

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:	Westford
Submission Date:	1/27/2025 8:20:18 AM
Project(s) for which this maintenance and capital planning information was submitted:	Col John Robinson - 202303260025
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? Combination of both
 - Are vendors used for any
 2. aspect of school facility maintenance? Yes
 - Other, Generator, 3 Year
 - Asbestos Abatement, As Needed
 - Asbestos Testing, As Needed
 - Elevators, 3 Year
 - Vendor Details
 - Fire Alarm System, As Needed
 - HVAC, 3 Year
 - Pest Management, 1 Year
 - Security System, 1 Year
 - Full Time Equivalent: the number of FTE custodial and maintenance staff positions for the years displayed.
 3. 2025: 42 Maintenance FTE's
2024: 42 Maintenance FTE's
2023: 42 Maintenance FTE's
 4. Is there a Director of Facilities for the district? Yes
 - Does the district have defined
 5. job descriptions for custodial and maintenance staff roles? Yes
 - Attachment: Job Descriptions [MSBA_Job_Descriptions.pdf](#), Date Uploaded: 1/2/2025
 - Is there a system of
 6. performance evaluations of the district's custodial and maintenance staff? Yes
 - Is training required and/or
 7. provided for the district's custodial and maintenance staff? Yes
 - Yes, annual training is conducted in regards to cleaning, maintenance, OSHA standards and asbestos. Other trainings occur on a regular basis with the support of our insurance carrier include: Electrical and Fire Safety, Fall Protection, Forklift Safety, Drug and Alcohol Awareness, Building Construction, Active Shooter: Recognition and Basic Response, Power Tool Safety, Back Injuries, Public Employee Safety in the Community, Preventing Slips, Trips, and Falls, Commercial Lawn Mower Safety, Respirators and Air Quality, Means of Egress, Preventing Bullying in Schools, Preventing Accidents in the Workplace, Developing Effective Communication Skills, Anti-Harassment in the Workplace, Career Professionalism, Active Shooter: Phases and Prevention, Water Quality Standards, Sleep and Your Health, Communicable Diseases Policy, Food Service General Safety in Schools, and Basic First Aid.
 - If "Yes," please describe:

Maintenance Planning

- Is there a written Maintenance Plan for the district that details minimum custodial and maintenance standards and which governs day to day operations?
1. Yes
- Attachment: Maintenance Plan [Facility_Operations_and_Maintenance_Plan.pdf](#), Date Uploaded: 1/2/2025
- Does the Maintenance Plan include standards and benchmarks for maintenance?
- Yes
- Please describe how the standards and benchmarks are established and monitored, OR note the page number in your uploaded Maintenance Plan that contains this information.
- The Town of Westford and Public Schools has received a MIIA Grant in the amount of \$10,000 to support moving forward with a new Asset Work Order System commonly referred to as Computerized, Management, Maintenance, System (CMMS). Current plans involving moving forward with Dude Solutions previously referred to as School Dude. Current plans anticipate implementing this system on April 1, 2022.
- The modulars will provide the needed and necessary modern support of appropriately monitoring facility operations, equipment and systems.
- Currently, Westford Public Schools rely on maintenance standards and checklists which can be manually reviewed to track deficiencies and reoccurring problems.
- Is there a preventative or predictive maintenance plan for the district's facilities?
2. Yes
- Attachment: Preventative or Predictive Maintenance Plan [Facility_Operations_and_Maintenance_Plan.pdf](#), Date Uploaded: 1/2/2025
- 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.
- Page 1 and 2
- Does the district have a work order system?
3. Yes
- Please describe the work order system and how it addresses planned and unplanned maintenance.
- The Town of Westford and Public Schools has received a MIIA Grant in the amount of \$10,000 to support moving forward with a new Asset Work Order System commonly referred to as Computerized, Management, Maintenance, System (CMMS). Current plans involving moving forward with Dude Solutions previously referred to as School Dude. Current plans anticipate implementing this system on April 1, 2022. UPDATE: The Town of Westford and Westford Public Schools has successfully been using Brightly CMMS (formally known as Dude Solutions) Since 2022 to track work orders, asset management and preventative maintenance tracking. We also use the system to track man hours work between all trades and all buildings.
- Attachment: Work Order [Work_Order_Sample.pdf](#), Date Uploaded: 1/7/2025

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 Westford Public Schools Facilities Department relies on facility checklist being conducted routinely to help monitor the progression of the equipment and systems. Routine inspections are also conducted in person with the Facilities, Director and Supervisor, the Building Commissioner and Fire Department.
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 Westford Public Schools and Town of Westford utilize the Brightly Asset Work Order System commonly referred to as Computerized, Management, Maintenance, System (CMMS) to capture asset repairs, repair costs, inspections and labor hours.
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 Town has a robust capital planning process that allows and provides the appropriate funds as needed to support and maintain our buildings and systems. This process takes into account smaller equipment replacement to include major building projects.
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

During the pandemic all Head Custodians were issued CO2 meters and were required to monitor all rooms on a bi-weekly basis. We have now reduced that frequency to once a month. These results are tracked in a file which easily helps to spot outliers indicating that there may be an issue that needs to be addressed.

If "Yes," describe how and how often air quality is monitored:

The Town recently finished a HVAC System Survey and Audit that was conducted by EFI Global. All ventilation and safety issues were addressed immediately.

Finally, the School's use the free IAQ surveillance program offered by the state to conduct yearly sampling. The School's will also use vendors as needed to support these initiatives.
 2. Does the district implement practices in the EPA's Tools for Schools program? Yes

If "Yes," please describe:

Yes, the Westford Public Schools is aware of the Tools for Schools program. The reference guides and fact sheets are utilized as needed. The checklists are used on a regular basis.
 3. Does the district have a protocol to eliminate toxic chemicals and use 'green' products for cleaning and repairs? Yes

If "Yes," please describe:

Only State User guide approved vendors offering Green products are approved for purchasing by the Facilities Department.

Best practices for building operators typically include regular inspecting, testing, balancing, and cleaning of
 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

If "Yes," please describe:

The Town relies on inhouse and supported external vendors to conduct preventative and regular maintenance on all HVAC equipment. The majority of our equipment is monitored via building management systems which support the overview of seeing the equipments performance. Often times maintenance staff will be requested to check and verify what the BMS system is showing is actually occurring.
 5. Does the district monitor energy consumption and spending? Yes

If "Yes," please describe:

Mass Energy Insights - We are a Green Community.
 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:

The District engaged AMERSCO in 2022 to conduct and perform an IGA (Investment Grade Audit) of all town and school owned buildings and made several recommendations for energy conservation measures including but not limited to lighting efficiency projects, weatherization, and building management systems. The Town and schools have followed up these recommendations by engaging vendors such as Guardian Energy Management Solutions to pursue weatherization projects in

two schools to-date and there is an entire slate of weatherization and lighting project on the horizon for FY25 and FY26.

Maintenance Budget

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

Please describe: The Director of Facilities, Jeff Goodwin, provides itemized budget requests for each of the DOE cost categories which fall within his area of responsibility. He crafts his request based on a review of historical expenditures.

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
2025	2,085,353	809,612	1,107,434	65,000	1,106,199	107,750	51,463		0	664,159	56,300 6,053,270
2024	2,111,216	611,500	1,013,307	65,000	1,045,708	107,750	26,702		0	695,222	56,300 5,732,705
2023	2,059,518	611,500	826,807	65,000	1,092,862	107,750	16,500		0	101,422	101,422 4,982,781
2022	1,964,480	576,000	858,400	69,000	998,012	111,500	92,750		0	109,000	496,253 5,275,395

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
2025	2,085,353	809,612	1,107,434	65,000	1,106,199	107,750	51,463		0	664,159	56,300 6,053,270
2024	2,111,216	611,500	1,013,307	65,000	1,045,708	107,750	26,702		0	695,222	56,300 5,732,705
2023	2,059,518	611,500	826,807	65,000	1,092,862	107,750	16,500		0	101,422	101,422 4,982,781
2022	1,964,480	576,000	858,400	69,000	998,012	111,500	92,750		0	109,000	496,253 5,275,395

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. Expended Budget: This information was pre-populated based on information the district provided to the DESE.

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
2024	2,431,534	685,593	706,457	339,253	1,475,999	159,535	52,011		0	702,104	60,161 6,612,647
2023	2,348,593	584,950	753,304	229,367	1,416,488	103,729	31,224		0	628,436	57,914 6,154,005
2022	2,200,004	563,645	794,748	221,525	1,404,832	143,346	86,818		0	558,273	166,516 6,139,707
2021	2,144,089	600,931	759,743	184,787	1,384,755	114,658	74,045		0	554,595	194,663 6,012,266

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 Scrtly	4230 Equip Maint	4300 Extra Maint	4400 Netw Tele	4450 Tech Maint	Total
2028	2,736,713	858,917	1,229,649	381,832	1,661,250	179,558	58,539	0	790,224	67,712	7,964,394
2027	2,657,003	833,900	1,193,834	370,711	1,612,864	174,328	56,834	0	767,208	65,740	7,732,422
2026	2,579,614	809,612	1,159,062	359,914	1,565,887	169,251	55,178	0	744,862	63,825	7,507,205

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.

The appropriate amount of spending for operations and maintenance for FY28 should be around \$8.5 million, reflecting a 6.8% increase. However, due to budget constraints and the town's failed override in the FY25 budget cycle, the school budget proposal does not include increases for any preventative maintenance—something that has long been a goal of the district to adequately fund. Over the past three years, the Facilities budget has faced shortfalls ranging from \$300k to \$600k, driven by rising contractual obligations, inflation, heating, utilities, and other maintenance costs. Unfortunately, these deficits had to be covered by reallocating funds from other function codes outside the Facilities department to support facility reactive needs.

8.

Please provide any other comments on your budget history and forecast that would help the MSBA understand variances or the district's budgeting process.

Over the last three fiscal year budget cycles, the challenges we have faced have primarily been inflation-related, which continues to pressure our budgets. These challenges include increases in employee collective bargaining agreements, higher costs for the town's electricity and natural gas contracts, and rising expenses for contracted services related to buildings, grounds, equipment, and information & technology. In the current economic climate, many contracts have seen increases of more than 10%. However, we are limited by the 2.5% appropriation cap, which significantly restricts our ability to address preventative and predictive maintenance needs.

9.

Our buildings, equipment, and facilities are aging and deteriorating, and we are forced to rely on reactive maintenance. To cover these reactive maintenance needs, we have had to shift funds from other areas, including curriculum, which poses significant safety risks for our students and negatively impacts the quality of education.

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 2024: \$93,398,355

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: Yes, each year the maintenance staff review the plan with the Facilities Director and Supervisor. This allows for opinions and projects to be recognized. The Principals and Head Custodians also have an opportunity to advocate for this plan. The plan is shown and shared internally via a google sheets (excel) document.

This plan is then transferred into the Towns Global Capital Plan database.

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.

Vote Date	Municipality	Category	Description	Amount	Yes Votes	No Votes	Win / Loss
03/05/2005	Westford	Override	GENERAL OPERATING EXPENDITURES	521,265	2319	3049	Loss
05/03/2005	Westford	Override	FUNDING SCHOOL BUDGET	3,000,000	2155	3225	Loss
09/04/2007	Westford	Debt Exclusion	design, engineer as well as renovate the Cameron Senior Center		1828	1317	Win
			Addition - debt exclusion for the Boston Rd Fire Station under Article 8 at the 3/28/15 Annual Town Meeting - vote was 770 yes, 730 no.				
			Addition - operating override for the Westford Public School Operations under Article 13 at the 3/25/17 Annual Town Meeting -vote was 2147 yes, 1920 no.				
			Addition - operating Budget Proposition 2 1/2 override under Article 1 at the the 4/27/2024 Annual Town Meeting - vote was 1190 yes, 694 no, however it did not pass at the Annual Town Election held on 5/7/2024 3,172 yes, 4,443 no.				

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.

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:

- 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) FY22_26_Capital_Planning_Database_02182022_(1).xlsx, Date Uploaded: 1/14/2025

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

Facility use fees are collected from the use of organizations wishing to use our facilities. These fees are placed into a Facility Revolving account which goes towards the maintenance and upkeep of the buildings.

- 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.

Our outstanding debt on June 30, 2024, was \$33,254,506. No new debt has been issued since then.
The Debt Limit is a standard set by the DOR. The limit is based on 5% of the towns Equalized Valuation (EQV). Our EQV certified for FY25 is 7,150,424,900. 5% of that would be \$357,521,245. So, we have over 300 million dollars in capacity inside the debt limit. Please note that certain water projects and MSBA financed school projects are allowed outside the debt limit. I have attached a Mass Databank Community Comparison report that shows 2023 and 2024 information for Westford and our market basket communities. This report shows the % of EQV for each community, debt as a % of budget and some other debt related statistical information. I included 2023 and 2024 because it looks like some community's information is missing for 2024.

Attachments

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

Job Descriptions	<u>MSBA_Job_Descriptions.pdf</u> , Date Uploaded: 1/2/2025
Maintenance Plan	<u>Facility_Operations_and_Maintenance_Plan.pdf</u> , Date Uploaded: 1/2/2025
Preventative Maintenance Plan	<u>Facility_Operations_and_Maintenance_Plan.pdf</u> , Date Uploaded: 1/2/2025
Sample Work Order	<u>Work_Order_Sample.pdf</u> , Date Uploaded: 1/7/2025
Facilities Condition Index	
Capital Plan Budget	<u>FY22_26_Capital_Planning_Database_02182022_(1).xlsx</u> , Date Uploaded: 1/14/2025
Supplemental Document(s)	

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: 1/27/2025 8:20:18 AM