

Staffing & Quality-Control Plan

Reusable operating standard | Tailor the account appendix before launch

OWNER	Maximus Garcia, Owner & Managing Member
APPLIES TO	Recurring commercial cleaning, day-porter, project cleaning, and facilities support
VERSION	1.0 August 20, 2026
CONTROL	Master plan; client-specific schedule, scope, and standards govern each account
OPERATING PRINCIPLE The contract defines what must be done. The staffing plan assigns ownership. The quality system verifies the result, corrects deficiencies, and improves the account over time.	

01

Account operating model

Role	Core responsibility	Escalates to
Owner / account lead	Client relationship, contract interpretation, pricing/change approval, executive inspection, major escalation	Client authorized representative
Site supervisor / working lead	Shift coordination, task allocation, access, supply/equipment readiness, first-level inspection, issue logging	Owner / account lead
Cleaning / porter staff	Assigned tasks, self-check, logs, safe equipment/chemical use, immediate condition reporting	Site supervisor
Approved subcontractor / partner lead	Assigned partner personnel, documentation, schedule, safety and scope compliance	Owner / account lead
Specialty provider	Licensed or specialized work under separate approved scope	Owner / client, as contract directs

No role may approve a material scope, price, staffing, contract, insurance, or compliance change unless authorized in writing. The owner remains the external escalation point unless the account plan names another person.

02

Mobilization gate

Gate	Required evidence	Owner
Contract	Executed agreement or purchase order; final scope; price; start condition; change control	Owner
Compliance	W-9; holder-specific COI; required WC/disability evidence; adopted policies; client forms	Owner
Site	Addresses, hours, access, security, parking, utilities, storage, emergency contacts	Account lead

Gate	Required evidence	Owner
Scope	Area/task/frequency matrix, exclusions, supplies, equipment, acceptance standards	Account lead + client
People	Roster, roles, schedules, backfill contacts, orientation and training records	Supervisor
Baseline	Authorized inspection, known conditions, open issues, sensitive/restricted areas	Supervisor + client
Launch	Task cards, logs, communication test, first-week inspection schedule	Supervisor

NO-LAUNCH RULE

Do not deploy staff based only on an email or verbal understanding when the scope, price, access, responsible supplies, insurance/compliance conditions, or authorized start is unresolved.

03

Staffing design and schedule control

Build staffing from the scope and service windows, not from a generic headcount. For each account, estimate productive hours by zone and frequency, then add supervision, setup/closeout, travel within the site, scheduled project work, and reasonable relief coverage.

Planning input	Account decision
Facility and occupancy	Area, use, public/patient/student/member traffic, operating hours, events, critical zones
Task demand	Daily, shift, weekly, monthly, quarterly, seasonal, and project tasks
Constraints	Access windows, elevators, alarms, restricted rooms, noise, loading, parking, storage
Work design	Zones, routes, team overlap, inspection ownership, communication method
Continuity	Call-out reporting, backup source, protected services, client notice, documented gap
Cost controls	Approved hours, overtime authorization, supplies, travel, partner rates, scope-change triggers

Account staffing schedule

Role / person	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Hours
[ROLE / NAME]	[]	[]	[]	[]	[]	[]	[]	[]
[ROLE / NAME]	[]	[]	[]	[]	[]	[]	[]	[]
[ROLE / NAME]	[]	[]	[]	[]	[]	[]	[]	[]

04

Call-out and backfill procedure

- Assigned worker notifies the supervisor through the approved channel as soon as the absence is known.
- Supervisor records the role, shift, notice time, reason category (without unnecessary medical detail), and critical tasks at risk.

3. Supervisor contacts approved backup personnel or partner lead and protects opening, restrooms, public-facing areas, events, waste, and other client-designated priorities.
4. If the absence may materially affect service, the account lead notifies the authorized client contact with the coverage plan and any limitation.
5. Supervisor documents actual replacement/coverage, tasks deferred, recovery work, and service verification.
6. Repeat or structural gaps are reviewed for schedule, roster, training, partner capacity, or pricing changes.

05

Training and assignment readiness

Training element	Minimum record
Company and conduct	Orientation date, trainer, attendance, respectful conduct, client interaction, escalation
Site and security	Access, keys/badges, alarms, restricted areas, emergency contacts, incident notice
Scope and standards	Assigned zones, task frequency, acceptance standard, exclusions, client-supplied items
Equipment and chemicals	Equipment-specific instruction, labels/SDS access, dilution/contact time where applicable, PPE, surface compatibility
Safety	Slip/fall controls, lifting, electrical awareness, sharps/unknown waste avoidance, stop-work and reporting
Policies	Required harassment, workplace violence/GBV, confidentiality, wage/timekeeping, and procurement-specific training

ASSIGNMENT RULE

A worker should not be assigned independently until the required site and task orientation is documented. Training must match the actual service; a general orientation is not a substitute for site-specific instruction.

06

Quality-control cycle

Layer	Who	When	Evidence
1. Self-check	Assigned worker	Each shift / task	Zone/task card, restroom or service log where required
2. Working-lead check	Supervisor	Per schedule and priority	Inspection result and immediate correction
3. Account inspection	Owner / account lead	Launch weekly, then risk-based	Scored inspection, photos only if authorized, action log
4. Client feedback	Authorized contact	Service review cycle	Requests, complaints, compliments, priorities
5. Trend review	Owner + supervisor	Monthly / quarterly	Repeat issues, staffing, scope, supplies, equipment, corrective actions

Recommended scoring: define account-specific critical items and weights before launch. A simple 0-2 scale may be used: 0 = deficient, 1 = partially meets standard, 2 = meets standard. Do not report an unsupported percentage if the inspection form or sample is incomplete.

07

Issue priority and corrective action

Priority	Definition	Control response
P1 - Immediate	Safety, access/security, critical opening, active leak/damage, or severe service condition	Protect people/property, notify authorized contacts, escalate specialty response, document actions
P2 - Material	Occupied/public-facing deficiency or repeated missed critical task	Assign correction in agreed window, verify, report cause if repeated
P3 - Routine	Noncritical deficiency, request, supply/equipment issue, improvement item	Schedule, track, verify, include in routine report
Change	Condition reveals added area, frequency, labor, supplies, specialty work, or legal requirement	Do not absorb silently; document and route for written scope/price decision

08

Operating logs and reports

Record	Required fields	Retention / control
Daily service log	Date, shift, assigned staff, areas, exceptions, supplies, incidents	Account file; supervisor review
Inspection	Date, inspector, location, standard, result, evidence, action	Account file; trend review
Corrective action	Issue, priority, owner, target, action, verification, closure	Open until verified closed
Staffing / backfill	Scheduled/actual, absence, notice, replacement, tasks at risk, recovery	Monthly account review
Work order	Requester, date/time, location, description, authorization, owner, cost status, completion	Open-item and cost report
Incident	Known facts, persons notified, immediate controls, follow-up; no speculation	Restricted access; insurer/counsel routing as needed
Training	Person, topic, trainer, date, materials, acknowledgment	Personnel/compliance file

09

Monthly account review

- Service delivery: completed tasks, exceptions, project work, and client priorities.
- Quality: inspection results, P1/P2 issues, repeat deficiencies, root causes, and closure age.
- Staffing: scheduled versus actual hours, absences, backfill, overtime, training, and continuity risk.
- Supplies/equipment: usage, stock-outs, damage, maintenance, and responsibility disputes.
- Commercial: approved extras, open quotes, scope changes, invoice status, and cost drivers.
- Safety/compliance: incidents, policy/training deadlines, COI or registration renewal dates, subcontractor files.
- Improvement: owner, due date, success measure, and next client review.

10

Account appendix - complete before mobilization

Field	Complete before release
Client / facility	[]

Field	Complete before release
Contract dates	☐
Authorized contacts	☐
Critical services	☐
Inspection cadence	☐
Client reporting cadence	☐
Backfill contacts	☐
Emergency / incident route	☐
Site-specific training	☐
Approved forms / systems	☐

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