

# Recommended Action Plan

for

## Town Wide Facility Management in Tolland

**Purpose:** This document lays out the plan of action to address HVAC and the facilities infrastructure in Tolland to ensure the investments in buildings and energy conservation measures are properly managed and maintained. The end result of the action plan is to have one responsible entity in Tolland that oversees, manages and maintains the HVAC systems and physical buildings in town.

**Background:** In 2012 the Town Council and Board of Education in Tolland initiated a project to use energy savings to finance facility improvements thru what is known as an ESCO (Energy Savings Company). Honeywell was selected as the ESCO and improvements have begun. A joint Town and School utilities fund was recently established to ensure savings from the improvements can be tracked and the payments made to payoff the bonds.

This plan was crafted by the Ad Hoc Joint Town Council and Board of Education Committee on Shared Services. The plan is based on recommendations from Town Manager Steve Werbner. The recommendations are a result of discussions with CNC's facility maintenance supervisor and mechanical engineers involved in prior commissioning of Tolland HVAC systems. The actions below were reviewed and approved unanimously by the Shared Services Ad Hoc Committee.

**Action Plan:** The Town Council and Board of Education shall review and vote to approve the following actions to be taken by the Town Manager and School Superintendent to establish a new Single Facilities and HVAC management unit.

1. The Town Manager with support and help from the School Superintendent shall establish a new Facilities and HVAC department prior to the completion and commissioning of the new HVAC systems installed by Honeywell. The department will be responsible for oversight of all building maintenance and improvements including but not limited to facility capital budget projects, routine facility maintenance such as electrical, plumbing, carpentry and painting, and HVAC system management.

The new department will have the following employee composition:

a. Facilities Manager – will be trained in all HVAC and automation systems used in town. Will report to Town Manager and coordinate maintenance activities with the Superintendent and school principals or their designees.

b. HVAC Supervisor – will be responsible for the day to day oversight of the HVAC systems in Tolland and the Trades employees. The current Acting Project Manager is being trained by CNC software's facility manager and would be an ideal candidate for the position.

c. Trades Employees – one plumber, one electrician and 2 general trades employees will perform maintenance on Tolland HVAC and facilities at the direction of the HVAC Supervisor. Staffing may come from existing personnel or new hires and the unit should be phased in taking advantage of any vacancies which may occur in the future in existing facility unit staff in the Board of Education.

2. The Town Manager and Superintendent will devise and establish a work order system to aid in the maintenance, management and tracking of reported problems in the buildings and with the HVAC systems.

3. As Soon As Possible, the HVAC Supervisor position should be created with job description and pay scale to begin training in automated HVAC system and oversight of existing trades employees. Until the Facilities Manager is found the

HVAC Supervisor will report to the Director of Public Works. The Public Works Director will provide information to the Town Manager and Superintendent as needed on the progress and activities of the HVAC Supervisor and his staff. The HVAC Supervisor will coordinate and direct Parks Department and School District facilities trade's staff to prioritize efforts to address work order jobs.

4. Upon establishment of the HVAC Supervisory position, NO employee will be able nor is allowed to make changes to the HVAC system settings except the HVAC Supervisor or his designee. The Town Manager and Superintendent shall inform their staffs of this change and educate them about the new system that was installed and to whom the new point of contact will be for reporting HVAC and facility maintenance items.

5. The Facilities Manager (Public Works Director until position filled) and HVAC Supervisor will prepare for each Town and Board of Ed facility a HVAC budget which will consist of appropriate outside contracts for service, preventative maintenance agreements, cost for parts replacement, cost of equipment or training for full time staff and a depreciation schedule for existing equipment which will ultimately need replacement in a 15-20 year time frame. The appropriate cost for these services will be charged to the Town and Board of Education. The personnel costs will be prorated on roughly a 1/3-2/3 share with the Town paying the lesser share based on facility square footage.

6. The Facilities Manager and HVAC Supervisor will work with and use the training resources provided by Honeywell on the HVAC systems installed. CNC Software has offered to provide training and HVAC management best practices for systems Honeywell is installing. This offer should be utilized as much and as long as reasonably possible.

7. Celtic, the Town's ESCO supervising consultant, shall be retained for as long as deemed necessary and beneficial to the town for management and advice on Energy Usage and ESCO contract matters.

8. Upon approval of the above Joint Facilities Department a timeline and budget for the establishment of the Facilities Manager, HVAC Supervisor and consolidation of Plumbing, Electrical and General Trades will be developed by the Ad Hoc Shared Services Committee.

**Financial Impact and Summary:** The above action plan will result in 2 new FTE positions, 1.0 Facilities Manager/Director and 1.0 HVAC Supervisor. The Financial impact may be reduced if the Supervisor employee is filled from within which will result in backfilling a lower salaried position. The action plan when fully implemented will result in a unified Facilities Group that will be responsible for oversight and management of HVAC systems, facilities and project management. The tracking and management of maintenance issues and items will be done via a work order system that will be established. This will require new policies, IT systems which will require some initial expense (TBD) to get started.