Planning for the 2020 CEFPs

Comprehensive Educational Facilities Planning

WVDE & SBA Partnership

Thursday, November 8, 2018

sba.wv.gov
Partnership
## SBA Staff

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The Old Process 1990-2010

- Capital Planning = The Law
- Inconsistent information, sources, levels of subjectivity
- Difficult to access & track changes
- Information becomes stagnant
- County to County Comparisons and Statewide Review nearly impossible
- Insufficient data to make decisions, especially amendments
- Difficult to update
Preventative Maintenance Program

- SBA 3% Grant to WVDE to Continue PM since 2010
- Corrective Maintenance ➔ Preventative Maintenance
- Cost savings and extended life expectancy of equipment
- Significant details already loaded into software
- PM Data loaded into databases reducing info needed in facility analyses
- Information gives a head-start on creating a Technology-Based CEFP
Why a Technology-Based CEFP?

- Right now, Everyone is doing it differently
  - No standard or “apples to apples” comparison

- Technology will allow you to model the building & equipment life cycles

- Better plan and better forecast for your ongoing capital needs

- Right now, everything is paper based – hard to search or analyze
What is NOT Different?

- Educational Plan drives the need for spaces
- Translating Educational Needs into Facility Needs
- Decisions made locally
- Architects / Engineers / Planners still used as County Consultants throughout the entire process, as needed by each LEA
- Community Support is Necessary!
The Old Process 1990-2010

ASSESS

PRIORITIZE

PLAN

EXECUTE

LOCAL or SBA PROJECT

RUN TO FAILURE

REACTIVE MAINTENANCE

NOT WORKING
The New Process – A Cycle of Success

- **Step 1: ASSESS**
  - Create a Detailed Assessment for all parts of your building and equipment

- **Step 2: PRIORITIZE**
  - Prioritize the Needs

- **Step 3: PLAN**
  - Create a plan of action for all items on the list

- **Step 4: EXECUTE**
  - Put the plan in motion – complete projects

- **Step 5: MAINTAIN**
  - Keep your system up to date so you never start at zero again

And... Repeat!
The New Process – A Cycle of Success

STEP 1: ASSESS
STEP 2: PRIORITIZE
STEP 3: PLAN
STEP 4: EXECUTE
STEP 5: MAINTAIN

SBA-Funded PM Program
- In Place -

SBA & WVDE Grant
In Partnership with Local Education Agencies

This is the CEFP
Approved Vendor

- Program Oversight – QA/QC
  - Mobilization
  - A/E Firm Training
  - Data Collection & Report Standardization
- State Level Executive Summary
- Annual Updates
  - State Reports
  - District Reports
  - School Reports
Step 1: ASSESS

**FACILITY ASSESSMENTS**
- Architect / Engineer / Ed. Planner
  - Evaluate existing facilities
  - Enter data into Form Database
  - Data transferred to Dude Connect
- PM Module & Public Data available
  - A/E Scope reduced in Early Stages
- Tech-Based SBA Form 134 – iPad
  - Not a subjective 1-5 answer

**EDUCATION PLANNING**
- Committees Form & Meet
- Evaluate Previous CEFP
- Determine Goals
- Create Educational Plan
  - Curriculum Plan
  - Instructional Plan
  - Operations Plan
  - Support Plan
  - Personnel Plan

**SOURCE DATA**
- Community Analysis & Demographics
- Population & Enrollment Study
- School Enrollment Projections

**ARCHITECTS**
- Counties
- DUDE CONNECT

**DUDE CONNECT**
- Information Database
  - Resources Readily Available
  - “Liquid” Content
  - Relevant
  - Consistent
  - Quality
Step 1: ASSESS

- Creation of CEFP Committees
  - Establish a single point of contact to Dude Solutions, Design Professionals & Sub-Committee Chairs
- Hire Architect / Engineer / Ed. Planner
- Evaluate Previous CEFP

TO-DO LIST:
Create Educational Plan
- Curriculum Plan
- Instructional Plan
- Operations Plan
- Support Plan
- Personnel Plan

As outlined in WVDE Policy 6200
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Step 2: PRIORITIZE

DUDE CONNECT

CAPITAL FORECAST DIRECT (CFD)

TRANSLATING EDUCATIONAL NEEDS INTO FACILITY NEEDS
Step 2: PRIORITIZE

CAPITAL FORECAST DIRECT (CFD)

• Uses information gathered in Dude Connect and from PM Program, CFD is a powerful tool that helps counties make data-driven decisions.

• Predicts and prioritizes asset maintenance based on accurate lifecycle information and best practices.

• Prevents unforeseen drains on county finances for greater control.

• Uses a facility condition index (FCI) to properly and equally evaluate buildings.

• Very transparent, justifies spending, creates a higher return on investments.
Step 2: PRIORITIZE

CREATE A SYSTEM

CAPITAL FORECAST DIRECT (CFD)
Step 2: PRIORITIZE

CAPITAL FORECAST DIRECT (CFD)
Step 2: PRIORITIZE

CURRENT REPLACEMENT VALUE (CRV) AND FACILITY CONDITION INDEX (FCI)

Each school will be assigned an FCI score that will be continually updated as the facility ages and repairs are made/logged.

FCI equals the percent of the CRV that needs to be repaired or replaced.

Example County High School has $8,500,000 in backlog of repairs

\[
\frac{\$8,500,000 \text{ in repairs}}{\$29,400,000 \text{ Current Replacement Value (SBA Formula)}} = 0.289 \times 100 \text{ (Index)}
\]

= 28.9% Facility Condition Index (The Lower the Better)
Step 2: PRIORITIZE

TRANSLINGING EDUCATIONAL NEEDS INTO FACILITY NEEDS

- Info & Data gathered in Dude Connect and CFD, each county must determine future facility needs.

- The *Architect / Engineer* Team may work as a resource consultant to this process.

- Plans in compliance with state and local requirements and will address the educational needs of the LEA.
Step 2: PRIORITIZE

TRANSLATING EDUCATIONAL NEEDS INTO FACILTY NEEDS

- Identify the best route to the future through a workable plan for handling priority rated, predictable situations, and anticipated changes.

- A CEFP defines ultimate goals for the LEA and accounts for the facilities required to help achieve these goals.

- The plan is materialized through several phases of construction and expansion or reduction and modification, if necessary.
Step 3: PLAN

PROJECT PRIORITY LIST

FINANCE PLAN

- Cost estimating assistance provided may be by professional consultants Architects & Engineers

COMMUNITY MEETINGS

- Consider Educational Requirements by WVBOE and Funding Limitations of the SBA
- Required by State Law
Additional Resources

▪ Tools of Dude Intelligence Available
▪ Updates logged as they happen working with PM Module
▪ Amendments have Justification capabilities with Dude Intelligence
▪ Living, constantly updating & evolving electronic plan
▪ Stored safely on the “Cloud”
SUMMARY

FACILITY ASSESSMENTS
EDUCATION PLANNING
SOURCE DATA

DUDE CONNECT
CAPITAL FORECAST
TRANSLATING EDUCATIONAL
DIRECT
NEEDS INTO FACILITY NEEDS

PROJECT PRIORITY LIST
FINANCE PLAN
COMMUNITY
MEETINGS

DUDE SOLUTIONS

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Projected Tasks & Timelines

- **January 2019**  | Project Statewide Kickoff
- **February 2019**  | Training Sessions, Facility Reviews, Educational Planning
- **January 2020**  | Begin “Translating Educational Needs” Section
- **April 2020**    | Project Priority List, Finance Plans, & Public Hearings
- **July 2020**     | Local Board Approval & Adoption
- **August 2020**   | Approval by WVDE & SBA
- **December 2020** | Specific Needs Project Funding by SBA
Questions?

Thank You!