

CUPE LOCAL 474

**Edmonton Public Schools
Custodial Workers Union**



Ten Years After

BUDGET BRIEF 2010

Presented to the Edmonton Public Schools Board of Trustees

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Table of Contents

| | |
|--|----|
| Introduction | 1 |
| Appendix 1 - CUPE 474 Budget Brief Outmoded Custodial Technology (2001) | 5 |
| Appendix 1- CUPE 474 Budget Brief Staffing Concerns – 2002..... | 6 |
| Appendix 1 - CUPE 474 Budget Proposal – Custodial Staffing Formula (2004) | 6 |
| Appendix 1- Site-Based Management (2005)..... | 9 |
| Appendix 1- Custodial Staffing Formula (2005)..... | 11 |
| Appendix 1- Securing quality education environments – Cleaning and Maintenance standards (2005) | 12 |
| Appendix 1 - Centralized Plant Operations and Maintenance Budgets (2007) | 13 |
| Appendix 1- Other Staffing Issues Affecting Safety and Cleanliness (2007)..... | 14 |
| Appendix 1 – Standardization of Custodial Services Is Cost Recovery (2007)..... | 17 |
| Appendix 1 - Other Staffing Issues Affecting Safety and Cleanliness (2007)..... | 19 |
| Appendix 1 – Budget Brief Green Cleaning (2008)..... | 22 |
| Appendix 1 – Budget Brief - Custodial Department (2008)..... | 23 |
| Appendix 1 - Community Use (2008) | 23 |
| Appendix 1 - Joint Hiring Committee..... | 26 |
| Appendix 1 - Standardization and Modernization of Custodial Equipment (2009)..... | 28 |
| Appendix 1 - Calgary Board of Education (2009) | 29 |
| Appendix 1 - Staffing Levels (2009) | 30 |
| Appendix 1 – Budget Brief - Appropriate Technology and Training (2009)..... | 32 |
| Appendix 1 – Budget Brief - Custodial Department (2009)..... | 33 |
| Appendix 1 – Budget Brief - Flood and Fire Clean Up (2009)..... | 34 |
| Appendix 2 - Economic Impact of Training and Education in Basic Skills..... | 36 |
| Appendix 2 - To Have and to Hold: Retaining and Utilising Skilled People. | 36 |
| Appendix 2 - The Impact of Employee Training on Job Satisfaction and Intention to Stay in the Hotel Industry 38 | |
| Appendix 2 - Socio-economic Impact of Building Emotional Intelligence in Frontline Workers..... | 38 |
| Appendix 2 - Occupational Outlook Handbook, 2010-11 Edition Building Cleaning Workers | 38 |
| Appendix 2 - Organizational Benefits..... | 39 |
| Appendix 2 - Building Service Worker - Program Outline (2008/09) | 39 |
| Appendix 2 – Feature Article: Promoting Personal Safety of Building Service Workers Issues and Challenges..... | 40 |
| Appendix 2 - Dignity at Work for Low Wage, Low Skill Service Workers..... | 41 |
| Appendix 2 - Recovery Act Grants Help SEIU Grow Green Training Programs | 41 |
| Appendix 2 - Trends in Facilities Maintenance: Tight Budgets, New Solutions | 43 |
| Appendix 2 - Green Existing Schools Implementation Workbook..... | 44 |
| Appendix 2 - Centralized Purchasing..... | 45 |
| Appendix 2 - Centralized versus decentralized purchasing in plant operations..... | 46 |

Introduction

Chairman Fleming, Trustees, Superintendent Schmidt.

Thank you for this opportunity to share the views of CUPE Local 474 as you prepare for the District's 2010-2011 budget. In this year's budget brief to the Board we thought it would be valuable to look at the outstanding issues that the local has brought to your attention over the past decade and which still require action.

These issues remain critical for custodial staff in the district and we would assert critical to the functioning of our schools for the next decade. When Edgar Schmidt became the District's Superintendent, he challenged district administration and staff to look forward to 2020 and think about students who would be entering the public schools now and how many would be graduating in 2020. We challenge the district to look at outstanding custodial issues for the past decade and hope that we can resolve them before students graduate a decade from now. Our schools will be ill served if these issues remain outstanding a decade from now.

For the coming year in particular, we know that the district will face the challenge of another round of cutbacks by the Provincial government in their attempt to make the public sector pay for their temporary deficit. These claw backs in funding must be challenged by this board and administration. The deficit is temporary, while public education is a permanent and necessary public institution in society.

Short term solutions such as cutting custodial staff have been tried in the past and have only resulted in long term job losses in our schools. Custodial staff who have been cut have not been replaced, or if they have it has been with part time workers. (Appendix 1 - CUPE 474 Budget Proposal - Custodial Staffing Formula 2004)

In our briefs presented over this past decade we demonstrated how ten years of cuts to custodial staff had impacted the district. We are still not at the required staffing levels to properly clean and maintain our schools. This is the outstanding issue of the decade, the failure of this administration to properly implement a custodial staffing formula that would ensure each school has adequate custodial staffing. (Appendix 1 - CUPE 474 Budget Proposal - Custodial Staffing Formula 2004 and Appendix 1 - CUPE 474 Budget Proposal - Custodial Staffing Formula 2005)

District wide this has also meant that we lack adequate custodial support services in that we continue to rely on temporary custodians (hourly paid workers on call) to make up for the lack of permanent spares and relief custodians. While the administration has long claimed this is an issue of supply and demand, the reality is that these positions are capped and we have called for expansion of these positions to meet the supply needs in the district of replacement custodial staff for those on sick leave, leave of absence or on vacation. This has been a perennial problem during the summer break, when schools scramble to have adequate staffing to clean the schools (Appendix 1- Other Staffing Issues Affecting Safety and Cleanliness 2007).

As we pointed out in last year's brief, our district has the largest square footage of cleaning per custodian of any school district in Alberta, including the Calgary Board of Education (Appendix - Calgary Board of Education 2009).

While the district agreed to a staffing formula in principle its implementation was slow and inadequate. Schools were given the opportunity to close classrooms in order to meet the square footage cleaning requirements. This did not increase the cleaning staff in schools but was used to avoid hiring more custodial staff or increasing custodial hours of work.

Lack of custodial staffing for after hours and community use of schools has limited our ability to meet the requirements of the Joint Use Agreement. Schools have used lack of custodial staffing to deny the public access to our schools. (Appendix 1 - Standardization and Modernization of Custodial Equipment 2009).

These problems are the direct result of the districts site based management model of administration which we have been critical of since its inception. (Appendix Budget Briefs 2007).

Custodial staffing, purchase of equipment and supplies are left up to each school. No other school district in Alberta or Canada uses this model for delivery of custodial services (Appendix 1 - Centralized Plant Operations and Maintenance Budgets 2007). They have a custodial department that accesses schools needs and supplies them. This allows for the proper implementation of a staffing formula, the purchase of adequate equipment and other needs as required across the district. (Appendix 1 - Staffing Levels 2009).

Others can do this because they have a custodial department as we have called for in past budget briefs and were assured that such a department would be developed. Nothing in this regard has occurred. The problem being of course, that as long as schools are responsible for custodial services, such as a centralized department cannot exist.

(Appendix 1 - Budget Brief - Custodial Department 2008, Appendix 1 - Budget Brief - Custodial Department 2009). This department would require the centralizing of the custodial services provided currently by different departments. With the district looking at restructuring the delivery of services, this is the perfect opportunity to create just such a custodial department.

Studies show that ongoing training is key to staff retention and satisfaction even more so than wages and benefits. The success of the districts Custodial Staff Development day which has seen continuing increases in staff participation reflects this need to learn. Participation in custodial in-services through Consulting Services also indicates that custodial staff values their learning opportunities. Training programs for our custodial staff need to be expanded based on hands on training as well as classroom and computer based training (Appendix 2 - To Have and to Hold: Retaining and Utilising Skilled People, Appendix 2 - Economic Impact of Training and Education in Basic Skills).

Hiring remains an issue, and our recommendations in past briefs that the district implement a joint hiring committee with Local 474 has been ignored (Appendix 1 - Joint Hiring Committee 2008). The Board has a representative on the Norquest Advisory Board for their Building Service Workers program, however we are not sure how this helps direct successful graduates of the program into our district. Since that position is now open we would suggest that the proper person for that role would be one of the districts custodial consultants.

The district should look at developing a Building Service Worker program of its own, that previously existed for High School students, to aid in providing custodial staff for our district as well as for other public and private sector organizations (Appendix 1 – Budget Brief - Custodial Department 2008).

In past briefs we have discussed the need to Green our schools, and we are pleased the district is proceeding with replacing cleaning chemicals in our schools with Green products. In order for this to succeed it must be a district policy that schools will only use these products and that they be purchased through the distribution centre (Appendix 1 – Budget Brief Green Cleaning 2008).

Leadership in Energy and Environmental Design (LEED) standards for Lillian Osborne High School and the Alberta government P3 schools is problematic. While LEED awards points for Green products, as well as other environmental standards it is an American standard, and in fact is based on California environmental policies which are the strictest in the United States. California is not Canada. While use of glass for natural lighting is encouraged under LEED this is a cleaning problem once the school is built. Other standards have been problematic as well. Whether it is types of flooring, paint etc. When we are designing schools custodial space is at a premium, storage is often lacking, as well as adequate outlets for equipment. Custodial input is needed when we are designing or renovating our schools.

LEED however does designate that school districts adopt a full Green Cleaning program, that not only includes reducing toxic chemical use, but the standardization of cleaning equipment, training and custodial staffing levels. School districts are encouraged to earn LEED points by centralizing and standardizing chemical and equipment purchases. (Appendix 2 - Green Existing Schools Implementation Workbook).

The centralization and standardization of purchasing equipment and supplies remains the most cost effective method for organizations to allocate resources. By the district adopting a centralized purchasing policy for equipment as well as cleaning supplies, and distribution of them to schools, a regular maintenance program, as well as standardized training would reduce costs in the long run as studies have shown. (Appendix 2 - To Have and to Hold: Retaining and Utilising Skilled People).

Carpet Cleaning remains an issue in our district. While we have implemented a carpet cleaning program, not all schools are taking advantage of it, instead they are asking custodial staff to clean carpets using less effective methods. Carpets hold dirt and germs, and need to be cleaned annually, this ensures that the school indoor environment is healthy and extends the life of the carpet. Schools should be required to have their carpets cleaned annually by our districts Truck Mounted Carpet Cleaning units. Again, this would occur if we had a custodial department that coordinated such cleaning in a centralized manner (Appendix 1 – Standardization of Custodial Services Is Cost Recovery 2007). As carpet cleaning is a cost recovery operation the Local has promoted this service to other districts where we have members employed. We believe that expanding this service out of district would help recover the costs of operations.

Computer Technology remains an issue, there remains custodial staff in the district without access to email or even computer hardware. While the district now communicates via email and its website there are still custodial staff with out access to this technology. As well there is a lack of comprehensive computer training for custodial staff. Spare and Relief Custodians should have Blackberries in order to receive email and to contact the Spare board. The lack of computer access and

training has been an issue for the past decade and it remains unresolved today (Appendix 1- CUPE 474 Budget Brief Outmoded Custodial Technology 2001 and Appendix 1 - Budget Brief - Appropriate Technology and Training 2009).

Boiler Safety remains an issue in our schools. These past two winters have seen cold snaps that strained our steam boilers. In fact we had a number of schools closed because of heating problems leading to frozen pipes. Adequate supervision of the boilers during cold snaps, especially on weekends is needed. This illustrates the importance of having skilled Power engineers in our schools. The administration is making a case for the dumbing down of custodial staff, to avoid the requirement that the 5th class Power Engineering course not be mandatory, as required under the collective agreement. Boiler operations are problematic, especially steam boilers, during the course of a regular year, but become even more so when we face cold weather conditions. Having properly trained and certified custodians who can operate the heating plant gives this district an advantage over other school districts. Many school districts are being informed by their maintenance departments that custodial staff will have to monitor the day to day operations of boilers as we do now, for safety reasons. We have made changes in the collective agreement to meet the training needs for the 5th Class Certificate and believe that this is a necessary requirement for our jobs.

Fire and Flood cleaning is a specialized operation, and we have had numerous fires and floods in our schools over the past few years. The district will require training for custodial staff in fire and flood restoration operations to meet future cleaning requirements caused by fires or floods. A district based training program should be implemented to train selected custodial staff for these cleaning operations. (Appendix 1 - Budget Brief - Flood and Fire Clean Up (2009).

Finally, this is an election year. Addressing these outstanding issues should be a legacy project for this board. These issues should not be left for the new board of Trustees to address. The district has a vision of where it wants to be in 2020 and that should include reforming the districts custodial services to meet the needs of the future.

Chairperson Fleming, Trustees, Superintendent Schmidt, thank you for the opportunity to present this brief tonight on behalf of the custodial workers of Local 474.

Appendix 1 - CUPE 474 Budget Brief Outmoded Custodial Technology (2001)

Custodial equipment in this district is old and outmoded. We have not kept up with the latest developments in custodial technology and equipment. In most schools vacuums, floor polishers and scrubbers are over twenty years old. While the district has updated its computer equipment, so that we no longer use Commodore 64's or Apples, the same cannot be said for custodial equipment.

Custodial staff has not only faced cuts in staffing but also to their equipment budgets. This is an inefficient use of labour and resources.

In large open areas, such as hallways, schools should be supplying and using self propelled floor scrubbers that custodians can drive rather than the push models of yesteryear.

This is ergonomically safer for staff to use not to mention the time saved by using better, more efficient equipment. Lighter, small vacuums for classroom areas are preferable to larger bulky wet dry vacuums found in most schools.

The cleaning industry has gone through major changes in the past twenty years, in providing technology that makes our jobs more efficient and safer. Yet our district has not adopted these for custodial staff. This is not merely a budget issue, it derives from the system undervaluing of our work. This leads to an undervaluing of our work knowledge and our advice.

It is time that schools ensure they provide their custodial staff with new technology, this needs to be a budget priority.

Appendix 1 - Maintenance and Utility Cost (2001)

Maintenance budgets which have been decentralized to schools are often used to offset other costs, such as the purchase of new computers or cost overruns in other SES areas. The fact is that maintenance funds to schools are woefully inadequate to address the real costs we face in maintaining our buildings.

Custodial staff are often expected to hold costs down and are sometimes being encouraged to do the maintenance work themselves or to look the other way when teaching staff do the work. This is in violation of the collective agreement.

If schools were funded adequately for maintenance costs, at approximately \$1 per sq. ft, rather than the approximately .58 cents per sq. ft. as they are now, the pressure to keep maintenance costs down would be reduced. The district receives block funds from the provincial government for maintenance and custodial costs and if these are not enough the district must lobby for more funds.

With utility costs increasing this year a further burden will be placed on our members as schools attempt to do more with less.

Appendix 1- CUPE 474 Budget Brief Staffing Concerns – 2002

Recommendation:

- *CUPE Local 474 Recommends That Professional Development Budgets Be Increased For Custodians To Ensure That Proper Skill Levels Are Maintained And To Allow Tutoring Of New Staff.*

Perhaps one of the most significant impacts that cutbacks have resulted in is the reduction in the hours of Head Custodians. In some cases, Head Custodians have been cut back as much as two (2) hours per day. This type of cut, amounting to only several thousand dollars over the course of a school year, has had a profound affect on the amount of work done in the schools. Justification for these cuts has been based on the student enrollment (though, as our joint hours of work study showed, schools with no decrease in student enrolment and even schools with increased enrollment have cut custodial staff or hours of work), but by cutting these hours, combined with additional staff cuts in hours, the amount of time allocated to perform all of the necessary custodial duties and maintain an acceptable level of cleanliness in the schools has been compromised. There are always extra “jobs” to be done, and we cannot always get them done in the hours allocated. Head Custodians should be eight (8) hour workers in each of Edmonton Public School’s sites, regardless of the student enrollment, staff population and community use. CUPE Local 474 has advocated for years that a custodial staffing formula be implemented, based on school size, age of the facility and student enrollment, staff population and community use. Although the administration indicates there are guidelines that they follow in making staffing decisions we have not been apprised of these guidelines. In spite of all of the cuts in hours to Head Custodians, to the best of our knowledge, there has never been a true cost analysis comparing the monies saved by the cuts versus the loss of work performed.

Recommendations:

- *CUPE Local 474 Recommends That A District Wide Policy Be Implemented To Ensure All Schools Will Be Staffed With 8 Hour Head Custodians.*
- *CUPE Local 474 Recommends That Edmonton Public Schools Implement A Custodial Staffing Formula.*

Appendix 1 - CUPE 474 Budget Proposal – Custodial Staffing Formula (2004)

Addressing the need for appropriate custodial staffing levels has been a long term priority for CUPE 474. First and foremost is the need to establish and maintain staffing levels required to secure safe, clean environments for education in our communities.

Recommendations:

- *No school of 50,000 sq ft. or less in the district should be staffed with less than 1.5 FTE regardless of enrollment. If a school is not viable it should be closed, if it is twinned each location needs its own HC and custodial staff, not staff shared between locations.*
- *This is a minimum staffing requirement.*
- *Where locations are between 50,000 and 100,000 minimum staffing should be 2.5 FTE.*
- *Where schools are 100,000 sq ft or more they must have a Utility Custodian and Charge Hand (excluding Hardisty School).*
- *Where schools are 100,000 sq ft and used year round for summer school, evening events etc. The school use requires more cleaning. We need to return to three shifts, day, afternoon and night shift.*

The following tables document the increase in staffing by facility required to achieve the staffing levels set out in these recommendations.

Proposed Annual Custodial Budget Costs

based on 2003 - 2004 EPSB Unit Costs

Schools Up to 50,000 square feet - minimum of 1.5 FTE recommended

Head Custodian (mandatory): \$43,852

| | 10 month | 12 month | | |
|--|----------------------|-----------------------|---------------------------|--|
| H/C & .500 FTE (4 hr) CA | \$58,701.00 | \$ 60,629.00 | | |
| H/C & .625 FTE (5 hr) CA | \$62,413.00 | \$ 64,824.00 | | |
| H/C & .750 FTE (6 hr) CA | \$66,125.00 | \$ 69,018.00 | | |
| H/C & .875 FTE (7 hr) CA | \$69,838.00 | \$ 73,212.00 | | |
| H/C & 1.00 FTE (8 hr) CA | \$73,550.00 | \$ 77,407.00 | | |
| H/C & 1.00 FTE (8 hr) C | | \$ 85,281.00 | | |
| | Square Meters | Square Footage | 2003-2004 Proposed | Min. Increase required to meet minimum recommendation |
| Belgravia | 1284 | 13820 | 0.750 | 0.750 |
| High Park | 1764 | 18983 | 0.900 | 0.600 |
| High School Outreach - Learning Stores | | | 0.900 | 0.600 |
| James Gibbons | 1826 | 19656 | 0.900 | 0.600 |
| Riverdale | 1634 | 17587 | 0.900 | 0.600 |
| Bellevue | 2543 | 27371 | 1.000 | 0.500 |
| Capilano | 3418 | 36794 | 1.000 | 0.500 |
| Clara Tyner | 2003 | 21556 | 1.000 | 0.500 |
| Coronation | 2124 | 22863 | 1.000 | 0.500 |
| Glendale | 2171 | 21805 | 1.000 | 0.500 |
| Glenora | 2402 | 25856 | 1.000 | 0.500 |
| Gold Bar | 3319 | 35730 | 1.000 | 0.500 |
| Grovenor | 2601 | 27996 | 1.000 | 0.500 |
| Jackson Heights | 3255 | 33423 | 1.000 | 0.500 |
| Kameyosek | 2555 | 27496 | 1.000 | 0.500 |
| Lendrum | 2509 | 27007 | 1.000 | 0.500 |
| Montrose | 3289 | 35402 | 1.000 | 0.500 |
| Mount Royal | 2601 | 27996 | 1.000 | 0.500 |
| Newton | 3122 | 33610 | 1.000 | 0.500 |
| Rutherford / Idylwyld | 3230 | 34770 | 1.000 | 0.500 |
| Sherwood | 2451 | 26381 | 1.000 | 0.500 |
| Terrace Heights | 2685 | 28899 | 1.000 | 0.500 |
| Virginia Park | 1906 | 21432 | 1.000 | 0.500 |
| Windsor Park | 1925 | 20720 | 1.000 | 0.500 |
| Woodcroft | 2284 | 24584 | 1.000 | 0.500 |

| | | | | |
|------------------|------|-------|-------|-------|
| Woodside Program | | | 1.000 | 0.500 |
| Horse Hill | 4811 | 51791 | 1.375 | 0.125 |
| Inglewood | 3262 | 35116 | 1.375 | 0.125 |
| Lansdowne | 2994 | 32233 | 1.375 | 0.125 |
| Menisa | 2773 | 29845 | 1.375 | 0.125 |
| Satoo | 3101 | 33379 | 1.375 | 0.125 |

Proposed Annual Custodial Budget Costs

based on 2003 - 2004 EPSB Unit Costs

Schools Up to 100,000 square feet - minimum of 2.5 FTE recommended

Head Custodian (mandatory): \$45,474

| | 10 month | 12 month |
|-----------------------------------|---------------|---------------|
| H/C + 1 C & .500 FTE (4 hr) CA | \$ 101,753.00 | \$ 103,681.00 |
| H/C + 1 C & .625 FTE (5 hr) CA | \$ 105,465.00 | \$ 107,876.00 |
| H/C + 1 C & .750 FTE (6 hr) CA | \$ 109,177.00 | \$ 112,070.00 |
| H/C + 1 C & .875 FTE (7 hr) CA | \$ 112,890.00 | \$ 116,264.00 |
| H/C + 1 C & 1.00 FTE (8 hr) CA | \$ 116,602.00 | \$ 120,459.00 |
| H/C + 1 C & 1.00 FTE (8 hr) C | | \$ 128,333.00 |

| | Total Area | Square Footage | 2003-2004 Proposed | Min. Increase required to meet minimum recommendation |
|-------------------------|------------|----------------|--------------------|---|
| Youngstown | 4691 | 50490 | 2.375 | 0.125 |
| Waverley | 4727 | 50888 | 1.125 | 1.375 |
| Belvedere | 2750 | 51024 | 2.250 | 0.250 |
| McCauley | 4580 | 51078 | 2.125 | 0.375 |
| Major General Griesbach | 4753 | 51160 | 2.000 | 0.500 |
| Hazeldean | 4776 | 51412 | 1.500 | 1.000 |
| Horse Hill | 4811 | 51791 | 1.375 | 1.125 |
| McKee | 4849 | 52194 | 1.750 | 0.750 |
| Academy at King Edward | 4865 | 52368 | 2.175 | 0.325 |
| Braemar | 4868 | 52397 | 2.000 | 0.500 |
| Glengarry | 5008 | 53904 | 2.438 | 0.062 |
| Richard Secord | 5056 | 54425 | 1.750 | 0.750 |
| Elmwood | 5024 | 54994 | 1.500 | 1.000 |
| Delton | 5129 | 55213 | 2.438 | 0.062 |
| Greenfield | 5146 | 55390 | 2.250 | 0.250 |

| | | | | |
|---------------------|------|-------|-------|-------|
| John A. McDougall | 5484 | 59036 | 2.000 | 0.500 |
| Eastwood | 5568 | 59939 | 1.750 | 0.750 |
| Britannia | 5758 | 61981 | 2.000 | 0.500 |
| Allendale | 5778 | 62200 | 2.000 | 0.500 |
| Strathearn | 5912 | 63637 | 2.000 | 0.500 |
| Sherbrooke | 5999 | 64572 | 1.875 | 0.625 |
| Stratford | | 67360 | 0.675 | 1.825 |
| Westmount | 6453 | 69461 | 2.000 | 0.500 |
| Distribution Centre | | 79160 | 0.875 | 1.625 |

Proposed Annual Custodial Budget Costs

based on 2003 - 2004 EPSB Unit Costs

Schools Over to 100,000 square feet - minimum of 1.0 FTE Charge Hand & Utility Man recommended

| | | | |
|------------------------|--|----|-----------|
| Add Chargehand | | \$ | 44,805.00 |
| Add Utility Man | | \$ | 43,121.00 |

| | Require Charge Hand | Require Utility Custodian | Total Extra Custodial Cost |
|----------------------|---------------------|---------------------------|----------------------------|
| LY Cairns | \$44,805 | \$43,121 | \$87,926 |
| McNally | \$44,805 | \$43,121 | \$87,926 |
| J Percy Page | \$44,805 | \$43,121 | \$87,926 |
| Eastglen | \$44,805 | \$43,121 | \$87,926 |
| Vimy Ridge | \$44,805 | \$43,121 | \$87,926 |
| Queen Elizabeth | Already in place | \$43,121 | \$43,121 |
| Strathcona | Already in place | \$43,121 | \$43,121 |
| Ross Sheppard | Already in place | \$43,121 | \$43,121 |
| WP Wagner | \$44,805 | \$43,121 | \$87,926 |
| ME LaZerte | \$44,805 | \$43,121 | \$87,926 |
| Harry Ainlay | \$44,805 | Already in place | \$44,805 |
| Centre for Education | Already in place | Already in place | \$0 |
| Jasper Place | Already in place | Already in place | \$0 |
| Victoria | Already in place | Already in place | \$0 |

Appendix 1- Site-Based Management (2005)

In all of our of our CUPE Local 474 budget presentations we have addressed our concerns about site-based management. For example:

In 1994, after a 10-year experiment with site-based management we called on the Board to “assess this experiment”. Research undertaken at that time by the three CUPE Locals was included in the report “Take a Look; Behind The Scenes at Edmonton’s Public Schools” and provided clear evidence of marked disparities. The report states:

We discovered that school-based budgeting is leading to a situation where our schools are no longer equal. In some schools, funds are being committed to support staff, to cleaning and to upkeep of facilities, whereas in others, they are clearly not.

(Take a Look 'behind that scenes' at Edmonton's Public Schools - A report from frontline workers, CUPE Locals 474, 784 and 3550, 1994)

Again in our 2003 budget presentation to this Board we stated...

At the present time most school and facility activities are subject to site-based management. As we have stated for over twenty years, this model for school administration has many serious limitations. Essential functions and expenses ... end up in competition for the same scarce budget dollars in individual facilities. The capacity for co-ordination of use of resources between sites is severely limited. Decisions made and priorities set by individual principals can result in significant variations in quality of services provided and standards. This is a very serious concern for custodial staff as our work is often sacrificed in the face of classroom teaching priorities.

In the EPSB, the limitations of site-based management have become immediately evident in the area of maintenance and for that reason, budgeting and planning for maintenance requirements was simply not feasible at the school site level. The knowledge and expertise required to make effective use of resources is now provided by facilities using a property management model for district schools. Principals are generally not facility managers. In our view these same arguments apply to custodial services.

(BUDGET BRIEF 2003-Public Education at the Crossroads

Presented to the Edmonton Public Schools Board of Trustees January 14, 2003)

The Provincial audit of Edmonton Public School Board February 2004 documents the fact that our custodial staffing levels are all over the map. This finding is consistent with what has been reported by our 1995 study as well as subsequent studies on hours of work and the contracting out study.

As noted in the previous section, funding for Plant Operation and Maintenance (POM) has increased significantly in the last 11 years - but ongoing underfunding of education, and site-based management have created a situation where much of the funding is diverted, and not available to provide for necessary custodial services.

Custodial Services portion of the POM for 2004-05 was over \$19.53 million, which was 50% of the budget. This year, the POM funds have been reduced and the administration is now saying that custodial funding will only be 42% of that. The administration cannot say what the % will be this year, as we need to see how the rest is spent on Utilities, Maintenance and custodial services at the end of the year. The District has now centralized to ensure that POM money was not being spent to supplement classroom spending as had been in the past. The financial shortfall of \$3 million Maintenance now has is because of the funding shortfall downloaded by the Province.

By contract, the custodial funding is still being spent by schools as they wish, not necessarily on custodial services, as it is sent to the schools as part of their per student funding. This money must be earmarked specifically for custodial services to ensure ALL POM funding is spent on the services for which it is intended, not for general school use.

In our experience, we are expected to clean 100% of our schools/facilities while we are only getting funding for over 60% of our costs. A decade of POM funding has been wasted on school-based management, which used the custodial portion of their funds for other purposes instead of re-establishing custodial staffing to the pre-1995 levels let alone what we had in 1985.

In light of the current funding crisis, we cannot afford not to have a custodial staffing and **cleaning standards district wide**. Other districts do this, and it is a more cost-effective use of POM funds. We would like reiterate that Principals should not overact when receiving the school allocation for POM. The funding problem is with the government. Our custodial provide excellent work and wonderful schools. The issue is simple - we do not have the resources to do the work anymore. Trustees must lobby the government for more money and challenge any decision unit in the district that cut custodial by asking them to justify these cuts. This justification is a requirement of you as Trustees and of the Administration who have agreed to do this in the past as a result of our joint studies on Hours of Work, and Custodial Staffing.

Recommendations:

- *It is the position of CUPE 474 that consistent, high standards of cleanliness across EPSB facilities require centralized planning and budgeting for custodial services. The Local affected should be fully consulted and participate in the plan to establish centralized funding for custodial service.*

Appendix 1- Custodial Staffing Formula (2005)

Addressing the need for appropriate custodial staffing levels has been a long-term priority for CUPE 474. First and foremost is the need to establish and maintain staffing levels required to secure safe, clean environments for education in our communities.

Recommendations:

- No school of 50,000 sq ft. or less in the district should be staffed with less than 1.5 FTE regardless of enrollment. If a school is not viable it should be closed, if it is twinned each location needs its own HC and custodial staff, not staff shared between locations.
- This is a minimum staffing requirement.
- Where locations are between 50,000 and 100,000 minimum staffing should be 2.5 FTE.
- Where schools are 100,000 sq ft or more, they must have a Utility Custodian (excluding Hardisty School).
- Where schools are 100,000 sq ft and used year round for summer school, evening events etc. The school use requires more cleaning. We need to return to three shifts, day, afternoon and night shift.

Appendix 1- Securing quality education environments - Cleaning and Maintenance standards (2005)

The experts tell us: "The management and cleanliness of school environments sends a 'we care' message to students, teachers, and staff. The evidence suggests that environmental conditions shape attitudes and eventually performance, especially attendance."

- Dr. Michael A. Berry. University of North Carolina.

Research in Canada and the US provides clear evidence of the importance of learning environments for student achievement. This research identified that for a large majority of school administrators (8 in 10) the condition of a school facility is a "key factor" or "absolutely critical" to student achievement. This and other related evidence concerning the importance of education environments has been presented to this Board in the past.

We are very concerned that despite evidence of the importance of school environments for student achievement, budget restrictions and political policy have gone in the opposite direction - including ongoing custodial staff cuts, disastrous experiments with contracting out, and the threat of involving private, for profit companies in the ownership and management of school facilities through public private partnerships¹.

In order for the district to really seriously improve student achievement, we need a cleaning standard for our schools and wide custodial staffing formula. We have the tools. These standards exist because we created them jointly with the district including the cleaning evaluation template and the custodial job descriptions.

Recommendations:

- *We need a district wide standard since each school is determining its own standards and each principal has their own bias as to what a clean school should look like, which may not be realistic given current staffing levels, work responsibilities and schedules.*
-

Appendix 1 - Centralized Plant Operations and Maintenance Budgets (2007)

CUPE 474 has long taken the position that site-based management is not appropriately applied to Plant Operations and Maintenance. The issues and concerns involved in PO&M are unique and demand a more coordinated approach.

That we take this position is not news to the Trustees. In all of CUPE 474's budget presentations we have highlighted our reservations about site-based management as applied to custodial services.

In 1994, after a 10-year experiment with site-based management, we called on the Board to "assess this experiment". Research undertaken at that time by the three CUPE Locals was included in the report "Take a Look; Behind The Scenes at Edmonton's Public Schools" and provided clear evidence of marked disparities. The report states:

We discovered that school-based budgeting is leading to a situation where our schools are no longer equal. In some schools, funds are being committed to support staff, to cleaning and to upkeep of facilities, whereas in others, they are clearly not.

(Take a Look 'behind that scenes' at Edmonton's Public Schools - A report from frontline workers, CUPE Locals 474, 784 and 3550, 1994)

Custodial funds from PO&M have been absorbed by the District into the per student grant given to schools under district wide School Based Management, which means that custodial costs have not been identified separately from school programs. This has resulted in custodial services being cut to free up funds for computers, classroom resources and teachers/teachers aides. This is, in our opinion, both shortsighted and contrary to the interests of building a healthy education environment.

Principals need more information and training about custodial services. CUPE 474 has attempted to communicate with principals to engage in a discussion about allocation of custodial resources. We are willing to share knowledge and information with principals to help them perform their job more effectively. However, we have received correspondence from the Acting Superintendent attempting to prevent us from contacting principals on issues of mutual interest. We find the administration's attitude on this matter discouraging and disappointing. Rather than encouraging discussion and mutual learning, the Superintendent wants to maintain silent silos. This attitude will result in a number of solvable issues continuing to fester.

As noted, funding for Plant Operation and Maintenance (POM) has increased significantly in the last 11 years - but ongoing under-funding of education, and site-based management have created a situation where much of the funding is diverted, and not available to provide for necessary custodial services.

In our experience, we are expected to clean 100% of our schools/facilities while we are only getting funding for over 60% of our costs. A decade of POM funding has been wasted on school-based management, which used the custodial portion of their funds for other purposes instead of re-establishing custodial staffing to the pre-1995 levels - let alone what we had in 1985.

In light of the current funding crisis, we cannot afford NOT to have a custodial staffing and cleaning standards district-wide. Other districts do this, and it is a more cost-effective use of POM funds. We would like reiterate that Principals should not overact when receiving the school allocation for POM. The funding problem is with the government. Our custodial provide excellent work, creating safe and secure schools. The issue is simple - we do not have the resources to do the work anymore. Trustees must lobby the government for more money and challenge any decision unit in the district that cut custodial by asking them to justify these cuts. This justification is a requirement of Trustees and the Administration who have agreed to do this in the past as a result of our joint studies on Hours of Work, and Custodial Staffing.

Recommendation:

- *It is the position of CUPE 474 that consistent, high standards of cleanliness across EPSB facilities require centralized planning and budgeting for custodial services. The Local affected should be fully consulted and participate in the plan to establish centralized funding for custodial service.*
- *Until a shift to centralized planning and budgeting for custodial services, the current system be reformed to ensure:*
- *Principals and new administrators receive training about custodial staff, their responsibilities and the need for adequate funding for custodial services;*
- *Central money targeted for custodial services be required to be used for only custodial services.*
- *Costs of staff development for custodial staff be covered by central administration.*

Appendix 1- Other Staffing Issues Affecting Safety and Cleanliness (2007)

The second Letter of Commitment in the Collective Agreement provides a commitment to maintain Head Custodian FTE position at October 2006 levels for schools with less than 125 students. Copies of these letters are attached to this presentation.

Last spring schools and DU's across the district were ordered by this board and administration to find 10% in savings. This was done by cutting staff. And as usual custodial staff found their hours cut, including schools with a single Head Custodian. This resulted in a million dollar surplus in the fall. A surplus made from the cutting of workers jobs and hours of work. This was done district wide regardless of the fiscal situation of any individual school. This was not Site Based Management, nor school based decision making, it was a District decision and as such directly impacted on custodial staffing in our schools more so than any other staff group.

This was not the first time custodial staff have had their hours or staffing components reduced to meet school or district fiscal needs. What has not happened over the past twenty years, is any real increase in custodial staffing. We have been cut so deeply that we are currently operating well over the 2500-3000 sq ft cleaning rate in most schools.

Staffing decisions made over the past two decades have created a number of stress points in Edmonton Publics Schools. The District has increased its number of facilities, student enrollment, support and teaching staff, central administrative staff, yet in contrast, custodial positions have been reduced. To aggravate this trend, the retention and recruitment of custodial staff will be challenged

by competing interests and the attrition of highly skilled and experienced custodial personnel. Given the demographics of custodial personnel, the attrition rate due to retirement promises to further compound problems for the District in competing for and maintaining adequate staffing levels.

Training, orientation and competition in recruitment and retention will increase costs to the District unless custodial operations are centralized and focus is placed on coordinating custodial staffing more effectively.

Information provided to us by the school administration shows that permanent full time custodial positions have not returned to 1993 levels. There have been increases in part-time and temporary positions. Generally speaking, temporary staff, however, do not have the qualifications or experience of full time staff. This results in increased costs in training and staff development and a reduction in custodial care quality.

Consider the following examples of inconsistencies, and problems faced by custodial staff under the current practices:

- Staff reductions have had the effect that Head Custodians are juggling wide ranging responsibilities including cleaning, supervision, boiler checks, shipping and receiving, etc. At many sites, the time required for essential cleaning is in competition with a wide range of other urgent work requirements.
- Utility Custodians have essential work in ensuring the indoor air quality in schools. Where these positions have been eliminated, the work is downloaded onto staff with already heavy workloads. The work is being done by Head Custodians and by custodial staff on day shift, though they are not being paid as such and may not have a 4th Class ticket. This work is in confined spaces cleaning school filters.
- Schools have replaced full time Afternoon Custodians, Division A with part time Division B Custodial Assistants. This has happened over the past decade. It is unrealistic, and has resulted in Head Custodians doing more heavy duty cleaning, while their responsibilities as plant managers and supervisors have increased. This has resulted in a reduction in cleaning but also access of our schools to the public under the joint use agreement.
- The current number of permanent spare positions is not sufficient to be able to cover for sick leave. There are only 30 permanent spare positions (as of February 2006). We need more spare positions rather than replacing them with temporary staff that are not always qualified to replace them.
- Currently eight schools have only part-time head custodians. When the buildings are in use, the custodian present is responsible for air quality, heating plant operations, facility safety and cleaning. Part time custodians are under great pressure to work through breaks and unpaid overtime to maintain minimum standards.
- Inadequate levels of custodial staff have the result that contract workers, or worse, no staff at all, are used in a range of circumstances during some of the hours the facilities are in use – partnership schools, alternative programs, after-hours community and rental use. The consequence is erosion of cleaning standards, extra work for ESPB staff the following day and

security concerns.

- Medical and stress leaves, modified work and workplace injuries are all on the rise among custodial staff. This is a direct result of workload and staffing issues. Custodians working faster, juggling tasks and doing jobs for which they are improperly trained all lead to increased injury and illness.
- Many custodians promoted to Head Custodian are not provided adequate training to permit them to excel at their new responsibilities of managing the facility and directing other staff.
- When directed by the Collective Agreement to hire Charge Hands or Utility Custodians schools have done so but have cut other custodial positions as a result. What was supposed to have occurred was the hiring of extra help has resulted in schools cutting cleaning staff and thus increasing the sq ft of cleaning time above the 2500-3000 sq. ft. limit.
- Each summer we fall short of the spare or temporary replacement custodians required to help out with summer clean up. In some cases, since custodial staff have to take their vacations in the summer, this may mean that a spare or temporary custodian is required for up to six weeks in a given location. Each year we face a shortage of spare or temporary cleaning staff. While the appointment of these staff to schools is supposedly based on a first come first served basis, the result has been constant complaints from all schools about not having spare custodians for when they are needed. In order to resolve this perennial problem we would suggest that a joint union management committee be struck to review the process of assigning spares in the summer, review the last five years of summer help requests that were met or not met, and as a result develop a staffing plan for summer cleanup that would include spares, temporaries and extra help (such as overtime for some regular custodial willing to work on Fridays) as well as addressing when the bulk of staff are needed for cleaning.

In short, the Edmonton Public School Board has turned its attention away from custodial services, and as a result a number of problems plague this area of operations. Solutions do not necessarily require large amounts of new funding, but a more coordinated effort at standardizing cleaning services and centralized management of existing resources. The stated recommendations in this presentation and staffing formula, will bring about some resolution to the many problems we make reference to, but there are other solutions as well.

Recommendations:

- *Joint process to identify existing temporary positions which are more accurately classified as permanent.*
- *Additional training to be provided to staff whom are shifted to permanent.*
- *Increase the number of permanent spare positions to 50 to address temporary staff shortages.*
- *Ensure all schools have a full-time Head Custodian. 1 FTE, regardless of student population.*
- *Ensure Utility Custodians are employed with 4th class building operator certification in order to perform indoor air quality functions.*
- *Joint committee to explore the causes and solutions to increasing injury, occasions of stress leave and needs to accommodate return to work initiatives.*
- *The OH&S Committee needs to explore standards and means that will ensure healthy schools and work environments.*

- *Provide leadership training for Head Custodians on an ongoing basis, akin to regular training provided for principals.*
- *Joint Committee to review the past five years of summer cleaning requests, to look at which schools require spares, how many are needed, and to develop a staffing plan to meet the schools summer replacement requests.*

Appendix 1 – Standardization of Custodial Services Is Cost Recovery (2007)

A standardized delivery model for custodial services is required and not just for our work but for other services associated with cleaning and maintenance of district buildings. We will outline these in greater detail but before we do, allow us to point out this district is losing money by continuing to have a mixed delivery of services. This is based on two conflicting economic models; one is central funding and delivery of services and the other is cost-recovery.

The fact is, this district has a two tiered approach to school funding, some are centralized and guaranteed, and the others are delivered on a cost recovery model. While this may look good when it comes to book-keeping, in reality it creates have and have not schools. It does not allow for genuine cost recovery, which is what happens when you have standardized custodial staffing requirements per building, standardized utilities policies, standardized cleaning chemicals and supplies, standardized cleaning practices for carpet care, etc. Because you have standardized and centralized funding, these factors have a genuine reduction in costs, district wide, which translates as a savings to each facility.

For instance having a standard for bulk purchasing of supplies and equipment, allows us to reduce the dangerous and toxic cleaning chemicals we use. A standard set of chemicals district wide would be cheaper to each school, they would also facilitate better health and safety practice since we would also have a common Workplace Hazardous Information System that all custodial would know how to apply.

In regards to equipment it would allow us to centralize the purchase of equipment, and to make sure custodial cleaning equipment was properly allocated in each building as required, and that this equipment was maintained and replaced as needed. With modern logistics and warehousing software there should be no problem with a centralized purchasing and distribution of equipment to schools. Thus we know many large high schools need ride on automatic floor scrubbers, but only one of them have this equipment. Too often custodial equipment is an afterthought in a schools budget, even though they have been supplied with funds to make these purchases.

The cost recovery model of delivering services has been a failure when it comes to property management. It has never really worked nor can it work well since it fails to take into account that the buildings and physical plants are bricks and mortar. Cost Recovery, which is the root of Site Based Management, is aimed at alternate service delivery. When all the basics are covered supplemental or extra funds can be allocated on a Cost Recovery basis. Unfortunately in this district some important

basic services were allowed to be delivered on a Cost Recovery basis, which has led us to the crisis we face in our school's cleanliness and health.

To put it in perspective let's look at a dinner. The basics of dinner are meat, potatoes and vegetables. These need to be delivered to everyone at the table. This is centralization. However some people like an appetizer before dinner and some like dessert, these are not part of the main course so they can be delivered as options, thus Cost Recovery.

Where this district has gone off course with custodial services is that they are charging schools for their vegetables. This has led to the scattergun approach to custodial service delivery in schools that we pointed out back in 1995.

And everyone knows veggies are an important part of dinner. They are not an option. Custodial services are like that too. If you don't eat your veggies you get sick. If you don't have adequate custodial services in your schools, the students and staff get sick.

Centralization of custodial services does not contradict the importance of also having a mechanism of staff input. That's what School Based Management was supposed to be about, one aspect was financial, and the other was about having staff input into school operations. By centralizing custodial services we do not expect to lose the input factor, the team building paradigm inherent in Site Based Management. As a local we have proven this model works in our joint committees with the district, and we would see these as participating in all aspects of a centralized custodial services program.

We have shown the district over the past decade that this is a win-win model that involves the workers in policy setting and direction for the district. It has resulted in many advances in this district that are a model for other districts that do not have what we have.

This union and its members have asked, no, demanded to be at the table on all these issues. We have been an after thought in many cases. We accepted your invitation to participate in Site Based Management, but found that it did not work for our members at many sites. Some it did. But the fact that it did not succeed in many sites meant overall it was a failure of inclusiveness.

Site Based Management was embraced by those who promoted it and it was directed at and to; Principals and teachers. Non teaching staff was an afterthought. This is the paradox of the districts paradigm of education reforms for the past two decades, the ideas are driven not by real educational needs but by budgeting. The bottom line has deliver education reform in this district, no different than it has in any other district in North America. This district got through its funding short falls by adopting the mixed economy of centralized budgeting and cost recovery.

We have said this many times before, that educational reform, becoming a learning organization, an inclusive educational team, all that stuff, had little to do with the reality which was downloading funding short falls to schools. This district took the meat, potatoes and veggies off the plate, gave

schools money to buy them and appetizers and dessert. The only thing the district offered then was the plate.

So strictly on an economic basis we can say conclusively that Cost Recovery is a failure when it comes to keeping our schools clean and healthy. Real cost recovery can only occur in custodial services if we approach it on a standardized district wide basis with real input from the workers. That includes the following; custodial staffing, cleaning chemicals and supplies, utilities, carpet cleaning, summer clean up, equipment ever greening (purchase, maintenance and renewal), training, evaluation,.

We have several different departments delivering custodial services, these need to be centralized under a single Director, similar to Facilities. Furthermore, that Director should come from the industry and not from a teaching background. A joint union-management committee would select the successful applicant.

A separate facility, a closed school should then be used for our custodial training school as well as where custodial services would operate from. It is where spares would work out of, as well as the carpet cleaning and other operations. This facility needs its own equipment and equipment yard.

A district this size needs to have regular carpet cleaning done. Since it was a decision to carpet schools, their maintenance is paramount. Carpets hold more dirt than any other kind of flooring, and thus for health reasons need to be steam cleaned annually. Steam cleaning also extends the life of the carpet. We have one truck unit doing this with two custodial technicians, and while they are cleaning 1 million sq ft that is still not all district buildings. This occurs because this service is cost recovery.

Schools are trying to get their own custodians to do hot water extraction and buying extractors in order not to hire the carpet cleaning unit. This is not cost effective, the equipment does not do the job well and it is far more labour intensive than the truck mounted unit.

Instead what should be done is that the district should have 6 F.T.E. custodial Carpet Technicians and two trucks, with delivery guaranteed annually to all district buildings. That is the meat and potatoes. Currently we offer the lowest commercial rate in the city to clean carpets. Doing all the schools would reduce that amount. Extra cleaning on the other hand could be considered dessert and charged as cost recovery. But basic cleaning is a necessity and needs to be done annually.

Standardized delivery of custodial services would free up Principals from building operations to do what they do best, which is teach and lead teachers. That, after all, is their profession.

Appendix 1 - Other Staffing Issues Affecting Safety and Cleanliness (2007)

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This was not the first time custodial staff have had their hours or staffing components reduced to meet school or district fiscal needs. What has not happened over the past twenty years, is any real increase in custodial staffing. We have been cut so deeply that we are currently operating well over the 2500-3000 sq ft cleaning rate in most schools.

Staffing decisions made over the past two decades have created a number of stress points in Edmonton Publics Schools. The District has increased its number of facilities, student enrollment, support and teaching staff, central administrative staff, yet in contrast, custodial positions have been reduced. To aggravate this trend, the retention and recruitment of custodial staff will be challenged by competing interests and the attrition of highly skilled and experienced custodial personnel. Given the demographics of custodial personnel, the attrition rate due to retirement promises to further compound problems for the District in competing for and maintaining adequate staffing levels.

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plant managers and supervisors have increased. This has resulted in a reduction in cleaning but also access of our schools to the public under the joint use agreement.

- The current number of permanent spare positions is not sufficient to be able to cover for sick leave. There are only 30 permanent spare positions (as of February 2006). We need more spare positions rather than replacing them with temporary staff that are not always qualified to replace them.
- Currently eight schools have only part-time head custodians. When the buildings are in use, the custodian present is responsible for air quality, heating plant operations, facility safety and cleaning. Part time custodians are under great pressure to work through breaks and unpaid overtime to maintain minimum standards.
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- Medical and stress leaves, modified work and workplace injuries are all on the rise among custodial staff. This is a direct result of workload and staffing issues. Custodians working faster, juggling tasks and doing jobs for which they are improperly trained all lead to increased injury and illness.
- Many custodians promoted to Head Custodian are not provided adequate training to permit them to excel at their new responsibilities of managing the facility and directing other staff.
- When directed by the Collective Agreement to hire Charge Hands or Utility Custodians schools have done so but have cut other custodial positions as a result. What was supposed to have occurred was the hiring of extra help has resulted in schools cutting cleaning staff and thus increasing the sq ft of cleaning time above the 2500-3000 sq. ft. limit.
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In short, the Edmonton Public School Board has turned its attention away from custodial services, and as a result a number of problems plague this area of operations. Solutions do not necessarily require large amounts of new funding, but a more coordinated effort at standardizing cleaning services and centralized management of existing resources. The stated recommendations in this presentation and staffing formula, will bring about some resolution to the many problems we make reference to, but there are other solutions as well.

Recommendations:

- *Joint process to identify existing temporary positions which are more accurately classified as permanent.*
- *Additional training to be provided to staff whom are shifted to permanent.*
- *Increase the number of permanent spare positions to 50 to address temporary staff shortages.*
- *Ensure all schools have a full-time Head Custodian. 1 FTE, regardless of student population.*
- *Ensure Utility Custodians are employed with 4th class building operator certification in order to perform indoor air quality functions.*
- *Joint committee to explore the causes and solutions to increasing injury, occasions of stress leave and needs to accommodate return to work initiatives.*
- *The OH&S Committee needs to explore standards and means that will ensure healthy schools and work environments.*
- *Provide leadership training for Head Custodians on an ongoing basis, akin to regular training provided for principals.*
- *Joint Committee to review the past five years of summer cleaning requests, to look at which schools require spares, how many are needed, and to develop a staffing plan to meet the schools summer replacement requests.*

Appendix 1 – Budget Brief Green Cleaning (2008)

We are pleased to see that our initiatives over the past several years calling for a green cleaning program for our schools have finally reached fruition. The district is now addressing this matter through a joint committee. However, we remain concerned that with site based management, schools will still have the option of opting out and purchasing cleaning supplies from outside suppliers.

In order to affect a real green cleaning program, all cleaning supplies need to be purchased through the distribution centre after having been subjected to proper testing as proposed by the Green Cleaning Committee.

An enhanced effective Green Program would find advantage for our District if we engaged other school districts and encourage them to supply their needs with our cleaning materials. The work we do in the promotion of this area will save them time and money. Our efforts could go a long way in promoting endless replication by other districts.

If products we use can be shown to have been tested and properly vetted as part of a comprehensive green cleaning program, we may be able to expand the Districts serviced by our Distribution Center.

In this light, it would be counter productive to allow district schools to continue to purchase non-approved alternative products or spurious 'equivalent' products from outside sources.

Recommendations:

- *Our Green Cleaning Program will only be effective if all custodial cleaning supplies are purchased through the Distribution Centre.*
- *Custodial staff will be provided with training around the use of Green products brought into the district.*

Appendix 1 – Budget Brief - Custodial Department (2008)

No other school district in North America has decentralized its custodial operations except Edmonton Public. Custodial staffing and cleaning standards are seen as far too important to be left to the whims of individual school administrators. Since the cleaning of schools is a complement to the other maintenance required to maintain these valuable physical assets, they should be considered a District responsibility.

Under this model, are we serving the families of this District or have we failed to deliver quality cleaning standards that are required for the health and safety of students and staff and the longevity of our physical plants? After twenty years of site based management, we see the need to review the delivery of custodial services.

Local 474 believes it is time to remove custodial services from the school line budget, and return to a central department of custodial services.

Facilities as well as the carpet cleaning operations have a custodial consultant. They also provide the Mechanical Consultants who do custodial training around the 5th Class Power Engineering course. Consulting Services provides custodial consulting and training. Personnel have the Spares Board, a custodial mentor, hire custodial staff, provide health recovery for custodial staff, have Health and Safety consultants who work with the joint Health & Safety committee. Now the department also provides custodial training through Staff Development. Purchasing and the Distribution Centre coordinate the purchasing of custodial supplies and Equipment.

Each of these departments has different approaches to financing custodial services. Some are centrally funded with no cost to schools, others charge for services under the maintenance agreement and Consulting Services is Cost Recovery. Schools may or may not choose to purchase custodial supplies and equipment from the Distribution Centre. There is absolutely no consistency throughout the District in funding custodial services. This is wasteful and inefficient.

Along with a lack of fiscal consistency, there is a lack of consistency in coordination and delivery of custodial mentoring, training, and consulting services. Principals are at a loss as to who to call for which service. Supervision of custodial consultants and services are not done by those qualified in our field, but rather by Principals promoted into central administration.

Last year, we recommended the need for a single central Custodial Department with a qualified Director who had a custodial services background. That recommendation was accepted but not acted upon. We draw this issue to your attention again this year with the following recommendations.

Recommendations:

- *Custodial services need its own department which the district has agreed to in principle. This department needs to have its own qualified director who has experience in custodial services.*

Appendix 1 - Community Use (2008)

Greater amounts of community pressure are being placed on our schools to open up gyms for community use. With changes in the booking procedures used for accessing schools after hours

however, last year resulted in a lot of disruption for custodial staff trying to deal with both community use groups as well as rentals. The City of Edmonton now does the bookings centrally for all schools. The District is now awash in complaints, including; lack of central booking system which restricts the use in one person schools. The District is routinely requested to open up all school facilities that have afternoon shifts and with overtime for weekends or schools that have weekend shifts.

After hours use of our schools is admirable, however it is problematic for the custodial staff who oversee these groups while trying to clean around them. Cleaning schedules in schools do not account for the time required to take care of rentals or community use. (Another formula consideration)

The letter sent to Principals regarding custodial staffing, addresses this issue. The letter is sent with the notion that principals understand the actual time it takes to care for renters and community use groups. The reality is, many school administration need to be fully informed on the actual time it takes custodial staff to take care of rentals and community use groups combined with the disruption it causes to a cleaning schedule.

An advantage to Weekend community use of a school has the advantage of time for custodial staff to complete extra cleaning. Too often however, custodial staff are shorted on week end hours and not given sufficient time to cover weekend shifts when the school is in use. Planning needs to allot facilities for community use and direct the hours these will be used. Included in this plan must be adequate time for custodial to clean up after rentals in evenings and on weekends.

There is a disparity with some of the Christian Schools in our district. They came into our district to benefit from PMO funding, and to give them access to funding for much needed upgrades and repairs. However it is not a level playing field since several of them still maintain their own control over after hours use of their facilities.

Again, this situation cries out for district-wide standardization and centralization of planning to meet our responsibilities to ensure community use and access. The district has an obligation to meet its commitment to the Joint Use Agreement. This is not a school by school agreement, but a district obligation. The District needs a standardized plan to look at which schools can be used and which can't. Schools with no full-time head custodian, for example, or with only one head custodian, would not be available for after-hours use.

We know which schools have the most use, schools which currently may not be offering after hours use but could etc. We need our own Joint Use Committee in this district to review this and to advise Planning. That committee should be made up of the Custodial and Athletics Consultants as well as members of Leasing and Rentals in facilities, a Principal's representative and a member of the Local. Since the Athletics Consultant and the Leasing Director sit on the City Joint Use Committee, they would facilitate two-way communications. They would come up with a plan over the next year on how to deliver community access to our schools after hours, and to list which schools could or could not be used.

Like everyone in the educational community, CUPE 474 believes schools are community institutions. Opening our doors to community groups and activities are an essential part of making a school a part of its community. Local 474 supports the policy of broad community use. This is not to say there are no issues.

The District has altered its policies regarding community rental, and as a result community use continues to decline. Costs are higher for community groups, and principals are often reducing access due to reduce custodial service costs for night functions. This is short-sighted and damaging to the District's reputation in the community.

A decision by the Principal on community use of schools, rentals, etc. create a state of unease. Whether or not a school is open for community after hours use is not a matter of custodial staffing, except in those schools where there are only day shift custodians.

The benefits of community and outside use of schools are clear – but there are costs and responsibilities associated. Our research in 2003-2004 found a number of significant concerns related to community use of schools. These include additional work requirements, security, wear and tear, and damages.

Security concerns include: open doors, windows unauthorized entry into the school areas, exit doors not closed properly, problems with alarm systems and vandalism. Additional work and damage concerns include: black marks on gym floors, wear and tear in washroom areas, toilets blocked and breakage and equipment damage.

It is the position of CUPE 474 that many or most of these problems could be addressed by adequate staffing using our members to do the work in EPSB schools.

Unfortunately, that is not always the case, and related problems abound:

- Frequently weekend shifts are not covered by EPSB custodial. Where work is scheduled, the shifts are unrealistic, staff is expected to end shifts at the same time as rentals and community users leave.
- This year, schools cut rentals and community access to coincide with cuts to afternoon custodial hours of work. This is unrealistic and leads to our inability to honour the Joint Use Agreement.
- Schools are allowing unsupervised use of the school, which violates the Boilers Act and is a security and safety concern.
- Vandalism has increased because our schools are not being staffed at night. Schools used to be cleaned until 11:00 p.m., now they are closing earlier, making them more insecure and vulnerable to vandalism.

The District finds itself challenged to fill custodial positions with the current labour shortage in our city and across the province. Regardless of the positions to be filled by those requiring power engineering certification or day to day temporary custodial, we remain dangerously short staffed. This situation has been compounded by two decades of District cuts to custodial staff. We have done more with less for too long and the results have been devastating to our staff group. Increases in

health related problems, personal stress and injuries on the job are more common than at any other time in our history.

Appendix 1 - Joint Hiring Committee (2008)

The District finds itself challenged to fill custodial positions with the current labour shortage in our city and across the province. Regardless of the positions to be filled by those requiring power engineering certification or day to day temporary custodial, we remain dangerously short staffed. This situation has been compounded by two decades of District cuts to custodial staff. We have done more with less for too long and the results have been devastating to our staff group. Increases in health related problems, personal stress and injuries on the job are more common than at any other time in our history.

The routine cutting of utility and charge hand positions by principals to save money has not paid long range dividends. Had these positions not been cut in the first place, we would have had custodial staff in the district to fill them. By cutting these positions, there was no incentive for anyone to want to advance. Recent requirements under the collective agreement however, see some of these positions being reluctantly replaced. The District though, now finds itself unable to fill these positions either internally or externally.

Why would someone want to work for a District that is perceived to undervalue its work force? Why would someone who, with their power engineering certification and is able to work in the surrounding chemical industry as a process engineer, take a position with greater responsibilities such as, managing a school and cleaning staff for example, for the pay and benefits the Edmonton Public School District offers?

We face a similar situation with Head Custodians in larger schools and many schools throughout the District. When the pay differential is so minimal, afternoon custodian are reluctant to give up their position to take on more responsibility?

When Head Custodians are subject to the whims of site-based decision making that cuts their staff continually year after year and still expects the same level of cleaning to be done, it is not a challenge to be creative; it's an impossibility.

We suffer a lack of sufficient spare custodians to replace custodial staff who are ill, absent, or out looking for other work. The failure of this District, to hire the 50 spares we recommended over the last decade would have addressed this need. Now the District cannot reach this target even if it wanted to.

Temporary workers, who work day-to-day with no benefits and were knocking on our door two years ago, are now working elsewhere. Perhaps they are taking Tim Hortons offer of equivalent pay and benefits with positions of far less stress and expectation.

The district has failed to address the custodial staff shortage in any meaningful way because it has failed to adapt to the changes in the labour market. Instead of advertising in the Edmonton Examiner for custodial staff, they continue to put expensive ads in the Edmonton Journal Career Opportunities section on the weekends. This section is for corporate and executive positions, for professional

careers. This is not the section of the paper someone looking for a custodial job would normally look. Papers like the Edmonton Examiner and the Edmonton Sun reach folks who are looking for work in custodial positions. There are even specialty newspapers available for jobseekers distributed free in boxes around the city. But you will not find Edmonton Public advertising in their pages. These are lost opportunities to reach potential workers. This district refuses to adapt. No real staffing strategy has been developed or proposed to this Local to address the changing nature of custodial staffing.

For instance, while the district sponsors its own career fair to expose district students to future careers, it does not advertise itself as one of those careers. Why? The District has not advertised custodial jobs at the University, College or NAIT. The hours of work for our afternoon shifts would be perfect for students needing jobs. This District does not tap all its available resources.

The district needs to be visible at job fairs being held around the city. It needs to be aggressive and advertise the advantages available for custodial workers. The district is a unionized workplace with a benefit plan and custodial workers have job security. This message must be sent out. The district needs to cooperate with its CUPE locals and promote itself at job fairs.

Once upon a time, we had a building service worker program in our high schools that offered vocational training, but that was abandoned. It may be revisited and viewed as a viable alternative.

Norquest College has revived its Building Service Worker program and a member of Personnel sits on this advisory committee. We do not seem to be benefiting from the graduates of this program. If simply having someone on the advisory committee is enough, are we targeting these workers with information about the benefits of working for Edmonton Public Schools?

The district new tag-line Bright Futures Begin Here was recently introduced to the employees. This message should not only apply to students. This is the message to promote this District to job seekers.

Any solution to the labour shortage we currently face must be a new approach to hiring. Our greatest successes have occurred when we developed win-win strategies by working together. The problem is that our personnel department is not skilled in dealing with custodial hires because its mind-set is geared to hiring teachers. Personnel views hiring custodial staff no differently than hiring teachers. They are two completely different professions. And the people who qualify for custodial work do not read the careers section of the Edmonton Journal or Globe and Mail.

We need to have experienced custodial staff sitting on hiring committees. The District struggles to hire custodial staff and when they do, they too often hire unqualified people. Personnel sets the hiring bar for custodial staff so low and they reap the rewards. We cannot afford to have a revolving door for custodial workers which is what occurs when people without proper qualifications are hired.

Local 474 believes a joint hiring committee would be the best solution both for the short-term and the long-term in order to address the custodial staffing needs of our District.

Recommendations:

- *The district should be advertising for custodial positions in the appropriate sections of the local print media.*
- *The district should broaden its use of local print media to advertise for custodial positions.*
- *The district should develop a job fair display in cooperation with Local 474 to do outreach for custodial staff.*
- *The district should encourage post secondary students to consider custodial work.*
- *The district should offer a building service program for High School students.*
- *The district should review its relationship with the Norquest Building Service Workers program.*
- *Custodial hiring for the district should be done by a joint union district committee.*

Appendix 1 - Standardization and Modernization of Custodial Equipment (2009)

While Edmonton Public Schools have made every effort to incorporate the latest teaching related technology, this has not been the case with custodial equipment. Schools have been allowed to buy their own equipment without a professional assessment of school needs.

Schools continue to be dependent on old outdated custodial equipment. Custodians have been recycling used equipment among schools for twenty years. Custodians at individual sites have been told there is no money for custodial equipment so they have given up asking for it. This is clearly not a best practice!

In an era where attracting and retaining talent in every staff group is an identified priority of CEO's globally, treating custodial in the manner this administration has chosen is just bad business. A culture of learned helplessness has been fostered.

Imagine a school trying to access the internet and District technology services using a Commodore 64. This is the state of our custodial equipment. Modern cleaning technology has changed in the last decade. While in our schools, chemical delivery systems as well as cleaning equipment remain from the 1980s and 1990s. In some extreme cases equipment may even be from the 1970s. Modern advances in cleaning equipment reduce labour time, increase cleaning ability, and are more portable and light weight. Modern chemicals are more concentrated and use dilution pump systems that are wall mounted. Many of our schools have these units, many, however, do not. Chemicals are still poured out by hand using the old eye ball measuring method. Efficiency is lost and safety is compromised.

OH&S considerations should have carpet cleaning done using small dry vacuums that have bags and triple filtration. Our schools, however, are still using wet/dry vacuums that are large, cumbersome and hard to empty. They are also noisier than modern dry only vacuums.

Companies developing cleaning equipment are out there selling their products as the best, *but our District has no program in place to assess what is best for our schools.* Instead we use the word of mouth assessment method; a Custodian in one school gets a new auto scrubber and promotes it. Whether this is the best auto scrubber for the school or for other schools is not reviewed. The decision is based on which salesman visited what school and who bought it.

District assessments of what schools need for cleaning equipment and the provision of said equipment is what is needed to streamline this practice. Not all schools, for example, need propane burnishers. Many that do use them have equipment that is dangerous and harmful to students and staff as well as the environment because they are old and do not meet the current industry and environmental standards.

Many schools do not have auto scrubbers, and some have auto scrubbers that are twenty years old. Modern floor cleaning is no longer done with a mop and pail, except in many of our schools. Auto scrubbers clean floors, damp mopping merely spreads the dirt around. This is neither conducive to a healthy learning environment nor a healthy workplace.

The latest technological advances in auto scrubbers have produced a wide variety of sizes and capabilities that did not exist ten or twenty years ago. Today, Gel Pac battery-powered high speed burnishers are available that are less environmentally harmful and can be used on a wider variety of flooring.

We have schools reluctant to invest in this much needed cleaning technology. A centralized program could look at equipment testing and determine the school's assessed needs. It would allow for a more uniform provision of equipment across the District. It would also allow for better familiarity for Spare Custodians and other Custodial Staff who move from one school to another in their careers due to uniform equipment usage. The creation of a central inventory of custodial equipment would provide access for other schools or district departments. In addition, this would be more cost effective for the District in the long run.

Recommendations:

- Purchasing and supplying of custodial equipment needs to be standardized in order to supply all schools with the appropriate modern equipment.

Appendix 1 - Calgary Board of Education (2009)

According to the 2007 Kinnaird Planning and Research Ltd. Study of Operations and Maintenance Expenditures of Alberta School Districts:

EPS custodial workers ranked as cleaning the most square footage per hour compared to all other school districts in the province. Total cleaning area was 3098.47122 per hour per FTE for EPS custodial workers.

The provincial average was 2608.063379999999625 per hour per FTE.

In 2007 Calgary Board of Education had 571.55 FTE custodial for their district. EPS had 480.20 FTE CBE had 91.35 FTE more Custodial Staff than our district which meant they cleaned fewer sq feet per hour than our staff did. CBE custodial clean 2870.637705 per hour.

Expenditures on cleaning and custodial new equipment and tools were also well below the provincial average of \$0.22 per sq. m. EPS spent \$0.14 per sq m. (a sq. m is 10.764 sq.ft). When it comes to cleaning and custodial supply expenditures per unit area EPS comes second from the bottom spending only \$0.77 per sq m. while the provincial average is \$1.68 per sq.m.

Only two other school districts the much smaller Elk Island and Peace River public schools spent less than a dollar per sq m for cleaning and custodial supplies.

Total cleaning cost for our district is also below the provincial average; which is \$25.52 per sq.m. EPS cost is \$24.76.

Recommendations:

- *The majority of cleaning is done on afternoon shift and this is where staffing needs to be increased in all schools.*
- *All District schools 50,000 sq. ft. or less require at least 2.5 FTE Custodial Staff.*
- *District schools between 50,000 and 75,000 sq. ft. require at least 3 or 4 FTE Custodial Staff.*

Appendix 1 - Staffing Levels (2009)

While Custodial Staffing levels were agreed to in our last collective agreement, CUPE Local 474 has been largely left out of the formulation. The District's Personnel Department has taken on this project. Despite our efforts to pursue meaningful consultation, the opportunities have produced only modest results. This is contrary to the spirit of the letter of intent we agreed to during the last round of collective bargaining.

EPSB Personnel Department decided that Custodial Staffing could be addressed in two ways: by increasing staff, or by closing classrooms or unused areas of the school. This latter idea was not part of the letter of agreement. It is, in fact, an arbitrary decision of the administration in order to avoid the need to increase the Custodial Staff or hours of work in our schools.

Closing unused sections of a school does not reduce the cleaning required, since the whole school is still used. Reducing square footage does not translate into less cleaning demand on Custodial Staff. Students, other staff, parents and volunteers as well as leasee's all contribute to the dirt brought in. That dirt is then spread throughout the school whether a room is open or closed. Even closed rooms as well as mechanical, lights and filters collect dust and dirt over time.

The square footage formula of our schools does not reflect the real square footage that we clean. It fails to take into consideration the exterior areas of the school, stairs, exterior windows, sidewalks, parking lots, grass areas, flower beds, tarmacs, security, heating and cooling plants. All these areas are cleaned usually by the Head Custodian or another custodial worker.

By having site based staffing, the District leaders choose not to plan for Custodial Staff replacement nor provide adequate replacements for Custodial Staff missing from schools due to illness, vacation, leave of absence, WCB, overtime or time in lieu, or for any other absence covered under the collective agreement.

Because Custodial Staffing is not District-wide nor assigned by a Custodial Department, each school Custodian is at the mercy of the availability of a replacement in order to get training, professional development or to take time off work as covered under the collective agreement.

Some schools have imposed a “no overtime” rule when it comes to replacing Custodial Staff, meaning that the other Custodial Staff have to do the extra work, which places them in a stressful and ultimately unhealthy work situation.

In order to fully understand Custodial Staffing issues in the District, we also have to look at what the roles and responsibilities are for each component of a school’s custodial department. The Head Custodian, for example, is responsible for the total building operation including the heating and mechanical plant. Their Power Engineering certification is on the line if problems in a building’s physical plant should occur.

By this definition, the certified operator has major responsibility for the physical plant of the building - not the Principal, the Administrative Assistant, or even Facilities.

The importance of proper maintenance and supervision of a school’s heating plant cannot be exaggerated. Low water condition in overworked boilers can be considered bombs waiting to explode. Conditions such as this can occur if a computerized monitoring system fails. Mistakenly adding water in such an instance does cause explosions. Eighty per cent (80%) of all such boiler accidents are due to the failure of having trained operators to deal with this type of situation.

Our District recommends the best practice of checking on our boilers every two hours. In the case of extreme cold weather the union recommends that Custodial Staff check boilers in their schools at least once during the weekend. This is not regularly practiced in our District where, to cut costs, administration has attempted a twice daily check of boilers and replaced boiler operator checks with internet computer monitoring. When the site has no coverage, the employer is only supervising a heating plant once a day.

The Head Custodian is also responsible for a wide variety of non-cleaning work and duties in the school and exterior cleaning of areas around the school. The afternoon custodial have non-cleaning duties as well with community users. These are not usually defined as daily cleaning requirements. The actual classroom, washroom and daily cleaning that any Head Custodian on duty can do, regardless if they have other staff or not, is approximately two hours daily.

Without consultation we cannot know if these facts have been considered when the District calculated a staffing formula to address Custodial Staff reductions in our schools. In some schools which have a single Head Custodian, the work day has been simply cut from eight hours to six hours. Cuts were made to satisfy a bottom line and nothing more. CUPE Local 474 is willing to revisit the staffing formula issue to resolve this in a mutually beneficial manner.

Eight hour Division A Custodians who work on afternoon shift as well as part time Division B Custodial Assistants were seen as interchangeable over the past two decades. Cuts in Custodial positions were made and afternoon Custodians were replaced with less expensive Custodial Assistants. A Division A Custodian does heavy duty cleaning, works eight hours a day, and does the majority of cleaning during an afternoon shift. It is the afternoon shift that does the majority of cleaning in our schools.

Consultation would have helped in accurately calculating the real cleaning needs in our buildings. Cleaning time needs to be calculated based on the afternoon shifts, not the day shift. Ultimately the accurate cleaning needs of our schools should be the issue; not the bottom line of saving schools money in salaries and benefits.

It is puzzling why administration feels they alone can develop staffing formula to support the cleaning needs of any school without consultation. CUPE Local 474 would not presume to tell teachers or Principals how to teach students. It makes no sense to send a painter to perform heart surgery and equally no sense to develop staffing formulae for our schools without our Local's input.

To properly clean and maintain our schools, each school less than 50,000 sq. ft. requires 2.5 FTE Custodial Staff. That is a Head Custodian, an afternoon Custodian and a Custodial Assistant. The current staffing formula letter that has gone out to Principals from Personnel does not approach these numbers. Money is cited as the issue when we raise the issue of minimal staffing levels. The results of these cuts put cleanliness standards in our school at the mercy of the bottom line.

The local annually has to address arbitrary and non-consultative cuts in Custodial Staff in our schools. The majority of Principals do not consult when cutting Custodial Staff; they simply do it and announce it.

Our District practice seems to be the use of the Custodial Staffing formula to find ways *not to* increase Custodial Staff. Principals are trying to do anything but the right thing which is; meeting minimal staffing standards which was the purpose of the letter of intent in the collective agreement.

Bearing in mind the model employed in our approach to Personnel Services, our District needs to seriously consider developing a District wide cleaning standard that is centrally staffed and delivered with qualified personnel.

Appendix 1 - Budget Brief - Appropriate Technology and Training (2009)

Edmonton Public is a District that embraces computer technology for teaching, internal and external communications. In fact we are a wired district. Some Custodial Staff have access to appropriate computer technology but adequate training is lacking. Custodial Staff, in many schools, do not have access to computers in their offices. Some may have computer access but no printers. Some custodial offices do not even have a phone.

For ten years the District has developed and promoted technology. CUPE Local 474 was involved in the early discussions on District-wide computer use. Since that time, change in technology throughout the District has flourished. For Custodial Staff, technology improves at a glacial pace. Budgeting for custodial access to technology in schools is at best an afterthought. Schools will get the latest in Smart Board technology, while demanding that Custodial Staff access their email and the District's electronic information through the General Office or from a location like the school library where they compete with students for computer access.

All custodial offices should have appropriate technology: computers, monitors, printers, and, yes, even telephones. All Custodial Staff, not only the Head Custodians should have access to the

computer and email. So much information is communicated directly to schools via the District's Staff Room and email that anything less is unacceptable.

Three years ago in our budget brief, we recommended that Spare Custodians be equipped with the latest cutting edge technology, the Blackberry. They remain a group with no computer access in the District because they travel from school to school and may be in a different school each day. They have never been provided with any technological access to the District's website or email. At the time we recommended the use of Blackberry technology, but this proposal was dismissed as too expensive.

Within a year Blackberry use was more prevalent in the District. Today many central services staff have Blackberries but our spares do not. All spares should be provided with Blackberries which act as cell phones, as well as being able to access email and the District's web site.

Having the technology is not enough, however, a comprehensive training program for use of the Internet, email and Blackberry technology should be provided to all Custodial Staff District wide at no cost. This would greatly assist with many issues including red alerts, health and safety, working alone, internal communications from Personnel, and Superintendent communications.

Recommendations:

- *All custodial offices need to be equipped with telephones, computers and printers, internet access and email accounts and custodial should have adequate computer training.*
- *Custodial Staff who work alone need to be supplied with cell phones.*
- *Spare Custodians need to be supplied with Blackberries and trained on their use.*

Appendix 1 – Budget Brief - Custodial Department (2009)

While other school districts across the province and across Canada have adopted some aspects of site based management, no school district has allowed for site based assignment of Custodial Staff except Edmonton Public. The reason other Districts/Regions assign staff centrally is clear, schools need to be cleaned and the best way to assign staff for cleaning is by the size of the plant. When site based management is used to make staffing decisions, Custodial Staff are seen as expendable to meet the bottom line, cleaning thus suffers, and schools become run down.

Under the current model, we are failing to serve the families of this District and failing to deliver the quality of cleaning standards that are required for the health and safety of students and staff, and the longevity of our physical plants. After twenty years of site based management, we see the need to review the delivery of custodial services.

CUPE Local 474 believes it is time to remove custodial services from the school line budget, and return to a central department of custodial services. Facilities as well as the carpet cleaning operations have a custodial consultant. They also provide the Mechanical Consultants who do custodial training around the 5th Class Power Engineering course.

Consulting Services provides custodial consulting and training. Personnel have the Spares Board, a custodial mentor, hire Custodial Staff, provide health recovery for Custodial Staff, and have Health and Safety consultants who work with the joint Health & Safety committee. Now the department

also provides custodial training through Staff Development. Purchasing and the Distribution Centre coordinate the purchasing of custodial supplies and Equipment.

Each of these departments has different approaches to financing custodial services. Some are centrally funded with no cost to schools. Others charge for services under the maintenance agreement and Consulting Services is cost recovery. Schools may or may not choose to purchase custodial supplies and equipment from the Distribution Centre. There is absolutely no consistency throughout the District in funding custodial services. This is wasteful and inefficient.

Along with a lack of fiscal consistency, there is a lack of consistency in coordination and delivery of custodial mentoring, training, and consulting services. Principals are at a loss as to who to call for which service. Supervision of custodial consultants and services are not done by those qualified in our field, but rather by Principals promoted into central administration.

Once again, we recommended the need for a single central Custodial Department with a qualified Director who had a custodial services background who can work closely with site administration. That recommendation was accepted but not acted upon. We draw this issue to your attention again this year with the following recommendations.

Recommendations:

- *Custodial services need its own department which the District has agreed to in principle.*
- *This department needs to have its own qualified director who has experience in custodial services.*
- *The Custodial Department should include custodial, mechanical, health and safety, staff development consultants, mentors, Spare Board Supervisor and Spares.*

Appendix 1 – Budget Brief - Flood and Fire Clean Up (2009)

Two years ago, District schools faced major clean ups after record flooding. Custodial Staff in the district, along with the use of the truck-mounted carpet cleaning units, met these challenges.

Disaster clean up of both fire and flood is an extension of custodial services. Both are based on the same cleaning principles and we have District staff trained in disaster clean up both post flood and fire. Yet last year, we had three fires in District schools, and Facilities Services flagrantly violated the collective agreement by contracting out the post fire clean-up to an outside contractor. The contractor merely supervised the clean up, which was done by District Custodial Staff, and in some cases, Parent volunteers.

The local grieved this and won its grievance in interpretations. We would encourage all the Trustees to review this grievance. As a result, a post disaster clean up protocol was to be put in place. The slowness in the process of addressing this issue by Personnel resulted in another situation where Facilities contracting out fire clean-up supervision six months later at Delwood School. This situation happened despite CUPE Local 474's efforts to mobilize Custodial Staff for clean-up.

The point is; this District paid two times to have an outside company supervise our staff. This company did not clean - they merely supervised.

We have trained Custodians, trained Union Executive, and district Custodial Consultants/Mentor as well as Health and Safety Consultants who are all capable of doing this kind of supervision. There is no need in this district to contract out post flood or post fire supervision for clean-up. This is an extreme waste of District resources and shows the need for widening our training for post flood and post fire clean-up for all district Custodial Staff.

A firm protocol needs to be in place that cannot be ignored by senior administration in the case of future events. There should be significant consequences to either party for flagrantly disobeying the protocol and/or the collective agreement.

Recommendations:

- *Post flood and fire clean up will be done in-house using custodial and Health and Safety Consultants as Supervisors, and Spares and school Custodial Staff.*
- *District Custodial Staff will be trained in post disaster clean-up.*

Appendix 2

<http://www.dius.gov.uk/~media/publications/B/BIS-RP-006>

Appendix 2 - Economic Impact of Training and Education in Basic Skills

Summary of Evidence

National Research and Development Centre for adult literacy and numeracy Institute of Education, University of London BIS Research Paper No.6 C Institute of Education, University of London 2009

"People with higher literacy and numeracy skills earn more in the labour market than those with lower basic skills. The returns are over and above any general effect on earnings from a person's background, ability and qualifications."

"When the models are estimated over the entire population, workplace literacy programme participation is estimated to increase earnings by 17% (NHES) or 11% (CPS)."

"These studies point to 100 hours of instruction as the point at which a majority of adult students are likely to show educationally significant progress, and, therefore, it serves as a benchmark that identifies an effective programme. That is, if the majority of students are persisting for 100 hours or more each year, the programme is probably having a measurable impact on at least half of its students."

http://www.eric.ed.gov/ERICDocs/data/ericdocs2sql/content_storage_01/0000019b/80/41/e7/04.pdf

Appendix 2 - To Have and to Hold: Retaining and Utilising Skilled People.

A National Vocational Education and Training Research and Evaluation Program Report 2008

The study analysed retention and utilisation at the organisation level. Its focus is on the role of human resource management practices, including training and high-performance work practices, in enabling employers to retain and utilise the skills of their staff.

The report finds that the key driver for both skills retention and utilisation is the presence of a learning orientation in the organisation. People stay in organisations if they feel they are learning and progressing in their careers. Retention or utilisation of skilled people is not necessarily improved through strategies such as increasing wages, adopting family-friendly working policies, and the use of non-monetary rewards. These things help make people feel satisfied, but they are not sufficient to retain skilled people in a tight labour market. What does facilitate retention is the application of high-performance work practices such as a commitment to learning, open-mindedness and shared vision. More widespread adoption of these practices would benefit employers and workers alike. Training as part of an overall learning culture, particularly nationally recognised training, is also important in retaining skilled people and making better use of their skills. This also offers opportunities for registered training organisations to work with employers to improve retention and utilisation strategies for employees.

<http://www.eric.ed.gov/ERICWebPortal/contentdelivery/servlet/ERICServlet?accno=ED503833>

Job-Related Training and Benefits for Individuals: A Review of Evidence and Explanations. OECD Education Working Papers, No. 19, 2008 Employer-provided training is by far the most important source of further education and training after an individual enters the labour market. A substantial portion of these human capital investments are financed by firms and it appears that the contribution by individuals are in most circumstances relatively modest. At the same time, substantial gains for individuals participating in training are documented in a large number of studies. The benefits are not only confined to wage returns as research has also shown that training leads to increased internal employability and job-security; and external labour market effects such as higher labour participation rates, lower unemployment, and shorter unemployment periods. Training is not equally distributed among employees. Older, low skilled workers, and to some extent female workers typically receive less training than other groups of employees. However, we do not find any clear-cut evidence that returns to training varies with gender, educational or skills levels, which suggests that inequalities do not arise because of differences in returns to training, but are more a consequence of inequalities of the distribution of training investments. The findings of this review further suggest that the returns to training are higher in the case that it is financed by the employer and that the returns to training are substantially higher for those leaving for a new employer. Employer-financed training appears, however, to lower the probability of an individual leaving for a new job elsewhere. The analysis of the distribution of returns to training reveals that although individuals benefit from these investments, the employer reaps most of the returns to training which suggests that the productivity effects are substantially larger than wage effects.

<http://www.humec.k-state.edu/publications/2008/11/03/the-impact-of-employee-training-on-job-satisfaction-and-intention-to-stay-in-the-hotel-industry/>

Appendix 2 - The Impact of Employee Training on Job Satisfaction and Intention to Stay in the Hotel Industry

Training has been found to link with improving job satisfaction and employee intention to stay. The purposes of this research were to investigate the expectations and perceptions of training quality between hotel managers and employees, and to suggest implications for improving training quality and increasing training satisfaction, job satisfaction, and intention to stay among employees in the hotel industry. The conceptual model of this study was developed based on SERVQUAL and the Service-Profit Chain model. T-test showed that employees perceived low training quality, which suggested employees were not satisfied with training quality and that training quality needed improvement. Results of regression analysis showed that training was positively related to training satisfaction and job satisfaction. Job satisfaction led positively to intention to stay.

The indirect effect of training quality on intention to stay was mediated by job satisfaction. This study suggests more understanding of the importance of training quality and its consequences, and to pay more attention to employee training.

Reference Information: Chiang, C.F., Back, K., & Canter, D. (2005). The Impact of Employee Training on Job Satisfaction and Intention to Stay in the Hotel Industry. *Journal of Human Resources in Hospitality & Tourism*, 4(2), 99-118.

http://www.bellewether.com/Documents/Socio-economic_Impact_of_FrontlineWorkers.pdf

Appendix 2 - Socio-economic Impact of Building Emotional Intelligence in Frontline Workers

The Secretary's Commission On Achieving Necessary Skills, better known as SCANS, authored a report directed to the U.S. Department of Labor entitled, Learning a Living: A Blueprint for High Performance. This report was developed by representatives from Nations Bank, IBM, Motorola, GTE, Aetna, General Electric, RJR Nabisco, MCI, TGI Friday's, UAW/Chrysler and others.

According to the report, "Every American employer, public or private, large or small, local or global, must consider the human resources needed for high performance and high quality. Yet, today, American companies do much less training than some of our international competitors; in fact fewer than 10 percent of front-line American workers receive training of any kind."

They went on to say that this segment of the U.S. Workforce needs support in building the following five competencies:

- Resources: Identifies, organizes, plans and allocates resources
- Interpersonal: Works well with others
- Information: Acquires and uses information
- Systems: Understands complex inter-relationships
- Technology: Works with a variety of technologies

<http://data.bls.gov/cgi-bin/print.pl/oco/ocos174.htm>

U.S. Bureau of Labor Statistics

Appendix 2 - Occupational Outlook Handbook, 2010-11 Edition Building Cleaning Workers

Certification and advancement. A small number of cleaning supervisors and managers are members of the International Executive Housekeepers Association, which offers two kinds of certification programs for cleaning supervisors and managers: Certified Executive Housekeeper (CEH) and Registered Executive Housekeeper (REH). The CEH designation is offered to those with a high school education, while the REH designation is offered to those who have a 4-year college degree. Both designations are earned by attending courses and passing exams and both must be renewed every 3 years to ensure that workers keep abreast of new cleaning methods. Those with the REH designation usually oversee the cleaning services of hotels, hospitals, casinos, and other large institutions that rely on well-trained experts for their cleaning needs.

Advancement opportunities for workers usually are limited in organizations where they are the only maintenance worker. Where there is a large maintenance staff, however, cleaning workers can be promoted to supervisor or to area supervisor or manager. Some janitors open their own maintenance or cleaning businesses.

<http://www.ipacweb.org/conf/03/salyards.pdf>

Cleaning Up a Custodial Hiring Mess:

A Competency-Based Approach

Stephen Salyards, OPM

Shirley Plunkett, USPS

IPMAAC: June 23, 2003

Appendix 2 - Organizational Benefits

High face validity/applicant acceptance. High empirical validity and selection utility No adverse impact Perception of professionalism Dispels myth that "anyone can do this work"
Enhances internal recruitment for higher level skilled positions

<http://groupb.ca/files/BSW%20course%20descriptions%202006.pdf>

Servitech Training - Group B Services po box 5425 victoria v8r 6s4
250-920-9619 servitechtraining@shaw.ca page- 7 - SCHOOL CUSTODIAL TECHNICIAN TRAINING COURSE This program is designed specifically for custodial services staff employed in school facilities. Its objective is to train school custodial departments to recognized School Board industry standard. This course is a prerequisite to an application for employment in many school districts, and will shortly be a requirement or preferred qualification for many others.

The curriculum includes:

. Attitudes and motivation, communication, ground rules for custodians, public relations, time/motion management, time scheduling . Safety: bloodborne pathogen awareness, sharps safety, first aid measures, hantavirus awareness, safe lifting, fire safety . WHMIS That Works, for educational facilities . Chemistry: types of soil, chemical classifications, how chemicals clean, pH, disinfection microbiology, deodorizing, solution dilution, chemical safety . Cleaning procedures: individual and team cleaning, office cleaning, classroom, lab, workshop, cafeteria and gymnasium maintenance, restroom and shower cleaning, hard floor maintenance, vacuuming, carpet cleaning, trash handling, glass and mirror cleaning, wall washing . Use of technology, such as computers and email.

Servitech Training will customize this course to the needs of your individual School District.

It may be conducted in phases, to work in with custodial department schedules.

The course consists of 90% classroom instruction, including videos, demonstrations and class participation, and 10% hands-on training. Each student will be given for future reference a copy of the course manual, containing charts, diagrams, check lists and visual aids.

<http://www.norquest.ab.ca/programs/pre-apprenticeandindustry/bsw.htm>

Appendix 2 - Building Service Worker - Program Outline (2008/09)

Program of Study - 10 weeks

| Course Code | Course Title | Credits |
|-------------|------------------------------------|---------|
| • PRTD-1000 | Carpet and Upholstery Cleaning | |
| • 1.0 | | |
| • PRTD-1002 | Complete Floor Care | 2.0 |
| • PRTD-1003 | General Cleaning | 1.0 |
| • PRTD-1005 | Special Area and Washroom Cleaning | 1.0 |
| • PRTD-1075 | BSW Work Experience I | 1.0 |
| • PRTD-1133 | Health and Safety | 1.0 |
| • PRTD-1136 | General Repairs | 2.0 |
| • PRTD-1181 | Computer Communications I | 2.0 |

www.viu.ca/ccs/certificates/buildingserviceworker.asp

Centre for Continuing Studies | Vancouver Island University Building Service Worker Information Sheet. This intensive full-time, 70-hour, non-credit certificate program provides training in practical skills

<http://www.aohnjournal.com/showAbst.asp?thing=34282>

Appendix 2 – Feature Article: Promoting Personal Safety of Building Service Workers Issues and Challenges

AAOHN Journal, Vol. 54 No. 6 June 2006 Shelley I. Chen, MSc, CHRP and D. Lynn Skillen, PhD, RN, OHNC

ABSTRACT

This exploratory, descriptive study conducted at a large western Canadian university solicited perceptions of personal safety among building service workers who perform night shift work alone. Ten semi-structured interviews were conducted at approximately 10:00 p.m. or 7:00 a.m with a convenience sample of night building service workers in private or semi-private locations on the university campus.

Transcribed interview data were subjected to inductive content analysis using descriptive, interpretive, and pattern coding (Miles & Huberman, 1994). Results suggest that building service night shift workers are exposed to personal safety hazards in their physical and psychosocial work environments. In addition, culturally and linguistically appropriate delivery of safety training and education about policies and procedures is required for culturally diverse building service workers. Promotion of personal safety in this heterogeneous worker population requires due diligence, assessment, and advocacy.

ABOUT THE AUTHORS

Ms. Chen is Human Resources and Finance Consultant, Family Linkages Foundation of Alberta, Edmonton, Alberta, Canada. Dr. Skillen is Professor and Director, International Nursing Office, Faculty of Nursing, University of Alberta, Edmonton, Alberta, Canada.

<http://www.erudit.org/revue/ri/2005/v60/n4/012339ar.pdf>

Appendix 2 - Dignity at Work for Low Wage, Low Skill Service Workers

PETER BERG, ANN C. FROST

Relations industrielles / Industrial Relations, vol. 60, n° 4, 2005, p. 657-682.

Using responses from a telephone survey of 589 low wage, low skill workers in US hospitals, the authors investigate the workplace features that influence workers' perceptions of dignity at work. Results indicate that higher pay, adequate levels of staffing and resources, and access to training are the variables that are most closely associated with dignity on the job.

FAIR TREATMENT

People want to be treated fairly and with respect at work. Freeman and Rogers (1999), in conducting focus groups with low wage, low skill workers, found that many of these workers were confronted on a daily basis with capricious and disrespectful treatment from their employers. Because many of these workers felt expendable (and were told so by their managers in many instances on a regular basis), their anger at work grew.

One custodial worker reported the following message he had often heard from managers: In every job, mostly every job I've had, management always felt like there's too many people out there that need jobs for us to have to put up with you.

Well, you either do what we say, or we'll let you go and it wouldn't be hard to fill it in, you know. (Freeman and Rogers, 1999: 23) Scholars in both industrial relations and organizational behaviour have highlighted the importance of fair treatment on the job.

<http://www.seiu.org/2010/01/recovery-act-grants-help-seiu-grow-green-training-programs.php>

Appendix 2 - Recovery Act Grants Help SEIU Grow Green Training Programs

By Nick Prigo, SEIU 32BJ Thomas Shortman Training Fund, January 12, 2010

Last week, the U.S. Department of Labor announced \$7.4 million in green jobs training grants to SEIU Local 32BJ and H-Cap, a national partnership of SEIU healthcare unions and major employers. These two grants are part of the American Recovery and Reinvestment Act and will provide essential green training to help 5,200 Americans get jobs in expanding green industries over the next two years.

Training Green building superintendents

SEIU 32BJ's Thomas Shortman Training Fund will receive \$2.8 million to expand green buildings training in New York City. This grant, announced by Secretary of Labor Hilda Solis, will help train 2,200 NYC building superintendents in energy efficiency through better operations & maintenance (O&M). Energy Efficient O&M can reduce building energy use by 10% at low capital cost, making it one of the cheapest and fastest ways to reduce energy bills and greenhouse gas emissions. Of the 2,200 superintendents that receive training under this grant, 200 of them will also have the opportunity to attend advanced building training through the City University of New York.

32BJ's Mike Fishman, the President of the largest building services workers union in the country:

"High-impact, cost-effective labor-management programs like 1,000 Green Supers are vital to the success of President Obama's energy and environmental protection agenda. With nearly 80 percent of New York's greenhouse gas emissions produced by buildings it's imperative for owners, workers, environmental groups and the federal government to jointly tackle this environmental challenge."

Previous posts on 32BJ's green training initiative can be found [here](#) and [here](#). More information about this program can be found at www.1000supers.com.

Training service workers for Green Healthcare Jobs The Healthcare Career Advancement Program's (H-CAP) \$4.6 million green training grant will help create a new career ladder for 3,000 entry-level environmental service workers in four regions of the country: Los Angeles, Seattle, New York City, and the Baltimore/DC corridor. 1199SEIU and other Locals will serve as its lead partner to train and place workers in the health care field, and workers in environmental services (often called housekeepers) will learn methods for tracking and reducing the use of energy, water and waste.

Participants will also receive training in non-polluting cleaning technologies and have an opportunity to prepare academically for entry into more advanced and certified green occupations that are currently in development by their employers. Unemployed workers will receive pre-employment training in the new, green approach to environmental services. This project will support the green revolution in healthcare by reducing water and energy consumption and reducing the cost of waste disposal while making the healthcare industry a safer and healthier place for patients and workers alike.

Both DOL grants--32BJ's Green Buildings Initiative and H-CAP's training for emerging green jobs in the healthcare industry--are part of a larger Recovery Act initiative totaling \$500 million to fund workforce development projects that promote economic growth by preparing workers for careers in the energy efficiency and renewable energy industries. "This funding is exactly what the American Recovery & Reinvestment Act is all about - creating and sustaining jobs today and preparing for the jobs of tomorrow," said Senator Mikulski (D-MD).

The DOL's announcement last Wednesday awarded a total of \$100 million in grants to programs training workers for the green jobs of the future. On Friday, President Obama reiterated support for investing in clean energy technologies as part of his economic recovery package by announcing more than \$2 billion in tax credits for clean energy manufacturing to stimulate "green" job growth. The President Obama also called for doubling the production of alternative energy and retrofitting more than 75 percent of federal buildings and 2 million homes in the U.S. over the next three year

<http://www.appa.org/aboutUs/index.cfm>

Association of Physical Plant Administrators of Universities and Colleges.
Institute for Facilities Management

The Institute for Facilities Management is APPA's premier educational program. Designed as a four-track course of study, the Institute is held twice yearly and includes core programming in General Administration, Maintenance & Operations, Energy & Utilities, and Planning, Design & Construction. More on Institute for Facilities Management visit us today.

ANNUAL CONFERENCE APPA 2009: Focusing on the Critical Few - Vancouver, BC, Canada
INSTITUTE/ACADEMY/ The Institute for Facilities Management is a four-track core
SUPERVISOR'S TOOLKIT and elective week-long program (each) offered two times a year
(September and January).

The Leadership Academy is a four-track week-long program (each) offered annually in April.
Supervisor's Toolkit is a week-long program offered several times a year

<http://www.impomag.com/scripts/ShowPR.asp?PUBCODE=032&ACCT=0000100&ISSUE=0208&RELTYPE=PR&PRODCODE=0000&PRODLETT=C&CommonCount=0>

Appendix 2 - Trends in Facilities Maintenance: Tight Budgets, New Solutions

As budgets shrink in both manufacturing and non-manufacturing sectors, facility maintenance professionals have found new ways to cope. By Gabriella Jacobs, Contributor

Claud Kissmann, PE, CPE, a mechanical engineer in the physical plant/architecture and engineering section of the University of Texas at Austin, notes that much of the technology non-industrial facilities use today came from the industrial-plant maintenance sector. "But while maintenance practices are equally beneficial in both," he says, "priorities and performance indicators are different. In the industrial environment, performance indicators can verify results such as production increases or improved product quality in a relative short period of time. In the service industry, documenting improvements is not as pronounced and requires monitoring complex data over longer periods of time."

Indicators such as higher asset value if property is liquidated, increased productivity due to better indoor air quality, lowered sick-leave per units of work hours, and employee morale, are complex, says Kissmann. As a result, "The facilities profession is just beginning to tap the technology which will allow the data required to develop case studies and verification of these issues."

Paul Sheehy, CPE, a corporate industrial engineer at Douglas Battery Manufacturing in Winston Salem, NC, predicts that this complexity puts added focus on another challenge: commitment. "Preventive and predictive technologies remain the cornerstone of an equipment-reliability program," he says, "but it takes committed people to make them work effectively. I find most young individuals trying to get into this business do not possess adequate long-term desire to stick with it and see the long-term results of hard work."

Faced with reduced staffs, younger staffs and the lack of commitment Sheehy observes, employers often turn to outside providers to fill the expertise gap. Such firms often not only provide maintenance services for the client, but also teach the client's maintenance personnel how to perform their duties better and faster. Life Cycle Engineering in North Charleston, SC, for example, is one that has carved a niche by helping manufacturers and production companies with maintenance engineering, maintenance management and computerized maintenance management services.

Similarly, Boston, MA-based services provider VFA recently introduced its Facilities/Infrastructure Certificate Program. It offers two educational tracks with various levels of training and accreditation for planning and assessment. They include the Facilities Inspection Certificate (certifies participants in the technical facilities-condition-assessment methodology to gather and maintain accurate,

consistent, building and infrastructure conditions data) and the Facilities Planning Certificate (certifies participants to use facility and infrastructure condition data and technology in long-term lifecycle and capital asset planning). According to VFA, professionals who receive certification in one or both enhance data integrity and the validity of an overall, long-term, capital planning process.

Not-for-profit trade and professional organizations also have resources to help facilities maintenance professionals adapt to turbulent times. For example, the Association for Facilities Engineering (AFE), Cincinnati, OH, conducts Certified Plant Engineer (CPE) and Certified Plant Maintenance Manager (CPMM) programs on site at companies across the country. These programs supplement the usual CPE and CPMM training programs. Held several times a year, certifications are conducted at designated locations for representatives of any company or as an independent study/testing under proctored conditions at a candidate's own employer.

The four-year-old CPMM program helps define standards of competence for industrial, commercial and institutional maintenance management. Criteria for eligibility are three or more years of experience in plant engineering, facilities engineering, maintenance management or related and/or equivalent employment. Students must successfully complete a written examination that covers details in numerous categories, including maintenance management, preventive maintenance, inventory and procurement, work orders/work flows, computerized maintenance management, training, predictive maintenance, reliability-centered maintenance, total productive maintenance, and others.

At its annual national conference, Facilities America, held next month in New Orleans, AFE will for the first time offer not only credits for recertification in these two programs, but also Continuing Education Units. More information is available at www.afe.org.

Other not-for-profit sources of information include Ohio's University of Toledo, which last year introduced a Maintenance Management Certificate program. It can be obtained online at www.learningjourney.cc, or by attending on-campus seminars. The curriculum includes benchmarking maintenance management, performance indicators for managing maintenance, computerized maintenance management systems, achieving total productive maintenance and "zero breakdown" strategies.

Also last year, New York City Technical College in Brooklyn announced it had more than 100 students enrolled in its new bachelor of technology in facilities management degree program. According to a school spokesperson, the program was developed to meet growing demand for "well-educated facility managers with sophisticated expertise and management skills."

Appendix 2 - Green Existing Schools Implementation Workbook.

<http://www.usgbc.org/ShowFile.aspx?DocumentID=6427>

(U.S. Green Building Council, Washington, DC , 2009) Assists with the evaluation and improvement of current school operations and maintenance practices and policies. The workbook is organized by LEED for Existing Buildings: O&M prerequisites and credits, though not all prerequisites and credits in the rating system are addressed by the workbook. The guidance and tools contained in the workbook correspond to prerequisites and credits that lend themselves to a campus- or district-wide

application. The workbook includes sample policies, programs, plans, and surveys, along with data collection forms, worksheets, and tables. 108p.

LEED-EB Indoor Environmental Quality Credit 10.6 - Low Environmental Impact Cleaning Equipment Policy (1 Point) ?? Vacuum cleaners must meet the requirements of the Carpet & Rug Institute "Green Label" Vacuum Cleaner Criteria and be capable of capturing 96% of particulates 0.3 microns in size and operate with a sound level less than 70dBA ?? Hot water extraction equipment for deep cleaning carpets must be capable of removing sufficient moisture such that carpets can dry in less than 24 hours ?? Powered maintenance equipment including floor buffers, burnishers and automatic scrubbers must be equipped with vacuums, guards and/or other devices for capturing fine particulates, and operate with a sound level less than 70dBA.

?? Propane-powered floor equipment must have high-efficiency, low-emissions engines ?? Automated scrubbing machines must be equipped with variable-speed feed pumps to optimize the use of cleaning fluids ?? Battery-powered equipment must be equipped with environmentally preferable gel batteries ?? Active micro fiber technology must be used where appropriate to reduce cleaning chemical consumption and prolong life of disposable scrubbing pads ?? Powered equipment must be ergonomically designed to minimize vibration, noise and user fatigue ?? Equipment maintenance log must document the dates of equipment purchase and all repair and maintenance activities

Appendix 2 - Centralized Purchasing

<http://dictionary.bnet.com/definition/centralized+purchasing.html>

<http://www.citeman.com/577-centralized-versus-decentralized-purchasing-in-plant-operations/>

The issue of centralization versus decentralization of purchase function is basically concerned with decision about the purchasing policies defining the purchasing authorities and the resultant responsibilities. This issue is highlighted in the situations such as a single plant with diversified production, geographically scattered multi-plant with diversified production, geographically scattered multi-plant with single product, scattered multi-plant with diversified products, ubiquitous availability of basic raw materials etc.

Centralized purchasing is a method of procurement of all types of materials, supplies, equipment etc. through a single department (not necessarily centrally located) under the direct control and superintendence of one responsible person. He is directly accountable to the top management for all duties falling within the broad area of purchase function.

A single-plant company with centralized operating facilities readily recognizes the efficiency and profitability of those arising from the centralized purchasing. In a single-plant company with diversified products or in a scattered plant company with a single product, the issue of centralized purchasing would become relatively difficult.

However, in a scattered plant company with diversified products, the issue of centralized purchasing would become increasingly complex. The complexity will be directly related with the number of plants, size of the plant, geographical dispersal and diversification of product range.

Under the policy of centralized purchasing all types of purchases in a single-plant organization are made by the central buying section, who are authorized to decide on the sources of supply, negotiate with the vendor, place the order and instruct the mode of delivery. In a multi-plant organization with scattered plant locations, all purchases are made by the central buying section of the head office. In such organizations sometimes regional or branch purchasing agents are employed to make purchases in local markets. They are doing so under the superintendence and control of the centralized department.

Materials which are used by more than one plant are purchased by the centralized purchase department. If the sources of the suppliers are scattered, then the suppliers are instructed to canalize the deliveries at various centers on the basis of freight advantages available from such deliveries. In such organizations, the regional or branch purchase agents are allowed to buy the material from the local market if they are available and involve freight advantage. They are also authorized to make emergency buying. However, this should be restricted to the minimum. The degree of decentralization should be reduced to the minimum. According to Lee and Dobler, "97 percent or more of the purchasing is performed by the purchasing department, decentralization should not be considered a problem. However, the correct extent of decentralization must be determined for each firm from an analysis of the individual factors involved in its operations." Though centralization avails certain advantages, certain degree of decentralization is desirable under the following conditions:

1. Where the unit uses single natural raw material which is available at local markets, it is desirable to have decentralized buying. The price of such commodities fluctuates various markets, the grades differ as per the localized climatic conditions, the deals are completed through auction in local mandis e.g. cotton, tobacco, groundnuts etc.
2. Sometimes certain low-value technical items are obtained from local vendor. The exact specifications of the materials are decided after the series of trials and tests. The buyer has to himself in close touch with the vendor.
3. The purchases of some non-technical odd items are allowed to be purchased from local markets. The reason is that the cost of paper processing from placing an order sometimes exceeds the cost of such items.
4. Particular decentralization of purchase function would be highly desirable in a scattered multi-plant unit manufacturing diversified products.

For a large group company with multiple plants at several locations it is advisable to have both centralized and decentralized purchase. High value and large consumption items can be procured through centralized purchase for cost effectiveness whereas plant operating supplies, purchases can be decentralized and can be made to be procured by the plant as they are of day to day requirements.

Appendix 2 - Centralized versus decentralized purchasing in plant operations

Date Posted on May 25, 2006

Category Operations Management

The issue of centralization versus decentralization of purchase function is basically concerned with decision about the purchasing policies defining the purchasing authorities and the resultant responsibilities. This issue is highlighted in the situations such as a single plant with diversified production, geographically scattered multi-plant with diversified production, geographically scattered multi-plant with single product, scattered multi-plant with diversified products, ubiquitous availability of basic raw materials etc.

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