

# Massachusetts School Building Authority

## Maintenance and Capital Planning Record

The Maintenance and Capital Planning Record is one of the pre-requisite documents required during the application process that the Massachusetts School Building Authority (MSBA) has established for the new grant program for school construction and renovation projects. This report was generated by the MSBA's online Maintenance and Capital Planning System. It contains information entered by representatives selected by the school district regarding district maintenance and capital planning budgets and practices.

For more information on the terms used in this report, the new grant program, or the Massachusetts School Building Authority, please see the MSBA website at <http://www.massschoolbuildings.org>. Information about the Maintenance and Capital Planning System can be found in the User Guide located in the Policies and Guidelines section.

This Maintenance and Capital Planning Report (MCP Report) contains the following sections:

- |                            |                 |
|----------------------------|-----------------|
| Staffing                   | Capital Program |
| Maintenance Planning       | Capital Budget  |
| Facilities Condition Index | Attachments     |
| Environment                | Submission      |
| Maintenance Budget         |                 |

Attachments are described by their file name and the date that they were uploaded and have not been reproduced within this report. Enter the Maintenance and Capital Planning System to print each attachment uploaded by the district in its entirety.

District:	Greater Fall River
Submission Date:	10/12/2018 11:16:20 AM
Project(s) for which this maintenance and capital planning information was submitted:	Diman Reg Voc Tech High - 201708210605
Comments:	

**Disclaimer:** A Maintenance and Capital Planning Record is NOT an application for funding. Submission of the Maintenance and Capital Record in no way commits the MSBA to accept an application, approve an application, provide a grant, or any other type of funding, or places any other obligation or requirement on the MSBA.

## Staffing

1.	Is school facility maintenance performed by the municipality or the school district?	School District
2.	Are vendors used for any aspect of school facility maintenance?	Yes
	Vendor Details	<p>Asbestos Abatement, Annual allocation</p> <p>Elevators, PM four times a year</p> <p>Fire Alarm System, PM four times a year</p> <p>Pest Management, Once a month, as needed</p> <p>Asbestos Testing, As needed per project</p> <p>Other, Spray Booth Maintenance, Once a year, as needed</p> <p>Security System, Annual contract, as needed</p> <p>Other, Landscape Grounds Maintenance, As needed</p> <p>Other, Boiler Maintenance, once a year, as needed</p> <p>Other, Roof Monitoring System, Annually, as needed</p> <p>Other, Hazmat Disposal, Annually, as needed</p> <p>Other, Tarmac PM and Maintenance , Ongoing, as needed</p> <p>Other, Building Pneumatics, three times a year</p> <p>Other, Sawdust Collector, Annually, as needed</p> <p>Other, Kitchen Exhaust Hoods, three times a year</p> <p>Other, Automotive Lifts, Annually, as needed</p> <p>Other, Domestic Water Backflow Testing, Quarterly</p> <p>Other, Physical Education Equipment Certification, Annually, as needed</p> <p>Other, Gym and Auditorium Floor Refinishing, Annually</p> <p>Other, Roof Maintenance, Annually, as needed</p>
3.	Full Time Equivalent: the number of FTE custodial and maintenance staff positions for the years displayed.	<p>2018: 10 Maintenance FTE's</p> <p>2017: 10 Maintenance FTE's</p> <p>2016: 10 Maintenance FTE's</p>
4.	Is there a Director of Facilities for the district?	Yes
5.	Does the district have defined job descriptions for custodial and maintenance staff roles?	Yes
	Attachment: Job Descriptions	<u>Custodian.doc</u> , Date Uploaded: 9/12/2018
6.	Is there a system of performance evaluations of the district's custodial and maintenance staff?	Yes
7.	Is training required and/or provided	Yes

	for the district's custodial and maintenance staff?	
	If "Yes," please describe:	SDS Training Equipment Training Asbestos Training Pesticide Training Hoisting License School Bus License

## Maintenance Planning

1.	Is there a written Maintenance Plan for the district that details minimum custodial and maintenance standards and which governs day to day operations?	Yes
	Attachment: Maintenance Plan	<a href="#">Maintenance Plan - 10-3-18.docx</a> , Date Uploaded: 10/3/2018
	Does the Maintenance Plan include standards and benchmarks for maintenance?	No
2.	Is there a preventative or predictive maintenance plan for the district's facilities?	Yes
	Attachment: Preventative or Predictive Maintenance Plan	<a href="#">Preventative Maintenance - School Dude.pdf</a> , Date Uploaded: 10/3/2018
	Or, if it is included in the district's Maintenance Plan, please provide the page number in that document where this information can be found.	
3.	Does the district have a work order system?	Yes
	Please describe the work order system and how it addresses planned and unplanned maintenance.	The District uses a software program called SchoolDude as a work order system. The requests are entered by any employee and is generated into a job que and is allocated to the maintenance/custodial staff.
	Attachment: Work Order	<a href="#">Work Order - School Dude.pdf</a> , Date Uploaded: 10/3/2018

## Facilities Condition Index

1.	Does the district conduct periodic inspections of school facilities to ascertain their condition?	Yes
	If "Yes," please describe what is inspected, who conducts the inspections, and how they are documented.	Annual safety inspection with the City of Fall River's Board of Health and Building Dept. - the District receives a inspection report Annual safety inspections based on NIOSH Standards - reported through the advisory board FirePro conducts annual inspections of sprinkler systems, Ansul systems, and re-certifying all portable fire extinguishers Annual boiler and all pressure vessel inspections as mandated by state and insurance carrier Quarterly fire drills mandated by the Fall River Fire Dept.
2.	Does the district have a Facilities Condition Index? A Facilities Condition Index (FCI) keeps track of school systems, identifies major system components, and tracks information about those components, including their expected useful life, age, and condition. For example, an FCI would track information not just about the HVAC system as a whole, but about each boiler.	No
	If the district does not have a bona fide FCI, does the district have another method for collecting facility data related to condition, cost of maintenance, and repairs?	Yes
	If "Yes," please describe.	The District has a proposed capital improvement plan (attached) to maintain or replace building mechanicals, structure, and infrastructure, including security.
3.	Please describe how the district analyzes facility condition information and how that analysis impacts decisions on the budget, capital improvements, staff performance, etc.	Budget preparation for the District begins in the fall of the year prior. Priorities include safety, security, delivery of educational services and personnel considerations. The District administration meets weekly to prioritize the aforementioned condition information and develop a budgetary plan for the following school year.
4.	Does the district have an existing protocol for commissioning/re-commissioning or retro-commissioning of any of its facilities or does the district have any plans to perform any commissioning activities (do not include any MSBA funded commissioning or re/retro-commissioning)?	Yes
	If "Yes," identify the school(s) and year(s) of re- or retro-commissioning:	Annually the District and school administration reviews the mission statement of the District and develops both District and School Improvement Plans that align with state and national standards for education. Additionally, market and educational trends, coupled with advisory board member recommendations, afford the District a pathway in planning future initiatives that will impact the physical plant in the areas of commissioning and re-commissioning of the existing plant.

## Environment

1.	Does the district routinely monitor air quality and air changes in its facilities?	Yes
	If "Yes," describe how and how often air quality is monitored:	Part of the monitoring process is to ensure that all mechanicals are functioning as designed. Additionally, any air quality issues that are reported by stakeholders results in an immediate testing of the impacted area. Following testing, impacted areas are addressed to industry standards recommendations.
2.	Does the district implement practices in the EPA's Tools for Schools program?	Yes
	If "Yes," please describe:	The District implements the Tools for Schools program through maintenance checklists, purchases, repair orders, and safety and health inspections.
3.	Does the district have a protocol to eliminate toxic chemicals and use 'green' products for cleaning and repairs?	Yes
	If "Yes," please describe:	The District consciously works with cleaning and supply vendors in purchasing cleaning supplies and implementing maintenance practices that try to limit or eliminate hazardous materials that could impact student or staff safety.
4.	Best practices for building operators typically include regular inspecting, testing, balancing, and cleaning of HVAC components in order to make them operate more efficiently and improve air quality. Does the district have a protocol for doing this?	Yes
	If "Yes," please describe:	Heating boilers are tuned annually to ensure maximum efficiency and fuel savings. HVAC units and ancillary mechanical operations are maintained and include: changing of filters, belts, as well as cleaning of accessible duct areas.
5.	Does the district monitor energy consumption and spending?	Yes
	If "Yes," please describe:	Part of the District's budget process is to review energy costs both annually and longitudinally. The District has a Veeter-Root system which monitors daily consumption of #4 oil. Areas in the building that have Smart Technology which includes occupancy sensors. Additionally, the District is retrofitting the heating and cooling systems that are centrally controlled. LED light retrofitting has been completed in various areas of the school. The District has negotiated with electrical companies to implement best market prices for electricity.
6.	Does the district implement energy conservation measures and/or has the district made improvements to its facilities that result in energy savings?	Yes
	If "Yes," please describe:	Please see above.

## Maintenance Budget

1.	Does the person in charge of facility maintenance have a role in establishing the maintenance budget?	Yes
	Please describe:	The Supervisor of Buildings and Grounds plays a direct role in developing the maintenance budget on an annual basis. This includes analysis of current and past expenditures, which includes but is not limited to, personnel, supplies, contract services, etc.

The following section requests information regarding the history of budget requests made to and allocated by the school committee as well as actual and projected district expenditures. The budget categories mirror those used to report to the DESE. The following DESE cost categories are used in the budget details captured in this section.

2.	<u>Requested Budget</u>										
FY	4100 Cust Svcs	4120 Bldg Heat	4130 Utility Svcs	4210 Grnd Maint	4220 Bldg Maint	4225 Bldg Scrty	4230 Equip Maint	4300 Extra Maint	4400 Netw Tele	4450 Tech Maint	Total
2018	564,008	136,000	470,000	85,000	554,809	0	25,000	148,885	0	0	1,983,702
2017	585,116	275,000	434,500	72,000	544,336	0	25,000	390,000	0	0	2,325,952
2016	675,121	328,500	410,000	72,000	476,920	0	25,000	1,434,336	0	0	3,421,877
2015	577,226	300,000	415,000	99,000	494,781	0	35,000	122,165	0	0	2,043,172
3.	<u>Allocated Budget</u>										
FY	4100 Cust Svcs	4120 Bldg Heat	4130 Utility Svcs	4210 Grnd Maint	4220 Bldg Maint	4225 Bldg Scrty	4230 Equip Maint	4300 Extra Maint	4400 Netw Tele	4450 Tech Maint	Total
2018	564,008	136,000	470,000	85,000	554,809	0	25,000	148,885	0	0	1,983,702
2017	585,116	275,000	434,500	72,000	544,336	0	25,000	390,000	0	0	2,325,952
2016	675,121	328,500	410,000	72,000	476,920	0	25,000	1,434,336	0	0	3,421,877
2015	577,226	300,000	415,000	99,000	494,781	0	35,000	122,165	0	0	2,043,172
4.	If there is a variance of 20% or greater between the total requested and total allocated amounts in the same year, please provide details on the reason for the difference.										
5.	<u>Expended Budget:</u> This information was pre-populated based on information the district provided to the DESE.										
FY	4100 Cust Svcs	4120 Bldg Heat	4130 Utility Svcs	4210 Grnd Maint	4220 Bldg Maint	4225 Bldg Scrty	4230 Equip Maint	4300 Extra Maint	4400 Netw Tele	4450 Tech Maint	Total
2014	487,166	290,303	461,990	63,768	494,893	0	23,237	225,896	0	0	2,047,253

Expended Budget (District-Entered): This information was entered by the district as it was not yet available through the DESE.

FY	4100 Cust Svcs	4120 Bldg Heat	4130 Utility Svcs	4210 Grnd Maint	4220 Bldg Maint	4225 Bldg Scrty	4230 Equip Maint	4300 Extra Maint	4400 Netw Tele	4450 Tech Maint	Total
2017	529,464	249,937	431,391	65,547	543,865	0	9,612	377,768	0	0	2,207,584
2016	558,423	286,652	359,739	52,271	535,367	99,074	27,544	446,725	0	0	2,365,795
2015	541,211	192,013	343,659	96,898	558,843	123,418	17,087	92,828	0	0	1,965,957

6. If there is a variance of 20% or greater between consecutive years in the district's total expended amounts please provide details on the reason for the difference.

7. Projected Budget:

FY	4100 Cust Svcs	4120 Bldg Heat	4130 Utility Svcs	4210 Grnd Maint	4220 Bldg Maint	4225 Bldg Scrty	4230 Equip Maint	4300 Extra Maint	4400 Netw Tele	4450 Tech Maint	Total
2021	590,365	259,921	498,623	84,872	651,090	0	21,218	260,157	0	0	2,366,246
2020	573,170	252,350	484,100	82,400	632,126	0	20,600	252,580	0	0	2,297,326
2019	556,476	245,000	470,000	80,000	613,715	0	20,000	245,223	0	0	2,230,414

8. What does the district believe that the appropriate amount of spending on operations and maintenance should be to allow for the routine maintenance of the district's facilities and to achieve a sound preventative and predictive maintenance program? Please provide both an absolute value and a percentage of the total district budget.
- Based on the current \$25M budget, the maintenance budget should be between \$2.5 - \$3.0M. This is the typical industry standard for a commercial building and would afford the opportunity to extend the life of the building.
9. Please provide any other comments on your budget history and forecast that would help the MSBA understand variances or the district's budgeting process.
- Based on the budgetary history of Diman Regional, Chapter 70 funding has never extended minimum contributions from the sending communities. Based on the projected costs for repair or replacement, this would result in an untenable burden on the local communities.
10. The DESE has not provided us with your Total District Expenditures for the most recent completed fiscal year. Please provide us with this information.
- Total District Expenditures for 2017: \$23,315,836



## Capital Program

1.	Does the district have a practice of capital planning?	Yes
2.	Does the district have a long-term future capital plan of at least five to ten years?	Yes
3.	Is the maintenance staff involved in the planning and design of capital projects?	Yes
	Please describe:	The maintenance/utility staff participates in the planning and design of capital projects where their expertise or credentialing affords. To this end, the utility staff includes a licensed electrician and pesticide application license.
4.	Does the district have an established line item for a capital reserve account, stabilization fund, or some type of segregated account of local funds reserved to fund capital projects for school facilities?	No

## Capital Budget

### Capital Budget History

The following is a list of all tax overrides, capital exclusions, and debt exclusions sought by the district and any of its associated municipalities and schools as provided by the Massachusetts Department of Revenue.

Vote Date	Municipality	Category	Description	Amount	Yes Votes	No Votes	Win / Loss
06/27/2006	Westport	Debt Exclusion	DEPARTMENT EQUIPMENT, COMPUTERS, REPAIRS TO TOWN FACILITIES, REC FACILITIES, CONST. SEPTIC SYSTEMS		1136	1291	Loss
06/27/2006	Westport	Debt Exclusion	CONSTRUCT, EQUIP AND FURNISH A NEW PUBLIC SAFETY FACILITY		1069	1369	Loss
06/27/2006	Westport	Debt Exclusion	ACQUIRE LAND FOR PURPOSES OF OPEN SPACE, RECREATION, CONVERSATION, ETC.		1310	1127	Win
06/26/2007	Westport	Capital Exclusion	DESIGN AND ENGINEERING SERVICES TO ESTABLISH DETAIL COSTS OF A NEW SOUTH END FIRE STATION	200,000	799	493	Win
06/17/2008	Westport	Debt Exclusion	construct, originally equip and furnish a new South End Fire Station		1243	798	Win
06/15/2009	Swansea	Debt Exclusion	construct, equip and furnish a new police station on G.A.R. Highway		1373	326	Win
04/13/2010	Westport	Override	GENERAL OPERATING EXPENDITURES	1,500,000	1761	2582	Loss
03/01/2011	Westport	Debt Exclusion	fund roof replacement at high school and window replacements at high school; window replacements at middle school; roof replacements at macomber school and all related to thereto them all.		619	334	Win
09/13/2011	Westport	Debt Exclusion	purchase of highway dept. equipment (trucks,plows, sanders, etc)		564	1557	Loss
09/13/2011	Westport	Debt Exclusion	repave lots and paved areas at high school and replace lighting panels at high school		468	1654	Loss
12/19/2011	Somerset	Debt Exclusion	towns share of bond issued by Somerset-Berkley Reg.Sch.District for purpose of paying costs of designing,constructing etc. for a new high school including all costs related hereto		1364	697	Win
04/10/2012	Westport	Debt Exclusion	pay costs of environmental remediation at westport middle school		1347	1739	Loss
05/12/2012	FALL RIVER	Debt Exclusion	Bonds for new town hall		336	102	Win
06/19/2012	Westport	Debt Exclusion	upgrade the towns data processing functions - phone systems, servers, desktop terminals, printers, etc.		2040	2453	Loss
06/19/2012	Westport	Override	DEFRAYING GENERAL OPERATING EXPENSES FOR SEVERAL TOWN DEPARTMENTS	1,047,000	1980	2526	Loss

06/19/2012	Westport	Override	FUNDING A Capital Exclusion STABILIZATION FUND	500,000	1786	2704	Loss
06/19/2012	Westport	Override	DEFRAYING EXPENSES NECESSARY TO REDUCE CLASS SIZE AT WESPORT PUBLIC SCHOOLS	165,000	2128	2383	Loss
06/19/2012	Westport	Override	DEFRAYING EXPENSES NECESSARY TO PROVIDE SPECIAL EDUCATION SERVICES AND RELATED SUPERVISION AND EVALUATION SUPPORT AT WESTPORT PUBLIC SCHOOLS	297,000	2140	2368	Loss
04/08/2014	Westport	Override	ASSESS ADDITIONAL AMT IN REAL ESTATE AND PERSONAL PROPERTY TAXES TO FUND Capital Exclusion STABILIZATION FUND	500,000	1064	2207	Loss
04/08/2014	Westport	Override	ASSESS ADDITIONAL AMT IN REAL ESTATE AND PERSONAL PROPERTY TAXES TO FUND THE OPERATING BUDGETS FOR THE TOWN AND SCHOOL DEPT.	949,465	1194	2324	Loss

1.	Please provide any comments, corrections, or additions to the information listed above.	
2.	Please describe any capital projects that were deferred due to funding constraints.	HVAC for the remaining 50% of the building. Upgrades for security purposes, including but not limited to, redesigning the foyer area, gates for the vocational programs, additional security personnel, and 3M products for the glass doors. Expansion of the student cafeteria and kitchen original to the building. Student population has increased by 125% since then. All improvements to classrooms involve asbestos removal prior to any renovations. Addition to the LPN Building to accommodate additional students. Electrical upgrades throughout the building. Parking lot needs immediate repairs. The phone systems has exceeded its useful life and requires upgrades. The technology infrastructure cannot support the technical requirements of academic and vocational areas.

#### Capital Improvement Plan and Budget

1.	<p>Please upload a document or documents that list, by year and by item, your anticipated district, municipal, and school capital spending for the next five years. Your attachment(s) can be in any format, but must include the following information:</p> <ul style="list-style-type: none"> <li>┆ Fiscal year of expected implementation for each item</li> <li>┆ Whether each item is for the entire district, an individual municipality( and which), or a school ( and which)</li> <li>┆ Description of scope or need for work</li> <li>┆ Estimated Cost</li> <li>┆ Funding mechanism(override or debt exclusion, if known)</li> <li>┆ Term of debt (if known)</li> </ul>	
	Attachment(s)	<a href="#">MCP Capital Plan Budget Template.xls</a> , Date Uploaded: 10/2/2018
2.	Please provide any information the district has about the availability of non-public funds for school facility purposes.	The District works aggressively to locate NGO funding, this includes the Bengal Education Foundation, Alumni Group, the Fall River Development Corporation, etc.
3.	Please provide information from the Treasurer, Finance Committee, and/or Capital Planning Committee regarding the current outstanding debt and future bonding capacity inside the debt limit for the municipality/municipalities.	As of October 1, 2018, there are no current outstanding debts. The District has approval of both the School Committee and sending communities to bond up to \$1.5M for MSBA feasibility study.

## Attachments

The following is the list of attachments that the district provided to the MSBA as a part of this MCP Record.	
Job Descriptions	<a href="#"><u>Custodian.doc</u></a> , Date Uploaded: 9/12/2018
Maintenance Plan	<a href="#"><u>Maintenance Plan - 10-3-18.docx</u></a> , Date Uploaded: 10/3/2018
Preventative Maintenance Plan	<a href="#"><u>Prevantative Maintenance - School Dude.pdf</u></a> , Date Uploaded: 10/3/2018
Sample Work Order	<a href="#"><u>Work Order - School Dude.pdf</u></a> , Date Uploaded: 10/3/2018
Facilities Condition Index	
Capital Plan Budget	<a href="#"><u>MCP Capital Plan Budget Template.xls</u></a> , Date Uploaded: 10/2/2018
Supplemental Document(s)	<a href="#"><u>Proposed Capital Improvement Plan.xls</u></a> , Date Uploaded: 10/2/2018 Proposed Capital Improvement Plan

## Submission

This section will remain blank until a record is submitted. When submitting, the district representatives are required to affirm the following:		
ⓑ	The district has reviewed all of the information entered in the MCP system and the documents attached and affirms that the answers are responsive to the questions and accurately and completely represent the maintenance procedures, budgeting history, capital planning process, expenditure history, and planned budget of the district.	
ⓑ	The district acknowledges that by submitting this form electronically it is providing the MSBA with the final, definitive version of the district's maintenance and capital planning information as of this date, and that this information will be used to determine the district's eligibility for reimbursement and potential incentive points.	
	Submission comments or notes:	
	Submission date:	10/12/2018 11:16:20 AM