Data Manual

JLARC Pilot
K-12 Facilities Inventory, Condition & Use System (FICUS)
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Why is JLARC Conducting the Pilot?

No Statewide Data Exist for K-12 School Facilities
The Office of Superintendent of Public Instruction (OSPI) allocates capital funding appropriated by the state Legislature to school districts through its construction assistance grant program. The funding is allocated using a formula based on projected student enrollment, square feet allowed per student, the state cost allowed per square foot, and the fiscal capacity of school districts (based on assessed property value per student). In order to be eligible for state funding, school districts must demonstrate to OSPI the ability to provide capital funds by local effort (e.g. a local construction bond or other local funding source).

The Legislature appropriated $641,766,000 for construction assistance grants in the 2005-07 and 2006 supplemental budgets. In the 2007-09 and 2008 supplemental budgets, the total for construction assistance grants was increased to $791,759,000.

The Legislature currently lacks a statewide source of information that would provide answers to common questions. These types of questions can be classified into three main categories, and include issues such as the following:

1. **Inventory:** How many school buildings are there? How old are they? How much did each building cost? How many have been remodeled, and at what cost? How many portables are in use?
2. **Condition:** What is the physical condition of school buildings? How many have systems that need repair or replacement?
3. **Use of Space:** How is classroom space being used? Are schools sharing space with the community? What are class sizes? How many specialized spaces exist (e.g. math and science)? Is there space to offer all-day kindergarten? Does the space function appropriately for the subject being taught?

The Legislature Directed JLARC to Pilot a System for K-12 School Facilities
The 2008 Supplemental Capital Budget (ESHB 2765, Sec. 1001) directed the Joint Legislative Audit and Review Committee to define and develop a pilot system for K-12 public school facilities. The Legislature intended that the system, once developed, be housed in and operated by the Office of the Superintendent of Public Instruction (OSPI) for school districts. The Legislature further directed JLARC to select up to ten public school districts to participate in the pilot.

The Legislature divided JLARC’s assignment into two phases, and requested that the Phase I report include the following:

- Identification of current sources of school district facility information and where the data resides;
- A review of other states’ scope and use of public school facility information;
- School district participants in the pilot;
- The scope of data to be collected;
• Recommended criteria for evaluating school facilities; and
• An implementation plan for the pilot.

The Legislature asked for a report at the conclusion of the pilot (Phase II) to include:

• A summary of data collected and analyzed for each participating district;
• An analysis of OSPI study and survey data for several participating school districts compared to an independent facility assessment;
• A cost/benefit analysis of expanding the pilot statewide, including timelines;
• Possible interaction of the facility system with the statewide first responder building mapping system (now known as the Critical Incident Planning and Mapping System) and other ongoing data collection efforts including student educational data managed by OSPI; and
• Methods to allow for the efficient transfer of information from the districts to the facility system.

The Phase II report is due to the Legislature in January 2010.

**Mandate Detail**

**ESHB 2765 from 2008 Supplemental Capital Budget**

NEW SECTION, Sec. 1001. A new section is added to 2007 c 520 (uncodified) to read as follows:

FOR THE JOINT LEGISLATIVE AUDIT AND REVIEW COMMITTEE

K-12 Inventory Pilot Project (08-2-850)

The appropriation in this section is subject to the following conditions and limitations:

(1) Funding is provided solely for the joint legislative audit and review committee to define and develop a pilot facility condition and inventory system for K-12 public school facilities. In developing and conducting the pilot, the joint legislative audit and review committee shall seek input from the superintendent of public instruction, participating school districts, the construction services group within educational service district 112, the state board for community and technical colleges, the office of financial management, the department of information services, and other entities as determined by the joint legislative audit and review committee. It is the intent of the legislature to build on the experience of the community and technical 24 college capital facility assessment and inventory process, which includes an independent condition assessment of facilities, to establish a baseline of basic public school facility building data and information. It is also the intent of the legislature that once developed, a facility condition and inventory system must be housed in and operated by the office of the superintendent of public instruction 30 for school districts statewide.

(2) The joint legislative audit and review committee shall select up to ten public school districts to participate in the pilot. The school districts must represent a cross-section of large and small districts, urban and rural districts, districts with facilities of varying age and condition, districts with varying fiscal capacity, and at least one district that serves as the host for a skills center.

(3) The facility condition and inventory system must include facility and site information necessary for facility assessment and maintenance. The facility condition and inventory system must also inform statewide policy options related to: (a) Class size; (b) all- day kindergarten; (c) specialized educational spaces, including math and science classrooms and labs, as well as other specialized spaces; (d) environmental health and safety improvements; (e) joint use of school facilities beyond the traditional school day; (f) high performance buildings; (g) use of portables; and (h) other policy options as identified by the joint legislative audit and review committee.
(4) Data elements in the facility condition and inventory system may include, but are not limited to, facility location, facility condition including health and safety considerations, type, size, current use, enrollment and space by grade level, information on specialized educational spaces, functionality of space, energy efficiency information, date and cost of original construction, date and cost of any major remodeling or renovation, operations and maintenance information and expenditures, and other data elements as determined by the joint legislative audit and review committee.

(5) By January 1, 2009, the joint legislative audit and review committee shall provide a report to the appropriate legislative fiscal committees on the following: (a) A proposed scope of work for the facility condition and inventory system pilot project; (b) identification of current sources of school district facility information and where the data resides; (c) recommended criteria for evaluating school facilities; (d) potential school district participants; (e) an implementation plan for the pilot group of school districts; and (f) a review of other states’ scope and use of public school facility condition and inventory information.

(6) By January 1, 2010, the joint legislative audit and review committee shall submit findings and recommendations on the pilot program to the appropriate legislative fiscal committees. At a minimum, the final report must include the following: (a) A summary of data collected and analyzed for each participating school district; (b) an analysis of study and survey data for several participating school districts compared to an independent facility assessment; (c) a cost/benefit analysis of expanding the pilot to school districts statewide, including potential timelines; (d) possible methods and frequency for collecting, inventorying, updating, and sharing facility information by the office of the superintendent of public instruction; (e) possible interaction of a facility condition and inventory system with the statewide first responder building mapping system and other data collection efforts that are ongoing, including student educational data managed by the office of the superintendent of public instruction; (f) methods that allow for the efficient transfer of information between school districts and the facility condition and inventory system; and (g) other recommendations as determined by the joint legislative audit and review committee.
What is the Goal of the Pilot?

*The Overall Goal of the Pilot Is to Determine the Feasibility and Costs of Statewide Data Collection*

In order to achieve the goal of the pilot, JLARC staff will need to determine whether a new evaluation form developed by JLARC or the existing evaluation form now used by OSPI best fits the needs of the districts and of the state, and whether an independent consultant or the districts (or both) can collect the data.

JLARC staff will conduct the following analyses as part of the pilot:

- Using a new evaluation form developed by JLARC, compare data collected by the districts to data collected for the same sites and buildings by an independent consultant;
- Determine whether the evaluation form developed by JLARC is easier to use than OSPI’s existing form by obtaining feedback from an independent consultant, who will use both forms;
- Collect information on the time and effort required to collect the data by surveying the district staff and the independent consultant; and
- Obtain feedback from district staff and from the independent consultant on any challenges they encountered during the pilot.

The goal of the pilot is **not** to individually report evaluation results for any building, site or district.
Details of the Pilot

Who Is Participating?

- Bridgeport:
  Gene Schmidt, Superintendent
  (509) 686-5656
gschmidt@bridgeport.wednet.edu

- Evergreen (Clark):
  Reg Martinson, Executive Director of Facilities
  (360) 604-4077
  rmartins@egreen.wednet.edu

- Keller:
  Dave Iverson, Superintendent
  (509) 634-4325
  diverson@keller.k12.wa.us

- Lopez Island:
  Bill Evans, Superintendent
  (360) 468-2202
  bevans@lopez.k12.wa.us

- Marysville:
  John Bingham, Capital Projects Director
  (360) 653-0846
  john_bingham@meridian.wednet.edu

- Meridian:
  Tim Yeomans, Superintendent
  (360) 398-7111
tyomans@meridian.wednet.edu

- Oakesdale:
  Jake Dingman, Superintendent
  (509) 285-5296
  jdingman@gonighthawks.net

- Pullman:
  Paul Sturm, Superintendent
  (509) 332-3581
  psturm@psd267.wednet.edu

- Spokane:
  Greg Brown, Director of Capital Projects
  (509) 354-5775
  gregoryb@spokaneschools.org

- Tumwater:
  Mel Murray, Director of District Programs and Capital Projects
  (360) 709-7005
  mel.murray@tumwater.k12.wa.us
What is the Timeline?

Preparation work for the pilot has already begun, but the pilot will officially start on January 15th, when JLARC will e-mail a data manual to each participating district. District data collection is scheduled to end on May 15th, when the final data submissions from the districts will be due to JLARC.

During the pilot, the district participants will be responsible for using a printed data manual to make notes as they evaluate the buildings and sites, and for entering the evaluation data into a web-based form. The web-based form is being developed by JLARC via a contract with WASPC. The form will be made available through WASPC's First Responder Building Mapping system, with which the districts are already familiar. District staff will also be asked to track the time it takes to complete these tasks, as well as any other costs, to be reported to JLARC at the end of the pilot.

The data manual will include definitions for data elements and instructions for completing the forms. JLARC will provide additional support and training to the participants throughout the pilot via an Internet discussion board and through videoconferences.

JLARC will contract with an independent consultant to use the new evaluation form and the existing OSPI evaluation form to evaluate the same buildings and sites the districts will be evaluating so that the data can be compared and the usefulness of the tool can be gauged.

The information JLARC plans to analyze at the end of the pilot includes:

- A comparison of scores between the consultant evaluations and the districts’ evaluations using the new evaluation tool;
- Feedback from the consultant on the use of the existing OSPI evaluation tool and the new tool developed by JLARC;
- A summary of the time and effort tracked by the districts and the consultant in collecting the data, as well as any obstacles or problems encountered during the pilot that the districts report via a survey administered by JLARC at the end of the pilot.

As required by the study mandate, JLARC will provide a second report to the Legislature in January 2010 that summarizes the results of the pilot.
<table>
<thead>
<tr>
<th>Task</th>
<th>Responsibility</th>
<th>Due Date</th>
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</thead>
<tbody>
<tr>
<td><strong>Pilot Implementation (Phase II Begins)</strong></td>
<td></td>
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<tr>
<td>E-mail data manual to pilot participants</td>
<td>JLARC</td>
<td>1/15/09</td>
</tr>
<tr>
<td>Open Internet discussion board for questions</td>
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<tr>
<td>Finalize and approve web-based data entry forms on WASPC site</td>
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<td>Hold first training videoconference to explain how to use the</td>
<td>JLARC</td>
<td>End of January 2009</td>
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<tr>
<td>manual, discussion board, and web-based forms</td>
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<tr>
<td>Collect data using hard copy manual, and then enter into web-</td>
<td>Pilot participants and</td>
<td>1/15/09-5/15/09</td>
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<tr>
<td>based forms</td>
<td>consultant (separately)</td>
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<tr>
<td>Monitor discussion board and determine whether there is a need for</td>
<td>JLARC</td>
<td>1/15/09-5/15/09</td>
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<td>any further training or assistance to districts, and schedule as</td>
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<td>needed.</td>
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<tr>
<td>Final submission of data due from districts to JLARC via web-</td>
<td>Pilot participants and</td>
<td>5/15/09</td>
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<td>based form, including information on time and effort for collecting</td>
<td>consultant (separately)</td>
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<td>the data.</td>
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<td><strong>Pilot Evaluation</strong></td>
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<td>Send a survey to the pilot participants and consultant soliciting</td>
<td>JLARC</td>
<td>5/15/09</td>
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<td>feedback on pilot and tools used to collect data</td>
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<tr>
<td>Return survey to JLARC</td>
<td>Pilot participants and</td>
<td>5/31/09</td>
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<td>consultant</td>
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<tr>
<td>Compare consultant data to district data and evaluate survey results</td>
<td>JLARC</td>
<td>8/15/09</td>
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<td>results to determine whether any changes need to be made to the</td>
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<td>evaluation tool or whether any data elements should/should not be</td>
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<td>collected.</td>
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<td>Determine how data collected during the pilot could be connected to</td>
<td>JLARC</td>
<td>Report to JLARC December</td>
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<td>other sources of data and collected on an ongoing basis</td>
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<td>2009; Report to Legislature</td>
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<td>Assign a cost to expanding the pilot statewide, considering:</td>
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<td>January 2010</td>
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<tr>
<td>-Time and effort reported by the districts</td>
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<td>-Whether district staff or a consultant (or both) will need to</td>
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<td>conduct future site and building evaluations</td>
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<tr>
<td>-How often the data will need to be updated</td>
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<tr>
<td>-Linkages to other data sources</td>
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<tr>
<td>-Ongoing costs for collecting and maintaining the data and support/</td>
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<td>training</td>
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How Will the Data Be Collected?

The pilot will use two complementary methods of facility data collection:

1) Data Collection Worksheets (the paper forms provided in this manual); and
2) Entry into web-based survey forms using Rapid Responder, the building mapping system managed by the Washington Association of Sheriffs and Police Chiefs.

The paper-based Data Collection Worksheets are provided for your convenience to gather your information about sites, buildings and rooms, so that you can later transfer that data into the Rapid Responder web-based survey forms. Please do not discard the paper worksheets until after all data are collected and verified by JLARC staff at the end of the data collection period.

As part of the pilot, JLARC will also be evaluating the time and effort and/or other costs you incur collecting the data. To help you track this information, we have questions at the bottom of each survey asking for your feedback.

Data Collection Worksheets

JLARC has developed separate data worksheets for the site(s), building(s), and rooms. You will need to print one worksheet for each site, each building, and each room evaluated in the pilot. These worksheets will be made available in Adobe Acrobat format (.pdf) on a webpage, which you will be sent at a later date.

The data collection worksheets contain a number of questions related to the features, systems, and functionality of the site, buildings, and rooms. Generally these questions can be divided into two types:

1) **Information** questions, which ask for data regarding the inventory, use, resource use, and other factual data about the site, building or room;
2) **Condition** questions, which ask for a ranking of the physical condition of the system or feature indicated; and
3) **Feedback** questions which ask about your time and effort (or other costs) in collecting the data

For information questions, please enter the answer to each question using factual data. Note that there are liberal comment fields provided where you can provide clarification, if needed.

For condition questions, please enter the percentage of the site, building or room that best applies to each answer. These questions provide a 0 to 4 scale for rating condition, where “0” is used to indicate that the question is not applicable, and 4 means that the system is basically non-functional.

For instance, half of a site’s playground equipment may be new, while the other half may need significant repairs. In this example, the question would be answered with a “50%” next to the score of “1”, and a “50%” next to the score of “3”. Please note that the total of your answers should not exceed 100. However, if a site had no playgrounds, playfields or play structures, the question in would be answered with a “100%” next to the score of “0”.

There are also comment fields for every condition rating. Please use these fields liberally to further clarify your answer, if needed.
For feedback questions, please describe the time, effort, and/or other costs you incur while reporting information. Please think about these costs in terms of total costs – but also explain how much of those costs are beyond the costs you already incur as part of your current job responsibilities. It would also be helpful to report where you located the data. For example, did you obtain the information on room space from blueprints, or was it necessary to measure each room? Do you already report the information requested in the pilot elsewhere? The feedback you provide here is very important as it will help JLARC staff potentially cost the model for statewide use.

**Web-Based Survey in Rapid Responder**

Rapid Responder is the on-line system managed by the Washington Association of Sheriffs and Police Chiefs to respond to and prepare for emergencies. The JLARC surveys in *Rapid Responder* mirror the data entry worksheets. This section of the manual describes how to access the *Rapid Responder* surveys.

**Step 1: Log into Rapid Responder**

You should have received a username and password to use in the *Rapid Responder* system. If you have not received one, or you would like someone else to receive one, please contact Bruce Kuennen at bkuennen@WASPC.org)

To log into the *Rapid Responder* system, go to “http://prodadmin.rapidresponder.com” and enter your username and password in the Login box.
Step 2: Navigating the “tree”

After logging into Rapid Responder, use the “Locations” navigation tree (in the upper left corner) to choose the site, building or room for which you are entering data.

* Rapid Responder includes a choice for entering data at the “county” and “floor” levels; the pilot will only collect data at the site, building, and room levels.

Step 3: Make sure that all of the sites, buildings, and rooms you are evaluating in the pilot are listed in the “tree.”

See the “Locations” box in the picture below for an example of what the tree looks like.
If you see that any sites, buildings, or rooms are missing, please add them as follows:

**To add a site:**
- In the Locations tree, click on the appropriate district.
- In the Manage Data tree, click on Administrative, then Locations. Click on “Add Site” in the right-hand box.
- Enter site data as appropriate. Click the “Add” button to add the site.

**To add a building:**
- In the Locations tree, click on the appropriate site.
- In the Manage Data tree, click on Administrative, then Locations. Click on “Add Building” in the right-hand box.
- Enter building data as appropriate. Click the “Add” button to add the building.

**To add a room:**
- In the Locations tree, click on the appropriate floor of the building.
- In the Manage Data tree, click on Administrative, then Locations. Click on “Add Room” in the right-hand box.
- Enter room data as appropriate. Click the “Add” button to add the room.

**Step 4: Accessing the survey forms**
- In the Locations tree, click on the appropriate site, building, or room (see note).
- In the Manage Data tree, click on Reports, then Surveys.
- Click on “JLARC Pilot” in the right-hand box. The survey will open in a new browser window.

**Step 5: Entering data into the on-line forms.**
To choose and answer questions, follow the steps below:
- In the survey form, click the hyperlink on the left side bar to choose a question.
- Enter the collected data on the right-side panel, in the question blanks.
- Please feel free to use the comments fields liberally to clarify your answer, give additional detail, or to comment on the survey or question itself.

**Note:** You must click the “Save” button on each page before moving to the next page, or your data will not be entered into the survey. The survey does not save entries automatically when moving to a different page.

The on-line forms are exactly like the worksheets you have filled out. For example, here is how the on-line forms looks for Site Improvements.
Example of an Inventory question

Similarly, the condition questions are formatted in the on-line system as follows:

If you have questions about the on-line forms, please contact Tasha French (french.tasha@leg.wa.gov).
Where Do I Go For Help?

Forum

An online forum has been created for this pilot, in order to facilitate communication amongst JLARC and the participating school districts.

Link: http://k12jlarcpiilot.forum-motion.com/

There are 7 sub-forums in which you can ask your question, depending on the topic: General, Data Entry, Printed Manual, Condition Evaluations, Inventory, Functionality of Space, and Use of Space.

JLARC staff and Carter Bagg, AIA, will monitor the board and provide answers to posted questions, as needed.

Registration

Before any questions can be posted, you must register and create an account:

1. Click the Register button at the bottom of the screen

![Register Button]

2. Read the Forum Terms of Service and click “I Agree to these terms”

   I Agree to these terms
   I do not agree to these terms

3. Enter the requested information

   Please enter your School District as the Username.

   Registration Information

   Items marked with a * are required.

   **Username**: Tumwater

   **E-mail address**: tumwater@tumwater.com

   **Password**: ******

   ![Save and Reset Buttons]
4. Click the Save button

5. For verification, re-enter the password you selected

6. Click the Save button

7. The last registration screen will tell you that you need to activate your account from an e-mail that will be sent to the e-mail address you provided. Read the instructions in the e-mail and follow them.

8. Done, you may now post your question/comment!

Who To Contact

Please contact Tasha French (french.tasha@leg.wa.gov) if you experience any technical problems with the forum.

For all other questions, please contact Nina Oman (oman.nina@leg.wa.gov) or Joy Adams (adams.joy@leg.wa.gov).