleaned (in, under, and around).
- Accept other duties as assigned.



Appendix A: Sample Description for a Custodial Worker, continued

Summer Duties

- Wash all windows inside and out.
- Wash all desks (including teachers') inside and out.
- Wash all walls as needed.
- Remove all dirt from lights and high-dust everything.
- Wash all doors and frames. Pay special attention around lock assembly.
- Scrub all floors and re-wax, strip if needed.
- Thoroughly vacuum all carpeted areas and extract.
- Completely clean all fixtures, furniture, ceiling, walls and floors.
- Accept other duties as assigned.

Working Conditions

The work environment characteristics described here are representative of those that a custodian encounters while performing the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee regularly works indoors and will occasionally work outdoors, including during both hot and cold weather.
- The employee will work near or with moving mechanical equipment.
- The employee may occasionally work with toxic or caustic chemicals such as petroleum products, degreasers, and sprays.
- The employee must be able to meet deadlines with severe time constraints.
- The noise level in the work environment is usually moderate.
- Some evening and weekend work can be expected on a regular basis (i.e., more than twice per month).
- There is a high probability that contact with blood-borne materials will occur within daily duties.
- All duties and procedures are to be performed within health safety standards as established by local and state OSHA and school district emergency procedures.

Equipment Used

- The custodian should expect to move, operate, and clean various manually powered brooms, mops, vacuums, dusting tools, and snow shovels as well as mechanically powered waxing and buffing equipment.
- He/she will be expected to climb and work from ladders as necessary.
- The custodian will also handle and apply chemical cleaning agents, some of which may be toxic if handled improperly.
- All custodial staff will undergo training with regard to equipment and chemical use.

General Qualifications

- To be eligible for employment as a custodian, a person shall demonstrate the knowledge, skills, and experience necessary to complete the assigned work efficiently.
- The person must be able to operate, maintain, and make adjustments to various types of equipment, as needed.
- He/she must also have the ability to pass a written and physical test, as well as establish and maintain effective working relationships with students, staff, and the community.
- He/she is required to perform duties within the expectations of all district requirements and board of education policies.
- He/she must understand proper procedures, handbook rules, school schedules, (i.e., practice times, game times—both home and away) and maintain confidentiality with regard to students and staff.
- He/she must also be available for duties on some Saturdays, Sundays, and evenings as assigned



Appendix A: Sample Description for a Custodial Worker, continued

General Qualifications, continued

- Moreover, the individual must be adaptable to working around children and possess skills for maintaining school buildings in a manner acceptable to the general health and safety standards of school buildings.
- He/she must also develop a basic understanding of the following areas: board of education policies and administrative regulations, school public relations, the role and function of public schools in the community, safe operation of mechanical equipment, and the importance of developing constructive working relationships with supervisors, fellow workers, students, the general public, and visitors to the school.

Educational Requirements, Credentials, and Licenses

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- High school diploma or general education degree (GED). Two years or equivalent experience in the custodial field. Prior leadership experience. Basic computer knowledge; knowledge of building layouts, systems, and controls.
- Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak effectively before groups of customers or employees of the organization.
- Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals.
- Ability to compute rate, ratio, and percent, and interpret bar graphs.
- Ability to apply common-sense understanding to carry out instructions furnished in written, oral, or diagram form.
- Ability to deal with problems involving several concrete variables in standard situations.

Physical Requirements

The physical demands described here are representative of those requirements that must be met by a custodian to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is regularly required to stand; walk; use hands and fingers to handle or feel objects, tools, or controls; and give and receive oral and written instructions.
- The employee frequently is required to reach with hands and arms.
- The employee is occasionally required to sit.
- The employee frequently must squat, stoop, or kneel, reach above the head, and reach forward.
- The employee frequently uses hand strength to grasp tools and rungs of ladders.
- The employee will frequently bend or twist at the neck and trunk more than the average person while performing the duties of this job.
- The employee must frequently lift and/or move up to 50 pounds, including cleaning supplies, pails, and bags/boxes.
- Occasionally the employee will lift or move up to 80 pounds.
- The employee will sometimes push or pull items such as tables, bleachers, scrubbing machines, etc.
- This job requires close vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

Source: School Facilities Maintenance Task Force. "Planning Guide for Maintaining Schools Facilities." February, 2003.



Appendix B: Grounds/Landscaping Sample Scope of Work

Overview

The contractor shall develop and implement an effective program of grounds maintenance. The program shall be designed to promote the overall attractiveness of the grounds as well as the safe and enjoyable use of recreational facilities. All procedures will be in accordance with established environmental protection policies, and will include but not be limited to the following:

- Provide all management, production and technical personnel as may be required to efficiently assist in the Ground Services duties.
- Provide training, management and direction of all personnel in the performance of their respective Ground Services duties.
- Provide the necessary supplies and equipment for the Ground Services staff to use in proper performance of their duties as a part of the Grounds program.
- Any services or tasks that have been omitted from this specification, which are clearly necessary for the complete maintenance of the grounds, shall be considered a requirement although not directly described in this specification.
- E. The contractor shall provide all labor material and equipment required for the performance of these services.

Tasks and Services

The contractor shall furnish and maintain all equipment necessary to perform the services required.

- Mowing
- Aeration
- Turf Fertilization
- Weed Control
- Turf Repair
- Irrigation inclusive of maintaining clear drainage areas around campuses
- Tree Care
- Care of Shrubs and groundcovers
- Care of Shrub Beds
- Flowers
- Field Lining
- Tracks and In-Field Maintenance
- Playgrounds
- Fence Lines and Signage
- Field and Landscape Structures
- Disposal of Landscape Waste
- Refuse Pick Up and Removal
- Paved Surface Care
- Project Work/New Installations
- Exterior Set-Ups and Special Events
- Grounds Management Planning Calendar
- Grounds Inspections
- Retention/detention basin maintenance

Deliverables

Within 30 days of the start date of the contract, the contractor shall meet with the Charter School Designee to establish Common Goals and Objectives for the Grounds keeping Program



Appendix B: Grounds/Landscaping Sample Scope of Work, continued

Functional Requirements

- Contractor shall provide:
 - Their own office spaces, office supplies, and office equipment..
 - Their own utilities.
 - Their own vehicles, insurance, fuel, oil products, and vehicle maintenance.
 - All supplies, equipment and tools required to perform the services
 - Contractor shall ensure that this operation will stand alone and not share personnel with any other contractor operations, except those covered by this contract.
 - Contractor will close, lock and otherwise secure all gates and fences surrounding the site.

Technical Requirements

- Emergency Service – Contractor shall be available to provide emergency services 24 hours a day,
- 365 days a year. Contractor shall respond to any and all emergency service requests from the designated agent within four (4) hours of the request.
- Inspections – In order to monitor the quality of work performed by the contractor, the Charter School Designee and the contractor shall conduct random inspections.
- Personnel – Contractor shall maintain an adequate staff at all times to ensure high quality services operations, including expert personnel for administration, purchasing, equipment consulting, and supervision. Only those personnel who have been properly trained shall be assigned duties under this contract. All personnel shall be dressed in a manner authorized by the contractor. The personnel shall be neat and clean in appearance at all times. Uniforms with company logo and personnel name tags shall be required and furnished by contractor and worn at all times.
- Personnel decisions shall be made in compliance with existing statutes and regulations pertaining to affirmative action, non-discrimination, wage and hour and any other stipulations germane to prudent personnel management.
- All employees of the contractor assigned to jobs at the schools, including periodic assignments, must undergo annual background checks at contractor's expense. These background checks include, but not limited to, a criminal background check by the State of Louisiana Police Department, a Social Security written authorization ensuring the ability to legally work in the United States from the Social Security Department, and a Drug Test from an authorized testing group.

Project Requirements

In addition to being responsible for Grounds keeping services as described by the proposer, the contractor will undertake all issues and duties pursuant to the management and oversight of these services, including:

- Supervision – The contractor will assume line management duties controlling direct labor activities: hiring, termination, task assignments, job description, scheduling, training, application of personnel policies and direct labor hour justification.
- Staff Interaction – The contractor will undertake to initiate, develop and maintain sound and professional working relationships with members of the Charter School staff.
- Policies and Procedures – The contractor's management staff will develop, publish and apply policies and procedures appropriate and necessary for the effective execution of the Grounds keeping Program
- Reporting - Within 30 days of the start date of the contract, the contractor will meet with the Charter School Designee to establish a schedule of regular reports for the Grounds keeping Program.



Appendix C: Sample Roof Inspection Checklist

A = Acceptable; N = Not Acceptable; N/A = Not Applicable

Where to Check	What to Look For	A	N	N/A	Notes
Exterior Walls	Check For Signs Of Leaks				
	Staining				
	Missing Mortar				
	Cracks				
Interior Walls	Check For Signs Of Leaks				
Ceiling	Check For Signs Of Leaks				
Interior Roof Deck	Check For Signs Of Leaks				
	Deterioration				
	Mold				
Roof Edges	Check For Deterioration				
Fascia/Coping/ Metalwork	Check For Signs Of Leaks				
	Staining				
	Missing Mortar				
	Check Attachment				
	Paint Any Rusted Metal				
	Re-caulk As Necessary				
Expansion Joints	Check For Signs Of Leaks				
	Excessive Movement				
	Deterioration				
Field Of Roof	Substrate Firmness				
	Note Damage/Deficiencies				
	Check For Loose Fasteners				
	Redistribute Any Ballast Across Bare Spots				
	Condition of roofing (clay tiles, membrane, shingles, etc.)				
	Skylights				
Base/Curb Flashings	Check Attachment				
	Check Counterflashings				
	Inspect for Signs of Movement				



Appendix C: Sample Roof Inspection Checklist, continued

A = Acceptable; N = Not Acceptable; N/A = Not Applicable

Where to Check	What to Look For	A	N	N/A	Notes
Penetrations	Check And Fill All Pitch Pans As Necessary				
	Inspect All Penetration Flashings				
	Displacement				
	Oxidation				
	Excessive Stretching				
	Tearing				
	Re-caulk As Necessary				
	Check Draw Bands				
Drainage System	Clean Out All Gutters				
	Downspouts				
	Scuppers				
	Drains				
	Check Strainers				
	Make Sure Drains Are Working				
HVAC Units	Check All Ductwork				
	Doors Are Securely Attached				
	Lines				
	Pipes				
	Sheet Metal Cabinets				
	Gaskets				
	Equipment Base/Tie-In				



Appendix C: Sample Roof Inspection Checklist, continued

A = Acceptable; N = Not Acceptable; N/A = Not Applicable

Where to Check	What to Look For	A	N	N/A	Notes
Other	Check For Oil Deposits				
	Surface Contamination				
	Soft Areas				
	Vandalism				
	Vegetation				
	Solar Panel/Mounting Damage				
	Ponding Water				
	Debris				
	Physical Damage				
	Roof Needs Cleaning				
	Traffic Patterns/Walkway Pads Needed				
	Condition of chimney(s)				
	Integrity of parapets				
	Integrity of expansion joints				



Appendix D: Supplemental Guidance

for the Inspection and Maintenance of Fire Alarm and Smoke Detection Systems

Maintenance Task	Frequency
Visually inspect the system to ensure there are no changes that affect equipment performance. Inspect for building modifications, occupancy changes, changes in environmental conditions, device location, physical obstructions, device orientation, physical damage, and degree of cleanliness.	Annually
Visually inspect fire alarm systems <u>unmonitored</u> for alarm, supervisory, and trouble signals to verify a system normal condition. This includes: <ul style="list-style-type: none"> Fuses Lamps and LEDs Primary (main) power supply Trouble signals 	Weekly
Verify that scheduled regulatory inspections are not due	Semiannually
Visually inspect fire alarm systems <u>monitored</u> for alarm, supervisory, and trouble signals to verify a system normal condition. This includes: <ul style="list-style-type: none"> Fuses Lamps and LEDs Primary (main) power supply Trouble signals (semiannually) 	Annually
Visually inspect supervising station alarm systems — transmitters to verify location, physical condition, and a system normal condition. This includes: <ul style="list-style-type: none"> Digital alarm communicator transmitter (DACT) Digital alarm radio transmitter (DART) McCulloh Radio alarm transmitter (RAT) All other types of communicators 	Annually
Visually inspect in-building fire emergency voice/alarm communications equipment to verify location and condition.	Semiannually
Visually inspect batteries for corrosion or leakage. Verify tightness of connections. Verify marking of the month/year of manufacture (all types).	Lead-acid – Monthly Nickel-cadmium – Semi-annually Primary (dry cell) – Monthly Sealed lead-acid - Semi-annually
Visually inspect remote annunciators to verify location and condition.	Semiannually
Visually inspect notification appliance circuit power extenders to verify proper fuse ratings, if any. Verify that lamps and LEDs indicate normal operating status of the equipment.	Annually
Visually inspect remote power supplies to verify proper fuse ratings, if any. Verify that lamps and LEDs indicate normal operating status of the equipment.	Annually
Visually inspect transient suppressors to verify location and condition.	Semiannually
Visually inspect fiber-optic cable connections to verify location and condition.	Annually



**Appendix D: Supplemental Guidance
for the Inspection and Maintenance of Fire Alarm and Smoke Detection Systems, continued**

<p>Visually inspect the following initiating devices to verify location and condition:</p> <ul style="list-style-type: none"> • Air sampling: <ul style="list-style-type: none"> • Verify that in-line filters, if any, are clean. • Verify that sampling system piping and fittings are installed properly, appear air-tight, and are permanently fixed. Confirm that sampling pipe is conspicuously identified. Verify that sample ports or points are not obstructed. • Duct detectors: <ul style="list-style-type: none"> • Verify that detector is rigidly mounted. Confirm that no penetrations in a return air duct exist in the vicinity of the detector. Confirm the detector is installed so as to sample the airstream at the proper location in the duct. • Verify proper orientation. Confirm the sampling tube protrudes into the duct in accordance with system design. • Electromechanical releasing devices • Fire extinguishing system(s) or suppression system(s) switches • Manual fire alarm boxes • Heat detectors 	Semiannually
<p>Visually inspect the following initiating devices to verify location and condition:</p> <ul style="list-style-type: none"> • Radiant energy fire detectors: <ul style="list-style-type: none"> • Verify no point requiring detection is obstructed or outside the detector's field of view. • Video image smoke and fire detectors: <ul style="list-style-type: none"> • Verify no point requiring detection is obstructed or outside the detector's field of view. • Smoke detectors • Projected beam smoke detectors <ul style="list-style-type: none"> • Verify beam path is unobstructed. • Supervisory signal devices • Waterflow devices 	Quarterly
<p>Visually inspect the following combination systems to verify location and condition:</p> <ul style="list-style-type: none"> • Fire extinguisher electronic monitoring device/systems • Carbon monoxide detectors/systems 	Semiannually
Visually inspect fire alarm control interface and emergency control function interface to verify location and condition	Semiannually
Visually inspect guard's tour equipment to verify location and condition	Semiannually
<p>Visually inspect the following Notification appliances to verify location and condition:</p> <ul style="list-style-type: none"> • Audible appliances • Audible textual notification appliances • Visible appliances 	Semiannually
Visually inspect exit marking audible notification appliances to verify location and condition	Semiannually
Visually inspect area of refuge two-way communication system to verify location and condition	Annually
Visually inspect supervising station alarm systems — receivers	Signal receipt – Daily Receivers (Verify location and normal condition) - Annually



Appendix D: Supplemental Guidance
for the Inspection and Maintenance of Fire Alarm and Smoke Detection Systems, continued

Visually inspect public emergency alarm reporting system transmission equipment to verify location and condition	Publicly accessible alarm box – Semiannually Auxiliary box – Annually Master box: Manual operation – Semiannually Auxiliary operation – Annually
Visually inspect mass notification system that is <u>monitored for integrity</u> to verify location and condition: <ul style="list-style-type: none">• Control equipment:• Fuses• Interfaces• Lamps/LED• Primary (main) power supply• Secondary power batteries• Initiating devices• Notification appliances	Annually
Visually inspect mass notification system that is <u>not monitored for integrity</u> (installed prior to adoption of NFPA 72, 2010 edition) to verify location and condition: <ul style="list-style-type: none">• Control equipment:• Fuses• Interfaces• Lamps/LED• Primary (main) power supply• Secondary power batteries• Initiating devices• Notification appliances• Antenna (Annually)• Transceivers (annually)	Semiannually



Appendix E: Guidance for Detention/Retention Basin Maintenance

For “Constructed Treatment Wetland” & “Dry Extended Detention” Type Basin

Routine Maintenance	<ul style="list-style-type: none"> • Trash & debris removal • Remove minor sediment accumulation near inlet and outlet structures • Stabilize/repair eroded banks and fill in animal burrows if present • Remove any evidence of visual contamination from floatables such as oil and grease • Eliminate pests and conditions suitable for creating ideal breeding habitat • Install or repair pond liner to ensure that first cell maintains a permanent pool • Remove algae mats as needed to prevent coverage of more than 20% of wetland surface • Mow berms routinely if applicable to maintain aesthetic appeal and to suppress weeds
Major Maintenance	<ul style="list-style-type: none"> • Remove dead, diseased, or dying trees and wood vegetation that interfere with facility maintenance • Correct problems associated with berm settlement • Repair berm/dike breaches and stabilize eroded parts of the berm • Repair and rebuild spillway as needed to reverse the effects of severe erosion • Remove sediment build up in forebay and main wetland area to restore original sediment holding capacity • Re-grade main wetland bottom to restore bottom slope and eliminate the incidence of standing pools • Aerate compacted areas to promote infiltration if volume reductions are desired • Repair or replace gates, fences, flow control structures, and inlet/outlet structures as needed

Source: “Stormwater BMP Guidance Tool: A Stormwater Best Practices Guide for Orleans and Jefferson Parish-
es” [http://www.deq.louisiana.gov/portal/Portals/0/permits/lpdes/General%20Permits%20Word/
Bayou_Land_Guidance_NO_BMP.pdf](http://www.deq.louisiana.gov/portal/Portals/0/permits/lpdes/General%20Permits%20Word/Bayou_Land_Guidance_NO_BMP.pdf)



Appendix E: Guidance for Detention/Retention Basin Maintenance, continued

For “Wet Retention” Basin

Routine Maintenance	<ul style="list-style-type: none">• Remove minor sediment accumulation near inlet and outlet structures• Stabilize/repair eroded banks and fill in animal burrows if present• Remove any evidence of visual contamination from floatables such as oil and grease• Eliminate pests and conditions suitable for creating ideal breeding habitat• Remove algae mats as needed to prevent coverage of more than 20% of wetland surface• Mow berms routinely if applicable to maintain aesthetic appeal and to suppress weeds
Major Maintenance	<ul style="list-style-type: none">• Remove dead, diseased, or dying trees and wood vegetation that interfere with facility maintenance• Correct problems associated with berm settlement• Repair berm/dike breaches and stabilize eroded parts of the berm• Remove trees, large shrubs and roots from downstream slope of embankments• Repair and rebuild spillway as needed to reverse the effects of severe erosion• Remove sediment build up in forebay and main wetland area to restore original sediment holding capacity• Re-grade main wetland bottom to restore bottom slope and eliminate the incidence of standing pools• Aerate compacted areas to promote infiltration if volume reductions are desired• Repair or replace gates, fences, flow control structures, and inlet/outlet structures as needed

Source: “Stormwater BMP Guidance Tool: A Stormwater Best Practices Guide for Orleans and Jefferson Parish-
es” [http://www.deq.louisiana.gov/portal/Portals/0/permits/lpdes/General%20Permits%20Word/
Bayou_Land_Guidance_NO_BMP.pdf](http://www.deq.louisiana.gov/portal/Portals/0/permits/lpdes/General%20Permits%20Word/Bayou_Land_Guidance_NO_BMP.pdf)



Appendix F: Guidance for Maintenance of HVAC and Related Components

The following tables establish the minimum requirements for inspection and maintenance. These recommendations are meant to be used as minimum maintenance and inspection guidelines and shall not supersede, in any manner, manufacturer maintenance requirements/recommendations for each piece of equipment. Note: Not all requirements of the Maintenance Tasks listed in the following sections may apply to the systems at each school site; adequate knowledge of the existing systems will allow the operator to decide which Maintenance Tasks apply to each system.

Sources:

ASHRAE 180 - Standard Practice for Inspection and Maintenance of Commercial Building HVAC Systems
 NFPA 10 - Standard for Portable Fire Extinguishers
 NFPA 25 - Standard for the Inspection, Testing, and Maintenance of Water-Based Fire Protection Systems
 NFPA 17 - Standard for Dry Chemical Extinguishing Systems
 NFPA 17A - Standard for Wet Chemical Extinguishing Systems
 NFPA 72 - National Fire Alarm and Signaling Code
www.ashrae.org

Building Management System

Maintenance Task	Frequency
Check compressed-air system (e.g., compressor, dryer, receiver, blowdown valve) for proper operation. Check for evidence of oil carryover and condition of oil filter. Repair or replace as needed to ensure proper operation.	Monthly
Check for proper air pressure. Repair or replace pneumatic system components as needed.	Monthly
Measure relative humidity and repair, clean, or adjust system as necessary to ensure intended operation.	Quarterly
Check control system devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check time-of-day schedule to confirm consistency with facility operation. Adjust schedule as needed.	Semiannually
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check pneumatic lines for blockages. Clean as needed.	Annually
Check to see that backup of digital control program is current.	Annually
Check battery backup and verify proper operation.	Annually

***Appendix F: Guidance for Maintenance of HVAC and Related Components, continued*****Air-Cooled Chillers**

Maintenance Task	Frequency
Perform chemical testing of system water. Treat as needed to ensure proper water chemistry and freeze protection.	Quarterly
Inspect gearbox for excessive wear. Repair or replace as needed.	Quarterly
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check fan belt tension. Check for belt wear and replace if necessary to ensure proper operation. Check sheaves for evidence of improper alignment or evidence of wear and correct as needed.	Semiannually
Check variable-frequency drive for proper operation. Correct as needed.	Semiannually
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check fan blades and fan housing. Clean, repair, or replace as needed to ensure proper operation.	Annually
Check refrigerant system pressures and/or temperatures. If outside of recommended levels, find cause, repair, and adjust refrigerant charge to achieve optimal operating levels.	Annually
Check open drive alignment, wear, seating, and operation. Repair or replace as needed.	Annually
Assess field-serviceable bearings. Lubricate if necessary.	Annually
Check for evidence of buildup or fouling on heat exchange surfaces. Restore as needed to ensure proper operation.	Annually
Check for proper fluid flow and for fluid leaks. Clean, adjust, and repair as needed to restore proper flow.	Annually
Inspect air-cooled condenser surfaces for damage or evidence of leaks. Repair or clean as needed.	Annually
Check low ambient head pressure control sequence for evidence of improper operation. Repair or replace components or modify software/algorithm to ensure proper operation.	Annually
Check compressor oil level and/or pressure on refrigerant systems having oil level and/or pressure measurement means. Repair, replace, or adjust as needed to ensure proper control.	Annually



Appendix F: Guidance for Maintenance of HVAC and Related Components, continued

Water-Cooled Chillers

Maintenance Task	Frequency
Perform chemical testing of system water. Treat as needed to ensure proper water chemistry and freeze protection.	Monthly (open systems) / Quarterly (closed systems)
Inspect gearbox for excessive wear. Repair or replace as needed.	Quarterly
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check refrigerant system pressures and/or temperatures. If outside of recommended levels, find cause, repair, and adjust refrigerant charge to achieve optimal operating levels.	Annually
Check open drive alignment, wear, seating, and operation. Repair or replace as necessary.	Annually
Check for evidence of buildup or fouling on heat exchange surfaces. Restore as needed to ensure proper operation.	Annually
Check for proper fluid flow and for fluid leaks. Clean, adjust, and repair as needed to restore proper flow.	Annually
Check compressor oil level and/or pressure on refrigerant systems having oil level and/or pressure measurement means. Repair, replace, or adjust as needed to ensure proper control.	Annually
Check variable-frequency drive for proper operation. Correct as needed.	Annually
Assess field-serviceable bearings. Lubricate if necessary.	Annually

***Appendix F: Guidance for Maintenance of HVAC and Related Components, continued*****Absorption Chillers**

Maintenance Task	Frequency
Check for the presence of non-condensables. Take necessary steps to eliminate non-condensables in system.	Weekly
Perform chemical testing of system water. Treat as needed to ensure proper water chemistry.	Monthly (open systems) / Quarterly (closed systems)
Check steam system traps, pumps, and controls. Clean or replace as needed to ensure proper operation.	Semiannually
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check variable-frequency drive for proper operation. Correct as needed.	Semiannually
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check for fouling, corrosion, or degradation. Clean or repair as needed.	Annually
Check drive alignment, wear, seating, and operation. Repair or replace as needed.	Annually
Check for evidence of buildup or fouling on heat exchange surfaces. Restore as needed to ensure proper operation.	Annually
Check for proper fluid flow and for fluid leaks. Clean, adjust, and repair as needed to restore proper flow.	Annually
Check inhibitor and internal fluid chemistry. Correct inhibitor and internal fluid chemistry if outside of established operating ranges.	Annually
Verify proper operation of safety devices per manufacturer's recommendations. Repair or replace as needed.	Annually



Appendix F: Guidance for Maintenance of HVAC and Related Components, continued

Cooling Towers and Evaporative-Cooled Devices

Maintenance Task	Frequency
Perform chemical testing of system water. Treat as needed to ensure proper water chemistry. Adjust bleed or blowdown rate as required.	Monthly (open systems) / Quarterly (closed systems)
Check water system ultraviolet lamp. Clean or replace as needed to ensure proper operation.	Quarterly
Inspect blowdown or drain valve. Clear all debris to ensure proper operation. Repair or replace if needed.	Quarterly
Check chemical injector device. Clean as needed.	Quarterly
Check cooling tower fan open drive system couplings, bearings, and seals for wear and proper alignment. Adjust, lubricate, repair, or replace as needed.	Quarterly
Check belt tension. Check for belt wear. Replace if necessary to ensure proper operation. Check sheaves for evidence of improper alignment. Correct as necessary to ensure proper operation.	Quarterly
Check for fouling, corrosion, degradation, or dirt/debris accumulation on or in sump and strainer, wet decks, fill, nozzles, and exterior louvers. Clean or repair as needed.	Quarterly
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check variable-frequency drive for proper operation. Correct as needed.	Semiannually
Visually inspect pumps and associated electrical components. Repair or replace as needed to ensure proper operation.	Semiannually
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Annually
Check fan blades and fan housing. Clean, repair, or replace as needed to ensure proper operation.	Annually
Assess field-serviceable bearings. Lubricate if necessary.	Annually
Check for proper fluid flow and for fluid leaks. Clean, adjust, and repair as needed to restore proper flow.	Annually
Check for proper damper operation. Clean, lubricate, repair, replace, or adjust as needed to ensure proper operation.	Annually
Check cooling tower motor(s) and pump(s) for proper operation. Repair or replace as needed to ensure proper operation.	Annually

***Appendix F: Guidance for Maintenance of HVAC and Related Components, continued*****Boilers**

Maintenance Task	Frequency
Visually inspect fuel filter. Clean, repair, or replace as needed to ensure proper operation.	Monthly
Perform chemical testing of system water. Treat as needed to ensure proper water chemistry.	Monthly
Check fuel pump for proper operation. Repair or replace as needed to ensure proper operation.	Quarterly
Inspect blowdown or drain valve. Clear all debris to ensure proper operation. Repair or replace if needed.	Quarterly
Check for evidence of leakage of fuel supply, heat transfer fluid, and flue gas. Repair as needed to ensure proper operation.	Quarterly
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, replace, or adjust components as needed to ensure proper operation.	Semiannually
Verify that scheduled regulatory inspections are not due	Semiannually
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check for evidence of buildup or fouling, corrosion, or degradation on heat exchange surfaces. Restore as needed to ensure proper operation.	Annually
Check for proper damper operation. Clean, lubricate, repair, replace, or adjust as needed to ensure proper operation.	Annually
Check combustion chamber, burner, and flue for deterioration, moisture problems, condensation, and combustion products. Clean, test, and adjust combustion process for proper operation.	Annually
Inspect refractory for damage or wear. Repair or replace as necessary to ensure proper operation. Clean upper and lower drums.	Annually
Observe burner flame at high load for correct clearance from refractory.	Annually
Verify proper operation of safety devices per manufacturer's recommendations. Repair or replace as needed.	Annually



Appendix F: Guidance for Maintenance of HVAC and Related Components, continued

HVAC Water Distribution Systems

Maintenance Task	Frequency
Perform chemical testing of system water. Treat as needed to ensure proper water chemistry.	Monthly (open systems) / Quarterly (closed systems)
Check chemical injector device. Clean as needed.	Quarterly
Check makeup water system for pressure and operation. Adjust as necessary.	Quarterly
Vent air from system high points. Check for proper fluid flow and check piping for leaks. Repair as needed.	Quarterly
Visually inspect pumps and associated electrical components. Repair or replace as needed to ensure proper operation.	Semiannually
Check for evidence of buildup or fouling on heat exchange surfaces. Restore as needed to ensure proper operation.	Annually
Check for proper fluid flow. Clean, adjust, and repair as needed to restore proper flow.	Annually
Check strainers. Clean as needed.	Annually
Visually inspect external piping insulation and vapor barrier for integrity. Correct as needed.	Annually
Check freeze stats, relief valves, flow and float switches, low-water cutoffs, and other safety devices for proper operation and repair or replace as required.	Annually

Pumps

Maintenance Task	Frequency
Check variable-frequency drive for proper operation. Correct as needed.	Semiannually
Visually inspect pumps and associated electrical components. Repair or replace as needed to ensure proper operation.	Semiannually
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check pump drive for wear or problems due to poor alignment or poor bearing seating. Repair or replace as needed.	Annually
Check for proper fluid flow. Clean, adjust, and repair as needed to restore proper flow. Check pump, piping, and seals for fluid leaks. Repair as needed.	Annually
Assess field-serviceable bearings. Lubricate if necessary.	Annually
Check insulation, vibration isolators, and flexible connectors for integrity. Repair as needed.	Annually

**Appendix F: Guidance for Maintenance of HVAC and Related Components, continued****Motors**

Maintenance Task	Frequency
Check oil level and pressure. Add and adjust as needed to ensure proper operation.	Monthly
Visually inspect fuel filter. Clean, repair, or replace as needed to ensure proper operation.	Monthly
Check for particulate accumulation on intake air filters. Clean or replace as necessary to ensure proper operation.	Monthly
Inspect flex connections. Repair as needed.	Quarterly
Check fuel pump for proper operation. Repair or replace as needed to ensure proper operation.	Quarterly
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check open drive couplings for evidence of wear or alignment problems. Repair or replace as necessary.	Annually
Check exhaust system for corrosion. Repair or replace as needed.	Annually
Verify proper operation of safety devices per manufacturer's recommendations. Repair or replace as needed.	Annually
Assess field-serviceable bearings, lubricate if necessary.	Annually

Steam Distribution System

Maintenance Task	Frequency
Perform chemical testing of system condensate and feed water. Treat as needed to ensure proper water chemistry.	Quarterly
Check piping for leaks. Repair as needed.	Quarterly
Check safety devices per manufacturer's recommendations. Correct or replace as needed.	Quarterly
Check piping anchors for integrity and check piping for alignment and expansion fittings for proper operation. Lubricate as needed.	Quarterly
Inspect blowdown or drain valve. Clear all debris to ensure proper operation. Repair or replace if needed.	Quarterly
Check chemical injector device. Clean as needed.	Quarterly
Check steam system traps, pumps, and controls. Clean or replace as needed to ensure proper operation.	Semiannually
Check for evidence of buildup or fouling on heat exchange surfaces. Restore as needed to ensure proper operation.	Annually
Check for proper fluid flow. Clean, adjust, and repair as needed to restore proper flow.	Annually
Check strainers. Clean as needed.	Annually
Visually inspect external piping insulation and vapor barrier for integrity. Repair or replace as needed.	Annually
Check interior of condensate return piping for wall thickness integrity. Repair or replace as needed.	Annually



Appendix F: Guidance for Maintenance of HVAC and Related Components, continued

Condensing Units

Maintenance Task	Frequency
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check fan belt tension. Check for belt wear and replace if necessary to ensure proper operation. Check sheaves for evidence of improper alignment or evidence of wear and correct as needed.	Semiannually
Check variable-frequency drive for proper operation. Correct as needed.	Semiannually
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check fan blades and fan housing. Clean, repair, or replace as needed to ensure proper operation.	Annually
Check refrigerant system pressures or temperatures. If outside of recommended levels, find cause, repair, and adjust refrigerant to achieve optimal operating levels.	Annually
Check for evidence of buildup or fouling on heat exchange surfaces. Restore as needed to ensure proper operation.	Annually
Check open drive couplings, bearings, and seals for evidence of wear or alignment problems. Lubricate and repair or replace as needed.	Annually
Inspect air-cooled condenser surfaces for damage or evidence of leaks. Repair or clean as needed.	Annually
Check low ambient head pressure control sequence for evidence of improper operation. Repair or replace components or modify software/algorithm to ensure proper operation.	Annually
Check refrigerant oil levels for refrigerant systems with oil pressure/level controls. Repair, replace, or adjust as needed to ensure proper operation.	Annually

***Appendix F: Guidance for Maintenance of HVAC and Related Components, continued*****Air Handlers**

Maintenance Task	Frequency
Check for particulate accumulation on filters. Clean or replace as necessary to ensure proper operation.	Quarterly
Check ultraviolet lamp. Clean or replace as needed to ensure proper operation.	Quarterly
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace as needed to ensure proper operation.	Semiannually
Check P-trap. Prime as needed to ensure proper operation.	Semiannually
Check fan belt tension. Check for belt wear and replace if necessary to ensure proper operation. Check sheaves for evidence of improper alignment or evidence of wear and correct as needed.	Semiannually
Check variable-frequency drive for proper operation. Correct as needed.	Semiannually
Check for proper operation of cooling or heating coil for damage or evidence of leaks. Clean, restore, or replace as required.	Semiannually
Check air filter fit and housing seal integrity. Correct as needed.	Annually
Check control box for dirt, debris and/or loose terminations. Clean and tighten as needed.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check fan blades and fan housing. Clean, repair, or replace as needed to ensure proper operation.	Annually
Check refrigerant system temperatures. If outside of recommended levels, find cause, repair, and adjust refrigerant charge to achieve optimal operating levels.	Annually
Check integrity of all panels on equipment. Replace fasteners as needed to ensure proper integrity and fit/finish of equipment.	Annually
Assess field serviceable bearings. Lubricate if necessary.	Annually
Check drain pan, drain line, and coil for biological growth. Clean as needed.	Annually
Check for evidence of buildup or fouling on heat exchange surfaces. Restore as needed to ensure proper operation.	Annually
Inspect for evidence of moisture carryover beyond the drain pan from cooling coils. Make corrections or repairs as necessary.	Annually
Check for proper damper operation. Clean, lubricate, repair, replace, or adjust as needed to ensure proper operation.	Annually
Visually inspect areas of moisture accumulation for biological growth. If present, clean or disinfect as needed.	Annually
Check condensate pump. Clean or replace as needed.	Annually
Visually inspect exposed ductwork and external piping for insulation and vapor barrier for integrity. Correct as needed.	Annually



Appendix F: Guidance for Maintenance of HVAC and Related Components, continued

Rooftop Units

Maintenance Task	Frequency
Check for particulate accumulation on filters. Clean or replace as necessary to ensure proper operation.	Quarterly
Check ultraviolet lamp. Clean or replace as needed to ensure proper operation.	Quarterly
Check steam system traps, pumps, and controls. Clean or replace as needed to ensure proper operation.	Semiannually
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check P-trap. Prime as needed to ensure proper operation.	Semiannually
Check fan belt tension. Check for belt wear and replace if necessary to ensure proper operation. Check sheaves for evidence of improper alignment or evidence of wear and correct as needed.	Semiannually
Check variable-frequency drive for proper operation. Correct as needed.	Semiannually
Check for evidence of buildup or fouling on heat exchange surfaces. Restore as needed to ensure proper operation.	Semiannually
Check for proper operation of cooling coil, heating coil, or heat exchangers and for damage or evidence of leaks. Clean, restore or replace as required.	Semiannually
Check air filter fit and housing seal integrity. Correct as needed.	Annually
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check fan blades and fan housing. Clean, repair, or replace as needed to ensure proper operation.	Annually
Check refrigerant system temperatures. If outside of recommended levels, find cause, repair, and adjust refrigerant charge to achieve optimal operating levels.	Annually
Check fan drive for wear or problems due to poor alignment or poor bearing seating. Repair or replace as needed.	Annually
Check integrity of all panels and curbs on equipment. Replace fasteners as needed to ensure proper integrity and fit/finish of equipment.	Annually
Assess field-serviceable bearings. Lubricate if necessary.	Annually
Check drain pan, drain line, and coil for biological growth. Clean as needed.	Annually
Check evaporator coil fins. Restore if possible. Replace coil if necessary to return to proper functioning.	Annually
Inspect for evidence of moisture carryover beyond the drain pan from cooling coils. Make corrections or repairs as necessary.	Annually
Check for proper damper operation. Clean, lubricate, repair, replace, or adjust as needed to ensure proper operation.	Annually
Inspect air-cooled condenser surfaces for damage or evidence of leaks. Repair or clean as needed.	Annually

**Appendix F: Guidance for Maintenance of HVAC and Related Components, continued****Rooftop Units, continued**

Check low ambient head pressure control sequence for proper operation. Repair or replace components or modify software/algorithm to ensure proper operation.	Annually
Check combustion chamber, burner, and flue for deterioration, leaks, moisture problems, condensation, and combustion products. Clean, test, and adjust combustion process for proper operation.	Annually
Visually inspect insulation and areas of moisture accumulation for biological growth. If present, clean or disinfect as needed.	Annually
Check compressor oil levels and/or pressure on refrigerant systems having oil level and/or pressure measurement means. Repair, replace, or adjust as needed to ensure proper operation.	Annually
Visually inspect exposed ductwork and external piping for insulation and vapor barrier for integrity. Correct as needed.	Annually

Outdoor Heat Exchanging Systems

Maintenance Task	Frequency
Check air filter and housing integrity. Correct as needed.	Monthly
Check for particulate accumulation on filters. Clean or replace as necessary to ensure proper operation.	Monthly
Check control system devices for evidence of improper operation. Repair, adjust, or replace components to ensure proper operation.	Semiannually
Check P-trap drain. Clean if necessary.	Semiannually
Check fan belt tension. Check for belt wear and replace if necessary to ensure proper operation. Check sheaves for evidence of improper alignment or evidence of wear and correct as needed.	Semiannually
Check for proper operation of heat exchanger. Clean, restore, repair, adjust, or replace components to ensure proper operation.	Semiannually
Check for proper operation of enthalpy device. Clean, restore, repair, adjust, or replace components to ensure proper operation.	Semiannually
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Semiannually
Check for proper fluid flow and for fluid leaks. Clean, restore, or replace as required.	Semiannually
Check drain pan, drain line, and heat exchanger for biological growth. Clean as needed.	Semiannually
Check dampers for proper operation, condition, setting, and operation. Repair, adjust, lubricate, or replace components to ensure proper operation.	Semiannually
Check condition, setting, and operation of damper motors. Repair, adjust, lubricate, or replace components to ensure proper operation.	Semiannually
Check sealing integrity of all panels on equipment. Replace fasteners and gasketing as needed.	Semiannually
Visually inspect areas of moisture accumulation for biological growth. If present, clean or disinfect as needed.	Semiannually
Assess field serviceable bearings. Lubricate if necessary.	Annually
Visually inspect exposed ductwork for insulation and vapor barrier integrity. Correct as needed.	Annually



Appendix F: Guidance for Maintenance of HVAC and Related Components, continued

Air Side Economizers

Maintenance Task	Frequency
Check air filter and housing integrity. Correct as needed.	Monthly
Check for particulate accumulation on filters. Clean or replace as necessary to ensure proper operation.	Monthly
Check condition, setting, and operation of outdoor sensor, return air sensor, or change-over controller. Repair, adjust, or replace components to ensure proper operation.	Semiannually
Check condition, setting, and operation of the economizer controller. Repair, adjust, or replace components to ensure proper operation.	Semiannually
Check condition, setting, and operation of the mixed-air/discharge sensor or changeover controller. Repair, adjust, or replace components to ensure proper operation.	Semiannually
Check dampers for proper condition, setting, and operation. Repair, adjust, lubricate, or replace components to ensure proper operation.	Semiannually
Check condition, setting, and operation of the economizer damper motors. Repair, adjust, lubricate, or replace components to ensure proper operation.	Semiannually
Check sealing integrity of all panels on equipment. Replace fasteners and gasketing as needed.	Semiannually
Visually inspect areas of moisture accumulation for biological growth. If present, clean or disinfect as needed.	Semiannually
Assess field-serviceable bearings, lubricate if necessary.	Annually
Check condition, setting, and operation of the low-limit stat. Repair, adjust, or replace components to ensure proper operation.	Annually

Dehumidification and Humidification Devices

Maintenance Task	Frequency
Check ultraviolet lamp. Clean or replace as needed to ensure proper operation.	Quarterly
Check for proper fluid flow and for fluid leaks. Clean, adjust, and repair as needed to restore proper flow.	Quarterly
Measure relative humidity and adjust system controls as necessary.	Quarterly
Check steam system traps, pumps, and controls. Clean or replace as needed to ensure proper operation.	Semiannually
Check for fouling, corrosion, or degradation. Clean or repair as needed.	Annually
Check strainers. Clean as needed.	Annually
Visually inspect distributors, drain pans, and other areas of moisture accumulation for biological growth. Clean or disinfect as needed.	Annually

**Appendix F: Guidance for Maintenance of HVAC and Related Components, continued****Terminal and Control Boxes (VAV, Fan Powered, etc.)**

Maintenance Task	Frequency
Check for particulate accumulation on filters. Clean or replace as necessary to ensure proper operation.	Quarterly
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check for proper operation of cooling or heating coil and for damage or evidence of leaks. Clean, restore, or replace as required.	Semiannually
Check for proper fluid flow. Clean, adjust, and repair as needed to restore proper flow.	Semiannually
Check air filter fit and housing seal integrity. Correct as needed.	Annually
Check fan blades and fan housing. Clean, repair, or replace as needed to ensure proper operation.	Annually
Check integrity of all panels on equipment. Replace fasteners as needed to ensure proper integrity and fit/finish of equipment.	Annually
Check for proper damper operation. Clean, lubricate, repair, replace, or adjust as needed to ensure proper operation.	Annually
Visually inspect areas of moisture accumulation for biological growth. If present, clean or disinfect as needed.	Annually
Visually inspect exposed ductwork and external piping for insulation and vapor barrier for integrity. Correct as needed.	Annually

PTACs/PTHPs (Packaged Terminal Air Conditioners or Packaged Terminal Heat Pumps)

Maintenance Task	Frequency
Check for particulate accumulation on filters. Clean or replace as necessary to ensure proper operation.	Quarterly
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check for proper fluid flow and for damage and evidence of leaks. Clean, adjust, and repair as needed to restore proper flow.	Semiannually
Check air filter fit and housing seal integrity. Correct as needed.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check fan blades and fan housing. Clean, repair, or replace as needed to ensure proper operation.	Annually
Check refrigerant system temperatures. If outside of recommended levels, find cause, repair, and adjust refrigerant charge to achieve optimal operating levels.	Annually
Check integrity of all panels on equipment. Replace fasteners as needed to ensure proper integrity and fit/finish of equipment.	Annually
Check drain pan, drain line, and coil for biological growth and debris. Clean as needed.	Annually
Check evaporator coil fins. Restore if possible. Replace coil if necessary to return to proper functioning.	Annually
Inspect for evidence of moisture carryover beyond the drain pan from cooling coils. Make corrections or repairs as necessary.	Annually
Inspect air-cooled condenser surfaces for damage or evidence of leaks. Repair or clean as needed.	Annually
Visually inspect areas of moisture accumulation for biological growth. If present, clean or disinfect as needed.	Annually
Assess field-serviceable bearings. Lubricate if necessary.	Annually



Appendix F: Guidance for Maintenance of HVAC and Related Components, continued

Water Source Heat Pumps

Maintenance Task	Frequency
Check for particulate accumulation on filters. Clean or replace as necessary to ensure proper operation.	Quarterly
Check ultraviolet lamp. Clean or replace as needed to ensure proper operation.	Quarterly
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check P-trap. Prime as needed to ensure proper operation.	Semiannually
Check for proper operation of cooling coil or heating coil and for damage or evidence of leaks. Clean, restore, or replace as needed.	Semiannually
Check air filter fit and housing seal integrity. Correct as needed.	Annually
Check fan blades and fan housing. Clean, repair, or replace as needed to ensure proper operation.	Annually
Check integrity of all panels on equipment. Replace fasteners as needed to ensure proper integrity and fit/finish of equipment.	Annually
Visually inspect areas of moisture accumulation for biological growth. If present, clean or disinfect as needed.	Annually
Check drive alignment, wear, seating, and operation. Repair or replace as needed.	Annually
Assess field-serviceable bearings. Lubricate if necessary.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check refrigerant system temperatures. If outside of recommended levels, find cause, repair, and adjust refrigerant charge to achieve optimal operating levels.	Annually
Check for evidence of buildup or fouling on heat exchange surfaces. Restore as needed to ensure proper operation.	Annually
Check drain pan, drain line, and coil for biological growth. Clean as needed.	Annually
Check coil fins. Restore if possible. Replace coil if necessary to return to proper functioning.	Annually
Check for proper fluid flow. Clean, adjust, and repair as needed to restore proper flow.	Annually
Inspect for evidence of moisture carryover beyond the drain pan from cooling coils. Make corrections or repairs as necessary.	Annually
Check condensate pump. Clean or replace.	Annually

***Appendix F: Guidance for Maintenance of HVAC and Related Components, continued*****Fan-Coils, Hot Water, and Steam Unit Heaters**

Maintenance Task	Frequency
Check for particulate accumulation on filters. Clean or replace as necessary to ensure proper operation.	Quarterly
Check ultraviolet lamp. Clean or replace as needed to ensure proper operation.	Quarterly
Check steam system traps, pumps, and controls. Clean or replace as needed to ensure proper operation.	Semiannually
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check P-trap. Prime as needed to ensure proper operation.	Semiannually
Check fan belt tension. Check for belt wear and replace if necessary to ensure proper operation. Check sheaves for evidence of improper alignment or evidence of wear and correct as needed.	Semiannually
Check for proper operation of cooling or heating coil and for damage or evidence of leaks. Clean, restore, or replace as required.	Semiannually
Check air filter fit and housing seal integrity. Correct as needed.	Annually
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Annually
Check fan blades and fan housing. Clean, repair, or replace as needed to ensure proper operation.	Annually
Check refrigerant system temperatures. If outside of recommended levels, find cause, repair, and adjust refrigerant to achieve optimal operating levels.	Annually
Check for evidence of buildup or fouling on heat exchange surfaces. Restore as needed to ensure proper operation.	Annually
Check integrity of all panels on equipment. Replace fasteners as needed to ensure proper integrity and fit/finish of equipment.	Annually
Assess field-serviceable bearings. Lubricate as necessary.	Annually
Check for proper fluid flow. Clean, adjust, and repair as needed to restore proper flow.	Annually
Check drain pan, drain line, and coil for biological growth. Clean as needed.	Annually
Check coil fins. Restore if possible. Replace coil if necessary to return to proper functioning.	Annually
Inspect for evidence of moisture carryover beyond the drain pan from cooling coils. Make corrections or repairs as necessary.	Annually
Check for proper damper operation. Clean, lubricate, repair, replace, or adjust as needed to ensure proper operation.	Annually
Visually inspect areas of moisture accumulation for biological growth. If present, clean or disinfect as needed.	Annually
Check condensate pump. Clean or replace.	Annually



Appendix F: Guidance for Maintenance of HVAC and Related Components, continued

Furnaces, Combustion Unit Heaters

Maintenance Task	Frequency
Visually inspect fuel filter. Clean, repair, or replace as needed to ensure proper operation.	Monthly
Check for particulate accumulation on filters. Clean or replace as necessary to ensure proper operation.	Quarterly
Check fuel pump for proper operation. Repair or replace as needed to ensure proper operation.	Semiannually
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check fan belt tension. Check for belt wear and replace if necessary to ensure proper operation. Check sheaves for evidence of improper alignment or evidence of wear and correct as needed.	Semiannually
Check air filter fit and housing seal integrity. Correct as needed.	Annually
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Annually
Check fan blades and fan housing. Clean, repair, or replace as needed to ensure proper operation.	Annually
Check fan drive for problems due to poor alignment or poor bearing seating. Repair or replace as needed.	Annually
Check integrity of all panels on equipment. Replace fasteners as needed to ensure proper integrity and fit/finish of equipment.	Annually
Assess field-serviceable bearings. Lubricate if necessary.	Annually
Check for proper damper operation. Clean, lubricate, repair, replace, or adjust as needed to ensure proper operation.	Annually
Check heat exchanger, combustion chamber, burner, and flue for deterioration, moisture problems, condensation, and combustion products. Clean, test, and adjust combustion process for proper operation.	Annually
Verify proper operation of safety devices per manufacturer's recommendations. Repair or replace as needed.	Annually
Check for proper operation of heating coil and for damage or evidence of leaks. Clean, restore, or replace as required.	Annually

***Appendix F: Guidance for Maintenance of HVAC and Related Components, continued*****Fans (includes Exhaust, Supply, Transfer and Return Fans)**

Maintenance Task	Frequency
Check fan belt tension. Check for belt wear and replace if necessary to ensure proper operation. Check sheaves for evidence of improper alignment or evidence of wear and correct as needed.	Semiannually
Check fan drive for problems due to poor alignment or poor bearing seating. Repair or replace as needed.	Annually
Check fan blades and fan housing. Clean, repair, or replace as needed to ensure proper operation.	Annually
Assess field-serviceable bearings. Lubricate if necessary.	Annually
Check variable-frequency drive for proper operation. Correct as needed.	Annually
Check control box for dirt, debris, and/or loose terminations. Clean and tighten as needed.	Annually
Check motor contactor for pitting or other signs of damage. Repair or replace as needed.	Annually
Check integrity of all panels on equipment. Replace fasteners as needed to ensure proper integrity and fit/finish of equipment.	Annually
Visually inspect exposed ductwork and external piping for insulation and vapor barrier integrity. Correct as needed.	Annually
Check for proper damper operation. Clean, lubricate, repair, replace, or adjust as needed to ensure proper operation.	Annually
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, replace, or adjust as needed to ensure proper operation.	Annually
Check integrity of flexible connections. Correct as needed.	Annually

Coils and Radiators

Maintenance Task	Frequency
Check ultraviolet lamp. Clean or replace as needed to ensure proper operation.	Quarterly
Check for proper operation of control valves and vents. Correct as required.	Quarterly
Check P-trap. Prime as needed to ensure proper operation.	Semiannually
Check for proper fluid flow and for fluid leaks. Clean, adjust, and repair as needed to restore proper flow.	Semiannually
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, replace, or adjust as needed to ensure proper operation.	Semiannually
Check refrigerant system temperatures. If outside of recommended levels, find cause, repair, and adjust refrigerant charge to achieve optimal operating levels.	Annually
Check for evidence of buildup or fouling on heat exchange surfaces. Restore as needed to ensure proper operation.	Annually
Check integrity of all panels on equipment. Replace fasteners as needed to ensure proper integrity and fit/finish of equipment.	Annually
Check drain pan, drain line, coil, and other areas of moisture accumulation for biological growth. Clean or disinfect as needed.	Annually
Check coil fins. Restore if possible. Replace coil if necessary to return to proper functioning.	Annually
Inspect for evidence of moisture carryover beyond the drain pan from cooling coils. Make corrections or repairs to eliminate the condition.	Annually
Check condensate pump. Clean or replace as needed.	Annually



Appendix F: Guidance for Maintenance of HVAC and Related Components, continued

Duct-Free Split Systems (Indoor Section)

Maintenance Task	Frequency
Check for particulate accumulation on filters. Clean or replace as necessary to ensure proper operation.	Quarterly
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust, or replace components as needed to ensure proper operation.	Semiannually
Check P-trap drain. Clean if necessary.	Semiannually
Check air filter fit and housing seal integrity. Correct as needed.	Annually
Check for proper operation of cooling or heating coil and for damage or evidence of leaks. Clean, restore, or replace as required.	Annually
Check fan blades and fan housing. Clean, repair, or replace as needed to ensure proper operation.	Annually
Check refrigerant system temperatures. If outside of recommended levels, find cause, repair, and adjust refrigerant charge to achieve optimal operating levels.	Annually
Check integrity of all panels on equipment. Replace fasteners as needed to ensure proper integrity and fit/finish of equipment.	Annually
Assess field-serviceable bearings. Lubricate if necessary.	Annually
Check for proper fluid flow. Clean, adjust, and repair as needed to restore proper flow.	Annually
Check drain pan, drain line, and coil for biological growth. Clean as needed.	Annually
Check coil fins. Restore if possible. Replace coil if necessary to return to proper functioning.	Annually
Visually inspect areas of moisture accumulation for biological growth. If present, clean or disinfect as needed.	Annually
Check condensate pump. Clean or replace as necessary.	Annually
Check variable-frequency drive for proper operation. Correct as needed.	Annually

Air Distribution Systems

Maintenance Task	Frequency
Check control system and devices for evidence of improper operation. Clean, lubricate, repair, adjust or replace components to ensure proper operation.	Semiannually
Visually inspect grilles, registers, and diffusers for dirt accumulation. Clean as needed to remove dirt buildup.	Semiannually
Assess field-serviceable bearings. Lubricate if necessary.	Annually
Check for proper damper operation. Clean, lubricate, repair, replace, or adjust as needed to ensure proper operation.	Annually
Visually inspect areas of moisture accumulation for biological growth. If present, clean or disinfect as needed.	Annually
Visually inspect exposed ductwork for insulation and vapor barrier integrity. Correct as needed.	Annually
Visually inspect internally lined ductwork until the first turn or up to 20 ft. (6.1 m) from a potential moisture source, such as a supply plenum, from air handler, outdoor air damper, humidifier, etc. for water damage and/or biological contamination and, if necessary, take corrective action.	Annually



Appendix F: Guidance for Maintenance of HVAC and Related Components, continued

Air Compressors

Maintenance Task	Frequency
Check compressed-air system (e.g., compressor, dryer, receiver, blowdown valve) for proper operation. Check for evidence of oil carryover and condition of oil filter. Repair or replace as needed to ensure proper operation.	Monthly
Check for proper air pressure. Repair or replace pneumatic system components as needed.	Monthly



Appendix G: Insurance Claim Form

To be submitted after charter organization has assessed property damage, mitigated any further damage, and obtained three (3) estimates/quotes for repairs. Please include any incident reports, photographs, or other documentation pertaining to the property damage/repair with this form.

Date		
Charter Organization Name		Facility or Site Name
Facility/Site Street Address		
Location of damaged property (building/room number or other description of location)		
Date damage was discovered		By whom?
Date you were first notified of damage		
Contact Name	Phone #	Email
Briefly describe the damage to property.		
Party or parties responsible for damage, if applicable		
Has a claim been submitted upon the party responsible for the damage?		
How was entry into/onto premises gained? Were there any signs of forcible or violent entry?		
Were premises occupied when the damage occurred?		
Is damage attributed to defects in your premises, maintenance policies/procedures, or the equipment itself?		

CLAIM DETAILS					
Item	Model number	Serial number	Date installed	Lowest repair quote	Current fair market value

<p align="center">Comments (attach additional sheet if needed)</p>



Appendix H: Fixed Assets Inventory Disposition Form

ORLEANS PARISH SCHOOL BOARD FIXED ASSETS INVENTORY DISPOSITION FORM									
Page ____ of ____									
<p>Instructions: Please complete this form to update your equipment inventory whenever there is a permanent change in the location of a tagged equipment item or whenever a tagged equipment item is lost, stolen, disposed of, or transferred to another department or agency. Department Head or Principal must sign. Send original form to the OPSB Accounting Department.</p>									
Department/School Name:		Date:							
Dept. Head/Principal (Printed):		Phone No.:							
Dept. Head/Principal (Signature):		Contact Person:							
OPSB Tag # (6 digits)	Description	Manufacturer	Serial Number	Condition (good, fair, or poor)	Date of Disposal or Transfer	Disposal Reason (lost, stolen, scrap, or transferred)	New Location Transferred To (if applicable)	Accounting Dept. use only: MUNIS Asset Number	
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22.									
									Rev 07/17/2014



Appendix I: Facility Inspection Checklist

Exterior	
GENERAL:	
Windows are in good condition	
Doors/gates are functional and in good condition	
Fencing is in good condition	
Door locks and security hardware are operational	
Other:	
LANDSCAPING (HARD & SOFT)/ SIGNAGE:	
Walkways are maintained and free of trip hazards	
Grass, trees, and other landscaping is maintained	
Catch basins and other drainage is maintained	
Exterior signage is in good condition	
Other:	
PLAYGROUND:	
Playground is well maintained and in working order	
Playground is in compliance with safety code and free of hazards	
Protective surfacing is sufficient	
Other:	
HVAC	
MECHANICAL:	
All HVAC system components operational	
All air handling units are operational & functional (including belts and bearings)	
Vents and grilles are clean and free of excessive dirt or dust	
Mechanical areas neat and clean and ventilation is unobstructed	
All BAS systems are functional, operational, and not in alarm	
Mechanical - Plumbing	
RESTROOMS:	
Restrooms are clean and maintained	
Stocked with toilet paper, paper towels, and soap	
Fully operational and intact- stall doors, partitions, and latches	
Fully operational and secure - toilets, faucets, urinals, and sinks	
Sinks, faucets, urinals, and toilets are free of leaks	
Open and accessible during school hours	
MECHANICAL:	
Pipes are in good condition and free of leaks or breaks	
Backflow preventer is chained and secure	
Water shutoff location (if no backflow preventer)	
Odors from gas leaks	
GENERAL:	
Drinking fountains are accessible and properly functioning	
Sinks, faucets, and hose bibs clean and operational	
Other:	



Appendix I: Facility Inspection Checklist, continued

Electrical - Lighting	
LIGHTING:	
Exterior lighting is adequate, functioning, and operational	
Lighting and controls are functioning and maintained	
Light fixtures/bulbs are protected from impact	
ELECTRICAL:	
Active breakers are in the "on" position and are functioning and operational	
Outlets, switches, junction boxes, wires, and other fixtures are properly covered	
Electrical fixtures are working properly	
Electrical panels/equipment are unobstructed and proper clearance is maintained	
All BAS systems are functional and operational	
Other:	
Interior	
General	
Walls are in good condition and without evidence of peeling paint, plaster efflorescence, water damage, holes, or cracks	
Flooring is in good condition and without evidence of trip hazards, missing tiles, holes, or water damage	
Ceilings and grids are in good condition and without evidence of missing/damaged ceiling tiles, holes, or water damage	
Other:	
KITCHEN & SERVING AREA:	
Kitchen and kitchen equipment is clean and operable	
Current temperature logs are posted on reach-in and walk-in coolers and freezers	
Functional thermometers on interior (as well as exterior) of coolers and freezers	
Permit to Operate and DHH inspection report is current and visible	
Kitchen Fire Suppression System is green tagged and current	
Other:	
KEYS:	
The grand master key is functional	
The keys to exterior doors are functional	
The access control cards are functional	
Other:	



Appendix I: Facility Inspection Checklist, continued

Fire/Life Safety	
FIRE SAFETY:	
Fire alarm panel is green tagged and current (record inspection date)	
Fire suppression pump is green tagged and current	
Building is free of any combustibles	
Exit signs and emergency lighting are fully functioning and unobstructed	
Exits, hallways, and stairways are in compliance FLS code	
Fire Extinguishers green tagged, visible and accessible (record inspection date)	
Evacuation routes are posted and visible	
Elevator fully functional and monitored	
Fire alarm pull stations are clearly visible and accessible	
Other:	
General	
HAZARDOUS MATERIALS (INTERIOR & EXTERIOR):	
Damaged tiles, pipe insulation, or other circumstances that may indicate asbestos exposure	
Indications of mold (odor or discoloration)	
Hazardous chemicals labeled and stored properly	
Cleaning materials and other hazardous chemicals are in compliance	
6 month asbestos surveillance is complete	
Certificates for custodial/maintenance asbestos training are available	
Other:	
PEST/VERMIN INFESTATION:	
Facility is free of pest droppings and/or odors associated with insects or vermin	
Facility is free from pest entry points	
Areas are clean to prevent attracting pests	
Facility is without visible signs of active termites	
Bait stations are clearly visible at perimeter	
PROPERTY INVENTORY	
All OPSB School property over 5K was inventoried and accounted for	



Appendix J: F.O.G. (Fats, Oil, Grease) Discharge Permit Application

Additional Information: [Plumbing Code Section 16.5](#)

FOG PROGRAM NOTIFICATION

Effective as of: September 9, 2016

In accordance with Plumbing Code, Section 16.5, Subsection A. *Rules Governing the Discharge into the Public Sanitary Sewerage System from Grease Traps and Grease Interceptors*, Food Service Establishments (FSEs) and Food Processing Establishments (FPEs) must obtain a **FOG Discharge Permit** from the Sewerage & Water Board of New Orleans (SWBNO). Section 16.5A applies to all FSEs and FPEs that discharge wastewater containing fats, oils and grease (FOG) to SWBNO's sanitary sewer system; including but not limited to: restaurants, grocery stores, meat markets, hotels, factory and office building cafeterias, public and private schools, hospitals, nursing homes, commercial day care center, churches, and catering services.

FSEs and FPEs must also install and maintain a grease trap or grease interceptor. All grease traps and grease interceptors shall be maintained for continuous, satisfactory and effective operation by the property owner and/or FSE and FPE, owner, leaseholder or operator at their personal expense. Enforceable Best Management Practices (BMPs) for the control of FOG shall also be implemented by all FSEs and FPEs.

Interceptor Inspection

Not less frequently than once per calendar year, each Food Service Establishment (FSE) and Food Processing Establishment (FPE) shall employ a licensed master plumber or other qualified professional approved by SWBNO to inspect each interceptor before a **FOG Discharge Permit** will be issued. Inspections of grease traps must be conducted to assure that the grease trap is in good operating condition according to Section 16.5 of the Plumbing Code, and FOG is not being discharged to the sanitary sewer system. Therefore, you are hereby directed to contact a licensed master plumber to schedule an inspection of your grease trap while it is being cleaned by your grease trap cleaning company. This inspection must be performed before a FOG Discharge Permit can be issued.

After evacuation of the interceptor, the licensed master plumber or other qualified professional approved by SWBNO shall make a visual observation of and shall photograph all inlet and outlet fittings, internal baffles, walls, floor and all other internal structures. Each FSE and FPE shall require the licensed plumber or other qualified professional approved by SWBNO Plumbing Department conducting the inspection to provide a written report of the inspection to the FSE or FPE that includes the photographs that are required by this section and that provides the name, address and telephone number of the licensed plumber or other qualified professional approved by SWBNO Plumbing Department conducting the inspection, the date of the inspection, and a description of any defects observed during the inspection.



Appendix J: F.O.G. (Fats, Oil, Grease) Discharge Permit Application, continued

FOG PROGRAM NOTIFICATION

A copy of this report must be sent to :

Sewerage & Water Board of New Orleans
Environmental Affairs Office
2900 Peoples Avenue Room 215
New Orleans, LA 70122
Fax: (504)942-3858
Email: Pbrown@swbno.org,

The application must be filled out completely and returned to our office within 60 days of your receipt of this letter. All defects shall be corrected within ninety (90) days by a certified licensed plumber. After which, a follow-up final inspection will be performed by the SWBNO Plumbing Department and /or Environmental Affairs Department before a Grease Trap Discharge Permit will be issued.

The following grease trap cleaning companies are approved by the Sewerage & Water Board of New Orleans to inspect and certify grease traps and interceptors for permit issuance:

- LIQUID ENVIRONMENTAL SOLUTIONS of TEXAS,LLC (504)466-5995
- DARPRO SOLUTIONS (800)536-9804
- FLO MORE SEWER SERVICES, LLC (985)340-4949
- BROVAC ENVIRONMENTAL SERVICE (504)905-6864
- CCC ENVIRONMENTAL SERVICES LLC (504)505-2091

For more information or questions concerning the permit application process, please visit us on the web at https://www.swbno.org/environmental_pretreatment.asp or contact Peter Brown, Walter Berard, Lauren Goldfinch, or Oliver Greenidge at 504-942-3856.





Appendix J: F.O.G. (Fats, Oil, Grease) Discharge Permit Application, continued

**INSTRUCTIONS FOR COMPLETING FOOD ESTABLISHMENT'S
GREASE TRAP/INTERCEPTOR DISCHARGE PERMIT APPLICATION**

All questions must be answered. **DO NOT LEAVE BLANKS.** If a question is not applicable, indicate so on the form. Instructions for responding to some questions on the permit application are provided below.

SECTION A - INSTRUCTIONS (GENERAL INFORMATION)

1. Enter the facility's official or legal name. Do not use a colloquial name.
 - a. **Operator Name:** Give the name, as it is legally referred to, of the person, firm, public organization, or any other entity which operates the facility described in this application. This may or may not be the same name as the facility.
 - b. Indicate whether the entity which operates the facility also owns it by marking the appropriate box.
If the response is "No", clearly indicate the operator's name and address and submit a copy of the contract and/or other documents indicating the operator's scope of responsibility for the facility.
 - c. **Type of Food Establishment -** Mark what is applicable to your business.
 - d. Indicate type of ownership in the designated box. Mark what is applicable to your business.
 - e. Provide Building Permit Number issued by the Department of Safety and Permits.
 - f. Provide Certificate of Occupancy (CO) Permit Number issued by the Department of Safety and Permits.
 - g. Provide Authorized Occupancy Load (Listed in the Certificate of Occupancy (CO)).
2. Provide the physical location of the facility that is applying for a **Grease Trap/Interceptor** discharge permit.
3. Provide the mailing address where correspondence from the Pretreatment Services Division may be sent.
4. **Designated signatory authority of the facility:** Provide the name, address, and **driver's license** of the designated authorized signatory who has the authority to sign all reports. The designated signatory is the principal officer or manager who has the authority to make changes to operation of the establishment and who has taken the legal responsibility of all actions within in the establishment. Example: Owner, Manager (If it is affiliated with a Corporation, a designation letter from the corporation must be submitted with the permit application).
5. **Designated Facility Contact:** Provide the name, address, and position of the contact person who is familiar with the day to day operations of the establishment.

SECTION B - INSTRUCTIONS (AUTHORIZED SIGNATURES)

See instructions for question 4 in Section A, for a definition of an authorized representative.



Appendix J: F.O.G. (Fats, Oil, Grease) Discharge Permit Application, continued

SECTION C – FOOD ESTABLISHMENT (BUSINESS ACTIVITY)

1. Water Sources - Mark the water source applicable to your business.
2. Account Type - Mark the account type applicable to your business.
3. & 4. Water service account number & Name on water account:
Enter Customer Water Account information, if you are a tenant, you must obtain this information from property owner. **(Permit application submitted without account information will not be processed.)**
5. If your facility have any of the categories or business activities listed below (regardless of whether they generate wastewater, waste sludge, or hazardous wastes), provide applicable information for business activity (check all that apply). If you have any questions regarding how to categorize your business activity, **contact Environmental Affairs for technical guidance.**
 - a. Fixture – any component or fixture of a food establishment or activity that generates or has the potential to generate waste or wastewater that enters or potentially may enter the wastewater collection system, e.g., ice machines, dishwashers, coffee makers, wash sinks, mop sinks, employee hand wash sinks, mixers, washing machines, floor drains, walk in coolers, any equipment cleaning and/or washing operations, or any other component or apparatus that generates wastewater.
 - b. Total Number – List total number of components or fixtures, e.g., floor drains – 9; dishwasher – 2; mop sinks – 2, etc.
6. Daily Average Flow is calculated by using the formula below:

$$\text{Daily Average Flow} = \frac{(\text{Water usage in Gallons per month*}) \times 100}{(\text{Number of days of actual operation per month})}$$

OR

$$\text{Daily Average Flow} = \frac{(\text{Water usage in Gallons per month})}{(\text{Number of days of actual operation per month})}$$

* Sewerage & Water Board of New Orleans *water bills are tabulated in hundred*

Example:

$$\text{Daily Average Flow} = \frac{52 \times 100}{(\text{Number of days of actual operation})} = 5,200 \text{ gallons per day}$$

OR

$$\text{Daily Average Flow} = \frac{(5,200 \text{ Gallons}) \times 100}{(22 \text{ days of actual operation})} = 236.36 \text{ gallons per day}$$

(If you provide a copy of the water bill, Environmental Affairs can assist you in calculating the total average flow in gallons/day)

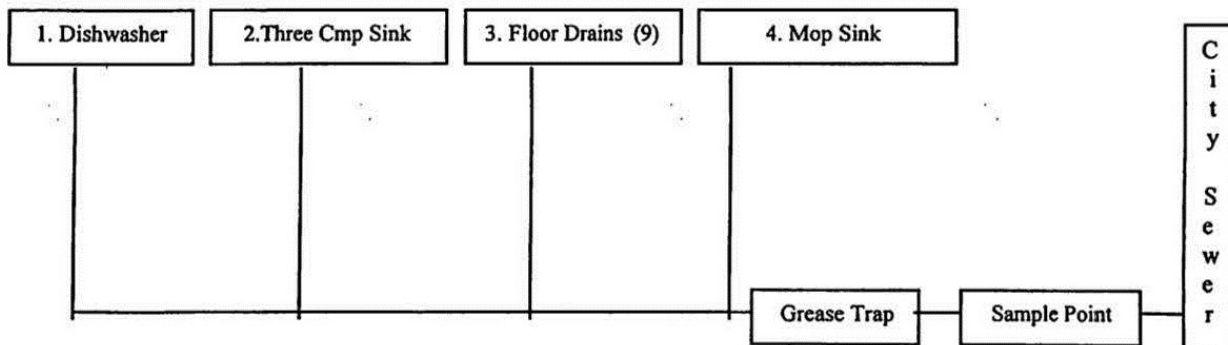


Appendix J: F.O.G. (Fats, Oil, Grease) Discharge Permit Application, continued

7. Provide information regarding nature of operation.
 - a. Day of Week – List applicable data for each week day.
 - b. Number of Meals Served – List approximate number of meals served during the course of a routine business day.
 - c. Hours of Operation – List hours the food establishment is opened for a typical business day.
 - d. Hours of Discharge – Indicate number of hours the facility typically discharges for a typical business day.
 - e. Total number of employees – List total number of employees that work at the establishment on a full-time or part time basis, include employees from all shifts if applicable.

SECTION D - FLOW SCHEMATIC

Schematic Flow Diagram - For each fixture activity in which wastewater is or will be generated, draw a diagram of the wastewater flow from the start of the activity to its completion. Number each fixture having wastewater discharges to the wastewater collection system. (See Example in Instructions).



SECTION E – OIL & GREASE / OTHER TREATMENT EQUIPMENT

- 1a. Describe the size and pumping frequency and location for each oil and grease interceptor.
- 1b. If grease trap is being installed, plans must be sealed by a Professional Engineer and calculations showed to obtain recommended size.
2. This section is used to gather information for treatment other than traditional interceptor. Provide information if facility use an alternative method of treatment for removing grease. For Example, a mechanical grease trap.
3. This section is used to gather information if the establishment uses biological treatment for removing grease:
 - a. Type of treatment - Mark/describe what is applicable to your business.
 - b. Please provide information regarding the company providing biological treatment services.



Appendix J: F.O.G. (Fats, Oil, Grease) Discharge Permit Application, continued

- c. List of devices with biological treatment application - Mark/describe what is applicable to your business.
- d. Frequency of application - Describe what is applicable to your business.
- e. Total amount of application - Describe what is applicable to your business.
- 4. Describe the location of the sample point to collect the wastewater discharge. (If sample point is not located at the establishment, make arrangements to install a sample point and provide Environmental Affairs with an expected installation date.)
- 5. For wastes not discharged to the city's sewer, indicate types of waste generated, quantity generated, the way in which the waste is disposed (e.g., hauled, etc.), and the location of disposal.

SECTION F – WASTE DISPOSAL

- 1. Please list all wastes generated that are disposed of off-site, including type, quantity per year, disposal method and location of disposal.
- 2. If an outside firm removes any of the above wastes, state the name(s) and address (es) of all waste haulers. (Attach additional page if needed.)
 - a. Grease Trap Waste: Note that only transporters holding a valid permit issued by the Sewerage & Water Board of Environmental Department may remove material from a grease or grit trap within the City of New Orleans. You must provide company information and their New Orleans permit number.
 - b. Rendering Grease: A rendering grease transporter collects waste for which a permit is not normally required, e.g., cooking grease or yellow grease, discarded food material, or similar wastes. You must provide their company information.

Please send the correspondence to:
 Sewerage & Water Board of New
 Orleans
 Environmental Affairs Department
 2900 Peoples Avenue
 Rm 215
 New Orleans, LA
 70118
 Email: pbrown@swbno.org
 Phone: (504) 942-3856
 Fax: (504) 942-3858



Appendix J: F.O.G. (Fats, Oil, Grease) Discharge Permit Application, continued

FOOD ESTABLISHMENT'S
GREASE TRAP/INTERCEPTOR DISCHARGE PERMIT APPLICATION

Note: Please read all attached instructions prior to completing this application. Grease trap/interceptor discharge permit fee of \$100.00 [check or money order only] must be submitted with the Permit Application

SECTION A - GENERAL INFORMATION

1. Facility Name: _____
 - a. Operator Name: _____
 - b. Is the operator identified in 1.a., the owner of the property and/or building?
Yes ☐ No ☐ If no, provide the name and address of the owner of the property and/or building and submit a copy of the contract and/or other documents indicating the owner's scope of responsibility for the facility.

 - c. Type of Food Establishment:
Restaurant: ☐ Convenience Store: ☐ Bakery: ☐ Deli: ☐ Other: ☐ Specify Other: _____

 - d. Type of Ownership:
Sole Proprietor: ☐ Partnership: ☐ General: ☐ Limited Corporation: ☐ DBA _____
 - e. Building Permit Number (issued by the Department of Safety and Permits starting with PB or PO or PP): _____
 - g. Certificate of Occupancy (CO) permit number - issued by the Department of Safety and Permits: _____
 - h. Authorized occupancy load (Maximum number of persons allowed at one time): _____
2. Facility Address:
Street: _____
City: _____ State: _____ ZIP: _____
Telephone: _____ Fax: _____



Appendix J: F.O.G. (Fats, Oil, Grease) Discharge Permit Application, continued

3. Business Mailing Address:

Street or P. O. Box: _____

City: _____ State: _____ ZIP: _____

Taxpayer ID {11 digits}: _____

4. Designated Authorized Signatory of facility:

[Attach similar information for each designated signatory]

Name: _____

Title: _____

Address: _____

City: _____ State: _____ ZIP: _____

Telephone: _____ Email: _____

5. Designated Facility Contact:

Name: _____

Title: _____

Telephone: _____ Email: _____

Designated Facility Contact driver's license #: _____ State: _____

SECTION B - AUTHORIZED SIGNATURES

***Designated Authorized Signatory Statement:**

I certify under penalty of law that this document and all attachments were prepared under my direction or supervision in accordance with a system designed to assure that qualified personnel properly gather and evaluate the information submitted. Based on my inquiry of the person or persons who manage the system, or those persons directly responsible for gathering the information, the information submitted is, to the best of my knowledge and belief, true, accurate and complete. I am aware that there are significant penalties for submitting false information, including the possibility of fine and imprisonment for knowing violations.

Business Owner's Name

Title

*Signature

Date

Telephone

Certified Grease Trap Inspector
or Licensed Plumber's Name

Plumber's LA LMP # or Grease Trap Company Name

Signature

Date

Telephone

**The Designated Authorized Signatory is the principal officer or manager who has the authority to make changes to operation of the establishment and who has taken the legal responsibility of all actions within in the establishment.*

**Appendix J: F.O.G. (Fats, Oil, Grease) Discharge Permit Application, continued****SECTION C – FOOD ESTABLISHMENT (BUSINESS ACTIVITY)**

1. Water Sources: (Check as many as are applicable)

Private Well: ☐ Surface Water: ☐ Municipal Water Utility: ☐ (Specify City): _____

Other: ☐ (Specify): _____

2. Account Type: Individual: ☐ Multi-tenant: ☐

3. Water service account number (s): _____

4. Name on water account: _____

5. If your facility has any of the categories or business activities listed below (regardless of whether they generate wastewater, waste sludge, or hazardous wastes), provide applicable information for business activity. (Check all that apply).

a. Fixture	b. Total Number	a. Fixture	b. Total Number
<i>Example: Three Compartment Sink</i>	<i>1</i>	<i>Example: Tilt Skillet</i>	<i>1</i>
One-compartment Hand Sink		Deep Fat Fryer – total number	
Two-compartment Sink		Deep Fat Fryer –total gallons	
Three-compartment Sink		Convection or Steam Oven	
Pre-rinse Station/Scraper		Chicken Rotisserie	
Food Grinder		Mop Sink	
Garbage Disposal Unit		Floor Sink	
Pre-rinse Quick Drain		Bar, Pub, Tavern	
Vent Hood		Floor Drain	
Commercial Dishwasher		Other	
Stove Top/ Wok / Range		Other	
Soup/Steam Kettles		Other	
Tilt Skillet / Grill		Other	

6. Daily Average Flow (gallons/day) _____ (See instructions for calculations)

7. Provide information below regarding nature of operation.

a. Day of Week	b. Number of Meals Served	c. Hours of Operation	d. Hours of Discharge	e. Number of Employees Total	f. Seating Capacity Total
<i>Example: Sunday</i>	<i>1200 meals</i>	<i>11 am to 1am</i>	<i>14 hours</i>	<i>20</i>	<i>100</i>
Sunday					
Monday					
Tuesday					
Wednesday					
Thursday					
Friday					
Saturday					



Appendix J: F.O.G. (Fats, Oil, Grease) Discharge Permit Application, continued

SECTION D - FLOW SCHEMATIC

Schematic Flow Diagram - For each fixture activity in which wastewater is or will be generated, draw a diagram of the wastewater flow from the start of the activity to its completion. Number each fixture having wastewater discharges to the wastewater collection system. (See example in instructions).

SECTION E – OIL & GREASE / OTHER TREATMENT EQUIPMENT

(All food service establishments, existing or new, are required to install an oil & grease device / or approved alternative treatment equipment to minimize oil, grease and solids in the City's wastewater collection system, in an effort to decrease sanitary sewer overflows).

1. Is an oil & grease interceptor installed at Permittee's facility?

a. ☐ Yes. Please describe in the table below.

b. ☐ To be installed**; estimated installation date: _____ (see Section E 1a)

****This information, including size, location and pumping frequency must be submitted to Pretreatment Services Division at time of permitting).**

☐ No. Please proceed to item 2.

Oil & Grease Interceptors	Size (Gallons)	Pumping Frequency	Location
<i>Example</i>	<i>1000 gallons</i>	<i>Once every 90 days</i>	<i>Behind the Food Establishment on the West Side</i>
Interceptor 1			
Interceptor 2			

2. Does facility use an alternative method of treatment for removing grease?

☐ Yes. Please provide a detailed description of the system: _____

☐ No. Proceed to number 4.

3. Does facility use biological treatment for removing grease?

☐ Yes. Please provide a detailed description of the system:

a. Type of treatment:

Bacteria: ☐ Solvents: ☐ Enzymes: ☐ Emulsifier: ☐ Surfactants: ☐

Other: ☐ Specify _____

b. Please provide information regarding the firm providing alternative treatment service:

Company Name : _____

Address: _____

City: _____ State: _____ ZIP: _____

Telephone: _____ Fax: _____



Appendix J: F.O.G. (Fats, Oil, Grease) Discharge Permit Application, continued

- c. Please check the devices with biological treatment application:

Grease Trap: ☐ Sinks: ☐ Floor Drains: ☐ Other: ☐

Specify: _____

- d. Frequency _____ of treatment application: _____

- e. Dosage amount of treatment application: _____

☐ No. Proceed to number 4.

4. Is a sample point to collect wastewater discharge present at permittee's facility?

☐ Yes. Please describe the location: _____

☐ To be installed***; estimated installation date: _____

***** (Installed sample point location description must be submitted to Environmental Affairs prior to opening the establishment for business activity).**

SECTION F— WASTE DISPOSAL

1. Please list all waste generated that is disposed of at an off-site location.

Type of Waste Generated	Quantity (per year)	Disposal Method	Disposal Location
<i>Example: Fryolator grease/ grease trap</i>	<i>1000 pounds/ 100 gallons</i>	<i>Reclaim/Treated</i>	<i>ABC Rendering/XYZ processing</i>

If an outside firm removes any of the above wastes, state the name(s) and address(es) of all waste haulers. (Attach additional page if needed).

- a. Grease Trap Waste:

Transporter Name: _____ Permit Number _____

Street: _____

City: _____ State: _____

ZIP: _____ Telephone: _____ Fax: _____

- b. Rendering Grease:

Rendering Grease Transporter Name: _____

Street: _____ City: _____ State: _____

ZIP: _____ Telephone: _____ Fax: _____

Please send correspondence to: Sewerage &
Water Board of New Orleans
Environmental Affairs Department
2900 Peoples Avenue Rm 215
New Orleans, LA 70122 76102
Phone: (504) 942-3856
Fax: (504) 942-3858

