

940 – Public School Facilities Authority File Plan

This file plan was developed to be a guide for Public School Facilities Authority employees. This guidance document was created to ensure consistent records classification and to provide agencies with other relevant record information. The final disposition authority resides in the Functional Records Retention and Disposition Schedule (FRRDS), 1.21.2 NMAC.

This file plan only list records series of program's specific to the Public School Facilities Authority. For records series of a general administrative nature, refer to the General Administrative Records File Plan. For records of a financial nature, refer to the General Financial Records File Plan. For records of a personnel or medical nature, refer to the General Personnel/Medical Records File Plan.

940-001 RADON AND ASBESTOS MANAGEMENT PLAN FILES:

Division/unit: Deficiencies correction

Maintenance system: Chronological by calendar year, then alphabetical by school district name

Record series content: Records relating to radon and asbestos testing of all public schools. File may contain results of OSHA review, required lab tests, lab studies, radon and asbestos management plans, correspondence, etc.

Classification: 1.21.2.467 NMAC, Asbestos

File closure: Close of calendar year in which created

[New - 03/31/2021]

940-002 to 940-010

940-011 SCHOOL IMPROVEMENT PROJECT FILE:

Division/unit: Capital outlay

Maintenance system: Alphabetical by school district, then school name, then numerical by project number

Record series content: Record concerning memorandum of understanding submitted to PSCOC for approval of deficiencies correction and capital outlay projects. File may contain memorandum of understanding, (project name, project number, approval request, scope of work, justification for project, budget information, schedule of events, management and supervision authority, required signatures), attachments, completed asbestos tests, copies of blueprints, school approval memorandum, final approval from PSCOC, approval letter from committee on concerns for the handicapped and energy minerals and natural resources, approval letter from PSCOC, on-site construction managers recommendations, construction record concerning renovation projects for correcting existing health and safety deficiencies in the public schools, correspondence, etc.

Classification: 1.21.2.132 NMAC, Construction Project Files - Capital Projects

File closure: Date project completed

[New - 03/31/2021]

940-012 CAPITAL OUTLAY ALLOCATION AWARD FILE:

Division/unit: Capital outlay

Maintenance system: Alphabetical by name of school district, then name of school

Record series content: Records concerning monies allocated through the legislature to build additions to school facilities or renovate and improve existing school facilities. File may contain school application for funds; description of school presentation as to what the project consists of, reason and amount of monies requested; allocation award letter, on-site construction manager recommendations, final approval from PSCOC, letter of acceptance from school district, correspondence, etc.

Classification: 1.21.2.326 NMAC, Annual Budget

File closure: Date project completed
[New - 03/31/2021]

940-013 SCHOOL IMPROVEMENT PROJECT SYSTEM:

Division/unit: Capital outlay

Maintenance system: Numerical by primary key

Record series content: System monitors and tracks statewide capital outlay and deficiency corrections monies approved for all public school districts in New Mexico. Data include description of school improvement and renovation projects to be completed, amount allocated for fiscal year, name of school district, name of school, monies requested and awarded for each individual school districts building project, description of building project, letter of approval date, amount of monies awarded, etc.

Classification: 1.21.2.326 NMAC, Annual Budget

File closure: Date project completed
[New - 03/31/2021]

940-014 AWARD ALLOCATION FILE:

Division/unit: Capital outlay

Maintenance system: Alphabetical by school district, then color-coded by name of fund

Record series content: Records concerning monies from individual funds awarded to school districts for school improvements, renovations, new construction, and health and safety issues. The four funds included are: *deficiencies corrections* fund; *capital outlay* fund; *direct appropriations* (legislative monies) fund; and *local general obligation* (city) fund. File may contain name of project, description of project, name of school district, name of individual school, amount of money awarded, from fund which money awarded, etc.

Classification:

(A) **Deficiencies correction:** 1.21.2.326 NMAC, Annual Budget

(B) **Capital outlay:** 1.21.2.326 NMAC, Annual Budget

(C) **Direct appropriations:** 1.21.2.304 NMAC, Account Transfers

(D) **Local general obligation (bond):** 1.21.2.304 NMAC, Account Transfers

File closure: Date project completed
[New - 03/31/2021]

940-015 to 940-020

940-021 PSFA INVOICING SYSTEM:

Division/unit: Construction management

Maintenance system: Numerical by project number

Record series content: Financial system used to track funds approved by the PSFA review department and PSCOC for capital outlay projects. Data include amount encumbered, project number, purchase order number, corresponding financial information, assigned PSFA construction manager, etc.

Classification: 1.21.2.309 NMAC, Ledgers

File closure: Close of fiscal year in which created
[New - 03/31/2021]

940-022 BIDNET SYSTEM:

Division/unit: Construction management

Maintenance system: Numerical by primary key [alphabetical by project name, then chronological by date]

Record series content: System monitors and tracks status on proposed and approved bids, requests for proposals submitted electronically for school improvement or renovation projects. Data include name of

school district, scope of project, project start date, project completion date and name of assigned project manager, commentary on proposed project by initiating agencies.

Classification: 1.21.2.346 NMAC, Bids, Proposals and Quotes

File closure: Date project completed

[New - 03/31/2021]

940-023 CIMS (CONSTRUCTION INFORMATION MANAGEMENT SYSTEM):

Division/unit: Construction management

Maintenance system: Chronological by project number, then by type of fund

Record series content: System monitors, tracks and provides information on funding for all capital outlay projects in New Mexico school districts. Data may include RFI, RFQ, BIDS, RFP, project cost, project time estimates, mock print drawings, blueprints, support documentation, correspondence, daily usage reports, monthly usage reports, progress reports, daily logs, uploaded architectural drawings, project specifications, weekly construction schedule, messages posted and answered, correspondence etc.

Classification: 1.21.2.132 NMAC, Construction Project Files - Capital Projects

File closure: Date project completed

[New - 03/31/2021]