Maintenance and Capital Planning System

User Guide for School District Users

Massachusetts School Building Authority
System User Guide

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2. Disclaimer

Information gathered through the MSBA Maintenance and Capital Planning system is not an application for funding. Submission of this information 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 upon the MSBA.

Only authorized users should have access to this system. All users must ensure the security of their user ID and password and should not share their user ID and/or password with others. All data entered using an MSBA-authorized user ID will be the responsibility of the user to whom the user ID was originally assigned. Unauthorized access to the MSBA Maintenance and Capital Planning system may result in processing delays.

3. Overview

The Maintenance and Capital Planning System (MCP) was created to improve the way that the school districts of Massachusetts provide information to the Massachusetts School Building Authority (MSBA). This system replaces the previous method of providing this information, which consisted of three paper forms:

- Maintenance and Capital Planning Questionnaire
- Maintenance Budget History and Forecast
- Capital Budget Statement (required under some circumstances)

The new system has been designed so that school districts have an improved experience: it will allow for faster submission, provide savings on print and mailing costs, and save time for school district users by importing data from other sources and allowing for the pre-population of records.

When You Will Need to Provide the MSBA with an MCP Record

An MCP Record is an essential part of the MSBA school project lifecycle. This information is required after a school has submitted a Statement of Interest and after the MSBA has accepted a potential project into the pipeline, but before the MSBA Board has approved the project and its reimbursement rate.

If you are a representative of a school district and you have been invited to provide additional information on one of your projects after submitting a Statement of Interest, you will typically need to submit a new MCP Record. Consult the letter that was sent to you by the MSBA for special instructions.

How an MCP Record is Evaluated

The MSBA has instituted many reforms to make the MSBA's school construction and renovation grant program more effective, efficient, and user-friendly for school districts and to ensure the long-term viability of the program. A vital component of these reforms is to protect the over $20 billion investment in school facility construction and renovation projects throughout the Commonwealth in the past 25 years, through active and on-going maintenance of school facilities by the school districts. The MSBA has adopted criteria based on industry best practices as a prerequisite for MSBA funding and evaluation criteria for the determination of the allocation of maintenance incentive reimbursement points on eligible projects. Those criteria can be found here:

 http://www.massschoolbuildings.org/building/prerequisites/maintenance_cap_planning

In short, the Maintenance and Capital Planning information provided by the district to the MSBA is a threshold requirement for MSBA funding and can account for up to two points of reimbursement for eligible projects. Eligibility generally depends on the project type and size. The information you provide via the MCP system is crucial in establishing the school district's eligibility for reimbursement.

Get Help

If you need help with this system and cannot find the answers to your questions in this user guide, please contact **Julie Leonard** at the MSBA, either at 617-720-4466 or at Julie.Leonard@MassSchoolBuildings.org.

Help as you go: Keep an eye out for the question mark symbol in the application. That denotes a helpful tip for that question which you can access by clicking on the question mark.

Images in this User Guide

The images in this User Guide were created by visiting the MSBA website using Firefox. There may be visual differences for users of Internet Explorer, Chrome, or other browsers.

4. Getting Started

District users should follow the procedures in this section to gain access to the MCP System.

Access to the System

To get access to this or any other MSBA System, please fill out an Access Request Form, located here:

http://www.massschoolbuildings.org/guidelines/guides

Access Request Forms are in Microsoft Word or PDF format, and will need to be printed, signed, and returned to the MSBA before access will be granted to any systems. Please allow enough time to get the appropriate signature(s) on the access forms. Most systems require the district superintendent's approval for new users.

For each user that requests access, you will have to indicate whether that user will need to edit the MCP or if they require read-only access.

User Names and Passwords

Use of MSBA systems requires that each individual user in a district have their own unique user name and password.

You must request separate access for each individual who will be using the system.

It is recommended that the district request access for the following people in advance:

- District Superintendent
- Director of Facilities or the person responsible for facilities oversight
- Any administrative staff who may be responsible for data entry
- Any staff members who have filled out MSBA maintenance forms in previous years

User access is reset every year for security reasons. If it has been more than a year since the district last filled out an MCP record, the district will have to fill out a new Access Request Form.

Regional and Vocational-Technical School Districts

Although each school district may designate as many or as few system users as it chooses, it is not necessary for each municipality within a regional school district to designate a separate representative for data entry. Information is gathered on the district level and there are no questions with details about individual schools. All data can be entered by district-level representatives.
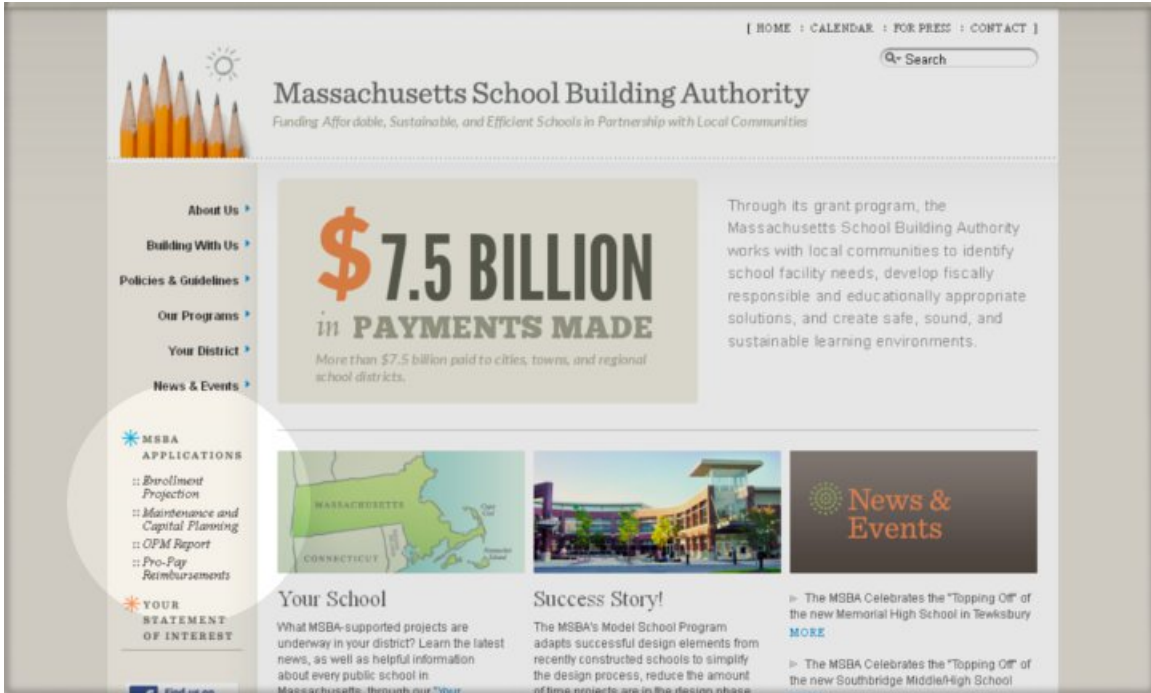
The only municipal-level information requested is a copy of each municipality's Capital Plan Budget detailing expected capital spending. However, each municipality's Capital Plan Budget is meant to be uploaded as an attachment. This can be handled by district representatives as well as municipal representatives.
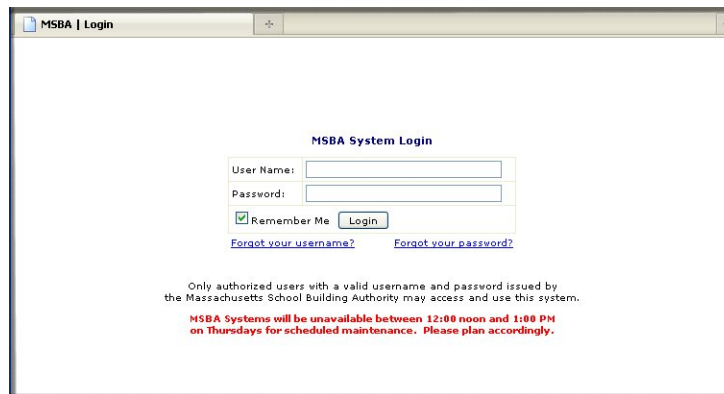
Log On

To log on to the MCP System, begin by going to

http://www.massschoolbuildings.org/

Click on the link to the Maintenance and Capital Planning system within the list of MSBA systems in the column on the left.

This will bring you to a log-in screen.

If you forgot either your username or your password, you can click on the links on this page to have them emailed to you.

Once you have logged on, you will see the list of all the MSBA Systems you have access to on your left. Select Maintenance and Capital Planning from the list on the left to begin.

System Entry

When you have chosen the Maintenance and Capital Planning system you will arrive on the system's home page, seen below.

Select the region and click on the district from the left to continue. The planning regions used by the MSBA correspond to the areas in the diagram.
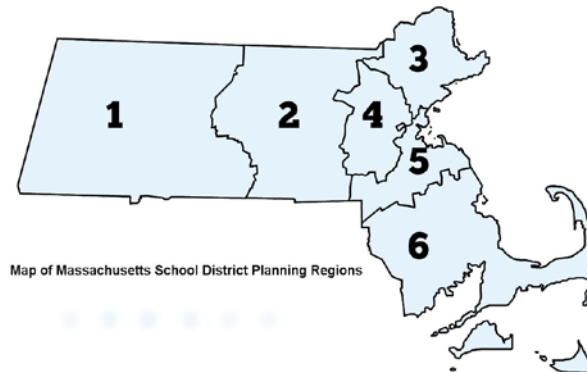

System Navigation Hierarchy

On the left hand side of the MCP application is a navigation hierarchy which you may use to select your district. The hierarchy available in the Maintenance and Capital Planning system is as follows:

1. Region: The MSBA has assigned every school district a region based on geographic location. A map is displayed below. There is no MCP data collected at the region level.
2. District: This is the level at which MCP information is collected. To access or edit district information, click on the district name.

Maintenance and Capital Planning data is gathered for the district as a whole, not for individual schools or projects. To edit or view Maintenance and Capital Planning information, you must click on your school district name.

Map of Massachusetts School District Planning Regions

5. The MCP Record from Creation to Submission

There are two types of users, "District Representatives," who enter data on behalf of their district, and "District Readers," who have read-only access to their district's MCP records. This section is primarily for District Representatives who will be entering data.

Create a New MCP Record

When you have clicked on a district, you will arrive on the district's home page.

Once in the district you will notice two tabs. The second tab, "District Contacts," contains contact information for various people involved in district administration. This information is shared across MSBA applications. District users can review this information at their convenience and contact their Field Coordinator or Project Manager at the MSBA if changes need to be made.

The first tab, "Maintenance and Capital Planning," is where the MCP record will be entered. There are three sections on this main tab: a top section that contains information about the system and ways to get help, a middle section that contains active forms for you to work on, and a bottom section that contains previously submitted forms. This bottom section will be blank if your district has not yet submitted any forms through the online MCP System.

To create a new form, click on **Create MCP Record** in the middle section. This will create a new MCP record for you to work on and place you on the first page of that record.

Navigate the MCP Record

Whenever you create a new MCP Record or enter an existing one you will land on this first page.

Note the tabs at the top: these tabs are the easiest way to navigate from one page of the MCP Record to another. You will be asked to fill in information on each page, **save each page**, and then, using the final tab, submit your record to the MSBA.

The pages or sections of an MCP Record, which are also listed as blue links in the Sections area, are:

- General Information (the page you are already on)
- Staffing
- Maintenance Planning
- Facilities Condition Index
- Environment
- Maintenance Budget
- Capital Program
- Capital Budget

To the right of each page name is an indicator of whether any required information still needs to be completed. As you answer questions in the application, that indicator will change from **Incomplete** to **Complete**.

For example, there is only one question on the General Information page at this time. It requires you to select the projects for which this MCP Record is being submitted. If you answer the question and click on **Save**, you will see the word next to General Information change from Incomplete to Complete.

Pre-Populate

If you have previously submitted an MCP Record electronically, pressing the **Pre-Populate** button will copy many of your answers from the old record into the new one. If you wish to pre-populate your record, **this should always be your first step**. You can press the pre-populate button later, but it will overwrite or wipe out any other information you have already put into the system.

Type of Question	Status
Yes/No questions	Pre-populated
Dropdown menu questions	Pre-populated
Long text questions, such as "Please describe your methodology for keeping the FCI up to date."	Pre-populated
Yearly data, such as budgets and staff numbers	Pre-populated for the years that are still needed. For example, if you fill out an MCP in 2010 you will have to fill in three years of budget predictions for 2011, 2012, and 2013. When you fill out an MCP in 2011, only two years of budget predictions will be pre-populated. You will still need to fill in the information for 2014, since that year was not present in the old record.
Attachments	Not pre-populated

Enter and Save Data

You will be asked to enter data on every page of the MCP Record, with the possible exception of the Attachments page.

You do not have to complete every field on a page in order to save your data. The MCP System allows for saving of partial data on every page. You will have to fill in all required fields in order to submit your record to the MSBA. Required fields are designated with a red asterisk (*).

Make sure that you press the "Save" button at the bottom of every page in order to save your changes. If you navigate away from the page before saving, your data will be lost.

Print and Submit

If you would like to print a copy of your MCP record, or you are finished entering data and would like to submit your MCP record to the MSBA for evaluation, go to the Submit tab.

Print

To review a copy of the record, just click on the button that is labeled MCP Record. This will create a PDF document for you that you can read, save, or print. Once you have submitted a record to the MSBA, you will also be able to print it directly from the main page for the district.

Check My Data and Submit

The first step toward submitting your MCP to the MSBA is clicking on the **Check My Data** button. This will create a pop-up window that will tell you the names of any fields that have yet to be completed, but are required for submission.

If all required fields have been filled in, the Check My Data button will still appear, but it will have a grayer appearance than the MCP Record button above it and clicking on it will have no result.

Once all required fields have been filled in, you will have to click on two check boxes in order to submit. By clicking these check boxes you are committing your district to the data that you have entered and to the MSBA's evaluation of your data. Read them carefully before submitting. Any final comments you have on your submission can be entered in the Comments or Notes field. That field will become available only when you are ready to submit.

To submit your record to the MSBA, press the Submit button. You do not also need to print and mail a copy of the form.

6. Attachments

Upload Attachments

District users will be asked to upload attachments throughout the MCP Record. In most places, users are only able to upload one document at a time. For example, the MSBA only needs to see one sample work order.

You can upload files up to 4 MB in size, which covers small to medium sized photographs, small to medium sized PDF or Microsoft Word documents, and most spreadsheets. This should be sufficient for all of the documents requested by the MSBA.

If you have a file that you need to upload that is larger than 4 MB, contact the MSBA for assistance.

When you click on the Attach button, you will see an attachment selection menu. It works similarly to attaching a document to an email. Select the file on your computer that you would like to upload.

This is what the attachment area will look like once you have **selected** an attachment:

If "Yes", please attach it now: *

Maintenance Plan: \\Msba-bos-nt-fp2\FLDREDIR\cflynn\My Documents_msba_logo.gif   Browse...   Attach

To finish attaching a document, **press Attach**. The attachment area will then look like this:

If "Yes", please attach it now: *

Maintenance Plan: _msba_logo.gif   4/19/2011   Delete   Re-Attach

If you need to make changes you can either delete your existing attachment or re-attach a new document in place of the other one. Please note that Re-Attaching a document will delete the previously attached document. If you have additional attachments, those can be uploaded as supplemental attachments on the Attachments Tab.

Attachments Tab and Supplemental Attachments

Any attachment you uploaded throughout the MCP record tabs will also be displayed on the Attachments tab. There you can review all of the documents you uploaded, as well as upload supplemental material that you think will help the MSBA understand your district's maintenance and capital planning practices.

Examples of Supplemental Attachments that will help the MSBA understand your maintenance and capital planning practices:

- Language from the Town Budget that describes how the town funds or utilizes a capital reserve account
- Example of an energy utilization tracking report

Examples of Supplemental Attachments that the MSBA does not need in order to evaluate your district's maintenance and capital planning practices:

- Invoices from utility companies or outsourced maintenance contractors
- Resumes or other details on the district's facilities director or other personnel
- Newspaper or online publication articles about your school district
- Reports or data originally generated by the MSBA

If you have a question about whether a document is appropriate to include in your Maintenance and Capital Planning record, please contact the MSBA.

7. Details on Specific Questions and Sections

Staffing: Vendor Details

The district is required to provide details on vendors with whom it contracts for maintenance services on the Staffing Page.

In the upper section the district should enter details on one vendor at a time. If the vendor type is not listed (for example, if the district contracts out snow removal, which is not in the list), the district should select Other and fill in the Other Vendor Type line. The district should also fill in the total contract duration. For example, if a district signed a five year contract two years ago, the MSBA still wants the district to fill in "Five Years" in the contract duration field.

After that, the district should press **Add to List**, which will populate the information that they have entered into the vendor list below and clear the vendor entry area, as displayed above.

Each item in the vendor list can be edited or deleted by the district as needed.

8. Editing Information in a Returned MCP Record

After the submission of an MCP Record by a district, the MSBA may require more information of a district before completing an evaluation of their MCP record. District users will be notified by email if their record has been returned. An MSBA Evaluator may also contact the district representatives and explain the information needed and the record will be returned to the district for editing.

When users from that district enter the MCP system they will see an indicator on the district page that a record has been returned:

Do not create a new record. Simply click on the link to open and **edit the existing record**. Then submit it as you did before, and the MSBA will evaluate your new information.

When editing a returned MCP Record, **make sure to click SAVE at the bottom of every page** in order to save your changes. If you navigate away from the page before saving, your new data will be lost.

9. Appendix: Glossary

Access Request Form

This is a form that must be filled out and signed by district users in order to gain access to MSBA Systems, including the MCP System.

Add/Reno

This is a term used by the MSBA to refer to projects that are either **Additions** and/or **Renovations**.

Addition

As used here, this is a type of school building project that creates additional square footage on or near an existing structure. For example, a building that had been using temporary classroom space may remove the temporary space and create an addition that builds new classroom space and connects it to the existing permanent structure.

Attachment

A document, image, or other file that will be uploaded by the district, as it cannot be captured through the questions in the MCP Record. For example, an image of a paper work order or a sample report from the system that manages the district's Facilities Condition Index.

Building Systems

Examples include: plumbing, electrical, fire suppression, telecommunications.

Capital Exclusion Vote

An action taken by a community through a referendum vote to raise the funds necessary to pay for a particular project from the property tax levy, but outside the limits under Proposition 2½.

Capital Planning

The process to identify, estimate, and schedule specific repairs or replacements of buildings and/or building systems.

Capital Reserve Account

See **Stabilization Fund**

Commissioning

For information on commissioning, see the Maintenance Best Practices section on the MSBA website. These can be found by selecting Building With Us from the menu on the left, and then selecting Maintenance and Capital Planning from the menu.

Debt Exclusion

An action taken by a community through a referendum vote to raise the funds necessary to pay debt service costs for a particular project from the property tax levy, but outside the limits under Proposition 2½.

Debt Issuance Process

The process of selling bonds to pay for capital projects.

DESE

Abbreviation: The Department of Elementary and Secondary Education (of Massachusetts). Information that has been given to this agency by school districts is displayed in the MCP System.

Director of Facilities

This is generally a district-level position that oversees all facilities and maintenance needs, including supervision of maintenance and

	custodial staff. May also be called the **Director of Maintenance and Operations**.
EPA's Tools for Schools	A comprehensive resource created by the EPA to help schools maintain a healthy environment by identifying, correcting, and preventing **IAQ** problems. More information is available on the EPA website, www.epa.gov/iaq/schools
Facilities Condition Index	This is a comprehensive inventory of the age, expected useful life, and replacement cost of building systems and components. An FCI paints a picture of expected maintenance and upkeep needs of building systems and components. An asset inventory that has been created for insurance purposes and does not typically serve as a Facilities Condition Index.
FCI	Abbreviation: **Facilities Condition Index**.
FTE	Abbreviation: Full Time Equivalent.
IAQ	Abbreviation: Indoor Air Quality.
Maintenance Plan	A document that consists of the district's philosophy and approach to maintenance and details minimum maintenance and custodial standards and the governance of day to day maintenance operations at all schools.
Maintenance Staff	This refers to personnel that have responsibility for the cleaning, upkeep, and repair of school facilities. This includes custodians, tradespersons, and supervisors.
MCP Record	The information filled out by a district in the Maintenance and Capital Planning system that describes that district's budget and practices related to both Maintenance and Capital Planning.
MCP	Abbreviation: Maintenance and Capital Planning
MSBA	Massachusetts School Building Authority. See massschoolbuildings.org for more information about the Authority.
Override Vote	A vote by a community at an election to permanently increase the levy limit.
PDF	Portable Document Format. This is a commonly used document format that can be accessed with a free download of Adobe Reader from Adobe.com.
Pipeline	The MSBA accepts projects into something informally called the "project pipeline" every year. This includes projects that have passed through an initial evaluation but not yet been approved for reimbursement by the MSBA Board, as well as projects that have been approved for funding by the MSBA Board.

Pre-Populate

Pre-populating a record will copy all of your answers from an old electronic record into the new record. This is similar to processes used in other MSBA systems, such as "refresh" or "copy forward."

Preventative Maint. Plan

The Preventative Maintenance Plan is either a separate document or a section of the **Maintenance Plan** that details the steps that are scheduled in advance to minimize and/or prevent problems in the buildings and building systems of the district's schools, as well as a schedule.

Retro-commissioning

For information on retro-commissioning, see the Maintenance Best Practices section on the MSBA website. These can be found by selecting Building With Us from the menu on the left, and then selecting Maintenance and Capital Planning from the menu.

Returned Record

Occasionally the MSBA will require additional information from a district before completing an evaluation of the district's MCP record. In these cases, the MSBA will return the record to the district so that information can be added.

Save or **Partial Save**

The MCP System allows for the saving of partial data. This means that you do not have to fill in every answer on a page in order to save your progress.

Stabilization Fund

Also known as a **Capital Reserve Account**. Funds set aside specifically to pay for capital repair or replacement projects.

Submit

The process by which you finalize and transmit your information to the MSBA for evaluation.

Useful Life

The time period expected for the functioning of a system.

10. Appendix: Frequently Asked Questions

Question: I can't submit yet, but I think I have filled in all the required fields. How can I find out what questions I still need to answer?

A: On the Submit page you will be able to click on the "Check My Data" button. The system will check your record and provide a list of the fields you will need to complete prior to submission.

Question: I have submitted MCP information in paper format before. Can I pre-populate my data?

A: No. The system can only pre-populate data from electronic records. However, after your first electronic submission, subsequent new records created can be pre-populated.

Question: How do I view previously submitted MCP Records?

A: Go to the district page and read the list of records under the Previously Submitted header. Those are your previously submitted records.

Question: How can I improve my district's maintenance practices?

A: See the Best Practices guide on the MSBA website. It can be found by selecting Building With Us and then selecting Maintenance and Capital Planning from the menu. You can also contact Julie Leonard at the MSBA for answers to specific maintenance questions. Julie can be reached at 617-720-4466 or Julie.Leonard@MassSchoolBuildings.org.