Planning for the 2020 CEFPs

Comprehensive Educational Facilities Planning

Monday, March 18, 2019

sba.wv.gov
Comprehensive Educational Facilities Planning

❖ Long-range Planning *before* Individual Projects
❖ Relating to the Delivery of Education...
   ❖ Identify current & future facility needs
   ❖ Predict life-cycle costs of systems & equipment
❖ Ongoing implementation, review
❖ “To-Do List” for facilities
❖ Tech-based platform – readily available data
CEFP Engagement Platform
### WVDE Policy 6200 – Chapter 1

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Goals &amp; Objectives</td>
<td></td>
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<tr>
<td>B</td>
<td>Community Analysis</td>
<td></td>
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<tr>
<td>C</td>
<td>Population &amp; Enrollment Study</td>
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<td>D</td>
<td>The Educational Plan</td>
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<tr>
<td>E</td>
<td>Evaluation &amp; Inventory of Existing Facilities</td>
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<tr>
<td>F</td>
<td>Major Improvement Plan</td>
<td>Phase 1</td>
</tr>
<tr>
<td>G</td>
<td>Inter-County Feasibility Study</td>
<td>Phase 2</td>
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<tr>
<td>H</td>
<td>Translating Educational Needs into Facility Needs</td>
<td>Phase 2</td>
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<tr>
<td>I</td>
<td>Finance Plan &amp; Project Priority List</td>
<td>Phase 3</td>
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<td>J</td>
<td>Synopsis of Comments from Public Hearing(s)</td>
<td>Phase 4</td>
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<tr>
<td>K</td>
<td>Objective Evaluation of the Plan’s Implementation</td>
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</tbody>
</table>
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 – Reactive Maint. to Preventative Maint.

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 -
Projects Funded
Locally or by SBA

This is the CEFP
Statewide Contractors

- Program Oversight – QA/QC
  - Mobilization
  - A/E & LEA 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
Phase 1

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

Evaluation and Inventory of Existing Facilities
Evaluation and Inventory of Existing Facilities

Standardization & Quality
Community Analysis
Enrollment Projections
Information Database

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

Resource / Consulting
“Dude Solutions 360”
Prediction Software “Capital Forecast Direct”

Translating Educational Needs into Facility Needs

Phase 1

Phase 2
**Phase 1**
- Evaluation and Inventory of Existing Facilities
  - Standardization & Quality
  - Community Analysis
  - Enrollment Projections
  - Information Database
- Committees Meet
  - Evaluate Previous CEFP
  - Determine Goals
  - Create Educational Plan
    - Curriculum Plan
    - Instructional Plan
    - Operations Plan
    - Support Plan
    - Personnel Plan

**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**
## Phase 1

**Evaluation and Inventory of Existing Facilities**

**Standardization & Quality Information Database**

### Site Level Deficiencies

<table>
<thead>
<tr>
<th>System</th>
<th>Material</th>
<th>Year Installed</th>
<th>Condition</th>
<th>Notes</th>
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<tr>
<td>Pedestrian Pavements</td>
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<td>Site Pavements - Parking</td>
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### Permanent Buildings

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<thead>
<tr>
<th>Record</th>
<th>Building Name</th>
<th>Predominant Building Type</th>
<th>Include Building in Assessment</th>
<th>Year Built</th>
<th>SSF</th>
<th>Basement (Y/N)</th>
<th># Floors (Excl. Bas)</th>
<th>Message</th>
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<td>Total SSF:</td>
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### Portable Buildings

<table>
<thead>
<tr>
<th>Record</th>
<th>Building Name</th>
<th>Year Installed</th>
<th>SSF</th>
<th>Message</th>
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The document appears to be a template for recording site-level deficiencies and permanent buildings inventory for a project managed by the Statewide Contractors. It includes fields for system, material, year installed, condition, notes, and records for permanent buildings with detailed fields for building name, predominant building type, include building in assessment, year built, SSF, basement (Y/N), and number of floors (excluding basement). The portable buildings section follows a similar structure, focusing on year installed and SSF.
Phase 1

- Establishing Facility Indexes – Statewide Consistency
  - Building Program Utilization
  - Facility Condition Index (FCI)
  - Energy Usage Index (EUI)
Phase 1

❖ Building Program Utilization

Student Enrollment
(Current, Projected, or Design)

Building Capacity
(Based on Educational Program)

= 85%  
(Desired Target)
Phase 1

- Facility Condition Index (FCI)

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

Replacement Cost of Facility (SBA Funding Formula) = 60

(Lower = Better)
Phase 1

❖ Energy Usage Index (EUI)

Facility Energy Consumption per Year (Converted to BTU)

= 45

“Conditioned” Building Square Footage

(Lower = Better)
Phase 1

❖ Source Data – Statewide Consistency

❖ Community Analysis & Enrollment Projections

STATEWIDE CONTRACTORS

Community Analysis
Enrollment Projections
Information Database

United States Census Bureau

West Virginia Department of Health & Human Resources

West Virginia Department of Education
Phase 1

❖ County Responsibilities
  ❖ Create CEFP Committees / Sub Committees
  ❖ Establish Executive Comm.
  ❖ Designate a Point of Contact
  ❖ Evaluate Previous CEFP
  ❖ Create 2020 CEFP Goals & Objectives
  ❖ Create Education Plan
Phase 1

- **The Education Plan** – Drives the Need for Spaces
  - Create Goals & Objectives
  - Think Ideally about all phases of Educational Delivery
  - How to boost student achievement, teacher success?
    - Not about which school to renovate, close

- **WVBE** – Asks the Questions & Sets the Standards
- **SBA** – Facilitates Data Gathering
- **Dude Solutions** – Gathers & Houses Data
Committees Meet
Evaluate Previous CEFP
Determine Goals
Create Educational Plan
Curriculum Plan
Instructional Plan
Operations Plan
Support Plan
Personnel Plan

Information Database

Phase 1

❖ Housed in **Dude Solutions 360** Information Database
Phase 1

**Information Database**

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

**STATEWIDE CONTRACTORS**

**LOCAL EDUCATION AGENCY**
Phase 1

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

Information Database
STATEWIDE CONTRACTORS
LOCAL EDUCATION AGENCY

Users

<table>
<thead>
<tr>
<th>NAME</th>
<th>EMAIL</th>
<th>JOINED</th>
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<tbody>
<tr>
<td>DNN Support</td>
<td><a href="mailto:dnn.support@dudes.com">dnn.support@dudes.com</a></td>
<td>02/05/2019</td>
</tr>
<tr>
<td>Steve Roth 01</td>
<td><a href="mailto:steve.roth@dudes.com">steve.roth@dudes.com</a></td>
<td>02/04/2019</td>
</tr>
<tr>
<td>Scott Carpenter</td>
<td><a href="mailto:scott.carpenter@dudes.com">scott.carpenter@dudes.com</a></td>
<td>02/04/2019</td>
</tr>
</tbody>
</table>
Phase 1

Committees Meet
Evaluate Previous CEFP
Determine Goals
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Information Database

STATEWIDE CONTRACTORS

LOCAL EDUCATION AGENCY

My CEFP Documents

Berkeley County

<table>
<thead>
<tr>
<th>Main Folder</th>
<th>Sub Folder: -</th>
<th>File Name</th>
<th>Size</th>
<th>Version</th>
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</thead>
<tbody>
<tr>
<td>Berkeley County</td>
<td>2010 CEFP</td>
<td>100.00 Background.docx</td>
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Create File | Upload File
Phase 1

Committees Meet
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Information Database

STATEWIDE CONTRACTORS

LOCAL EDUCATION AGENCY

Comprehensive Educational Facility Plan
Berkeley County Schools

CEFP Editor

Oversee / Master Planning / My CEFP Documents / CEFP Editor

Background
Phase 1

Committees Meet
Evaluate Previous CEFP
Determine Goals
Create Educational Plan
Curriculum Plan
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Information Database

Statewide Contractors

Local Education Agency
Phases:

1. Committees Meet
2. Evaluate Previous CEFP
3. Determine Goals
4. Create Educational Plan
5. Curriculum Plan
6. Instructional Plan
7. Operations Plan
8. Support Plan
9. Personnel Plan

Information Database

Statewide Contractors

Local Education Agency
Phase 1

Committees Meet
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STATEWIDE CONTRACTORS

LOCAL EDUCATION AGENCY

Survey and Email

Community survey and e-mail is where you’re able to send e-mail or surveys to select groups in the West Virginia School System’s user community. It’s here that you’re able to communicate with community groups like County Administrators, Facility Personnel or Architects - keeping them informed on important information. You’re also able to survey any group using the library of survey templates available to you in 360.

What is it you’d like to send?

Please Select

Group

None selected
Evaluation and Inventory of Existing Facilities

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Translating Educational Needs into Facility Needs

“A/E FIRM”
“Statewide Contractors”
“Local Education Agency”

“A/E FIRM”
“Statewide Contractors”
“Local Education Agency”

“Dude Solutions 360”
Prediction Software “Capital Forecast Direct”

“Project Priority List
Finance Plans
Community Meetings”

“Project Cost Estimating”

“Justification Capabilities
“Dude Intelligence””

“Digital 2020 CEFP”

Phase 1
Phase 2
Phase 3
Phase 2

Translating Educational Needs into Facility Needs

"Dude Solutions 360"
Prediction Software
"Capital Forecast Direct"

Resource / Consulting
Phase 3

- Project Cost Estimating
- Justification Capabilities “Dude Intelligence”
- Project Priority List
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Phase 1
Phase 2
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Digital 2020 CEFP

A/E FIRM
STATEWIDE CONTRACTORS
LOCAL EDUCATION AGENCY

Resource / Consulting

“Dude Solutions 360”
Prediction Software “Capital Forecast Direct”

Translate Educational Needs into Facility Needs

Project Cost Estimating

Justification Capabilities “Dude Intelligence”

Project Priority List
Finance Plans
Community Meetings

Digital 2020 CEFP
Comprehensive Educational Facilities Planning - 2020

February 2019  A/E Procurement

April 2019  Project Rollout – LEAs & Architects
Forming Committees, Goals & Objectives, Educational Planning
Facility Condition Assessments

January 2020  “Translating Educational Needs into Facility Needs” Section

April 2020  Project Priority List, Finance Plans, & Public Hearings

July 2020  Local Board Approval

August 2020  Approval by WVDE & SBA

December 2020  Specific Needs Project Funding by SBA
Comprehensive Educational Facilities Planning

- Rather than a stagnant 3-ring binder on a shelf...

- Data is... Visible, Provable, Actionable

Data ➔ Information ➔ Knowledge ➔ Insight
Questions?

Thank You!