

FREDERICK COUNTY PUBLIC SCHOOLS		Reg. No. 200-5
Subject:	FURNITURE AND EQUIPMENT LISTS FOR ADDITIONS AND RENOVATIONS TO SCHOOLS	Date of Issue: 8/15/79
Preparing Office:	Office of the Superintendent	Amended: 9/11/02

I. Policy

II. Procedures

To assure that the equipping of new schools, additions and renovations is consistent with the design requirements and the intentions of the local and state authorities for school construction, the following procedures will apply.

A. Definitions:

1. Supplies

A supply is any article or material that meets any one or more of the following conditions:

- a. does not last more than one year;
- b. is better to replace than to repair;
- c. is not an independent unit.

Supplies are consumed in the normal course of business operations. Typical examples of supplies are paper, workbooks, tapes, cartridges, fuel, etc. Supplies may also include small equipment and furniture that would be replaced if defective, such as calculators, certain tools, plastic stools, etc.

2. Equipment

An equipment item is a movable or fixed unit of furniture or furnishings, an instrument, a machine, an apparatus, or a set of articles that meet the following conditions:

- a. lasts more than one year;
- b. is better to repair than replace;
- c. retains its original shape, appearance, and character with use;
- d. does not lose its identity through fabrication or incorporation into a different or more complex unit or substance.

3. Movable furniture and equipment

Movable furniture and equipment items are transportable from one location to another without appreciable damage or change to the location from which they are removed or to the location where they are installed. They do not function as

integral parts of the building or grounds and are not permanently fastened or attached to the building or grounds. A piece of furniture or equipment that is simply bolted or screwed to the floor, such as a heavy lathe or desk, which can be moved as a unit once these bolts have been removed is "movable furniture or equipment."

Movable furniture and equipment is not eligible for State funding. These items should be shown on the construction documents and identified as:

- a. "Not in Contract" (N.I.C.)
- b. As an add alternate(s) for local funding, or
- c. The project architect or construction manager shall identify and list (including the quantity) the ineligible items in the bid documents and require that apparent successful contractor to provide the unit price and total cost within two (2) working days after the apparent low bidder is notified.

4. Built-in or fixed equipment

Built-in or fixed equipment shall be indicated on the drawings and in the specifications for construction. Built-in equipment is either built into buildings or into grounds.

Equipment that is built into buildings consists of items that are integral parts of buildings. That is, the equipment is permanently fastened to the building, functions as part of the building, has a useful life approximately equal to that of the building, and causes appreciable damage to the building if removed. Examples of such equipment are:

- walk-in refrigerators and freezers
- bulletin boards
- counters
- basketball backboards
- building service systems, such as ventilating, heating, lighting, communication, and water systems

Equipment that is built into grounds consists of equipment items that are permanently attached to the grounds and function as part of the grounds. Examples of such equipment are:

- flagpoles
- gates
- goal posts
- underground storage tanks that are part of a building service system.

5. Educational Specifications

The educational specifications describe the proposed educational activities, the performance expectations for the supporting facilities and is a record of the decisions made by the project planning committee. The document serves two purposes. It is the basis for reviewing the proposed schematic design and a tool for evaluation after construction and occupancy. The educational specifications may be modified during the planning process. Issues may arise and new decisions may be made that necessitate amendments to the specifications.

6. Prototype Furniture and Equipment List

The prototype furniture and equipment list is a comprehensive list of movable furniture and equipment, maintained on an ongoing basis by the purchasing department. It is kept up to date reflecting current curriculum standards, market price fluctuations and manufacturer model changes. The prototype list is not project specific. There are three lists: elementary, middle and high. The purpose of the prototype list is to develop and maintain a standardized list of furnishings and to establish equipment budgets in the construction fund. The modified prototype list serves as the first draft document of the final furniture and equipment list for a project.

7. Final Furniture and Equipment List

Subsequent to approval of the educational specifications by the board, a more detailed list of movable furniture and equipment required for a new school, or an addition and renovation to an existing school, shall be developed by the principal and the instructional director and submitted to the board for their approval. It is project specific. This is the list that the purchasing department will utilize for bidding and ordering purposes. This document is subject to minor modifications prior to bidding/ordering.

B. Using the Prototype List for Budget Development

1. The budget allocation for movable furniture and equipment for a construction project will be based on a prototype furniture and equipment list, adjusted for student capacity, program and size of the building. Other factors specific to each project will also be taken into consideration when determining the budgets. This applies to renovation projects as well as new construction with the additional criteria to include a deduction for reusing existing furniture and equipment. If existing equipment is retained, the instructional directors and/or curriculum specialists must first assess equipment condition as satisfactory. These prototype lists will be maintained in the purchasing department and updated with the advice of curriculum specialists, supervisors, and instructional directors.
2. The application of adjustment factors to establish a budget will be performed by a committee to include representatives from the facilities department, purchasing department, and the instructional division.

3. The purchasing department is responsible for maintaining the prototype furniture and equipment lists.
4. On an ongoing basis, curriculum specialists and department supervisors shall notify the purchasing department in writing of any changes in their curriculum or programs that affect the furnishings required in their areas. In this way, a standardized list of approved furnishings will be maintained at all times. The prototype lists should be reviewed periodically to ensure they reflect the most current costs and curricula.
5. Copies of the prototype lists will be made available in electronic format using the current Frederick County Public Schools standard database software program. Changes will be accepted in electronic format or on paper copy.
6. The budget for media materials will be determined by the executive director for media services. It will be based on State standards and the recommended guidelines for a high school collection in cooperation with the principal and the executive director of facilities services. Average prices, based on local and national statistics, as well as new school library media collections from other Maryland school systems, will be used to calculate the proposed allocation. This proposed calculation will include the general collection (fiction/non-fiction), reference collection (print and online databases), video resources, automation software, periodicals, newspapers, and specialized media supplies.
7. The budget for start up supplies and textbooks shall be from the general operating budget and established through the normal annual budget process. The instructional directors or designees shall coordinate the specific appropriation request. In case of a renovation, an appropriation for start-up supplies and textbooks is not automatic.
8. The executive director of facilities services will notify the principal in writing of the allocated budget for media materials and movable furniture and equipment. The budget department will notify the principal of the budget for start-up materials and supplies.
9. The equipment budget will cover any costs for the principal's discretionary rental of storage containers associated with the delivery and move-in of the furniture and equipment. The furniture and equipment budget also will be used to cover any salaries associated with staff to coordinate receipt and distribution of furniture and equipment prior to occupancy.
10. Recognizing that every renovation project is unique in scope when a school is involved in a major renovation that impacts a major instructional area(s), the school leadership team may request additional per diem day(s) from the appropriate associate superintendent to move to a new location. The number of scheduling days needed will be determined by the construction timeline, area of the building being renovated, how the renovation impacts instruction, and the specific needs of the project.

11. For renovation projects where packing and moving existing equipment by school-based staff or third party contractors is anticipated, the cost shall be budgeted as a capital construction cost associated with the project and shall not be charged to the equipment budget.

C. Preparation of Final Furniture and Equipment Lists

Approximately ten (10) months prior to completion of construction, the purchasing department will distribute a copy of the modified prototype list for the specific project used as the basis for the budget. Curriculum specialists and supervisors will be requested to review the list of furnishings in their area/discipline and make any addition/deletions/updates as appropriate for the project and submit them to the purchasing department. The curriculum specialists and department supervisors shall approach the final list based on the guidelines listed below as well as the program requirements for their subject areas.

1. If the curriculum specialists and supervisors have been maintaining the prototype list on an ongoing basis, few changes should be necessary.
2. The appointed principal shall perform the primary review/modification of the list of furnishings needed for non-subject related areas, such as the cafeteria, guidance and administration offices. The appointed principal is responsible for overseeing the review process for all disciplines and areas of the building.
3. If making changes, the curriculum specialist and department supervisors must first consult with the school principal or designee prior to submitting their lists to the purchasing department. This is especially important in renovation projects due to the complexity of equipment coordination and existing school based programs.
4. The furniture and equipment list shall be consistent with local guidelines differentiating between supplies and equipment. Only equipment items are eligible for inclusion on the equipment list.
5. The facilities department and the purchasing department will maintain, and share with the curriculum specialists and supervisors, a list of movable equipment included in the construction contract such as telephones, clocks, chalkboards, etc. to prevent duplication.
6. The purchasing department is responsible for review and pricing of the updated final list. The role of the purchasing department shall be to determine completeness in description and whether sufficient information has been provided for preparing a bidding document.
7. In the event that the equipment list totals more than the fund allocation, a determination will need to be made by the principal regarding whether to delete items from the equipment list at this time or allow the priority of each item to be the basis of deletion after the bidding documents have been returned and analyzed for final pricing.

8. After the principal has approved the equipment list, it shall be submitted to the executive director of fiscal services for presentation to the facilities and finance committee of the board of education. Approval by the facilities and finance committee is required prior to review and approval by the board of education.
9. Once the equipment list has been approved by the board of education, it will be made available for distribution by the purchasing department to the curriculum specialists, department supervisors, facilities manager and others upon request.
10. Based on the approved equipment list, the purchasing department shall be responsible for following the procurement procedures as well as preparing the requisitions charged against the appropriate school construction fund codes. The purchasing department is also responsible for establishing a plan for receipt of equipment and expediting purchase orders.
11. With the amount of planning and approvals required on school equipment lists, only minor modifications should be necessary after the list has been approved by the board of education. The selection of a different type of equipment due to changes in technology or additional items to those already approved by the board of education shall require additional approval by the board, if deemed significant by the purchasing officer. Adjustments downward to bring the equipment lists in line with the approved local funding shall not require the board's approval.
12. The facilities department shall check with the purchasing department as to the status of furniture and equipment orders and obtain the principal's authorization before initiating a transfer of funds from the equipment budget for any purpose.
13. In the event that the available funding is less than the actual cost of all the items to be purchased, the principal shall revise downward the number of items based on prioritization. The principal has final decision making authority but is encouraged to discuss any deletions or quantity adjustments to the list with the requesting curriculum specialist or supervisor in advance.

Approved:

Original signed by

Jack D. Dale
Superintendent