Planning for the 2020 CEFPs

Comprehensive Educational Facilities Planning

Tuesday-Wednesday, April 16-17, 2019

sba.wv.gov
Comprehensive Educational Facilities Planning

Why are we doing this?

❖ Need described Statutorily
❖ Cornerstone of WVDE & SBA Policy
❖ Eligible for SBA Funds
❖ 2010 Plan Expires
What is the purpose?

❖ Long-range Planning *before* Individual Projects

❖ Relating to the Delivery of Education...
  ❖ Identify current & future facility needs
  ❖ Predict life-cycle costs of systems & equipment
Comprehensive Educational Facilities Planning

What will this do?

- Becomes a “To-Do List” for facilities
- Allows for an Ongoing Implementation & Review
- Accommodate Educational Innovations
- Build Community Support

New for 2020!

- Tech-based platform – readily available data
CEFP Engagement Platform
### WVDE Policy 6200 – Chapter 1

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<th>Phase</th>
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<td>C. Population &amp; Enrollment Study</td>
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<td>J. Synopsis of Comments from Public Hearing(s)</td>
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<td>K. Objective Evaluation of the Plan’s Implementation</td>
<td>Phase 4</td>
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The Old Process 1990-2019

**Phase 1:** ASSESS

**Phase 2:** PRIORITIZE

**Phase 3:** PLAN

**Phase 4:** EXECUTE

- LOCAL or SBA PROJECT
- RUN TO FAILURE
- REACTIVE MAINTENANCE

**NOT WORKING**
The New Process – A Cycle of Success

❖ Phase 1: **ASSESS**
   ❖ Create a Detailed Assessment for all parts of your building, equipment – Create ideal Education Plan

❖ Phase 2: **PRIORITIZE**
   ❖ Translate Educational Needs into Facility Needs

❖ Phase 3: **PLAN**
   ❖ Create a plan of action for all items on the list

❖ Phase 4: **EXECUTE**
   ❖ Put the plan in motion – complete projects

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

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

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

SBA-Funded PM Program
Dude Solutions
- In Place -

This is the CEFP
Statewide Contractors

- Program Oversight – QA/QC
  - Mobilization
  - A/E Firm Training
- Information Gathering Instruments
- Justification Capabilities
- Predictive Analysis
- Database to House Information - CEFPs
Statewide Contractors

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

Source Data (Enrollment Projections, etc.)

Ideal Educational Plan

Translating Educational Needs into Facility Needs & Implementation Plan

2020 CEFP Projects
Phase 1

**A/E FIRM**
- Evaluation and Inventory of Existing Facilities

**STATEWIDE CONTRACTORS**
- Standardization & Quality
  - Community Analysis
  - Enrollment Projections
  - Information Database

**LOCAL EDUCATION AGENCY**
- Committees Meet
- Evaluate Previous CEFP
- Determine Goals
- Create Educational Plan
  - Curriculum Plan
  - Instructional Plan
  - Operations Plan
  - Support Plan
  - Personnel Plan

**WVDE Policy 6200 – Chapter 1**

A. Goals & Objectives
B. Community Analysis
C. Population & Enrollment Study
D. The Educational Plan
E. Evaluation & Inventory of Existing Facilities
Phase 1

A. Goals & Objectives
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WVDE Policy 6200 – Chapter 1

A/E FIRM

Standardization & Quality
Community Analysis
Enrollment Projections
Information Database

Commences Meet
Evaluate Previous CEFP
Determine Goals
Create Educational Plan
Curriculum Plan
Instructional Plan
Operations Plan
Support Plan
Personnel Plan

Pre-Configured WVDE & SBA Templates
LEA Responsibilities – Phase 1

- Create CEFP Committees
- Evaluate Previous CEFP
- Create 2020 CEFP Goals & Objectives
- Create Education Plan
  - System Plan
  - Curriculum Plan
  - Instructional Plan
  - Operations Plan
  - Support Plan
  - Personnel Plan
- Coordinate A/E Facility Condition Assessments (FCA)
Create CEFP Committees

❖ Establish Committees, Sub-Committees, Leaders
❖ Name a Point of Contact to State & Consultants
❖ Facilitate Meaningful Discussions
❖ Create an Open Dialogue
❖ Build a Consensus between Community, Educators, & the Board
❖ Evaluate Previous CEFP and be honest
❖ Dream BIG!
The Education Plan

❖ Review Goals & Objectives

❖ Think **Ideally** about all phases of Educational Delivery

❖ How to boost student achievement, teacher success? - Architecturally
  ❖ Not about which school to renovate, close
  ❖ Decisions on the future of facilities in “Translating” Section

❖ Applicable Ideas from Educational Forums?

❖ Explore “what you **DON’T** know”
Phase 1

A/E FIRM
- Evaluation and Inventory of Existing Facilities
- Standardization & Quality
  - Community Analysis
  - Enrollment Projections
  - Information Database

STATEWIDE CONTRACTORS
- Committees Meet
  - Evaluate Previous CEFP
- Determine Goals
- Create Educational Plan
  - Curriculum Plan
  - Instructional Plan
  - Operations Plan
  - Support Plan
  - Personnel Plan

LOCAL EDUCATION AGENCY

WVDE Policy 6200 – Chapter 1
A. Goals & Objectives
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D. The Educational Plan
E. Evaluation & Inventory of Existing Facilities

Your A/E Firm

Alpha
Facilities Solutions

Dude Solutions 360
Facility Condition Assessments

❖ Completed by your A/E Firm

❖ Statewide Contractors give Access to Data Collection Tools

❖ Gives an Idea of what needs to happen for your facility to meet:
  ❖ Current Building Codes & Standards
  ❖ Current WVDE Policy 6200 Standards

❖ Establishes Key Indexes – Statewide Consistency

❖ Feeds directly into **Dude Solutions 360** Database
FCA Indexes – Facility Condition Index (FCI)

\[
\frac{\text{Cost of Facility Improvements}}{\text{Replacement Cost of Facility}} = 60
\]

(Lower = Better)

Cost of Facility Improvements
(to meet all Codes & Standards)

Replacement Cost of Facility
(SBA Funding Formula)
FCA Indexes – Energy Usage Index (EUI)

Facility Energy Consumption per Year
(Converted to BTU)

\[
\frac{\text{“Conditioned” Building Square Footage}}{} = 45
\]

(Lower = Better)
FCA Indexes – Building Program Utilization

\[
\text{Student Enrollment} \quad \text{(Current, Projected, or Design)} \quad = \quad 85\% \\
\text{Building Capacity} \quad \text{(Based on Educational Program)} \quad \text{(Desired Target)}
\]
**Phase 1**
- Evaluation and Inventory of Existing Facilities
- Committees Meet
- Evaluate Previous CEFP
- Determine Goals
- Create Educational Plan
  - Curriculum Plan
  - Instructional Plan
  - Operations Plan
  - Support Plan
  - Personnel Plan
- Standardization & Quality
- Community Analysis
- Enrollment Projections
- Information Database

**Phase 2**
- Resource / Consulting
- “Dude Solutions 360” Prediction Software
- “Capital Forecast Direct”
- Translating Educational Needs into Facility Needs

**Phase 3**
- Project Cost Estimating
- Justification Capabilities
  - “Dude Intelligence”
- Project Priority List
- Finance Plans
- Community Meetings

**Digital 2020 CEFP**
Facility Condition Information
Source Data (Enrollment Projections, etc.)
Ideal Educational Plan

Translating Educational Needs into Facility Needs & Implementation Plan

Gather Data
Make Decisions
Execute Plan

2020 CEFP Projects
Future Training Session(s)
<table>
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<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>January 2019</td>
<td>Project Statewide Kickoff</td>
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<td>April 2019</td>
<td>A/E Procurement, Training Sessions</td>
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<tr>
<td></td>
<td>Facility Condition Assessments</td>
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<td>Begin Forming Committees, Educational Planning</td>
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<td>January 2020</td>
<td>“Translating Educational Needs into Facility Needs” Section</td>
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<tr>
<td>April 2020</td>
<td>Project Priority List, Finance Plans, &amp; Public Hearings</td>
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<td>July 2020</td>
<td>Local Board Approval</td>
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<td>August 2020</td>
<td>Approval by WVDE &amp; SBA</td>
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<td>December 2020</td>
<td>Specific Needs Project Funding by SBA</td>
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Questions?

Thank You!