

Office of the Superintendent of Public Instruction

Service Delivery Alternatives Final Report Deliverable II

MGT of America, Inc.
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Chapter 1.0: Introduction and Background

The 2007-09 Washington State Supplemental Biennial Capital Budget authorized funding (\$1.1 million) for the Washington State Office of the Superintendent of Public Instruction (OSPI) to develop and implement a Regional School Construction Technical Assistance Program. The intent of the program was to provide assistance to school districts in school construction matters. The legislature directed OSPI to target districts with the greatest need and deliver the assistance through the Educational Service Districts. The funding proviso is as follows;

Regional School Construction Assistance Program (08-2-857)

The appropriation in this section is subject to the following conditions and limitations: The appropriation is provided solely for the office of the superintendent of public instruction to develop and implement a regional school construction technical assistance program for school districts primarily delivered through educational service districts. The program will be prioritized towards school districts with the greatest need in terms of school construction management and school construction capabilities. In developing and implementing this program, to the maximum extent possible and appropriate, the office of the superintendent of public instruction shall receive assistance from the architectural and engineering services division of the department of general administration and the construction services group based out of educational service district 112. As part of the work, the office of the superintendent of public instruction shall review voluntary model contracts for school construction.

In July 2008, OSPI determined that it would be beneficial to prepare a “gap analysis” of existing school construction services as a basis for the program. OSPI contracted with MGT of America, Inc. (“MGT”) to conduct a study to determine what facility services are needed by school districts, to identify service delivery methods, and to make a recommendation regarding preferred delivery method(s) for a regional school construction assistance program.

The following report is *Deliverable 2* in this study and presents a recommendation for developing and implementing the Regional School Construction Technical Assistance Program (RSCTAP). The recommendations in this report are based on the “Gap Analysis” conducted to determine what services were needed by school districts, which was previously submitted to OSPI as *Deliverable 1*. *Deliverable 3* will be a presentation to various stakeholders, including OSPI, the Joint Task Force, and/or other legislative committees, if necessary, regarding the data collected, analyses made, and recommendations developed through this study.

MGT conducted research into programs developed in other states relating to school facilities construction. The nine states chosen were the same ones referenced in the *K-12 School Construction Funding Formula Transparency Study* prepared for OSPI by Berk and Associates. Appendix A contains the detailed descriptions of the programs in North Carolina, Arizona, California, New York, Kentucky, Massachusetts, New Jersey, New Mexico, and Ohio. In addition, MGT discussed various options with OSPI staff in relation to past and current programs, a sample of ESD's and school districts interviewed for the gap analysis, and the Construction Services Group and the Engineering and Architectural Division of General Administration.

MGT's goal was to put forth recommendations that would be readily implementable, effective in delivering services, and have a broad base of support. Our experience tells us that any service delivery model will evolve over time in response to circumstances, staff, and the service users' needs, but that the initial implementation can provide a strong foundation for a program's future.

Chapter 2.0: Service Delivery Models

Program Goal

The goal of the Regional School Construction Technical Assistance Program is to facilitate the delivery of needed school construction services to the school districts with the greatest need. The regional nature of the program will be emphasized by delivering it through the Educational Service Districts in a proactive manner. The technical assistance nature of the program will be emphasized by delivering services through active out-reach to identified and interested districts and offering responsive support to all districts.

Service Delivery Models in Sample States

As described earlier, MGT studied the service delivery approach in the nine states that Berk and Associates studied relative to funding formulas: California, Arizona, New Jersey, New Mexico, Kentucky, New York, Massachusetts, Ohio, and North Carolina. States vary as to how they deliver services for the construction of school facilities. The variation is often tied to how much of the total cost is funded through the state as opposed to local funds. Some characteristics of the nine states surveyed are listed below;

- ◆ All but three states have staff or project managers working out of a central office.
- ◆ New Jersey and New Mexico have two regional offices.
- ◆ Arizona uses nine private project management firms.
- ◆ Kentucky focuses on centralized, consistent service delivery to ensure equity throughout the state.
- ◆ Arizona, California, New York, and New Mexico assign staff or project managers to specific districts, counties or regions.
- ◆ New Mexico is the only state to have regional managers who are housed in the area in which they are assigned to.

In addition to ensuring compliance to state-mandated standards or regulations for funding, the state school facility agencies offer the following services;

- ◆ General design review
- ◆ Prototype designs
- ◆ Planning and design publications including topics such as;
 - New Construction
 - Building Renewal
 - Preventive Maintenance
 - Smart Growth
 - Energy Efficiency and Sustainability
 - 21st Century Schools
 - Emergency Deficiency
 - Land Acquisition
- ◆ Historical and current cost data
- ◆ Computer assisted tools for calculating space needs
- ◆ Workshops
- ◆ Centralized facility data base
- ◆ Facilitating joint use projects
- ◆ Career Technical Facilities
- ◆ Enrollment projections
- ◆ Property agreements, relocation, land acquisition, demolition and remediation
- ◆ Community collaboration
- ◆ Contract/project management

In general, state agencies are providing planning and management services that ensure state funds are used effectively, and that schools are equitable and adequate throughout the state.

Delivery Model Alternatives

Based on our review of the structures used in other states and our discussions with OSPI staff, the ESDs, and the sample districts, MGT identified three possible delivery models for further study. The following discussion reviews the pros and cons of the delivery model alternatives discussed with OSPI staff and stakeholders.

CENTRALIZED DELIVERY MODEL

The centralized delivery model would utilize staff located in the Olympia office of OSPI to deliver the RSCTAP. Each staff member would be responsible for a different region of the state. The regions could be made up of one or more ESDs.

Pros

- ◆ OSPI more able to maintain control and ensure consistency within program.
- ◆ May be greater pool of potential staff to work in different regions since they could live centrally (Olympia).
- ◆ More convenient for staff to work together and build off each other's strengths.
- ◆ Utilizes OSPI staff who are generally seen as sympathetic by districts to the needs of districts.

Cons

- ◆ Counter to proviso directing program to be delivered through ESDs.
- ◆ Tends to insulate staff from direct contact with ESDs and districts.
- ◆ Requires more staff travel to work directly with districts.

ESD DELIVERY MODEL

The ESD delivery model would utilize ESD staff, funded through OSPI, to deliver the RSCTAP. Given current funding, it is likely that not every ESD could be funded, and there would need to be a prioritization based on greatest need.

Pros

- ◆ Utilizes ESD staff who are generally seen as sympathetic by districts to the needs of districts
- ◆ Utilizes ESDs to deliver program, as in legislative proviso
- ◆ Places responsibility for supervision and evaluation of staff under ESD which has closer oversight of the work
- ◆ Locates ESD-RSCTAP staff geographically closer to districts
- ◆ Facilitates ESD-RSCTAP staff being proactive and reaching out to districts

Cons

- ◆ OSPI has less control over activities and priorities of staff delivering RSCTAP
- ◆ Inequities could develop among different ESDs in interpreting the goals of the RSCTAP
- ◆ Potentially less of a pool of qualified candidates to fill the positions given regional locations
- ◆ No clear avenue for RSCTAP staff to work together and support each other

OSPI/ESD DELIVERY MODEL

The OSPI/ESD delivery model would utilize OSPI staff and locate them in ESD facilities. The OSPI-RSCTAP staff would rent space from the ESDs and deliver the RSCTAP program to the districts. Similar to the ESD delivery model, the current funding level would preclude a staff person in every ESD and there would need to be a prioritization process.

Pros

- ◆ Facilitates OSPI maintaining control over activities and goals of the RSCTAP
- ◆ Provides avenue for collaboration between OSPI-RSCTAP staff
- ◆ Utilizes ESDs to deliver program as in proviso
- ◆ Locates ESD-RSCTAP staff geographically closer to districts
- ◆ Facilitates ESD-RSCTAP staff being proactive and reaching out to districts
- ◆ Utilizes OSPI staff who are generally seen as sympathetic by districts to the needs of districts

Cons

- ◆ Potentially less of a pool of qualified candidates to fill the positions given regional locations
- ◆ May be less enthusiastically supported by ESDs
- ◆ Reduces on-site supervision and evaluation

ESD/OSPI DELIVERY MODEL

The ESD/OSPI delivery model would utilize ESD staff in ESD facilities, but the RSCTAP staff would be programmatically supervised by the OSPI program coordinator. The coordinator would define the program, provide on-going training and support, and ensure delivery of state-identified program services. The RSCTAP staff would deliver the RSCTAP program to the districts. Similar to the ESD

delivery model, the current funding level would preclude a staff person in every ESD and there would need to be a prioritization process.

Pros

- ◆ Employee is a member of the ESD “team” and is accountable to ESD
- ◆ Increases on-site supervision and evaluation
- ◆ Districts may be more accepting of ESD employee than OSPI employee
- ◆ Facilitates OSPI maintaining control over activities and goals of the RSCTAP through strong deliverables and clear scope of work in the contract
- ◆ Provides avenue for collaboration between OSPI-RSCTAP staff
- ◆ Utilizes ESDs to deliver program, as in proviso
- ◆ Locates ESD-RSCTAP staff geographically close to districts
- ◆ Facilitates ESD-RSCTAP staff being proactive and reaching out to districts

Cons

- ◆ Potentially less of a pool of qualified candidates to fill the positions given regional locations
- ◆ Salary of individuals may vary from ESD to ESD and may exceed that of the OSPI Coordinator
- ◆ OSPI will pay indirect to ESDs on entire cost of employee
- ◆ Not all ESDs would have a dedicated regional RSCTAP. Would require cooperation between ESDs.
- ◆ Employee will have 2 supervisors – ESD and OSPI. Contract can be written with clause that ESD will not override OSPI decisions.
- ◆ Will require clear role and function definition, especially if employee has a split position

Chapter 3.0: Recommendation

Recommendation: OSPI will develop and implement the Regional School Construction Technical Assistance program utilizing one central program administrator, physically located in Olympia, and up to six regional advisors, physically located in ESD facilities.

Organization Structure:

The six RSCTAP advisors will report directly to the RSCTAP program administrator, who will report directly to the Director, OSPI School Facilities. The program administrator and the advisors will work in close coordination with the OSPI regional coordinators. The advisors will be housed in ESD facilities but be required to meet at least, monthly together in Olympia at OSPI. The advisors will rent office space at the ESDs and work directly with school district and ESD personnel. The advisors would be recruited and hired based on having backgrounds with different emphases, such as construction, maintenance, finance, education, etc. so given this diverse background and training, the advisors can be “cross-deployed” to other regions, based on their expertise, despite being physically housed in one ESD region. This will encourage synergy and sharing of resources and provide the best support to districts.

Identification of High-Needs Districts

A goal of the program, is to deliver services to the district that have the highest need. Identifying those districts will take some study and research. One approach might be to identify those districts that have not applied for a Study and Survey grant recently and contact them to see what their needs are. Prioritizing districts by their Study and Survey history may be a helpful tool for the advisors. The graphic below shows how this approach might be applied in one ESD.

**Exhibit 3-1
Proposed Prioritization of Districts in a Sample ESD**



Districts of ESD 171	Date of Last Study & Survey	Proposed Prioritization	
MANSFIELD	-	HIGH	
PALISADES	-		
STEHEKIN	-		
WATERVILLE	05/16/86		
ORONDO	07/10/87		
OROVILLE	11/13/87		
TONASKET	10/01/93	MEDIUM	
MANSON	04/25/95		
WILSON CREEK	07/13/95		
LAKE CHELAN	04/11/96		
SOAP LAKE	01/17/97		
OMAK	06/04/97		
EASTMONT	10/02/98		
EPHRATA	07/12/99		
METHOW VALLEY	10/04/99		
WAHLUKE	01/07/00		
ENTIAT	08/29/00		
NESPELEM	07/16/01		LOW
WENATCHEE	09/12/01		
GRAND COULEE DAM	05/12/03		
WARDEN	08/12/04		
COULEE-HARTLINE	09/16/04		
OKANOGAN	03/14/05		
PATEROS	10/06/05		
CASHMERE	10/18/05		
BRIDGEPORT	04/06/06		
CASCADE	10/20/06		
MOSES LAKE	11/28/07		
ROYAL	02/06/08		
BREWSTER	07/24/08		
QUINCY	07/28/08		

Role of Advisors:

The advisors will act as facilitators to help the school districts resolve any issues and meet any needs in relation to school facilities and asset preservation. The advisors will work in conjunction with the coordinators, but will not duplicate the coordinators' responsibility for the funding process. A stated job description requirement will be that the candidate be a self-directed, out-going, "can-do" type of person. An expectation of the advisors will be that they will be in the field, visiting school districts 85% of the time.

The advisors will begin by assessing the needs of the districts and then work with the program administrator, the regional coordinators, and the other RSCTAP advisors to provide access to resources to meet the assessed needs. The advisors may provide minor services to districts when there is no conflict with services provided by ESDs or private companies.

The program administrator will work with the advisors and other stakeholders to develop a "suitcase of tools". The suitcase could include tools such as publications, list of resources, decision matrices, sample policies or procedures, model contracts, and general guidelines for meeting the needs of school facilities.

Potential Advisor Services:

The program administrator and the advisors will be charged with meeting the needs of the school districts in the area of school construction. Some potential services which were assessed in the gap analysis could include:

- ◆ Maintain a list of school construction resources including services provided by the ESDs, CSG and GA, as well as the private sector
- ◆ Provide assistance in developing and maintaining a facility inventory
- ◆ Maintain a "small-works roster" of consultants and contractors
- ◆ Provide direction in preparing a facility master plan
- ◆ Provide information on funding strategies
- ◆ Provide assistance in pre-bond planning
- ◆ Provide help in site selection and acquisition
- ◆ Create decision matrices for school closures
- ◆ Assist districts in developing energy efficiency programs and executing performance contracts
- ◆ Provide resources for designing energy efficient and sustainable schools

- ◆ Assist districts with developing maintenance plans
- ◆ Work with ESDs to identify and provide additional services to districts
- ◆ Assistance in developing facility related board policies
- ◆ Provide guidelines for assessing facilities including;
 - Building condition assessment
 - Site condition assessment
 - Educational adequacy assessment
 - Energy efficiency assessment
 - Health and Safety assessment
 - Security assessment
- ◆ Assistance in working with community groups and obtaining community input

Proposed Implementation Plan:

- | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| 1. The Director of School Facilities shall appoint a program administrator. | December 2008 |
| 2. The program administrator shall prepare a program description, performance objectives and advisor job descriptions for review and approval by the Director. | January 2009 |
| 3. The Program Administrator shall identify three ESDs with school districts having the greatest need and negotiate inter-local agreements. | January 2009 |
| 4. The Director and the Program Administrator shall hire three advisors. | February 2009 |
| 5. The Program Administrator, the Regional Coordinators, and OSPI staff as appropriate shall train the Advisors. | March 2009 |
| 6. The Program Administrator shall identify three additional ESDs and negotiate inter-local agreements. | April 2009 |
| 7. The Director and the Program Administrator shall hire three more advisors and begin their training. | May 2009 |
| 8. The Director and the Program Administrator shall report the performance of the program to the Superintendent of Public Instruction, the Task Force and the Legislature. | May 2009 |

Appendix A

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Facility Service Delivery Methods in Other States

North Carolina

The School Planning Section of the North Carolina Department of Public Instruction assists North Carolina school districts, architects and designers in the planning and design of high quality school facilities that enhance education and provide lasting value to the children and citizens of the state.

Services:

Plan Review & Commentary

School Planning reviews plans for new schools, additions, and renovations. Design review helps to ensure that school facilities accommodate and facilitate educational programs. Comments made during review stress safety, longevity, durability, flexibility, economy, and efficiency of building construction systems. Comments take into account local program flexibility while providing accountability in regard to the State Boards of Education's North Carolina Public Schools Facilities Guidelines. Usually, design review conferences are held at each design phase involving the designers, local unit facilities staff and the school planning staff of professional architects, engineers and educators. It is suggested that you schedule a meeting with the Office of the State Fire Marshal at (919) 661-5880 and then call School Planning at (919) 807-3554 to schedule a review on the same day.

Prototype School Design Clearinghouse

The 1996 North Carolina General Assembly directed the State Board of Education to establish a central clearinghouse for access by local boards of education that may want to use a prototype design in the construction of school facilities. This system is expected to result in cost and time savings in school design; provide broader access to architects that specialize in school design; and increase awareness of current trends in school design.

Planning Assistance

Planning assistance is provided to local units. This assistance includes publications such as the North Carolina Public Schools Facilities Guidelines, in which recommendations for all building elements and spaces of schools can be found. School Planning has developed computer-assisted tools for calculating needed spaces and sizes for new schools, based upon anticipated capacity. School Planning evaluates facility needs and provides analysis of specific building or site problems, with priority placed on small and low-wealth school systems. Instruction and guidance are available to assist all units with facility planning and self-evaluation. Current and historical school construction cost information is maintained and made available. School Planning provides technical assistance and authorization of state funding for school construction.

Publications and Workshops

School Planning has prepared numerous guides and reference publications on various aspects of K-12 school planning and design. These publications are updated periodically and new versions are placed on this web site. State educational planners, architects, engineers, and schools of education and architecture are partnered in the development of these publications. The staff of School Planning provides workshops and presentations on facility design, planning, and management to a wide variety of groups with interest in educational facilities.

School Facilities Information

A Facility Information Management System is being developed to provide planning tools and building data for local and state planning. This database consists of specific information on each school within a school district, including numbers and different types of classrooms, capacities, core facilities, types of construction, building age and other data useful in preparing long-range plans for improvements and analysis of an individual school district's facilities.

The State Bond for Public School Facility Needs

Based upon a comprehensive study of School Facility needs across the state, the 1996 North Carolina Legislature approved a referendum for the issuance of one billion eight hundred million dollars (\$1,800,000,000) in general obligation bonds for the construction of school facilities. This referendum was approved by the citizens in November of 1996. The first bonds were sold and money became available in March of 1997.

Per email from Steve Taynton, School Planning Chief

In NC, General Statutes state that the local counties are responsible for school facilities while the state provides the money for teacher salaries. That being said, however the state recognizes that the counties are unable to provide what is really needed for facilities. There have been numerous statewide bond issues over the years, the most recent being 1.8B in 1996. In addition, funds from the lottery and corporate income tax provide around 200M per year. We administer the distribution of these funds.

The school planning staff is small; we have 2 architects, 1 electrical engineer, 1 mechanical engineer, 1 structural engineer 1 statistician, 1 school planning consultant, 1 admin asst. and the section chief. We review ALL plans for school construction and renovation offering advice and comment on all aspects of design, code, constructability, cost efficiency, etc. Prior to 1996 we had a staff of about 20 and traveled extensively, providing surveys of long range needs to LEAs and advising them about problems with specific schools. In addition, we were required to "approve" all plans for construction. In 1996, we had a legislative transition to "local control" and a major departmental staff reduction. We now only "review and comment" on plans. We also research and publish numerous guides on different aspects of school design as you can see on our website. Occasionally, we still travel to LEAs to help them with specific issues but this is severely limited by staff availability and a very small travel budget.

School planning has never been divided into districts, primarily because each district would need a full complement of architects and different types of engineers. This would result in a very large overall staff.

Arizona

The Arizona School Facilities Board (ASFB) is a citizen board appointed by the governor that represents a cross-section of education and the private sector. The board's executive director is appointed by the governor and serves on the governor's cabinet. The board has the authority to distribute, without legislative approval, the funds required to construct new schools, renovate existing schools and provide annual building renewal.

Services

The School Facilities Board has adopted rules to establish minimum school facility guidelines, assess school buildings against these guidelines, and provide money to bring the buildings up to the guidelines. The building "adequacy guidelines" serve as the minimum standards for existing and new school facilities in Arizona. These guidelines contain everything from square-footage formulas to lighting levels. To oversee the construction projects, the School Facilities Board has contracted with nine project-management firms. Each bid package of approximately \$30 million is assigned a project manager, who coordinates all the work and people involved in the various projects across multiple school districts. The board bids and manages all of these projects to obtain the best prices, and to be sure the work is done on time and within budget.

The ASFB website provides informational documents and forms on all aspects of facility services and is categorized as "New Construction", "Building Renewal", "Preventive Maintenance", "Smart Growth", "Energy Efficiency & Sustainability", "21st Century Schools", "Emergency Deficiency", and "Land Acquisition". See Appendix for a complete list.

Coordinators

According to the policy manual, it appears ASFB is centralized and does not micro-manage districts. They randomly select 20 districts for PM inspections every 30 months. For construction projects, the state has contracted with 9 project management firms to create a pool of project managers who are then assigned to district projects.

California

The Office of Public School Construction (OPSC) is responsible for providing the staff necessary to carry out the policies and implement the various programs of the State Allocation Board (SAB). This includes helping school districts get ready to apply for funding, determining eligibility for projects, and ensuring that state funds are allocated properly. OPSC also provides technical assistance, outreach, and education to school districts. The SAB is charged with “formulating fair systems for determining priorities among project proposals.” OPSC’s mission is to “enable school districts to build safe and adequate school facilities for their children in an expeditious and cost-effective manner.”

Services

School Facility Program (SFP)

The School Facility Program provides State funding assistance for two major types of facility construction projects: New Construction and Modernization

SFP: Charter School Facilities Program

Proposition 1D provides \$500 Million for Charter School Facilities

SFP: Critically Overcrowded School Facilities Program

The COS program allows school districts with critically overcrowded school facilities, to apply for a preliminary apportionment for new construction projects; in advance of meeting all SFP New Construction program laws and regulations required for a final construction apportionment.

SFP: Joint-Use Program

This program allows a school district to utilize funds from a joint-use partner to build a joint-use project the district would not otherwise be able to build due to lack of financial resources.

Career Technical Education Facilities Program (CTEFP)

The purpose of CTEFP is to provide funding to qualifying school districts and joint powers authorities (JPA) for the purpose of constructing new facilities or reconfiguring existing facilities to integrate Career Technical Education (CTE) programs into high schools.

Overcrowding Relief Grant (ORG)

A new grant that enables districts to reduce the number of portable classrooms on overcrowded school sites and replace them with permanent classrooms.

Program Manager

OPSC has 30 program managers assigned to one or more counties that act as the liaison and subject matter expert to the local districts.

Per Carol Shellenberger, Operations Manager: "The Office of Public School Construction (OPSC) has one location in Sacramento that serves the entire state of California. Therefore, the Project Managers assigned to the various counties in California are housed in Sacramento. "

New York

The Facilities Planning Department of the New York State Education Department oversees public school construction through the review of all capital projects, including floor plans and enrollment projections. As part of the review process, the Facilities Department provides school districts with an estimate of state aid.

Project Managers

Per email from Carl Thurnau, Coordinator, Facilities Planning:

"Project Manager" is probably not the proper term for my staff in the conventional sense. They are not technical construction types but educational professionals whose main function is to assist individual school districts with complying with the state approval process and getting the appropriate state financial reimbursement for their projects. They are based in Albany and do not have any job site responsibilities across the state.

There are over 700 school districts in NY and the project managers are not assigned regionally, but each has an assigned group of districts which they stay with in order to develop a relationship over time with that particular district. We approve over 2,500 capital project per year and take care of the finances, as well as the technical review and issuance of the building permit.

Kentucky

The Division of Facilities Management is responsible for ensuring sanitary, safe, and accessible construction of public school buildings and grounds. The Division provides assistance to school districts by reviewing and approving all sites, new buildings, additions, alterations of existing buildings, energy savings projects, and hazardous material abatement from initial construction project application through final completion. The division also reviews and approves property disposal and property lease agreements, and assists districts with construction finance. The facilities program aims to bring all schools up to a minimum quality standard and ensure adequate and equitable facilities for students across the state. The Division has eight employees.

No Regional Coordinators

Per Mark Ryles, Director of Facilities Management: They are centralized. They focus on the equity and adequacy of the design as is legislatively mandated. They do travel to the districts but only for planning orientation activities--they do not "micromanage" districts. He does not believe it is cost effective to have regional services as it takes away from consistent service delivery. If regional coordination is considered, he recommends that it be focused on leadership (boards & admin rather than staff people).

Massachusetts

The Massachusetts School Building Authority (MSBA) was established in 2004 to reform the management of the distribution of state school building grant funds and to create a framework for a new, financially sustainable school building grant program. The grant program began on July 1, 2007. The MSBA focuses on project eligibility and the creation of a fair process to distribute state funds to projects with the greatest need.

Services

MSBA has a process for any district that has a capital need:

1. Identify the Problem

- ◆ Local community identifies deficiencies in school facilities through the Statement of Interest process.

2. Validate the Problem

- ◆ MSBA and local community work together to validate deficiencies identified.
- ◆ Requires the MSBA and the city, town or regional school district to agree on the problem.

3. Evaluation of potential solutions

- ◆ MSBA and local community work in collaboration to identify potential solutions.
- ◆ Solution must fit within the MSBA's available funding, long-term capital plan and will be prioritized based on the priorities established in G.L. c.70B s.8.

4. Confirm the solution

- ◆ MSBA and local community agree on solution and appropriate course of action.

5. Implement the agreed upon solution

- ◆ MSBA and local community continue collaboration through design and construction.

Coordinators

The MSBA has been meeting with districts to go over the *Statement of Interest* process as outlined above, but they don't have regional coordinators to provide services to the districts. MSBA allows the school district to select a project manager, which must meet approval by a special MSBA board.

New Jersey

The New Jersey Schools Development Authority builds new schools as well as repairing, renovating, and adding on to existing schools in SDA (formerly Abbott) Districts. In Regular Operating Districts and Vocational Districts, it provides financial assistance for school construction projects.

Services

Per Gail Lawrence at the SDA:

The SDA's responsibility with respect to SDA Districts is for financing 100% of eligible costs. It also procures design, construction and construction management for NJ Department of Education (DOE) approved facilities projects in these school districts, as well as acquiring land as necessary. The SDA manages most projects for these districts. However, the August 2007 legislation establishing the SDA provided a mechanism for delegating projects to SDA Districts that are deemed capable and qualified by the DOE, and determined by SDA to have the capacity. The DOE and SDA each are developing sets of regulations to address these issues.

SDA has a Real Estate Services division who is responsible for all SDA real-estate activities, including relocation, land acquisition and purchasing, demolition and remediation. It also handles community relations issues.

SDA Office of Project Management includes four key areas of responsibility: Architecture & Engineering, Contract Management, Safety Management and Project Management. The primary goal of the Office of Project Management is to deliver quality and energy-efficient schools on time and within budget throughout the State.

The Office of Project Management includes design and construction professionals who develop and manage school construction projects from conception to post-occupancy. The Office manages the relationships of key project development partners, including municipalities, school districts, designers, contractors and construction managers, as well as various other State agencies that play a significant role in delivering a project.

Perhaps the most critical piece of the SDA organizational foundation is the project charter. This SDA Board allocates funds only upon approving a charter, which contains a project's budget, scope and schedule. The Board receives updates if the need for any significant change arises. These charters also provide a level of transparency. They work hand-in-hand with our Board agenda and memos posted to our Web site to see that stakeholders and the general public are kept fully informed about the school-building projects.

The regional offices (Trenton Regional Office and the Northern Regional Office) were opened to better serve individual school districts by situating wide-ranging services (such as above) closer to areas where the construction is actually taking place. The SDA individuals who staff each office are responsible for project management, design and construction review and oversight, affirmative action, land acquisition and feasibility assessments, property management, district communications and outreach.

New Mexico

The Public School Facilities Authority (PSFA) operates as staff for the Public School Capital Outlay Council (PSCOC) to manage a permanent funding program; to assist school districts in the planning, construction, and maintenance of their facilities; to assist in training district facility and maintenance staff; and to implement efficient and cost effective systems and processes. The PSFA's mission is to ensure adequate public school facilities throughout New Mexico via efficient and prudent use of funds and a decision-making process that is equitable, systematic, and needs-based. See Appendix for list of services.

Regional Managers

There is one regional manager assigned to each region (there are 16 total). According to the web, they have an office in Santa Fe and a field office in Albuquerque.

According to Tim Berry, Deputy Director of PSFA, the regional managers work from the area they are assigned to. They are housed in whatever district in the area has space available for an office. The RMs have a varying role, depending on the size of the district--RMs in small districts have a much more active role than that of large districts. RMs handle everything involved in the PM process that has state money tied to it.

Ohio

The Ohio School Facilities Commission (OSFC) was created in May 1997 as a distinct state agency to oversee the rebuilding of Ohio's public schools. The combination of litigation (DeRolph v. State) and a federal survey of the condition of school facilities that ranked Ohio 47 out of 50 states led to the creation of the OSFC and increased state funding to address "adequacy and equity." To meet the education needs of students, the OSFC mission is to renovate or entirely rebuild deteriorating, overcrowded, and inefficient school facilities in partnership with local school districts.

Services

OFC offers the following programs to districts:

- ◆ Classroom Facilities Assistance Program
- ◆ Exceptional Needs Program
- ◆ Expedited Local Partnership Program
- ◆ Urban Initiative
- ◆ Energy Conservation Program (H.B. 264)
- ◆ Emergency Assistance Program
- ◆ Extreme Environmental Contamination Program
- ◆ Facilities Assessment
- ◆ Vocational Facilities Assistance Program (VFAP)
- ◆ VFAP - Expedited Local Partnership Program (VFAP ELPP)
- ◆ Career - Tech Loan Program
- ◆ Community Schools Classroom Facilities Guaranteed Loan Program

Project Administrators

OSFC uses project administrators according to the chart below:



