



State-Chartered Charter School Facilities Master Plan/Educational Specifications Scope of Work Checklist

Revised – September 2022

Per Section 22-24-5 NMSA 1978, the facilities master plan/educational specifications is a requirement for potential Public School Capital Outlay Council (PSCOC) awards to school districts and state-chartered charter schools, including lease assistance.

For charter schools, the document has two purposes. The facilities master plan (FMP) component typically applies to schools that have a building or know of a specific building they would like to locate. These sections outlines capital improvements the building needs for the school to function and support the schools educational program. **Some of the items listed below may not be applicable since a charter school might not be in its permanent facility.**

For those charters not in a permanent facility, the educational specifications component (ed specs) helps the charter school define the quantity, size, and characteristics of instructional and support spaces in a desired facility according to the school's educational program and curriculum. This information is useful for the applicant charter as it looks for suitable buildings to house its school.

The ed specs component may still be useful for those schools in their permanent facility but looking to expand or add on to their building. It can help them organize or re-purpose their space and identify uses for the new space.

This checklist provides an overview of requirements for the state-authorized charter school facilities master plan/educational specifications document. This document must be prepared in the following format:

Deliverables

PSFA requires the following in the final deliverables for a completed FMP project:

- Title identifying FMP/Ed Specs as five-year plan with active years. If a district or charter school starts a plan at the beginning of 2021 and is does not complete the project by July 1st of 2021, the plan's start year shall automatically default to January of the following year (2022). If the plan is not complete within a year, we can revisit the appropriate effective dates. Essentially, a district should get a full five years out of its plan.
- For a more user friendly document, please use traditional pagination (Page 1, 2, 3,4....)
- Provide PSFA with review draft electronically through upload into PSFA's construction management system (Currently E-Builder) or delivered via email or file sharing

Plan Content

The checklist that follows outline the required sections and content for and FMP/Ed Specs document.

I. INTRODUCTION

A. Charter School Overview

1. Identify year of initial charter
2. Identify first year of operation (planning year)
3. Identify charter school enrollment cap per school's charter
4. Provide basic facility information
 - a) School's physical address
 - b) Building ownership and identify:
 - Does charter school lease?
 - Is charter school in lease to purchase agreement?
 - Does charter or charter foundation own the building?
 - c) Discuss public building compliance and discuss school's attempts to locate in a public building if not in compliance
 - If the school is not in a public building, outline plan for compliance with public building requirement.
 - d) Explain how the school manages its maintenance program.

B. Planning Process

1. Discuss the process used to create the FMP (meetings, workshops, outreach). The FMP process could vary depending on the school and its community and may or may not involve establishing a committee. The school and consultant team can determine the most effective way to obtain planning input.

II. EXISTING AND PROJECTED CONDITIONS

A. School Educational Programs and Curriculum Delivery Methods

1. Educational structure

- a) Grade levels
- b) Scheduling and/or structure of school day/week
- c) Special groupings such as academies, blended learning, etc....
- d) Desire class size or pupil teacher ratio

2. Provide overview of school's educational program/philosophy and its relation to facilities.

- a) Discuss the types of educational and support spaces required to deliver educational program and/or curriculum.
- b) Describe any alternative or unique methods of educational program and support delivery such as off-site instructional locations, outdoor spaces, meal delivery, contract healthcare, and/or online instruction. Indicate whether alternative or unique methods are permanent or will change if school re-locates.

3. List any anticipated special curricular and/or extracurricular activities the facility will accommodate.

4. Discuss any anticipated changes to the charter or educational program such as changes in grade level configuration, changes in instructional program, or potential school relocation.

B. Site and Facilities (Please note, detailed floor plans shall be part of Section VI)

1. Provide a site location map that identifies the school's location and facilities.

2. Provide a general description of the school's site and facilities.

- a) If school occupies only a portion of its facility, indicate the amount and location of school within the facility.

3. Discuss the school's location relative to its desired or strategic location (i.e. is the school located in the area given its proximity to its students or other strategic factors such as proximity to other educational institutions, public parks, transit routes, allied programs, and/or other types of community uses). – **If applicable**

C. Enrollment and Charter School Cap

1. Provide table or chart that summarizes the previous 10 years of enrollment based on the 40-day count (or as far back to date of first enrollment if school has not been in operation for 10 years).

- a) Provide a graph of enrollment compared to the school's enrollment cap and discuss how the school intends to reach its cap.
 - Identify whether current building limits school's ability to reach cap.
 - Identify how the school will phase in the enrollment until it reaches its cap.
 - Identify timeline for reaching the cap.

2. Discuss relevant factors that influence school's enrollment **(if any)**.

III. CAPACITY AND UTILIZATION ANALYSIS

A. Capacity Analysis

1. Provide the maximum capacity of the facility with and without portables.

2. Provide the functional capacity of the facility with and without portables.

B. Utilization Overview for Existing Facility (please note, detailed utilization analysis will be provided in Section VI).

1. Classroom data – Please identify:

- a) Total number of permanent general classrooms
- b) Total number of permanent specialty classrooms or instructional spaces including physical education, performing arts, visual arts, vocational, technology, labs and other special elective spaces

- c) Total number of portable classrooms
- d) Grand total number of classrooms
- e) Total number of other specialty instructional spaces
- f) Classroom deficiency/surplus

2. For facility – Please identify specialty and support spaces present at facility including **(as applicable)**:

- a) Administration spaces
 - o Counseling
 - o OT/PT
 - o Staff offices
 - o Student health
- b) Student dining
- c) Kitchen facilities
- d) Physical education spaces
- e) Labs
- f) Building support including maintenance and custodial

3. Provide the school's utilization rate and discuss special factors that affect utilization such as:

- a) Space limitations
- b) FTE availability
- c) Low PTR required for certain rooms/classes
- d) Curriculum issues (AP classes, vocational programs, electives, special programs that limit student loading, staffing)

4. Provide comment on existing facility's ability to accommodate enrollment and educational program

- a) If the school is in its permanent facilities, discuss changes required in this facility for the school to accommodate its enrollment and educational program **(if applicable)**

IV. PROPOSED FACILITY REQUIREMENTS (EDUCATIONAL SPECIFICATION) – If applicable

A. Facility Concept

1. Discuss concepts the school desires in its own building including:
 - a) Desired physical location
 - b) Safety/security features
 - c) Sustainability and energy efficiency

- d) Flexibility of spaces
- e) Acreage
- f) Site requirements (playing fields, courts, outdoor learning space, garden, bus/parent pick up and drop off)
- g) Technology needs/broadband

B. Space Requirements

1. Itemize the quantity and sizes of spaces required to accommodate the instructional program (please note, template can be modified to respond to unique situations). Identify:
 - a) Type and number of general classrooms, including size and students served in each
 - b) Type and number of specialty classrooms, including size and students served in each
 - c) Type and number of support spaces, including size and students served
2. Discuss spaces in which the school waives the adequacy standards.

V. CAPITAL PROGRAM (If Applicable and applies to charters in their own facilities)

A. Available Funding For Capital, Systems, Security, and Technology Needs

1. Identify current and future financial resources available (indicate years available) to meet capital, system, security, maintenance, and technology needs.
 - a) List sources of funds for maintenance
 - b) List sources of funds for capital needs
 - c) List source of fund for security needs
 - d) Lists source of funds for systems needs
 - e) List sources of fund for technology/broadband

B. Planning Strategy (The school's building ownership status will guide this section).

1. If the school owns the building or is in its permanent space, identify whether the school needs:
 - a) Additions needed to accommodate enrollment or educational program
 - b) Renovation and/or remodeling

- c) Systems upgrades
- d) Security/safety improvements
- e) GSF reductions

2. If the school leases its building, identify
 - a) Building ownership strategy or options
 - b) Public building compliance
 - c) Steps the school is taking to search for a permanent facility
3. Discuss building maintenance needs, if not part of the lease agreement.

C. Planning Implementation

1. Address prioritization process and how school determined planning priorities.
2. Provide priorities for capital improvement standards based projects for the next five years and identify sources of funding **(if applicable)**
3. Provide priorities for systems based projects for the next five years and identify anticipated sources of funding **(if applicable)**
4. Provide priorities for security based projects for the next five years and identify anticipated sources of funding **(if applicable)**
5. Provide priorities for broadband projects for the next five years and anticipated sources of funding **(if applicable)**
6. Identify maintenance issues, including Major and Minor findings from the FMAR for the school to address and identify anticipated sources of funding **(if applicable)**

VI. TECHNICAL APPENDIX

A. Please provide the following for the facility.

1. Site Plan to Scale that labels the buildings in use.
2. Floor Plan to scale with room number and use of each room/space labeled. Identify vacant or underutilized spaces and/or instructional spaces that have been re-purposed for some other use. Identify support spaces.

3. Utilization detail - Prepare a utilization analysis that identifies the following (*please note, utilization forms can be modified to fit unique or different situations as long as requested information below remains*):

- a) Room Number
- b) Teacher identification (For privacy, we are no longer requesting name)
- c) Classroom square footage
- d) Number of students allowed per adequacy
- e) Number of students in room for the school day or class period
- f) Current room use by school day, hour, and/or class period
- g) Original intended use for room (elementary only)
- h) Classroom occupancy and occupancy percentage
- i) Number of hours room is used by day and week based on available hours in school day
- j) Utilization rate for individual space as well as state wide average
- k) Color code uses based on utilized, vacant/non-assigned spaces, prep period, underutilized space, specialized space, and/or space scheduled as necessary

4. Additional supporting material as needed