

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

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: Burlington
 Submission Date: 8/30/2021 5:58:35 PM
 Project(s) for which this maintenance and capital planning information was submitted: Fox Hill - 202000480007
 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

- Is school facility maintenance
1. performed by the municipality or the school district? School District
 2. Are vendors used for any aspect of school facility maintenance? Yes
 - Asbestos Testing, 1 year
 - Pest Management, 1 year
 - Fire Alarm System, 1 year
- Vendor Details
3. Full Time Equivalent: the number of FTE custodial and maintenance staff positions for the years displayed.
 - 2021: 38 Maintenance FTE's
 - 2020: 38 Maintenance FTE's
 - 2019: 37 Maintenance FTE's
 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 [SKM9245A621081713240 \(1\).pdf](#), Date Uploaded: 8/25/2021
 6. Is there a system of performance evaluations of the district's custodial and maintenance staff? No
 7. Is training required and/or provided for the district's custodial and maintenance staff? Yes
 - If "Yes," please describe: yearly training is available on procedures, use of equipment, use of supplies, first aid and CPR training

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? No

Attachment: Maintenance Plan
2. Is there a preventative or predictive maintenance plan for the district's facilities? No

Attachment: Preventative or Predictive Maintenance Plan
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 Maintenance Direct to facilitate work orders. Staff members can enter tickets

Attachment: Work Order [Screen Shot 2021-08-17 at 1.34.42 PM.png](#), Date Uploaded: 8/17/2021

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. The Burlington Building department and Fire Department perform annual inspections on all buildings. Fire alarms, elevators, and bleachers are tested at regular intervals yearly.
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 uses Maintenance direct to record all issues related to each building. The district works with the town administration and a capital budgets committee to maintain a 10 year capital plan for the buildings.
3. Please describe how the district analyzes facility condition information and how that analysis impacts decisions on the budget, capital improvements, staff performance, etc. **The facilities operating budget is intended to cover predictable yearly maintenance in all buildings. The district works with the town administration and a capital budgets committee to maintain a 10 year capital plan for the buildings. Large projects are requested through warrant articles from Town Meeting.**
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)? **No**

Environment

- Does the district routinely
1. monitor air quality and air changes in its facilities? Yes
 If "Yes," describe how and how often air quality is monitored:
 The district has portable air monitors that measure and collect air quality samples. We collect data weekly in various buildings and analyze the data. The district also uses an outside consultant to randomly collect data.
 2. practices in the EPA's Tools for Schools program? Yes
 Does the district implement
 If "Yes," please describe:
 The district meets weekly with air consultants to review collected air quality samples and discuss future actions. We have notices posted in all classrooms on best practices for air quality. Air purifiers were purchased for all classrooms.
 3. chemicals and use 'green' products for cleaning and repairs? Yes
 Does the district have a protocol to eliminate toxic
 If "Yes," please describe:
 Cleaning products are centrally purchase for all buildings. We review purchases to verify compliance on the EPA's website. Green products are chosen when possible.
 4. HVAC components in order to make them operate more efficiently and improve air quality. Does the district have a protocol for doing this? Yes
 Best practices for building operators typically include regular inspecting, testing, balancing, and cleaning of
 If "Yes," please describe:
 The district has an in-house HVAC person on staff. The person regularly tests and inspects HVAC throughout the district. The district also contracts with an HVAC company to perform scheduled maintenance in all buildings.
 5. energy consumption and spending? Yes
 Does the district monitor
 If "Yes," please describe:
 Yes, the district works with the town as part of Green Communities. We are constantly looking for ways to reduce energy and consumption.
 6. and/or has the district made improvements to its facilities that result in energy savings? Yes
 Does the district implement energy conservation measures
 If "Yes," please describe:
 We have installed LED lighting in all of our buildings. Added HVAC controls where possible, and room sensors to shut off lights and heat when unoccupied.

Maintenance Budget

1. Does the person in charge of facility maintenance have a role in establishing the maintenance budget? Yes

The director of Operations works with the School Business manager and the Superintendent when creating the maintenance budget.

Please describe:

During the budget process the following are taken into consideration; prior year expenses, preventative maintenance projects for the upcoming year, contract price changes, and a 3-year history of unplanned maintenance repair costs.

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. Requested 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	2,133,742	523,939	1,230,581	15,000	1,445,645		0	0	0	0	0 5,348,907
2020	2,065,596	523,939	1,230,581	0	1,466,862		0	0	0	0	0 5,286,978
2019	1,993,714	523,940	1,423,781	0	1,466,427		0	0	0	0	0 5,407,862
2018	1,840,328	581,369	1,668,010	0	1,089,746		0	0	0	0	0 5,179,453

3. Allocated 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	2,133,742	523,939	1,230,581	15,000	1,445,645		0	0	0	0	0 5,348,907
2020	2,065,596	523,939	1,230,581	0	1,466,862		0	0	0	0	0 5,286,978
2019	1,993,714	523,940	1,423,781	0	1,466,427		0	0	0	0	0 5,407,862
2018	1,840,328	581,369	1,668,010	0	1,089,746		0	0	0	0	0 5,179,453

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. N/A

5. Expended Budget: 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
2018	2,471,651	323,848	1,285,858	0	1,558,786		0	0	0	0	0 5,640,143
2017	2,325,363	308,204	1,242,817	0	1,278,653		0	0	0	0	0 5,155,037

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
2020	1,973,414	306,105	877,616	6,401	1,356,349		0	0	0	0	0 4,519,885
2019	2,058,620	467,520	1,538,415	0	1,463,613		0	0	0	0	0 5,528,168

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.

In FY 2020 the district's buildings were shut down on March 8, 2020 through the end of the school year due to the COVID-19 pandemic; thus a decrease in utility services & heating expenses.

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
2024	2,286,597	523,939	1,230,581	15,000	1,549,208		0	0	0	0	5,605,325
2023	2,230,827	523,939	1,230,581	15,000	1,511,422		0	0	0	0	5,511,769
2022	2,176,416	523,939	1,230,581	15,000	1,474,558		0	0	0	0	5,420,494

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.

BPS believes that facility maintenance is a budget priority; maintaining our buildings to ensure that we provide a safe place for students and staff to learn in is of the utmost importance. Please note that the upkeep of our grounds is fulfilled by the Town's Recreation Maintenance budget. BPS believes that an appropriate amount of spending on O&M for routine maintenance of the district's facilities is the amount allocated for the given budget year; currently 9.36% of the school's operating budget.

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.

Burlington has a history of being conservative when it comes to budgeting; both Town and school work together on an attainable budget guideline in December and work with our Selectboard, School Committee, and Ways & Means Committee through May of each year to develop our budgets for Town Meeting within the agreed-upon guideline. Due to the uncertainty of local receipts with the pandemic, we aimed to level fund expenses in FY22; given that we have not begun guideline discussions for the next fiscal year (FY23), the projections above assumes level funding with the exception of salaries and the contractual increases.

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 2020: \$66,076,892

Capital Program

Does the district have a
1. practice of capital planning? Yes

Does the district have a
2. long-term future capital plan of at least five to ten years? Yes

Is the maintenance staff
3. involved in the planning and design of capital projects? Yes

Please describe: The maintenance staff works with the director of operations to determine which projects can be performed in-house and which cannot. Maintenance staff will attend meetings with designers, engineers and vendors and provide feedback.

Does the district have
an established line item
for a capital reserve
account, stabilization
4. 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.

The Department of Revenue reports no Override, Capital Exclusion, or Debt Exclusion votes for this district in the last ten years.

- Please provide any comments, corrections, or additions to the information listed above.
1. N/A

- Please describe any capital projects that were deferred due to funding constraints.
2. N/A

Capital Improvement Plan and Budget

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:

1.
 - Fiscal year of expected implementation for each item
 - Whether each item is for the entire district, an individual municipality(and which), or a school (and which)
 - Description of scope or need for work
 - Estimated Cost
 - Funding mechanism(override or debt exclusion, if known)
 - Term of debt (if known)

Attachment(s) Capital Plan 4-15-21.pdf, Date Uploaded: 8/30/2021

- Please provide any information the district has about the availability of non-public funds for school facility purposes.
2. N/A

- 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.
3. Please see "Debt Statement" as of 6/30/2021 in the attachments section.

Attachments

The following is the list of attachments that the district provided to the MSBA as a part of this MCP Record.

Job Descriptions	SKM9245A621081713240(1).pdf , Date Uploaded: 8/25/2021
Maintenance Plan	
Preventative Maintenance Plan	
Sample Work Order	Screen Shot 2021-08-17 at 1.34.42 PM.png , Date Uploaded: 8/17/2021
Facilities Condition Index	
Capital Plan Budget	Capital Plan 4-15-21.pdf , Date Uploaded: 8/30/2021
	Burlington debt statement 21-6-30.pdf , Date Uploaded: 8/30/2021
Supplemental Document(s)	Debt Statement as of June 30, 2021

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: 8/30/2021 5:58:35 PM