



Educational Specifications Scope of Work Checklist Updated November 2021

The following checklist is a guide to assist districts in creating and submitting Educational Specifications (Ed Specs) as part of the design process. Ed Specs are an early project planning tool and serve as the written documentation of educators' intent for program delivery, definition of the physical parameters of the learning environment, determination of the utilization and capacity and identification of instructional delivery requirements of the district. They serve as the primary resource for the design professional in ascertaining the needs of the facilities for both traditional public schools and state chartered charter schools.

This checklist is based upon the required deliverables that the contractor turns into the Public School Facilities Authority and is cross-referenced with the PSFA Educational Specifications Deliverables Document found at www.nmpsfa.org. Educational Specifications development use the New Mexico Public School Adequacy Planning Guide incorporating the New Mexico Adequacy Standards as reference and consist of a written and graphic document with the following checklist components.

If FMP is two years old or less, please revalidate the information in the existing FMP for enrollment and capacity/utilization number for Sections 3 & 4 and their subsections. Provide update if necessary when the current enrollment is significantly different from FMP projections or changes in programs impact capacity numbers. Please consult with PSFA Facilities Master Planner for enrollment and capacity/utilization discussion and need.

PART I: EXISTING CONDITIONS

Section 1. PSCOC Award and Consistency with Facilities Master Plan

A. Consistency: Discuss how the Feasibility Study/Educational Specifications are consistent with the PSCOC award language for the project (re-state the award language in this section).

B. Provide a summary on how the project is consistent with the district's Facilities Master Plan (FMP) including where the project ranks among the list of FMP priorities.

Briefly summarize the process the district used to create its FMP and identify this project as a priority.

- C. Provide a brief description of the project including (but not limited to):
1. Type of project (new, replacement, major renovation)
 2. Vicinity Map and description of the project location (Identify if this is the existing site or new location)
 3. Square footage
 4. Site acreage
 5. Number of students/staff to be served
 6. Maximum and Functional Capacity

Section 2. Educational Program and Delivery System

- A. Describe the school's instructional program and curriculum delivery methods.
- B. Describe the school's grade level configuration and identify any special organizational models (i.e. academies, grade level groupings, collaboration/partnerships).
- C. Discuss school scheduling approach (periods, hours, lunch seating rotations, library time, computer lab, student arrival, and student dismissal).
- D. Identify any special programs or unique curriculum features such as special education, performing/visual arts, electives, advanced placement, online learning opportunities, outdoor classroom, and/or off site learning/areas).
- E. Discuss any special curricular and extracurricular activities the building accommodates including joint use with other entities that use the school.
- F. Discuss spaces for which the school has a variance from the NM State Adequacy Standards (if any).
- G. Discuss any anticipated changes to the educational program or delivery system in the new project.

Section 3. Demographics and Enrollment

A. Past Enrollment Trends – Provide an overview of enrollment trends in district-wide elementary schools for the previous five school years. Discuss relevant factors that have impacted the enrollment trends such as:

1. Relevant demographic trends in the county/district/School Attendance Boundaries such as:

- a) Census data

- b) Birthrates
- c) In/out migration
- d) Historic enrollment trends

2. Provide table or chart that summarizes the past five years of enrollment at School (based on 40-day Certified Enrollment Counts).

B. Enrollment Projections – Provide an enrollment projection analysis for the next five years for School and its individual grade levels.

- 1. Provide table or chart that summarizes the enrollment projection for the next five years for the project.
- 2. Provide a brief analysis of projection and likely enrollment trend scenario for School.
- 3. Discuss relevant factors that justifies the projection and likely enrollment trend scenario for School such as (as applicable):

- a) Previous enrollment trends
- b) Survival ratios
- c) Birth rates
- d) Municipal/County/Regional demographic trends
- e) Housing development
- f) Boundary adjustments
- g) Programmatic changes
- h) Economic development initiatives/dominant industry expansion
- i) School consolidation
- j. Others

SECTION 4. Utilization and Capacity

A. Maximum/Functional Capacity Analysis – For the existing facility or for all district facilities (depending on award language), please identify :

- 1. Maximum capacity with and without portables
- 2. Functional capacity with and without portables

B. Utilization Analysis for the existing facility – Prepare a utilization analysis of the existing facility that identifies the following (please utilize PSFA Utilization Analysis sheet located on PSFA website at):

<http://nmpsfa.org/?q=facility-planning>

C. Identify special factors that affect capacity and utilization of existing facility such as (if any):

1. Special education
2. Other special programs or curriculum issues
3. Attendance boundary issues
4. FTE availability
5. Vacant, underutilized, or repurposed instructional spaces
6. Excess underutilized or unassigned space in school and/or district
7. District transfer policy

D. Space Needs at the new/replacement facility, addition, or major renovation

1. Based on capacity, utilization, current educational program, and special factors, discuss classrooms and core spaces the project will need to accommodate enrollment projection and planned educational program.
2. Discuss relevant strategies and/or options to meet the school's projected space needs including (if applicable)
 - a) Increased/decreased capacity and related square footage
 - b) Additions to or expansion of core facilities
 - c) Boundary adjustments
 - d) Schedule changes
 - e) Grade level configuration
 - f) Transfer limitations

SECTION 5. Building Site and Conditions Review

A. Review PSFA Facilities Assessment Data Base and Facilities Master Plan and note significant issues with school structure, systems, and overall condition (applicable to major renovation/addition projects only).

B. Provide graphic showing school dates of school construction and additions (applicable to major renovation/addition projects only).

C. For projects involving major renovations or additions, provide revised conceptual floorplan that shows where work will take place, the nature of work, the types of spaces to be added/demolished (applicable to major renovation/addition projects only).

D. For all projects, provide conceptual site plan showing how project will lay out on the site and how it relates to:

1. Parking
2. Student drop-off/pick-up for both parent and bus
3. Playground/Playing Fields
4. Identification of Site Acreage

PART II: EDUCATIONAL SPECIFICATIONS

SECTION 6. Facility Goals and Concepts For Project School

A. For new project/addition/major renovation describe the major facility goals and concepts including the following (but not limited to) characteristics:

1. Safety and Security
2. Sustainability and Energy Efficiency
3. Building flexibility – the ability of the building to accommodate different teaching methods, curriculum, potential changes in grade level configuration or programs
4. Potential for community use or shared facilities with other entities (if any)
5. Utilities – briefly describe how site utilities will be provided
6. Preventive Maintenance Program – how will maintenance be handled
7. Any other issues or special considerations that impact building use, space requirements, and/or costs

SECTION 7. Space Requirements in Project School

A. In a chart or table, Itemize the quantity and sizes of spaces required to accommodate the educational program

1. Make a clear distinction between the spaces to adequacy and those over adequacy per the adequacy planning guide at:

<http://www.nmpsfa.org/?q=node/115>

2. Quantify the number of spaces needed and size of spaces needed for the school's educational program including but not limited to
 - a. Student dining
 - b. Administration
 - c. Student health/nurse suite (can be included in admin)
 - d. Media arts
 - e. Technology aided instruction (computer labs)
 - f. Janitorial/building support
 - g. Student commons
 - h. Any other spaces requires to support school's operation
3. Identify the number of students each space will serve.
4. Calculate building TARE

B. Provide a graphic diagram illustrating the relationship between program areas

C. Identify anticipated student capacity, utilization, and efficiency of the facility use and provide supporting analysis

SECTION 8. Project Budget

A. Provide an estimate of probable cost for the total project including:

1. Site development costs
2. Facility construction
3. Demolition
4. Other project costs

B. Identify cost estimating assumptions and address.

1. Unit costs
2. Inflation
3. Other cost factors (i.e. distance from materials/labor, part of the state in which project is located)

C. Identify anticipated project delivery schedule.

FINAL PRODUCTS:

Provide PSFA (1) one copy of the draft educational specifications document for review (either hard copy OR electronic format acceptable) prior to School Board approval. Upon receipt of PSFA approval letter, provide PSFA (1) one hard copy of the final educational specifications document. Upload an electronic copy of the final educational specifications document to the PSFA E-Construction Management System.