New Mexico Public School Facilities Authority
Facilities Master Plan Scope of Work Checklist

Revised August 2022

The following components are required for a 5-year facilities master plan for school districts.

Deliverables

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

- ☐ The title identifying FMP as five-year plan with active years. PSFA considers a plan good through January 1st of the beginning year to December 31st of the 5th year.
- ☐ 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 (Page1,2,3,4….)
- ☐ Provide PSFA with review draft electronically through upload into PSFA's construction management system (Currently E-Builder) or delivered via email or file sharing in the event of non-PSCOC funded plan.
- ☐ Please provide floor plans as separate PDF files.
- ☐ Upload the final electronic copy into construction management system in two sections so that Section V, containing floor plans is its own file. PSFA will post sections without floor plans on its website.
- ☐ Schools under an existing PSCOC standards based awards will not have to be physically assessed but will need to be included as part of the demographics and enrollment projections. Please see our Facilities Assessment Data base, page 1 for schools under PSCOC standards based awards at the following link.

https://www.nmpsfa.org/wordpress/wp-content/uploads/2022/10/2023-Preliminary-Ranking.pdf

12/1/2022

Plan Content

The checklist that follows outline the required sections and content for an FMP document.

I. INTRODUCTION

A. District Facilities Vision and Goals

1. Discuss the short and long range vision for the district's school facilities

2. Identify the district's goals for its facilities

B. Issues and Findings

Provide brief bullet point list of issues the district is facing (i.e. enrollment decline, facility conditions, bonding, excess space, overcrowded facilities).

C. Planning Process

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

D. Executive Summary of the Capital/Systems/Security/Broadband and Technology Program

1. Identify priority projects and/or schools for:

   a) Capital/Standards Based
   b) Systems
   c) Security (may not be a PSCOC funding category)
   d) Broadband/Technology

2. Identify estimated costs for priorities

3. Identify potential funding sources for addressing priorities

Please note – a table or graphic is acceptable for displaying items 1-3 in this section

II. EXISTING AND PROJECTED CONDITIONS

A. District Overview

1. School District Overview

  a) Number of Schools in District
  b) Types of Schools (traditional, magnet, alternative, charter)
  c) Grade level configuration of each school
  d) Special factors or programs in the district (year round schools, online academies, etc.…)
  e) Others

2. Anticipated or projected changes in the district such as new programs, new facilities, closure of facilities, and/or grade level re-organizations during planning cycle (if any) and how changes may impact facilities.

B. Site/Facilities Overview

1. Discuss school district boundaries and school attendance zones for districts with multiple schools

  a) Include mapping of school district, school district subareas, and attendance zones (create maps in a format that is supported in or capable of being imported into ArcGIS)

2. Provide district facility inventory in tabular form for the district's school sites and provide the following information for each facility:

  a) Name of facility
  b) Site acreage
  c) Date of opening
  d) Date of major additions and renovations
  e) Facility condition index (FCI) and weighted New Mexico Facility Condition Index (wNMCI)
  f) Total building area gross square feet (GSF)
  g) Teacher housing units in the district, if any
  h) Other Support Facilities

C. Demographics and Enrollment

1. Demographics and Socioeconomics – Identify and discuss relevant factors that have influenced enrollment over the previous five years related to the following:

  a) Discuss relevant demographic trends in the community/county that influence enrollment in the district (birthrates, in/out migration, census data, historic enrollment trends).

b) Discuss relevant socio-economic/economic development/community development trends that may impact enrollment in the district (industrial mix/jobs, economic development, housing development).

c) Discuss special factors in the community that could influence enrollment in the district such as military installations, presence of large institutions, housing initiatives, urban/regional/community planning initiatives.

2. Enrollment Trends and Projection

a) Provide table <u>or</u> chart that summarizes the previous 10 years of enrollment (based on 40-day count) by:
   o District (PreK-12th)
   o District wide grade level
   o Individual school sites by grade level

b) Provide table <u>or</u> chart that summarizes projected student enrollment over the next five years by:
   o District (PreK-12th)
   o District wide grade level
   o Individual school sites by grade level

c) Provide brief analysis of projection with most likely growth scenario including relevant factors contributing to most likely scenario (i.e. what variables will influence the projections for the district and schools):
   o Discuss relevant factors contributing to most likely scenario such as **(as applicable):**
     ▪ Previous enrollment trends
     ▪ Survival ratios
     ▪ Birthrates
     ▪ Housing development
     ▪ Municipal/County/Regional demographic changes
     ▪ Boundary adjustments
     ▪ Programmatic changes
     ▪ Student location
     ▪ Economic development initiatives/dominant industry expansion
     ▪ Educational programs
     ▪ Impact of Bureau of Indian Education schools operating in the area (if any)
     ▪ Military installation impact (if any)
     ▪ Others

III. CAPACITY AND UTILIZATION

A. Maximum/Functional Capacity Analysis

1. At each school site identify:

   a) Maximum capacity with and without portables
   b) Functional capacity with and without portables

2. Identify special factors that affect capacity.

B. Utilization Analysis

1. Prepare utilization overview that identifies utilization rate for each school site and overall district utilization and vacant instructional space (*Please note detailed utilization analysis will be provided in Section V*.

2. Identify special factors that affect utilization.

C. Space Needs

1. Based on capacity, utilization, and educational program, and special factors, discuss classrooms needed to accommodate existing and future enrollments for every school site**.**

2. Identify strategies to meet space needs.

3. Identify vacant and under-utilized spaces in individual schools and/or schools with excessive space for the enrollment (if any). Provide comment on these spaces' ability to be repurposed or utilized for other functions.

IV. CAPITAL IMPROVEMENT PROGRAM/PLANNING STRATEGY

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

1. Identify current and future financial resources available (indicate years available) to meet capital, systems, security, maintenance, and technology needs.

   a) List source of funds for maintenance
   b) List sources of funds for capital needs
   c) List sources of funds for systems needs
   d) List sources of funds for security

e) List sources of funds for technology/broadband

B. Prioritization Process

1. Summarize issues the district is facing that help form the planning strategies and priorities

2. Summarize district planning priorities and available/potential resources required to implement priority projects

C. Planning Strategy and Implementation

1. When developing the planning strategy and implementation, consider:

a) Does district need a new school (to accommodate growth/relieve overcrowding)
b) Which facilities needs to be fully replaced (if any)
c) Which facilities need renovation
   - Identify level of renovation
   - Identify building systems that need upgrading or replacement
   - Identify capital needs as part of major renovation
d) Which facilities only need general maintenance
   - Identify any maintenance needs that could result in capital needs if not addressed
e) Which facilities or structures need to be closed, demolished, downsized, consolidated, or repurposed. Discuss options can the district explore to address underutilized facilities?
f) Pre-K Facilities Needs
   - Identify new pre-k facilities or additions to existing pre-K facilities in order to accommodate demand
g) Identify whether the district needs teacher housing including estimated number needed

2. Technology/Broadband Plan – Discuss current and future technology and broadband needs. Provide overview of district technology plan.

3. Security – Discuss security needs in the district and at each school site.

D. Capital Plan Priorities

1. List priorities for standards based capital improvement projects for the next five years and identify anticipated sources of funding.

2. List priorities for systems based projects for the next five years and identify anticipated sources of funding.

3. List priorities for security based projects for the next five years and identify anticipated sources of funding.

4. List priorities for broadband projects for the next five years and anticipated sources of funding.

V. TECHNICAL APPENDIX

A. Supporting Information

1. Brief report on each school site incorporating the PSFA FAD Executive Summary Report. Include other FAD sections as needed.

    a) Provide itemized list of capital, systems, security, and broadband needs.
    b) Provide illustrative photographs as appropriate.

2. Provide site plans for each school site (to scale).

    a) Label buildings utilizing the same labels as the FAD and include building ages

3. Facility floor plans for each school site at a readable scale and with room number and use of each room/space labeled. Identify vacant or underutilized spaces and/or instructional spaces that the school has repurposed for some other use.

4. Utilization detail - Prepare a utilization analysis that identifies the following

    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

5. Provide <u>overview</u> of current Preventive Maintenance Plan

6. Additional supporting material as needed.