Town of Natick
Town Administrator's Office

TO: BOARD OF SELECTMEN

FROM: MARTHA WHITE, TOWN ADMINISTRATOR
MICHAEL WALTERS YOUNG, DEPUTY TOWN ADMINISTRATOR

SUBJECT: FACILITIES MANAGEMENT STUDY – PRELIMINARY REPORT

DATE: 11/24/2010

CC: SCHOOL COMMITTEE
FINANCE COMMITTEE

Attached is the Facilities Management Study Preliminary Report. While significant work has been accomplished, further analysis and research is needed before making definitive recommendations for change.

I suggest that an appropriate venue for further discussion on the alternatives presented in the Preliminary Report is the Financial Planning Committee, and that a meeting of that committee be called for the week of December 6.

We look forward to exploring the opportunities presented in this report.

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Town of Natick

Facilities Management Study
Preliminary Report

November 29, 2010

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Section I:

Executive Summary

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Section I: Executive Summary

In June 2010, the Board of Selectmen approved administration's undertaking of a study of Facilities Management with the primary focuses being to analyze the possibility of consolidating related municipal and school operations. Primarily, the building maintenance divisions for both the Department of Public Works and the Natick Public Schools are the departments being considered, along with the Land, Facilities and Natural Resources and Energy Divisions. A series of other departments, including those who manage municipal buildings including Recreation, Council on Aging, Fire, Police, and the Morse Institute Library, as well as the many separate school buildings, have been reviewed for how they interact with their respective municipal and school maintenance departments and how these public buildings are operated and maintained. This report provides the preliminary results of this effort to date.

Evaluation of any service must be performed via the use of industry-accepted metrics. Subjectivity, though a part of anything having to do with political governance, must always take a back seat to pragmatic and practical data. That being said, to measure a program based upon the "bottom line" alone inappropriately disregards non-monetary and other less tangible aspects of public service. Nonetheless, this study is intended, to the greatest extent possible, to reach objective, well-reasoned conclusions.

As with any study, one cannot simply begin measuring without first defining what exactly it is being studied. Facilities management, as examined within this report, is best defined as the following:

> The maintenance, management and operation of the physical structures and facilities developed or acquired by public agencies to house governmental functions and are managed by experienced, intelligent, dedicated professionals who facilitate and ensure continuously better service to the public. [1]

This report is organized in an orderly format. Section II examines the history of facilities maintenance in Natick. Section III provides detailed information on the current provision of facilities maintenance in Natick. Section IV provides information on Comparable Communities,

[1] This definition is borrowed and modified directly from Donald C. Stone's work Professional Education in Public Works/Environmental Engineering and Administration (Chicago: American Public Works Association, 1974) and Sam M. Cristofano, and William S. Foster, (ed.) work Management of Local Public Works. Washington, D.C.: International City/County Management Association, 1986. The actual quote (contained in Cristofano & Foster, et. Al. work) is:

"Public works are the physical structures and facilities that are developed or acquired by public agencies to house governmental functions and provide water, power, waste disposal, transportation, and similar services, and are managed by experienced, intelligent, dedicated professionals to facilitate and ensure continuously better service to the public."

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and in particular comparable communities that have already consolidated municipal and school building maintenance functions. Section V outlines potential alternative service delivery models for facilities maintenance in Natick. Finally, Section VI outlines recommendations and next steps for the Board of Selectmen and others to consider.

Finally, this study is a work in progress. Town Administration is pleased to present what we have collected to date, and eagerly invites any feedback, suggestions or criticisms which may come forth from this draft. Our goal is to provide policymakers with the tools necessary to make educated and informed decisions to guide further review and analysis. We hope this report does exactly that.

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Section II:

Historical Perspective

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Section II: Historical Perspective

Since the time that Natick was founded, some degree of facilities management has existed.

At the turn of the last century, maintenance of Town facilities was highly decentralized. Custodian and routine maintenance functions were budgeted for and controlled in respective Town Departments. The only departments that managed a defined public infrastructure were the Water Commissioners and the Sewer Commissioners. This changed in 1904 when the Town established a Parks Commission[2], and again in 1914 with the establishment of a Highway Surveyor.

The first outright attempt to centralize public works and facilities management facilities was taken in 1921 with the creation of a Public Works Commission and the Department of Public Works. This effort placed the Sewer, Water and Highway Departments under the direction of one Superintendent, answerable to the Public Works Commission. The First Annual Report of the Department of Public Works mentions many of the initial challenges and successes involved with the consolidation of separate departments, but also provided this positive sentiment from Superintendent Mosher:

> *"Your Superintendent feels that substantial savings have already resulted from centralization of effort in both field and office work and will continue in a more marked degree as further improvement are inaugurated.*[3]

Throughout the ensuing sixty years, numerous ad hoc committees were created which reviewed and then recommended changes to or maintenance of public works and building functions. Many of these committees were primarily focused on either the renovation of or creation of new facilities – both municipal and school related. Functionally, the Public Works department remained unchanged – with only the addition of the Sanitation Department during that time period. The Parks Department underwent a series of changes over the ensuing sixty years from 1921, eventually being combined into the Recreation and Parks Department in the 1960's. A separate Forestry Department was created in 1961[4], whereby previously separate functions of the Tree Warden and the Town Forest were organized under one service area.

The greatest period of change and consolidation in the provision of facilities maintenance in Natick occurred in the late 1970's and early 1980's. First, after a year and one half of study, a recommendation was put forward in 1979 (and eventually favorably acted upon) to consolidate

[2] Town of Natick, Park Commissioners' Report, Reports of Town Officers with a Statement of the Receipts and Expenditures of the Town of Natick for the year ending January 31, 1905. (Natick, Mass: Press of Natick Bulletin, 1905) 88.
[3] Town of Natick, Report of the Superintendent, Natick Town Report. (Natick, Mass: Press of Natick Bulletin, 1922) 164.
[4] Town of Natick, Forestry Department, 181st Annual Report of the Town of Natick, Massachusetts. (Wellesley, Mass.: Wellesley Press, Inc., 1962) 35.

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the Forestry and Public Works Departments.[5] The eventual culmination of this consolidation effort was the creation of the Land, Facilities and Natural Resources Division of the Department of Public Works at the beginning of FY 1984 (July 1, 1983). This combined division included the old Forestry Department, the Tree Warden, as well as responsibility of the school grounds & fields, and municipal parks.[6] It was stated that:

> *"With the establishment of the Land Facilities and Natural Resources as a new division of the Department of Public Works, inter-related department problems will be able to be acted upon more readily thereby serving the public in a more efficient and prompt manner.*[7]

The second major change to the management of facilities maintenance, public works and indeed, town governance, occurred in 1980 when the Town radically altered its Charter. In addition to the more well known creation of the position of the Town Administrator, it also abolished the Public Works Commission and placed all responsibilities under a Director of Public Works answerable directly to the Town Administrator. [8]

The most recent efforts studying the building maintenance functions of the Town and Schools came in the late 1990's. At that time, both the Municipal and school sides of Town governance created a Building Maintenance Task Force for the purpose of:

> *"Conducting a comprehensive review of municipal and school department maintenance departments in order to evaluate the most responsible manner for these departments to service the public buildings."*[9]

The internal Task Force, comprised of various municipal and school officials, spent time gathering pertinent information about the respective building maintenance functions of both the municipal and school sides of the Town. At the end of their review, the Task Force made the following four recommendations:

- Consolidation of Energy Purchases
- Incorporate Vehicle Maintenance from School to DPW
- Reassigning School Building Turf/Shrubbery and Landscaping Immediately Around the Schools from School Custodians to LFNR Division

[5] Town of Natick, Committee to Study the Feasibility of the Possible Takeover of the Forestry Department by the Public Works Department, 199th Annual Report of the Town of Natick, Massachusetts. 63-64.
[6] Town of Natick, Department of Public Works Report, 203rd Annual Report of the Town of Natick, Massachusetts. 24-25.
[7] Ibid.
[8] Town of Natick, Charter Commission, 199th Annual Report of the Town of Natick, Massachusetts. 41-43.
[9] Building Maintenance Task Force, memo to Frederick C. Conley, Town Administrator and Dr. Raymond Glynn, Superintendent of Schools, Natick, February 26, 1998.

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- Formal Consolidation of Combined Maintenance and repair Division for the Schools and Town[10]

Of these four recommendations, only one was actually implemented – that of school vehicle maintenance being handled by the DPW Equipment Maintenance division. Consolidation of Energy Purchases was not able to be made at the time due to the elimination of a state agency which would have allowed for joint energy purchasing at reduced rates.[11] School Building Turf was not consolidated with LFNR because it was determined the net increase in staff necessary to adequately handle the added workload was 3 employees while no net decrease in school custodians could be achieved. [12]

Finally, it is the last recommendation – Formal Consolidation of Combined Maintenance and Repair Division for Schools and Town – that requires more study.

The Task Force wrote the following:

> *"The task force agreed upon a concept of a "permanent person" plan for the maintenance of municipal buildings. This means that one custodian would be responsible, i.e. accountable, for the care and cleaning of a particular building. It was also discussed that each segment, town and school, would answer to one common but impartial manager. Merits of combining the two maintenance divisions would be assisting each division during peak, crisis, or emergency periods.*
>
> *Unfortunately, the demands of the municipal complex and the new school buildings have strained the resources of both the Town and School maintenance operations. It was determined that a consolidated maintenance department would not result in any reduction in personnel. There were also no clearly identified benefits of having a consolidated department with respect to efficiencies in operations. There was a concern that a larger department would result in a lesser attention to the particular needs of the building users in both the schools and town facilities, Therefore, there did not seem to be any overall advantage to move towards consolidation.[13]"*

No further analysis was found in the archives to further determine the reason for this finding.

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[10] Cohen, Paul E., Deputy Town Administrator, memo to Board of Selectmen, Natick, December 20,1999.
[11] Ibid.
[12] Ibid.
[13] Ibid.

Finally, one final round of consolidation of public works functions came in 2004, when the Highway and Sanitation Divisions were consolidated. This has allowed for greater flexibility of operations within the Department of Public Works.[14]

Summary

Natick has a long and established history of providing a variety of public works and facilities management services – and just as long a period and history of studying and revising service delivery models. The next section will detail how Natick provides this service today.

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[14] Town of Natick, Department of Public Works Report, 225th Annual Report of the Town of Natick, Massachusetts. 56-57.

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Section III:

Current Service Delivery Model

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Management of Education Facilities
Management of Municipal Facilities
Shared provisions for Facilities Maintenance

Section III: Current Service Delivery Model

Facilities Management in the Town of Natick is divided between Education and Municipal sides of Town Government. In the current model, some degree of coordination already occurs between the two agencies, notably in the areas of grounds maintenance and some energy purchasing. All facilities maintenance functions are detailed in the ensuing pages.

Management of Education Facilities:

The Natick Public Schools has the primary responsibility for the maintenance, operation, and repair of the 8 elementary, middle and high schools within the Town of Natick. Construction of new facilities has, by Town practice, been overseen through ad hoc building committees run by citizen volunteers.

Facilities

The Natick Public Schools has direct oversight over 8 school buildings, totaling more than 809,000 gross sq. feet. They are listed below.

Facility Name	Address	Gross Sq. Ft.	Year Built
Bennett Hemenway Elementary School	22 East Evergreen Road	80,000	1998
Brown Elementary School	1 Jean Burke Drive	55,200	1975
Johnson Elementary School	105 South Main Street	26,774	1490
Kennedy Middle School	Trevor Lane	106,000	1965
Lilja Elementary School	41 Bacon Street	55,200	1990
Memorial Elementary School	97 Eliot Street	60,524	1960
Natick High School*	124 Pond Street	292,000	1954
Wilson Middle School	22 Rutledge Street	134,000	2004
Total		809,698	

**Note: Natick High School is currently being replaced and is under construction. The gross sq. ft. amount will change.*

Staffing

The Natick Public Schools employs 38 individuals for the function of maintaining, operating and repairing its 8 school buildings. These are shown by position below.

FY 2011 Funded Position	FY 2011 Count
Director of Facility Services	1
Facility Services Manager	1
Senior Custodian III	2

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Senior Custodian II	1
Senior Day Custodian I	6
Junior Custodian II – Afternoon	4
Junior Custodian II – Night	3
Junior Custodian I – Day	2
Junior Custodian I – Afternoon	6
Junior Custodian I – Night	6
Assistant Night Custodian	1
Maintenance III	3
Maintenance Mechanic IV	1
Total	**37**

Performance Metrics

Workload		
Gross Square Footage of School Buildings	809,698	sq. ft.
Number of Buildings Served	8	buildings
Average Daytime # of Participants (Students + Teachers & Staff)	5,247	persons
Number of Custodians	31	persons
Efficiency		
Square Footage/custodian	26,119	sq.ft/custodian
Participants served/Custodian	169	people/custodian

Budget

The Natick Public Schools budgets for their facilities management under the Operations and Maintenance section of their annual operational budget. Included in this budget are costs for networking and telephones. For FY 2011, this is shown below.

	2008 Actual	2009 Actual	2010 Appropriated	2011 Appropriated	2010 vs. 2011 $	2010 vs. 2011 %
Salaries & Compensation	1,838,205	1,840,113	1,787,707	1,738,059	-49,648	-2.78%
Custodial Services (4110)	109,447	120,047	110,000	115,000	5,000	4.55%
Fuel for heating of buildings (4120)	756,738	663,318	740,000	740,000	0	0.00%
Electricity (4130)	666,454	770,203	900,000	870,000	-30,000	-3.33%
Telephone (4140)	70,335	62,946	75,000	75,000	0	0.00%
Building Repairs (4220)	585,707	640,838	431,000	462,000	31,000	7.19%
Vehicle Maintenance Other (4230)	5,616	8,704	8,000	8,000	0	0.00%
Network and Telecommunications (4400)	95,694	146,971	192,864	197,592	4,728	2.45%
Operations & Maintenance Budget	**4,128,196**	**4,253,140**	**4,244,571**	**4,205,651**	**-38,920**	**-0.92%**

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Management of Municipal Facilities:

The Department of Public Works maintains the remainder of the facilities in the Town of Natick – whether they are offices, public safety stations, community centers, fields, or all of the components of the water & sewer infrastructure. The Department of Public Works also manages the energy consumption and budgets for all municipal properties. The Natick Public Schools manages energy consumption for all school properties.[15]

Facilities

The Town of Natick maintains 21 separate properties totaling nearly 375,000 square foot in three distinct categories; buildings operated primarily by general fund operations, water & sewer operations and leased properties.

General Fund:

Facility Name	Address	Gross Sq. Ft.	Year Built
Cole Recreation Center	179 Boden	24,850	1956
Community Senior Center*	115 East Central Street	24,332	1950
Recycling Center	251 South Main Street	2,448	1980
DPW administration	75 West Street	36,096	1970
DPW Vehicle Service	75 West Street	35,420	1973
Fire Station 3	2 Rhode Island Avenue	3,222	1958
Fire Station 2	210 Union Street	2,050	1950
Fire Station 4	268 Speen Street	4,882	1956
LFNR Garage	West Street	750	1980
Bacon Free Library	56 Eliot Street	5,499	1880
Morse Institute Library	14 East Central Street	60,680	1997
Police & Fire Headquarters	20 East Central Street	53,970	1998
Town Hall	13 East Central Street	31,741	1998
East School	90 Oak Street	24,869	1950
Total		310,809	

** Note: Community/Senior Center is currently being replaced and is under construction. The gross sq. ft. amount will change.*

[15] It should be noted that although some energy purchases are made jointly between municipal and schools departments (including vehicle fuels), the schools can take advantage of reduced energy costs by purchasing through the TEC collaborative. Municipal departments are ineligible to qualify for educational discounts.

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Water and Sewer:

Facility Name	Address	Gross Sq. Ft.	Year Built
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	2,784	1996
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	4,674	1906
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	1,124	1960
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	5,288	2005
Water Treatment - Springvale Facilities	1076-1080 Worcester Street	3,920	2005
Total		17,790	

Leased Properties:

Facility Name	Address	Gross Sq. Ft.	Year Built
Eliot School	5 Auburn Street	14,014	1938
William L. Chase Arena	75 West Street	32,508	1970
Total		46,522	

For the next several subsections, information is provided strictly for the Building Maintenance Division of the Department of Public Works.

Staffing

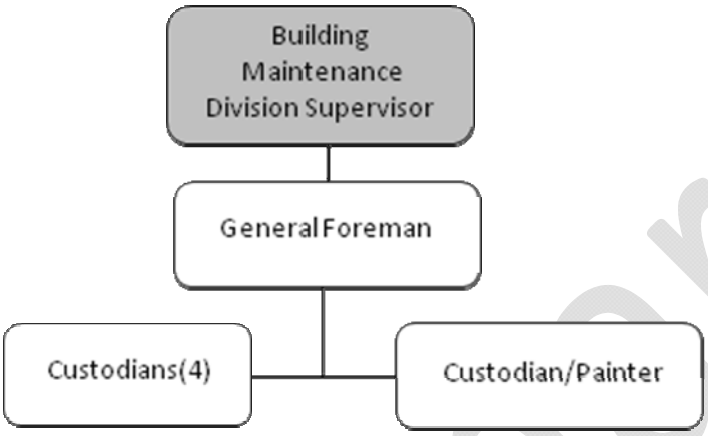
The Building Maintenance Division of the Department of Public Works employs 7 individuals for the function of maintaining, operating and repairing its 21 municipal buildings. These are shown by position below.

	2007	2008	2009	2010	2011
Division Supervisor	1	1	1	1	1
General Foreman	1	1	1	1	1
Crew Chief	1	1	0	0	0
Custodian	3	3	4	4	4
Painter	0	0	1	1	1
Total FTE	**6**	**6**	**7**	**7**	**7**
Total FT/PT	**6 FT/0PT**	**6 FT/0PT**	**7 FT/0PT**	**7 FT/0PT**	**7 FT/0PT**

In addition, the division utilizes contracted cleaning services to perform routine cleaning of municipal buildings. More information can be found under the performance metrics sub-section.

Organization Chart

The organization chart below is for the Public Works Building Maintenance Division.



Performance Metrics

Performance metrics for the Building Maintenance Division are shown below. Metrics are for FY 2011.

Workload		
Gross Square Footage of Municipal School Buildings	375,121	sq. ft.
Number of Buildings Served	19	buildings
Average Daytime # of Participants (Citizens + Staff)	655	persons
Number of Custodians	6	persons
Number of Hours Served - Employees	15,250	hours
Number of Hours Served - Contracted Services	8,700	hours
Number of Requests Taken	2,600	requests
Efficiency		
Square Footage/custodian	62,520	sq.ft/custodian
Participants served/Custodian	109	people/custodian

Budget

The budget for Municipal Facilities Maintenance is broken out between three Divisions of DPW – Building Maintenance, Energy and Land, Facilities and Natural Resources.

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Building Maintenance

	2008 Actual	2009 Actual	2010 Appropriated	2011 Appropriated	2010 vs. 2011 $ (+/-)	2010 vs. 2011 % (+/-)
Salaries Supervisory	$ 80,654	$ 83,034	$ 84,273	$ 85,542	$ 1,269	1.51%
Salaries Operational Staff	$ 189,968	$ 225,349	$ 248,830	$ 257,509	$ 8,679	3.49%
Salaries Part-Time Operational	$ 1,310	$ -	$ 3,600	$ 3,750	$ 150	4.17%
Supervisory Staff Add'l Comp	$ 7,042	$ 7,708	$ 9,350	$ 9,350	$ -	0.00%
Operational Staff Additional Comp	$ 2,952	$ 2,170	$ 2,400	$ 2,625	$ 225	9.38%
Operational Staff Overtime	$ 34,681	$ 29,490	$ 25,155	$ 25,900	$ 745	2.96%
Personnel Services	**$ 316,608**	**$ 347,751**	**$ 373,608**	**$ 384,676**	**$ 11,068**	**2.96%**
Repairs & Maint. Facilities	$ 400,480	$ 275,560	$ 260,000	$ 270,000	$ 10,000	3.85%
Repairs & Maint. Eliot School	$ -	$ 71,953	$ 60,000	$ 26,400	$ (33,600)	-56.00%
Repairs & Maint. Elevator/Chair lif	$ 18,743	$ 29,388	$ 26,000	$ 27,500	$ 1,500	5.77%
Purchase of Services	**$ 419,223**	**$ 347,513**	**$ 346,000**	**$ 323,900**	**$ (22,100)**	**-6.39%**
Clothing Allowance Opera Staff	$ 1,750	$ 1,954	$ 2,100	$ 2,100	$ -	0.00%
Other Services (Misc.)	**$ 1,750**	**$ 1,954**	**$ 2,100**	**$ 2,100**	**$ -**	**0.00%**
Contractual Svs - Cleaning	$ 109,161	$ 104,104	$ 96,536	$ 96,500	$ (36)	-0.04%
Tech/Professional Services	**$ 109,161**	**$ 104,104**	**$ 96,536**	**$ 96,500**	**$ (36)**	**-0.04%**
Custodial Supplies	$ 43,832	$ 44,247	$ 36,000	$ 40,000	$ 4,000	11.11%
Other Supplies	**$ 43,832**	**$ 44,247**	**$ 36,000**	**$ 40,000**	**$ 4,000**	**11.11%**
Total Building Maintenance	**$ 890,575**	**$ 845,570**	**$ 854,244**	**$ 847,176**	**$ (7,069)**	**-0.83%**

Municipal Energy

	2008 Actual	2009 Actual	2010 Appropriated	2011 Appropriated	2010 vs. 2011 $ (+/-)	2010 vs. 2011 % (+/-)
Street Lighting						
Street Lighting Expenses	$ 170,707	$ 201,761	$ 226,500	$ 228,500	$ 2,000	0.88%
Contractual Services	$ 49,778	$ 51,440	$ 56,000	$ 53,800	$ (2,200)	-3.93%
Buildings						
Bldg Maint - Utilities: Electric	$ 412,024	$ 489,790	$ 540,570	$ 545,000	$ 4,430	0.82%
Recreation - Utilities Electric	$ 3,897	$ 6,306	$ 7,600	$ 7,600	$ -	0.00%
Highway - Utilities Electric	$ 1,572	$ 4,260	$ 2,000	$ 4,300	$ 2,300	115.00%
Bldg Maint - Utilities: Fuel Oil & Natural Ga	$ 194,284	$ 208,178	$ 248,500	$ 204,300	$ (44,200)	-17.79%
Vehicles						
Eqp Maint - Vehicular Supplies: Gasoline	$ 477,526	$ 323,567	$ 397,500	$ 381,500	$ (16,000)	-4.03%
Purchase of Services	**$ 1,309,788**	**$ 1,285,302**	**$ 1,478,670**	**$ 1,425,000**	**$ (53,670)**	**-3.63%**
Holiday Lighting	$ 629	$ 1,094	$ 500	$ 1,000	$ 500	100.00%
Other Supplies	**$ 629**	**$ 1,094**	**$ 500**	**$ 1,000**	**$ 500**	**100.00%**
Total DPW Energy	**$ 1,310,417**	**$ 1,286,396**	**$ 1,479,170**	**$ 1,426,000**	**$ (53,170)**	**-3.59%**

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Land, Facilities and Natural Resources

	2008 Actual	2009 Actual	2010 Appropriated	2011 Appropriated	2010 vs. 2011 $ (+/-)	2010 vs. 2011 % (+/-)
Salaries Supervisory	$ 80,654	$ 83,034	$ 84,273	$ 85,542	$ 1,269	1.51%
Salaries Operational Staff	$ 281,398	$ 288,055	$ 274,502	$ 280,866	$ 6,364	2.32%
Salaries Temporary Operational	$ 26,250	$ 23,850	$ 26,239	$ 26,239	$ -	0.00%
Supervisory Additional Comp	$ 15,042	$ 10,008	$ 11,150	$ 11,150	$ -	0.00%
Operational Staff Additional Comp	$ 4,365	$ 4,052	$ 4,000	$ 4,000	$ -	0.00%
Operational Staff Overtime	$ 48,188	$ 27,697	$ 25,250	$ 27,300	$ 2,050	8.12%
Personnel Services	**$ 455,897**	**$ 436,696**	**$ 425,414**	**$ 435,097**	**$ 9,683**	**2.28%**
Purchased Services Misc.	$ 5,291	$ 3,123	$ 4,650	$ 4,650	$ -	0.00%
Purchase of Services	**$ 5,291**	**$ 3,123**	**$ 4,650**	**$ 4,650**	**$ -**	**0.00%**
Licenses - CDL & Special	$ 350	$ 110	$ 440	$ 300	$ (140)	-31.82%
Clothing Allowance Operational Staff	$ 2,450	$ 2,450	$ 2,100	$ 1,750	$ (350)	-16.67%
Other Services (Misc.)	**$ 2,800**	**$ 2,560**	**$ 2,540**	**$ 2,050**	**$ (490)**	**-19.29%**
Tech & Prof. Svs. - Tree Svs	$ 64,456	$ 64,591	$ 30,000	**$ 30,000**	$ -	0.00%
Tech & Prof. Svs. - Mowing Svs	$ 32,513	$ 45,238	$ 54,100	**$ 53,000**	$ (1,100)	-2.03%
Tech. & Prof. Serv.	**$ 96,969**	**$ 109,830**	**$ 84,100**	**$ 83,000**	**$ (1,100)**	**-1.31%**
Materials Field Maint	$ 52,508	$ 51,341	$ 50,000	$ 50,000	$ -	0.00%
Materials Playground	$ 8,975	$ 7,277	$ 8,900	$ 8,900	$ -	0.00%
Materials Beach Maint	$ 1,361	$ 918	$ 600	$ 600	$ -	0.00%
Materials Planting	$ 1,916	$ 1,805	$ 5,000	$ 5,000	$ -	0.00%
Tools & Hardware	$ 7,117	$ 3,254	$ 7,000	$ 7,000	$ -	0.00%
Supplies	**$ 71,877**	**$ 64,595**	**$ 71,500**	**$ 71,500**	**$ -**	**0.00%**
Total DPW LF & NR	**$ 632,834**	**$ 616,803**	**$ 588,204**	**$ 596,297**	**$ 8,093**	**1.38%**

Existing Shared Management of Facilities:

There are several areas where shared maintenance and management of facilities already occurs:

School Grounds (Athletic Fields): This has been controlled by the Land, Facilities and Natural Resources Division of the Department of Public Works since 1983. The staff of the L, F and NR division is responsible for the maintenance of all municipal and school athletic fields, parks, and tree maintenance. All told, they are responsible for 61 fields town-wide.

Vehicle Maintenance: This has been controlled by the Equipment Maintenance Division since 1998. All school and municipal vehicles are serviced by the mechanics at 75 West Street in the DPW Vehicle Service building.

Snow Plowing: All divisions of DPW are responsible in the case of a snow event to assist with plowing. DPW laborers plow streets and routes to schools – including sidewalks up to school buildings.

Energy: Vehicle fuels are purchased completely through the Department of Public Works, and allocated in the Municipal Energy budget.

Summary:

There have been a series of analyses over the years aimed at consolidating services for cost and efficiency improvements, and several such consolidations have been successfully implemented. Nonetheless, a renewed, in-depth analysis of facilities maintenance and related functions is warranted at this time. As noted in the following sections, many communities have undertaken much consolidation in recent years, utilizing various models and with varying degrees of success.

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Section IV:
Comparative Communities

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Survey of Comparable Communities
Focus on: Ashland, Lexington, Needham, Westwood, Wayland

Section IV: Comparative Communities

It is an old maxim of local government – the services provided by towns are as diverse as the communities they represent. How communities manage and maintain their facilities is no different. For the purposes of examining regional data for this study, comparable communities included those in Metrowest or those with a similar population and size as Natick. The chart showing comparable communities and information about their services is shown below.

Community	Consolidated (Y/N/Partial)	Date of Consolidation	Type/Degree of Consolidation	Currently Studying Consolidation
Natick	Partial	TBD	Fields, Vehicles	Yes
Ashland	Yes	2009	Full	No
Lexington	Yes	2008	Full	No
Needham	Yes	1994	Full	No
Medway	No	N/A	N/A	Yes
Wayland	Yes	2007	Administration & Maintenance	No
Westborough	No	N/A	N/A	Yes
Westwood	Partial	Ongoing	Fields	No

Focus On: Ashland

Ashland consolidated its building maintenance functions in 2009 (FY 2010). The Ashland model (found in Section VII: Appendices), consolidated two departments – municipal facilities and school facilities into one shared Department of Public Facilities. The Director is appointed by the Superintendent with the collaboration of the Town Manager. Issues pertaining to school buildings are worked out between the Director and the Superintendent; issues pertaining to municipal buildings are worked out between the Director and the Town Manager.

The Ashland model unique in that it keeps the existing departments relatively intact. Employees, budgets and equipment are still budgeted within their separate spheres of municipal and school operations. The Director of Public Facilities serves to coordinate the two distinct departments and fosters the sharing of resources whenever it is deemed appropriate. The Ashland Town Manager has expressed that the consolidation has worked great in the first year, and there have been minimal problems.[16]

[16] John Petrin, e-mail to Martha L. White, 17 June 2010.

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Focus On: Lexington

Lexington consolidated its facilities maintenance functions in 2008 (FY 2009). Prior to consolidation, The Town of Lexington delivered its building and facilities maintenance functions in a similar fashion to Natick. Municipal and School building maintenance were separate functions. There was little coordination between the two groups, and the maintenance efforts of both sides were consistently underfunded and in efficient.[17]

Effort began two years prior to implementation to study, analyze and come up with a framework whereby consolidation could occur. A critical step in consolidation was the successful adoption of M.G.L. Ch. 71, Sec. 39m by Lexington Town Meeting in 2007.[18] This statute, (recently adopted by the 2010 Natick Fall Annual Town Meeting), allows for consolidation between school and municipal departments. Carl Valente, Town Manager of Lexington, stated that a key to successful coordination and consolidation was the agreement of the Lexington Public Schools.

Today, the Lexington Department of Public Facilities maintains school grounds & shrubbery, manages the combined energy budgets Town-wide, performs all trades work on the 20 municipal and school buildings, performs project management of all capital projects (ranging from small repairs & restorations to complete reconstruction & new building construction), and performs scheduling for all buildings.[19] The Director of Public Facilities reports to both the Superintendent of Public Schools and the Town Manager. Issues pertaining to school buildings are worked out between the Director and the Superintendent; issues pertaining to municipal buildings are worked out between the Director and the Town Manager.[20]

The DPF has actually added significant staff through efficiencies found through consolidation. To date, the DPF has hired a Director, a couple of technical professionals (HVAC & technology technicians), and office staff via either the efficiencies discovered through consolidation and/or rental income from facilities. The efficiencies discovered came through the cultivation of "low-hanging fruit" – in this case the hiring of a permanent, qualified HVAC technician who was able to program and monitor building energy usage whereas the Town lacked the knowledge base before. Continued efficiency has been achieved through the investment in hiring permanent higher-skilled, higher-paid technicians and contracting out lower-skilled, lower-paid maintenance and laborer functions. Simply put, Lexington has achieved an economy of scale through consolidation whereby it made economic sense to have a small but dedicated staff of building professionals. [21]

[17] Carl Valente, "Department of Public Facilities", Presentation to the Massachusetts Municipal Management Association, Boston, October 22, 2009.
[18] Carl Valente, Personal Interview, 10 September 2010.
[19] Valente, Presentation.
[20] Valente, Interview.
[21] Ibid.

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Valente stated that there were several lessons to be learned from consolidation. The first was the importance of hiring of a talented professional manager to run the department. He credits much of the success of the Department of Public Facilities in Lexington to the hiring of a professional facilities manager who had the desired skill set necessary for the shared department. The second lesson was to avoid, if at all possible, having multiple employers for department staff. Although all of the department staff report to the Director of Public Facilities, existing collective bargaining agreements spell out legally who the employees report to. This has resulted in management issues and is an ongoing concern which will continue to be worked out.[22]

Overall, Lexington has been pleased with the results of consolidation.

Focus On: Needham

Needham consolidated in 1994. For over a decade, Needham had a governing board consisting of the Town Administrator, School Superintendent, Library Director, DPW Director and Park and Recreation Director which oversaw the affairs of the consolidated department. With the creation of a new charter in 2005, that governing board ended.[23] The Department of Public Facilities contains two divisions – a Construction Division and an Operations Division. The Construction Division provides support for the Permanent Public Building Committee (PPBC) and helps advise and support the Town Manager on Facility construction, planning and operational needs[24]. Projects over $500,000 are managed by the PPBC.

The Operations Division is responsible for custodial services and provides scheduled and routine maintenance to all Town and School buildings, manages rentals in school gyms and auditoriums. It, like the DPF in Lexington, manages scheduling in all Town buildings. The department is also responsible for managing major building related capital projects and capital improvements with cost under $500,000.[25] The division also includes all maintenance trades in support of all Town and School buildings.

Needham has a Director of Facility Operations who oversees all custodians and trades.

The model has been very workable and successful in Needham.

[22] Ibid.
[23] Kate Fitzpatrick, e-mail to Martha L. White, 17 June 2010.
[24] Town of Needham – Construction Division. 10 November 2010. <http://www.needhamma.gov/index.aspx?NID=630>
[25] Town of Needham – Operation Division. 10 November 2010. <http://www.needhamma.gov/index.aspx?NID=950>

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Focus On: Westwood

Like Natick, Westwood has partial consolidation of facilities maintenance functions, in the area of field maintenance. The Department of Public Works took over maintenance of fields from the schools. The transition took about five years to complete. Each field was only transferred when it was rebuilt and there was a commensurate budget increase to the DPW budget, without any requirement that the school reduce their budget by the amount of savings they would realize from the shift.[26]

Westwood has discussed combining the maintenance of buildings under the school, but this has not yet been achieved. At this point, Westwood is still under a process whereby DPW maintains all municipal buildings.[27]

Focus On: Wayland

Wayland hired a joint School/Town Public Buildings Director in 2007. Historically, the municipal side had no facilities manager whereas the schools did. This position reports jointly to the Town Administrator & the School Superintendent. Wayland noted that a pitfall of the initial consolidation was that no inter-board agreement between the School Committee and the Board of Selectmen was in place at the beginning of consolidation. As a result, the Town struggled for the first two years over jurisdictional matters. Custodians were previously under the jurisdiction of the School's Facilities Department and continue to remain so as part of the joint department.[28]

Summary

As is often the case with municipalities, different communities choose to perform the same services in different ways. However, many comparable communities have engaged in some degree of facilities management consolidation in recent years, and most with success.

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[26] Mike Jaillet, e-mail to Martha L. White, 17 June 2010.
[27] Ibid.
[28] John Senchyshyn, e-mail to Martha L. White, 17 June 2010.

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Section V:
Alternatives

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Consolidation of Facilities Management Functions
Partial Consolidation of Facilities Management Functions
Contracting/Privatizing Functions

Section V: Alternatives

Natick has a long history of evolving its governmental structures in order to provide for greater efficiency and better customer service. This report has demonstrated that there are other models available to the Town to consider with respect to its delivery of facilities management. This section outlines three possible scenarios which the Town could consider moving forward; other scenarios may well emerge as research and analysis continues.

Scenario I: Consolidation of Facilities Management Functions

This scenario would create a separate and distinct Department of Facilities Management, responsible for all building and facility maintenance and operation, repair and maintenance of mechanical and trades functions (painting, plumbing, electrical, HVAC and security components of Town–owned buildings), public grounds maintenance (all fields, parks and forestry concerns) and administration of town-owned leased properties, energy and capital procurement.

A new director, answerable to both the Town Administrator and the Superintendent of Public Schools, would oversee this department. Based upon the feedback from other communities, it is recommended this director be hired from outside of the existing organization.

Other facility maintenance, specifically infrastructure maintenance (water, sewer & highways), would remain under the purview of the Department of Public Works. This would also remain true for snow plowing, with the exception that many employees of the new Department of Facilities Maintenance would continue to perform their current plowing responsibilities in the case of a snow event.

This scenario may have the greatest potential long-term impact, but also requires the greatest amount of additional analysis and research. Further research with school and department of public works officials is necessary to determine where potential cost savings and efficiency may found through consolidation. Such an analysis would need to examine the different user groups and demands upon custodians in schools vs. municipal buildings, the requirements of the Education Reform Law of 1993 in regards to school building supervision requirements, collective bargaining obligations, and the benefits of consolidation of procurement functions regarding maintenance and energy services, among others. It is difficult to assert with certainty that proper research and analysis could be conducted in time to work this scenario into the FY 2012 budget process.

Finally, it is important to note that this proposed reorganization would require approval of not only the Board of Selectmen and the School Committee, but also Town Meeting. Any proposed reorganization/consolidation of departments should be memorialized in a Memorandum of

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Understanding and/or Agreement between the Natick Public Schools and the Town of Natick so as to avoid any confusion over joint responsibilities moving forward.

Scenario II: Partial Consolidation of Maintenance Functions

Scenario II would take pieces of consolidation from Scenario I, but not go so far as to create a new department. After further research is performed, this proposal would take any item which is determined to be "low-hanging fruit" and build it into the FY 2012 budget. Examples of this consolidation would be the consolidation of all energy budgets under one department's area of responsibility, budgeting or consolidation of all trades within one department's area of responsibility, or further combining of existing divisions of the Department of Public Works or the Natick Public Schools.

Several iterations envisioned in Scenario II could be achieved within the FY 2012 budget process. Any iteration that rises to the level of "reorganization" in the context of Section 6-1 of the Town Charter require the approval of Town Meeting, and certainly, the assent of the Board of Selectmen and/or School Committee as applicable. Again, it is recommended that should any iteration under this scenario be proposed which require the transfer of a function between the schools and municipal departments that it also be memorialized in a Memorandum of Understanding and/or Agreement between the School Committee and the Board of Selectmen so as to avoid any confusion over joint responsibilities moving forward.

Scenario III: Contracting/Privatizing Functions

In the course of analyzing consolidation, it also became clear that other communities, including Natick, have achieved cost savings by contracting out maintenance functions (e.g. custodial services). The Department of Public Works Building Maintenance Division already uses contracted cleaning in many of its buildings, leaving a reduced force of remaining maintenance workers to perform more complicated building services. This model should be further studied, to determine if cost efficiency can be achieved while not sacrificing service quality to end users.

This scenario can be proposed by respective administrations as part of the FY 2012 budget and does not require approval of Town Meeting. It only requires approval through the normal budget process by the School Committee or Board of Selectmen, respectively.

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Section VI:

Recommendations & Next Steps

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Section VI: Recommendations & Next Steps

A hallmark of modern organizations is that operations be analyzed regularly so as to continuously enhance efficiency and productivity. This is something which is done throughout most municipal and school operations as a matter of course.

The next steps which staff recommends be taken in this study are:

- Further research and modeling of the scenarios laid out in Section V, especially further consultation with school and municipal officials to develop cost analysis.
- Development of scenarios and inclusion (where possible) in preparation of the FY 2012 budget
- Answering unanswered questions

Several unanswered questions warrant further analysis, including but not limited to:

1) How would a consolidated department save money in the short, middle and long-term?
2) Within what facilities would this department be housed?
3) Who should the head of a newly created Department of Facilities Management report to?
4) How would discrepancies between union contracts for jobs of similar classification be treated?
5) How would the current model which provides for the delivery of several building facility maintenance functions through private companies be amended or incorporated?
6) How can (or can) "low-hanging fruit" be implemented immediately or by July 1, 2011 once it is found?
7) How does the Education Reform Law of 1993 impact proposed models of consolidation and how can consolidation be structured so as to appropriately account for the requirements of said law?

The final report will be delivered to the Board of Selectmen after the first of the year and recommendations incorporated into the FY 2012 Town Administrator's Recommended Budget in January.

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Section VII:

Appendices

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Presentation of Lexington Model of Facilities Management
Ashland Model of Consolidation Agreement

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Appendices:

Presentation on Lexington's Consolidated Department of Public Facilities Model

Preliminary

Town of Lexington

Department of Public Facilities

Carl F. Valente, Town Manager

Presentation to the
Massachusetts Municipal
Management Association

October 22, 2009 1

Actions Resulting in DPF

Creation of a Town wide facilities department has been recommended and discussed over the years.

Reports in the 60's, 80's, and 90's all called for maintenance reorganization and possible combination of School and Town Departments.

Support by new Superintendent and Town Manager and Failed School Override was impetus for change in 2007.

October 22, 2009 2

2007 Town Meeting Article 19

ARTICLE 19 **ACCEPT MGL CHAPTER 71, SECTION 37M (JOINT FACILITIES DEPARTMENT)**

To see if the Town will vote to accept Section 37M of Chapter 71 of the Massachusetts General Laws relating to the consolidation of maintenance functions of the School Committee with those of the Town; or act in any other manner in relation thereto.

(Inserted by the Board of Selectmen)

DESCRIPTION: This statute permits the consolidation of maintenance functions of the School Committee and the Town if it is accepted by a vote of the Town Meeting and a vote of the School Committee.

Approved by Town Meeting

October 22, 2009 3

2007 Memorandum of Agreement

1. Department of Public Facilities
   - Custodial care/cleaning
   - Maintenance and Repairs
   - School landscaping and snow removal
   - Capital Improvements
2. Public Facilities Board
   - Town Manager and the Superintendent of Schools
   - Responsible for appointing the Director
3. Director of Public Facilities
   - Administer the Department's responsibilities and personnel
   - Liaison to the Permanent Building Committee for construction projects

Agreement between Board of Selectmen, School Committee and Town Manger

October 22, 2009 4

DPF Goals & Objectives

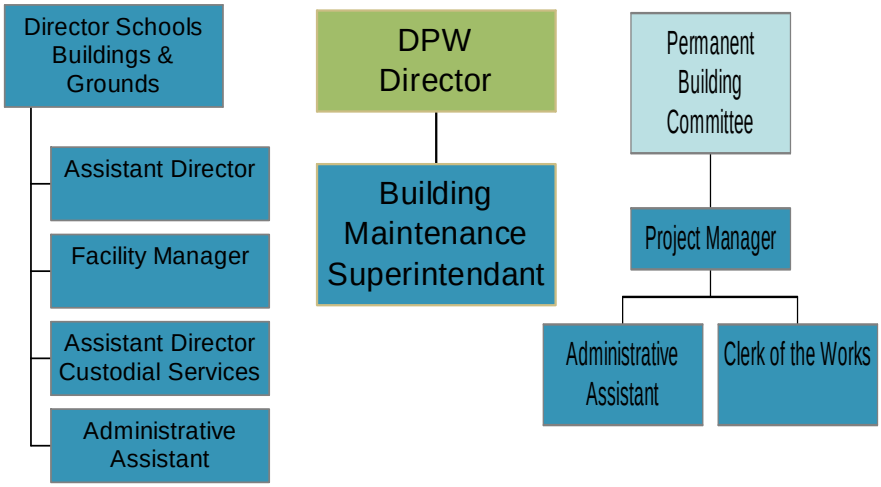
1) Operate and maintain buildings efficiently
- Operational efficiencies
- Labor utilization
- Material procurement
- Contracted services
- Rental program

2) Protect Capital Assets
- Preventative Maintenance Program (PM)

3) Capital Planning
- Strategic Master Planning with Schools and Municipal Departments
- Five Year Capital Plan in support of program and asset requirements
- Appropriate communication with appropriate committees, departments, and residents

October 22, 2009 5

2007 Organizations



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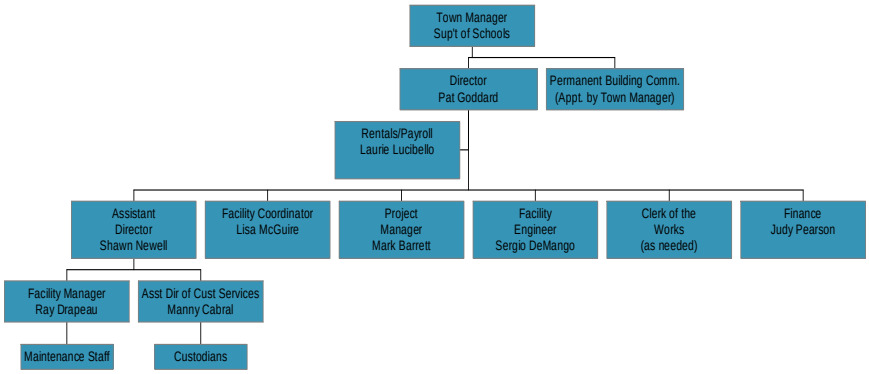
2009 Organization



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Building Oversight

No. of Buildings	20
Sq. Feet	1,250,000
Salaried Employees	6/3
Maintenance Staff	10
Custodial Staff	52
Daily Occupants	7000+

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People

Two Year Assessment:

- Skills – Facilities has not kept current with required skill levels for current technologies (e.g. HVAC,security, cleaning process.)
- Organization- Before DPF, three organizations and responsibilities, minimal collaboration. Importance of merging cultures.

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Doing the right thing - planning

Two Year Assessment: Needed improvement in process and planning.

- Implemented work order report, by building.
- Partnered with DPW on school snow removal plan.
- Developed Preventative Maintenance (PM) plan for schools 1092 pieces of equipment.
- Developing Request for Proposal (RFP) for performance based cleaning supplies contract.
- Combined school and municipal fire protection contract.
- Contracted building envelope engineer for improving life cycle of roof systems.

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Doing them right

Two Year Assessment: Many stakeholders, committees, and end users were not satisfied with ability to participate and influence project objectives.

- Improve collaborative establishment of goals and objectives and communication of process.
  1) Director in on Senior Management Team
  2) Establishing lines of communication.

- Measure performance and foster continuous improvement.
  1) Establishing benchmarks from which to measure improvement. Energy benchmark resulting in plan reduction for 2009 of $200,000 and an additional $250,000 projected for FY11.
  2) Five-year goal of 20% energy reduction in all buildings.

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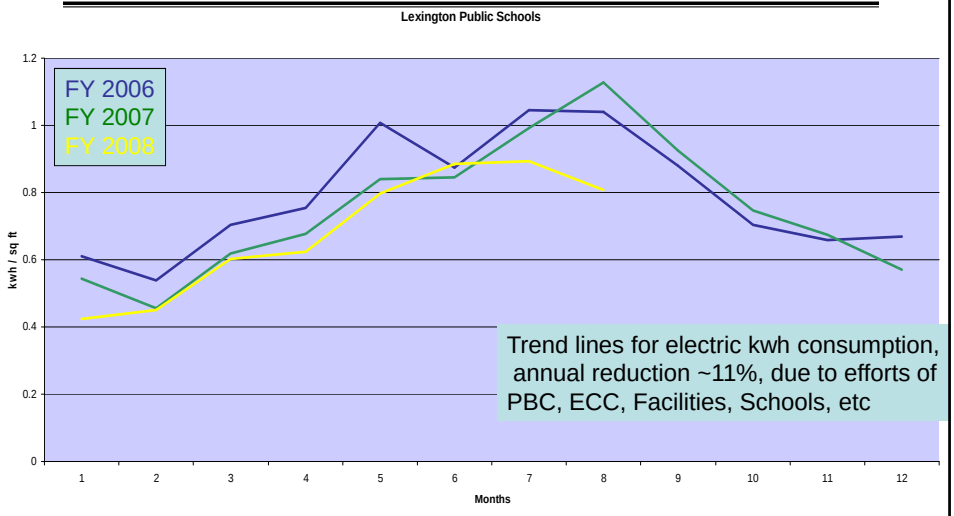
Electricity Measures – Consumption Trend



October 22, 2009 12

Unwritten Reasons for Success

- Hired outstanding Director
- Proposed and Funded SPED Stabilization Fund
- Locked in favorable energy supply contracts
- Aggressive capital program

October 22, 2009 13

Next Steps

- Three year process
- Continue to hire and develop talented people
- Measure for continuous improvement
- Facilitate getting people involved

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Appendices:

Ashland's Model Memorandum of Understanding

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MEMORANDUM OF UNDERSTANDING
BETWEEN
THE ASHLAND BOARD OF SELECTMEN
AND THE
THE ASHLAND SCHOOL COMMITTEE

PURPOSE

The purpose of this Agreement is to consolidate the positions of Schools Supervisor of Buildings and Grounds and the General Government Public Facilities Director so as to bring professional management services for school and general government facilities. This cooperative town-wide arrangement will provide the most cost-effective management plan for public facilities. In no way will the position diminish the fiscal authority of either entity; the position represents two independent functions. Facility management responsibilities for both general government and school will be strengthened through collaborative purchasing, more efficient use of available resources and closer communication. The Director of Facilities will be directed by a set of mutually developed goals designed to benefit the community as a whole.

DETAILS OF AGREEMENT

The Memorandum of Understanding will constitute the operating agreement between the Ashland Board of Selectmen and the Ashland School Committee with regard to the matters covered. The Town Manager will be responsible to the Board of Selectmen for the implementation of this agreement as the Superintendent of Schools will be responsible to the School Committee. Both the Board of Selectmen and the School Committee delegate to their respective professionals the managing of details to make the terms of this agreement work.

It is the intent of the Board of Selectmen and the School Committee to make the working relationships outlined herein a permanent part of the operation of their respective departments of town government. The term of this memorandum of understanding is for two years beginning November 1, 2009. This memorandum of understanding shall automatically be renewed on a yearly basis after the initial term unless either party gives notice to the other party, no later than December 31st for termination of the agreement as of the following July 1st, in order to plan an orderly transition out of the program.

PUBLIC FACILITIES

INTENT

It is the intent of this memorandum of understanding to consolidate the management of general government public facilities and schools buildings and grounds. The Director of Public Facilities shall coordinate and manage general government and school facilities. It is agreed that this coordination would be in the long term most efficient for general operations.

STRUCTURE

The Director of Public Facilities shall be appointed by the School Superintendent. The current Schools Supervisor of Buildings and Grounds, Kevin Johnson, shall be appointed to fill the position. In the future, the hiring of a new Director of facilities shall be done by the School Superintendent in collaboration with the Town Manager.

The Director of Public Facilities shall have control of the Buildings and Grounds Department for the schools and the Public Facilities Department for general government. The Director will report to the Town Manager on a day-to-day basis for all matters pertaining to general government facilities and to the Superintendent of Schools for schools buildings and grounds. The Town Manager shall have sole authority for general government matters and the Superintendent of Schools shall have sole authority over matters pertaining to the School Department. The Town Manager and the Superintendent of Schools shall see that direction is given to the Director in a team approach. The Town Manager or his/her representative and the Superintendent of Schools or his/her representative and the Director of Facilities shall meet periodically to coordinate matters of mutual interest. The Town Manager and the Superintendent of Schools shall be jointly responsible for evaluating the Director of Facilities (Manager).

IMPLEMENTATION PLAN

Effective November 1, 2009, the Director of Public Facilities shall have managerial responsibility for the School Department Buildings and Grounds Department and General Government Public Facilities Department. The two departments shall be maintained as separate departments. Operating budgets, capital programs, improvement plans and employees shall be kept separate, as is. The implementation of various programs shall be done concurrently in order to achieve operational efficiencies. Current employees shall be maintained within their current departments. Employees may be shared by departments on an as needed basis as determined by the Director of Public Facilities. Employees may be shared on a regular basis upon agreement by the Town Manager and Superintendent of Schools. Equipment may be shared as needed. The Town Manager and the Superintendent of Schools shall periodically be briefed as to the equipment needs of the department by the Director of Facilities. The salary of the Director of Public Facilities shall be budgeted within the School Department budget.

ASHLAND BOARD OF SELECTMEN	ASHLAND SCHOOL COMMITTEE
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
Date:_____	Date:_____