Planning for the 2020 CEFPs

Comprehensive Educational Facilities Planning

WVDE Winter CTE Conference

Wednesday, February 20, 2019

sba.wv.gov
Partnership
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
The Old Process 1990-2010

ASSESS

PRIORITIZE

PLAN

EXECUTE

RUN TO FAILURE

LOCAL or SBA PROJECT

REACTIVE MAINTENANCE

NOT WORKING
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 – Jerry Milliken to help you
- 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!
CEFP Engagement Platform

Collaboration
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

SBA-Funded PM Program
- In Place -

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

SBA & WVDE Grant
In Partnership with Local Education Agencies

This is the CEFP
Approved Vendors

- Program Oversight – QA/QC
  - Mobilization
  - A/E Firm Training
- State Level Executive Summary
- Annual Updates
  - State Reports
  - District Reports
  - School Reports
Approved Vendors

- Facility Condition Assessment
  - Program Oversight
  - QA / QC
  - A/E Firm Training
  - Standardization & Quality
- Reports directly into Dude Solutions Platform
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**

ALPHA & ARCHITECTS

LEAs (ARCHITECTS?)

THE DUDE

DUDE CONNECT

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

## FACILITY ASSESSMENTS

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
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### Site Level Deficiencies

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<th>Material</th>
<th>Year Installed</th>
<th>If different from building</th>
<th>Condition</th>
<th>Notes</th>
<th>Message</th>
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### Permanent Buildings

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<th>Predominant Building Type</th>
<th>Include in Assessment</th>
<th>Year Built</th>
<th><strong>SF</strong></th>
<th>Basement (Y/N)</th>
<th># Floors (Excl. Base)</th>
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<th>Evaluation Status</th>
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### Portable Buildings

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![Place photo here](image-url)
## Step 1: ASSESS

### FACILITY ASSESSMENTS

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<th>Building</th>
<th>Year Built</th>
<th>Gross Square Feet</th>
<th>Basement</th>
<th># Floors</th>
<th># Rooms</th>
<th>#/ Ext (incl. Ext)</th>
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</table>
Step 1: ASSESS

- Creation of CEFP Committees
  - Establish a single point of contact to Dude Solutions, Design Professionals & Sub-Committee Chairs
- Evaluate Previous CEFP
- Complete “To-Do” List

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

As outlined in WVDE Policy 6200
Step 1: ASSESS

EDUCATION PLANNING

GENERAL CAMPUS INFORMATION

District LEA Name: Sheridan School District
Federal LEA ID: 500015
FIPS Code: 5

School Name: EAST END INTERMEDIATE SCHOOL
State LEA ID: AR-2705000
State School ID: AR-2705000-2705024

School Description: 2705 - East End IS 5205 W. Sawmill Road Little Rock AR 72206

Address 1: 5205 W SAWMILL RD
City: LITTLE ROCK
County: Saline County
State: Arkansas
Zip Code: 72206
Step 1: ASSESS

EDUCATION PLANNING COUNTIES

Oversee / Master Planning / My CEFP Documents

My CEFP Documents

Berkeley County

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<th>Size</th>
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Create File  Upload File
Step 1: ASSESS

**FACILITY ASSESSMENTS**
- Architect / Engineer / Ed. Planner
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- PM Module & Public Data available
  - A/E Scope reduced in Early Stages
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**EDUCATION PLANNING**
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**SOURCE DATA**
- Community Analysis & Demographics
- Population & Enrollment Study
- School Enrollment Projections

**ALPHA & ARCHITECTS**
- LEAs (ARCHITECTS?)

**DUDE CONNECT**
- Information Database
  - Resources Readily Available
  - “Liquid” Content
  - Relevant
  - Consistent
  - Quality
Dude Connect

Information Database
Resources Readily Available
“Liquid” Content
Relevant
Consistent
Quality
Dude Connect – Surveys

- Collect data from your community with a library of pre-configured or custom surveys.
Create forms and collect data to initiate additional tasks. Forms can be used to create users, projects, work orders and more.
Membership Group Directory

- Submit questions to the community and search already submitted questions for answers from fellow community members.
- Participate in group discussions to network, learn and unite with other members of the community.
- Submit your ideas directly to those who make things happen through the idea portal.
- Voting allows for the community to prioritize ideas and bring important items to the top of the list.

Membership Group Directory: A place for user to make connections through discussions, elevate their knowledge through answers and shape the future with their ideas.
• Create and manage users, their span of control and access to content.
• Users can be added through a self-registration form or manual input by an Admin. Roles are used to determine what a user has access to.
• Each role can be configured to what pages and content they can see. Groups can be set up in the Community to connect users with a common attribute.
• Create and manage a file library of any file type/size to provide access to your users.
• Upload a document to a configured folder which can be permissioned for access by specific roles or groups.
• Users can view or download the files to access important information or take action.
Step 1: ASSESS

FACILITY ASSESSMENTS

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ALPHA & ARCHITECTS
LEAs (ARCHITECTS?)
THE DUDE

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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

CAPITAL FORECAST DIRECT (CFD)

CREATE A SYSTEM

Add System

System: Roofing
Subsystem: EPDM (Rubber Membrane)
Unit Of Measure: Sq. Ft.

Cost & Life Cycle

Filtering
View Building Types starting with:
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

1 - 25 of total 57 listed

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<tr>
<th>Building Type</th>
<th>Dude Life Cycle (Yrs)</th>
<th>Life Cycle (Yrs)</th>
<th>Dude Cost/UOM</th>
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<td>$8.28</td>
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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

TRANSLATING EDUCATIONAL NEEDS INTO FACILTY 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 FACILITY 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 2: PRIORITIZE – Key Performance Indicators (KPIs)

TRANSLATING EDUCATIONAL NEEDS INTO FACILTY NEEDS
Step 2: PRIORITIZE – Capital Forecast Dashboard

**TRANSLATING EDUCATIONAL NEEDS INTO FACILITY NEEDS**

- Ability to roll up county Capital Forecast data to analyze costs of needs and projections.
Step 3: PLAN

PROJECT PRIORITY LIST

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

FINANCE PLAN

- Consider Educational Requirements by WVBOE and Funding Limitations of the SBA

COMMUNITY MEETINGS

- 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

PROJECT PRIORITY LIST

CAPITAL FORECAST DIRECT

FINANCE PLAN

TRANSLATING EDUCATIONAL NEEDS INTO FACILITY NEEDS

COMMUNITY MEETINGS

DUDE SOLUTIONS

WVDE & SBA
SBA Staff – Architectural Services

School Building Authority of West Virginia
County Assignments

Assistant Directors of Architectural Services

Mike Hall
Joyce VanGilder
Dana Womack
SBA Staff – County Representatives

Mike Hall
Michael.R.Hall@wv.gov

Joyce VanGilder
Joyce.A.VanGilder@wv.gov

Dana Womack
Dana.E.Womack@wv.gov

Call Us:  (304) 558-2541
SBA Staff – Additional Resources

David L. Roach
David.L.Roach@wv.gov

Ben Ashley
Benjamin.S.Ashley@wv.gov

Angie Bradley
Angela.L.Bradley@wv.gov

Jerry Milliken
WVDE Consultant
Milliken.Jerry@gmail.com

Call Us: (304) 558-2541
Projected Tasks & Timelines

- **January 2019**  Project Statewide Kickoff
- **Feb. - Mar. 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
Thank You!