



# Pilot K-12 Facilities Inventory, Condition & Use System

## Preliminary Report

Joint Legislative Task Force on  
School Construction Funding

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# Overview of Presentation



## OVERVIEW

- Background and Summary of Conclusions
- Feasibility of Collecting Facilities Data Statewide
- Lessons Learned During the Pilot
- Benefits of Collecting Facilities Data
- Cost Options



# Background and Summary of Conclusions

# Washington Lacks a Data System to Answer Questions About K-12 Facilities



## BACKGROUND & SUMMARY

- Legislature currently has no statewide data to answer basic questions about K-12 facilities.
- Cannot answer questions such as:
  - Average age of school buildings
  - Number of portables in use
  - Estimated repair costs for schools statewide

# Partial K-12 Facilities Data Available From Different Sources



## BACKGROUND & SUMMARY

- **OSPI** has some information for districts that apply for construction assistance.
  - Current for 40% of the 295 districts, or 44% of 140 million square feet
  - Paper or compact disc (not automated)
- **Washington Association of Sheriffs and Police Chiefs (WASPC)** has some automated information on every school, mostly focused on emergency responders' needs.
- **Districts** have some information, but not standardized in format or detail.

# Pilot Was Assigned to JLARC in the 2008 Supplemental Capital Budget



## BACKGROUND & SUMMARY

JLARC is to define and develop a pilot facility condition and inventory system for K-12 public school facilities.

The system must:

- Include information necessary for facility assessment and maintenance; and
- Inform policy options such as space for all-day kindergarten.

Legislature intends that the system be housed in and operated by OSPI.

# Summary of Conclusions



- Inventory data **was** feasible to collect.
  - Basic facts about buildings
- Physical condition data **was** feasible to collect.
  - Rating of condition of building systems on a 1 - 4 scale
- Costs to collect inventory and physical condition data range from \$2.5 million to \$5.7 million.

# Ten Volunteer Pilot Districts Were Located Across the State



BACKGROUND & SUMMARY



# Participants Varied in Size, Setting, and Fiscal Capacity



- Size
  - Ranging from 35 students (Keller) to 29,609 students (Spokane)
- Setting
  - Three rural, two large towns, two suburban, and two urban
- Fiscal capacity
  - State contribution to capital funding is based on assessed property value per student
  - Pilot districts range from 20% state contribution (Lopez Island) to 91.4% (Bridgeport)



# Feasibility of Collecting Facilities Data

# Some Types of Condition Data Were Not Feasible To Collect



FEASIBILITY

- ✘ Energy/water use and costs by building
  - Some buildings not metered separately
- ✘ Maintenance and operation costs by building
  - Some districts do not track costs by building
- ✘ Detailed health and safety information
  - Some could report last assessment and improvements made; however, Board of Health rules are in transition

# Use of Space and Functionality Data Were Not Feasible To Collect



FEASIBILITY

- ✘ Use of space data (subject taught, square feet, staff and students at classroom level, community use of space)
  - Time consuming for large districts
  - Data can become outdated quickly
  - Accurate measurements could be costly
  
- ✘ Functionality data (adequacy of space, configuration, environment)
  - Currently no state standards



# Lessons Learned During the Pilot

# JLARC Conducted Three Analyses During the Pilot



## LESSONS LEARNED

- 1) What facilities data already exist that could be used or linked to other sources of data?
- 2) Is OSPI's existing condition evaluation form for evaluating buildings adequate?
- 3) How do consultant evaluations of buildings compare to district staff evaluations of buildings?

# Lesson #1: WASPC Data Could Be Basis of OSPI Inventory



## LESSONS LEARNED

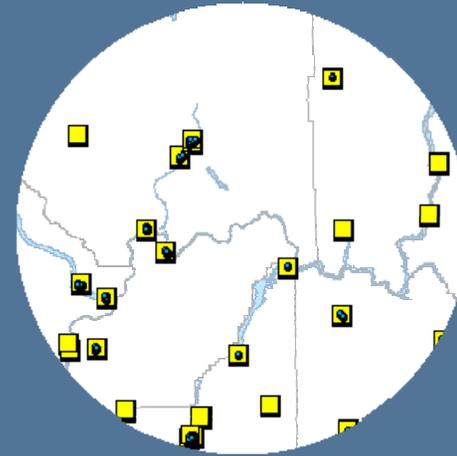
Washington Association of Sheriffs and Police Chiefs (WASPC) has site maps, floor plans, and latitude/longitude data for all schools through 2009.

- Floor plans would allow OSPI to access information for all K-12 facilities in the state.
- Latitude/longitude information could allow linkages to other data.

# Example: Availability of Childcare Options Near Elementary Schools



- Elementary schools
- Licensed childcare providers



LESSONS LEARNED

## Lesson #2: OSPI's Condition Evaluation Form is Adequate But Could be Improved



### LESSONS LEARNED

- Existing OSPI form was adopted in 1992.
- JLARC developed a new form during the pilot, more closely aligned to industry standard codes (called “UniFormat” codes).
- The benefit of UniFormat codes is their link to costing data used in the construction industry.
- By comparing the two forms, we determined that the existing OSPI form is adequate, but would be more useful if linked to UniFormat codes.
- It is possible to link OSPI form to UniFormat codes.



## Lesson #3: Building Condition Scores Submitted by District Staff Were Similar to Consultant Scores

### LESSONS LEARNED

- JLARC asked district staff and consultants to evaluate the same buildings using the same evaluation forms using a 1 to 4 scale.
- The maximum possible difference in points on any score was 3 points.
- Of 1,016 scores, **91% differed by 1 point or less.**



# Benefits of Collecting Inventory and Condition Data



# Inventory Data Would Answer Questions Such As the Following:

## BENEFITS

- How many portables are being used?
- How old are most school buildings?
- How much do districts spend on construction and renovation vs. the state?
- What grades are taught in which buildings?
- How many districts own vs. lease their sites?
- How much are districts spending to purchase or lease sites?
- If latitude and longitude data are linked between agencies:
  - What is the availability of family services near schools?



## Condition Data Would Answer Questions Such As the Following:

### BENEFITS

- How many roofs (or other building systems) need to be replaced (or repaired) in the state?
- What is the average condition of foundations (or other building systems) in the state?
- How have building conditions changed over time in certain areas?
- If condition assessments are linked to industry-standard UniFormat codes: how much is it estimated to cost statewide to repair K-12 buildings?



# Four Cost Options for Collecting Inventory and Physical Condition Data

# Cost Options Have Two Components: IT and Condition Assessments



COST OPTIONS

## 1) Information Technology (IT) costs:

Estimates were developed by OSPI and reviewed by Department of Information Services.

## 2) Condition assessment costs:

Estimates were based on a funding formula used by OSPI in the “**study and survey**” process.

- Funded by OSPI when a district evaluates the condition of its buildings, typically by hiring a consultant (architect, engineer).
- Usually when a district requests construction funding from OSPI.
- Focuses on buildings with instructional space.

# Other Facts About Study & Survey (S&S)



## COST OPTIONS

- OSPI has current S&S information on 44 percent of K-12 space.
  - Information must be updated after 6 years if district requests construction funds.
- The state funds approximately 3 cents/square foot on average for S&S condition assessments.
  - Comparable to 2.5 cents/square foot at community and technical colleges.
  - More detailed assessments = higher costs.

# Assumptions in the Cost Estimates



## COST OPTIONS

- State would fund consultant evaluation of buildings every sixth year, as in the current study and survey process.
- The districts would absorb the cost of collecting and reporting the inventory data and maintaining the condition data between consultant evaluations.
- The focus of the condition assessments would be on buildings with instructional space, as it is currently in the study and survey process.
- OSPI would develop a database and web-based forms to collect and store the information and produce reports.

# Option 1: Current OSPI Form, Automated, Existing State Data



COST OPTIONS

- Statewide inventory data
- Existing OSPI condition evaluation form, linked to UniFormat codes
- Automation of existing condition data (44 percent of state square footage)
- IT system with simple, web-based screens

**Option 1: Simple Summary Information; Partial State Data**

Biennium	IT	Condition Assessments	Total
1 <sup>st</sup> Biennium	\$233	\$723	\$956
2 <sup>nd</sup> Biennium	\$63	\$723	\$786
3 <sup>rd</sup> Biennium	\$63	\$723	\$786
<b>Total</b>	<b>\$359</b>	<b>\$2,169</b>	<b>\$2,528</b>

Dollars in thousands

# Option 2: Current OSPI Form, Automated and Expanded Statewide



COST OPTIONS

- Statewide inventory data
- Existing OSPI condition evaluation form, linked to UniFormat codes
- Automation of existing condition data (44 percent of state square footage)
- Consultant evaluations of remaining 56 percent of state square footage
- IT system with simple, web-based screens

## Option 2: Simple Summary Information; Complete State Data

Biennium	IT	Condition Assessments	Total
1 <sup>st</sup> Biennium	\$233	\$1,267	\$1,500
2 <sup>nd</sup> Biennium	\$63	\$1,267	\$1,330
3 <sup>rd</sup> Biennium	\$63	\$1,267	\$1,330
<b>Total</b>	<b>\$359</b>	<b>\$3,800*</b>	<b>\$4,159*</b>

Dollars in thousands  
 \*These sums differ slightly from the totals due to rounding.

# Option 3: Adapted Form, Automated, Statewide Data Collection



COST OPTIONS

- Statewide inventory data
- New condition evaluation form adapted from another agency, linked to UniFormat codes
- Consultant evaluations of 100 percent of state square footage
- IT system with semi-customized screens with some detailed information such as building deficiencies and condition score calculations

Option 3: Semi-Customized Information; Complete State Data			
Biennium	IT	Condition Assessments	Total
1 <sup>st</sup> Biennium	\$263	\$1,267	\$1,530
2 <sup>nd</sup> Biennium	\$230	\$1,267	\$1,497
3 <sup>rd</sup> Biennium	\$230	\$1,267	\$1,497
<b>Total</b>	<b>\$723</b>	<b>\$3,800*</b>	<b>\$4,523*</b>

Dollars in thousands  
 \*These sums differ slightly from the totals due to rounding.

# Option 4: New Customized Form, Automated, Statewide Data Collection



COST OPTIONS

- Statewide inventory data
- New condition evaluation form completely tailored to OSPI, linked to UniFormat Codes
- Consultant evaluations of 100 percent of state square footage
- IT system with completely customized screens and very detailed information

<b>Option 4: Completely Customized Information; Complete State Data</b>			
<b>Biennium</b>	<b>IT</b>	<b>Condition Assessments</b>	<b>Total</b>
1 <sup>st</sup> Biennium	\$931	\$1,267	\$2,198
2 <sup>nd</sup> Biennium	\$484	\$1,267	\$1,751
3 <sup>rd</sup> Biennium	\$484	\$1,267	\$1,751
<b>Total</b>	<b>\$1,899</b>	<b>\$3,800*</b>	<b>\$5,699*</b>

Dollars in thousands  
 \*These sums differ slightly from the totals due to rounding.

# Timeline and Contact Information



Final Report: January 5, 2010

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