Pilot K-12 Facilities Inventory, Condition & Use System

Preliminary Report

Joint Legislative Task Force on School Construction Funding

December 2, 2009

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Overview of Presentation

- 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

- 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

- **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

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

- Lopez Island
- Meridian
- Marysville
- Bridgeport
- Keller
- Spokane
- Oakesdale
- Pullman
- Tumwater
- Evergreen
Participants Varied in Size, Setting, and Fiscal Capacity

<table>
<thead>
<tr>
<th>SIZE</th>
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<tbody>
<tr>
<td>Ranging from 35 students (Keller) to 29,609 students (Spokane)</td>
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</table>

<table>
<thead>
<tr>
<th>SETTING</th>
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<tbody>
<tr>
<td>Three rural, two large towns, two suburban, and two urban</td>
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</table>

<table>
<thead>
<tr>
<th>FISCAL CAPACITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>State contribution to capital funding is based on assessed property value per student</td>
</tr>
<tr>
<td>Pilot districts range from 20% state contribution (Lopez Island) to 91.4% (Bridgeport)</td>
</tr>
</tbody>
</table>
Feasibility of Collecting Facilities Data
### Some Types of Condition Data Were Not Feasible To Collect

<table>
<thead>
<tr>
<th>FEASIBILITY</th>
</tr>
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<tbody>
<tr>
<td>✗ Energy/water use and costs by building</td>
</tr>
<tr>
<td>- Some buildings not metered separately</td>
</tr>
<tr>
<td>✗ Maintenance and operation costs by building</td>
</tr>
<tr>
<td>- Some districts do not track costs by building</td>
</tr>
<tr>
<td>✗ Detailed health and safety information</td>
</tr>
<tr>
<td>- Some could report last assessment and improvements made; however, Board of Health rules are in transition</td>
</tr>
<tr>
<td>Use of Space and Functionality Data Were Not Feasible To Collect</td>
</tr>
<tr>
<td>---------------------------------------------------------------</td>
</tr>
</tbody>
</table>

- 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

<table>
<thead>
<tr>
<th>LESSONS LEARNED</th>
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</thead>
<tbody>
<tr>
<td>1) What facilities data already exist that could be used or linked to other sources of data?</td>
</tr>
<tr>
<td>2) Is OSPI’s existing condition evaluation form for evaluating buildings adequate?</td>
</tr>
<tr>
<td>3) How do consultant evaluations of buildings compare to district staff evaluations of buildings?</td>
</tr>
</tbody>
</table>
Lesson #1: WASPC Data Could Be Basis of OSPI Inventory

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

- Yellow squares indicate Elementary schools.
- Blue circles indicate Licensed childcare providers.

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

- 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

- 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:

<table>
<thead>
<tr>
<th>BENEFITS</th>
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</thead>
</table>
| • 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:**

- 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

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)

<table>
<thead>
<tr>
<th>COST OPTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• OSPI has current S&amp;S information on 44 percent of K-12 space.</td>
</tr>
<tr>
<td>- Information must be updated after 6 years if district requests construction funds.</td>
</tr>
<tr>
<td>• The state funds approximately 3 cents/square foot on average for S&amp;S condition assessments.</td>
</tr>
<tr>
<td>- Comparable to 2.5 cents/square foot at community and technical colleges.</td>
</tr>
<tr>
<td>- More detailed assessments = higher costs.</td>
</tr>
</tbody>
</table>
Assumptions in the Cost Estimates

- 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

- 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

<table>
<thead>
<tr>
<th>Biennium</th>
<th>IT</th>
<th>Condition Assessments</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Biennium</td>
<td>$233</td>
<td>$723</td>
<td>$956</td>
</tr>
<tr>
<td>2nd Biennium</td>
<td>$63</td>
<td>$723</td>
<td>$786</td>
</tr>
<tr>
<td>3rd Biennium</td>
<td>$63</td>
<td>$723</td>
<td>$786</td>
</tr>
<tr>
<td>Total</td>
<td>$359</td>
<td>$2,169</td>
<td>$2,528</td>
</tr>
</tbody>
</table>

Dollars in thousands
Option 2: Current OSPI Form, Automated and Expanded Statewide

- 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**

<table>
<thead>
<tr>
<th>Biennium</th>
<th>IT</th>
<th>Condition Assessments</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1\text{st} Biennium</td>
<td>$233</td>
<td>$1,267</td>
<td>$1,500</td>
</tr>
<tr>
<td>2\text{nd} Biennium</td>
<td>$63</td>
<td>$1,267</td>
<td>$1,330</td>
</tr>
<tr>
<td>3\text{rd} Biennium</td>
<td>$63</td>
<td>$1,267</td>
<td>$1,330</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$359</strong></td>
<td><strong>$3,800</strong>*</td>
<td><strong>$4,159</strong>*</td>
</tr>
</tbody>
</table>

Dollars in thousands

*These sums differ slightly from the totals due to rounding.
Option 3: Adapted Form, Automated, Statewide Data Collection

- 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

<table>
<thead>
<tr>
<th>Biennium</th>
<th>IT</th>
<th>Condition Assessments</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td>1st Biennium</td>
<td>$263</td>
<td>$1,267</td>
<td>$1,530</td>
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<tr>
<td>2nd Biennium</td>
<td>$230</td>
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<td>$1,497</td>
</tr>
<tr>
<td>3rd Biennium</td>
<td>$230</td>
<td>$1,267</td>
<td>$1,497</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$723</strong></td>
<td><strong>$3,800</strong></td>
<td><strong>$4,523</strong></td>
</tr>
</tbody>
</table>

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Dollars in thousands
Option 4: New Customized Form, Automated, Statewide Data Collection

- 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

### Option 4: Completely Customized Information; Complete State Data

<table>
<thead>
<tr>
<th>Biennium</th>
<th>IT</th>
<th>Condition Assessments</th>
<th>Total</th>
</tr>
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<tbody>
<tr>
<td>1st Biennium</td>
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<td>$2,198</td>
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<tr>
<td>2nd Biennium</td>
<td>$484</td>
<td>$1,267</td>
<td>$1,751</td>
</tr>
<tr>
<td>3rd Biennium</td>
<td>$484</td>
<td>$1,267</td>
<td>$1,751</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$1,899</strong></td>
<td><strong>$3,800</strong></td>
<td><strong>$5,699</strong></td>
</tr>
</tbody>
</table>

Dollars in thousands

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Timeline and Contact Information

Final Report: January 5, 2010

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