

Methodology for Maintenance Incentive Point Allocation

Consistent with its enabling legislation and regulations, the MSBA has created a methodology for awarding up to two incentive reimbursement points for exhibited best practices for routine and capital maintenance and upkeep of school facilities. These best practices include activities such as establishing and implementing capital improvement plans, using a detailed preventative/predictive maintenance plan, maintaining a building and systems inventory, and using facility maintenance manuals and practices that standardize preventative and routine maintenance procedures.

The methodology bases the allocation of up to two maintenance incentive reimbursement points on how many of the twenty (20) best practices the district performs and how well they are performed by the district based on the MSBA's assessment of the district's performance. This methodology is the culmination of many hours of research, discussions with industry professionals, school superintendents, maintenance staff and school business officials as well as guidance gleaned from the MSBA Maintenance Task Force. The methodology is simple to implement, logical, and encourages districts who wish to receive incentive reimbursement points for maintenance practices to focus on and enhance their facility maintenance and capital planning. The 20 best practices are as follows:

1. **Staff Training** – Appropriateness and quality of staff training
2. **Written Maintenance Manual** - Use and quality of a written maintenance manual of minimum custodial and routine maintenance standards
3. **Preventative/Predictive Maintenance Plan** – Use and quality of a detailed preventive and/or predictive maintenance plan including schedules and checklists for defined tasks, inspections and dates for maintenance activities
4. **Work Order System** – Use and quality of a work order system (manual or computerized) that defines the process for scheduling planned maintenance and/or maintenance emergencies and evidence of effective implementation
5. **Maintenance budgets and expenditures** – Review of the past 3 years of maintenance budgets and expenditures to determine the consistency and adequate level of maintenance funding
6. **Facility Condition Index and Inventory** – Use of a facilities condition index (FCI) or building audit/inventory of buildings, detailing major system components, age, condition, useful life to guide capital planning and repairs
7. **Periodic Inspections** - Consistent and scheduled periodic inspections of key building components
8. **Historical Capital Plan** – Demonstrated historical use of a capital plan and funding and implementation of the plan
9. **Future Capital Plan** – Use of a future long term 5-10 year budgeted capital plan
10. **Facility Staff participation in Capital Projects** – Consistent participation by facilities staff in capital projects (i.e., participation in project meetings/design review and ongoing throughout planning, design and construction process)
11. **Segregated Local Capital Projects Fund** – Creation and use of segregated local funds reserved for use on capital projects

12. **Retro/Re-Commissioning** – Established/existing practice for facility retro/re-commissioning
13. **Monitoring Air Changes and Indoor Air Quality (IAQ)** – monitoring air changes and IAQ to ensure adequate circulation
14. **Environmental Quality Standards** – Implementation of EPA's IAQ Tools for Schools or compliance with other environmental quality standards and/or green practices
15. **HVAC Testing and Balancing** – Inspecting, testing, balancing and cleaning HVAC components to maintain performance of equipment and IAQ
16. **Monitoring of Energy Usage and Expenditures** – Monitoring energy usage and spending for trends, identifying abnormalities in usage patterns and maintaining adequate budget expenditures
17. **Energy Conservation Measures** – Implementation of energy conservation measures to improve school building performance and reduce energy costs
18. **Visual Observations of Cleanliness** – The result of attentive custodial care as evident by observation of the building(s) cleanliness
19. **Visual Observations of Routine Maintenance** – The results of routine maintenance efforts as evident by visual observation
20. **Visual Observations of Capital Maintenance** - The results of prior capital repairs/replacements as evident from visual observations

The maximum amount of incentive reimbursement points for maintenance practices that the MSBA may award a district is 2 points. Each of the 20 best practices can receive up to 10% of the available maximum 2 points. Each best practice is evaluated by ranking the district's performance as Average, Below Average or Above Average (in a manner similar as that of the Needs Survey reviews) and weights the ranking accordingly. An Average ranking would get 90% of the .10 points, Below Average would get 25% of the .10 points, and Above Average would get 115% of the .10 points, all subject to the total maximum amount of 2 points. This weighting gives a district credit for doing an activity, even if it is not done well, and provides incentive to perform above average by giving extra credit.

This scoring methodology is consistent with the goals and priorities of the statute and regulations. This scoring methodology rewards districts that perform all the best practices well, calculates average scores for those that undertake most of the best practices and have average performance, and results in a low score for districts that only do some of the best practices and have average or below average performance.