



NEW MEXICO PUBLIC SCHOOL
CAPITAL OUTLAY COUNCIL

NEW MEXICO PUBLIC SCHOOL
FACILITIES AUTHORITY

FACILITIES MASTER PLAN
CHECKLIST AND
GUIDELINES FOR
PREPARING DISTRICT PLANS

2023



PART I: OVERVIEW OF THE FACILITIES MASTER PLAN PROGRAM



PART I. OVERVIEW OF THE FACILITIES MASTER PLAN PROGRAM

The Facilities Master Plan Checklist and Guidelines provides the requirements for completing a facilities master plan (FMP) for school districts. Part I of this document contains an overview of the FMP program while Part II provides the checklist along with guidelines on how to address certain FMP requirements.

New Mexico state law requires all school districts to have a current five-year FMP, as a prerequisite for eligibility to receive state capital outlay assistance (Section 22-24-5 NMSA 1978). The district's FMP shall also include district-authorized charter schools. Similarly, state-chartered charter schools shall have their own five-year FMP/Educational Specifications hybrid (FMP/Ed Specs) as a pre-requisite for eligibility to receive state capital outlay assistance.

The FMP is a plan for all of a school district's, district-chartered, or state-chartered charter school's facility needs. The plan becomes the "road map" by which the district or state-chartered charter school can anticipate the changing demands of its educational facilities such as addressing adequacy standards deficiencies, enrollment impacts, utilization/capacity, and program needs. The plan identifies the necessary funding and time frames for each facility and outlines an appropriate strategy for maximizing resources and efficiency while minimizing operating costs over the planning period.

Adequate, functional, and well maintained school buildings are important parts of the educational process. The FMP serves as the major tool to help districts make decisions to meet these important responsibilities. The FMP is important for identifying issues and facility needs within a school district while providing a well-thought out strategy dealing with challenges. It identifies the potential resources a district can apply to priority projects and provide options for the district to deal with enrollment growth, surplus square footage, aging facilities, and preventive maintenance.

PART I: WHY PLAN FOR SCHOOL FACILITIES

- Maintaining and improving school buildings is among the many tasks district administrators must address, often with limited and competing financial resources.
- The school district may be at a crossroads and can benefit from added direction.
 - Demographic shifts – the district may be growing or losing enrollment
 - The district may have too much space that the district needs to maintain and operate
 - The district may have too little space and may need additions, boundary adjustments or new school
 - The district's facilities may be old and unable to support changing needs of modern education
- Improving, upgrading, and/or maintaining a school building can be intimidating and overwhelming – where to start?
 - Multiple school buildings and campuses magnify this issue. What do you prioritize?

PART I: BENEFITS OF A FACILITIES MASTER PLAN

- The FMP is an organizational, management, and budgeting tool
- The FMP contains all information and data on facilities in one place.
 - Information on systems
 - Information on building condition
 - Utilization and capacity of each building
- Contains rigorous demographic and socioeconomic analysis, providing a profile of the districts enrollment trends and projections
- Data about facility use helps to organize existing or new space to accommodate educational programs
- Anticipates and plans for change in educational program delivery as it relates to facilities
- Planning demonstrates a strategy behind facility improvement decision making in order to maximize taxpayer dollars

Even if a school district or state-chartered charter school does not intend to utilize PSCOC funding in the next five years, planning is still a good business practice. Districts have their own resources and identifying issues and needs will help prioritize facilities improvement.

PART I: PROCESS FOR PREPARING THE FMP

The process for preparing the FMP can vary depending on the district but at a minimum should include:

- Building assessment and condition including review – Consultant walks the building and notes structural and system issues at each campus
- FAD review - PSFA provides the district and its consultant access to the Facilities Assessment Database, which ranks each campus against condition, life/health/safety, space, and renewal needs. The consultant will update the FAD executive summary for each building and submit these updates to PSFA for update of the FAD.
- Data gathering – Consultant and the district will gather data and research various issues facing the district. These can range from demographic and socioeconomic data to review of each school’s master schedule to develop a capacity and utilization analysis.
- Review of district policy and program – District policy and educational/curriculum issues influence plan recommendations. These items can range from desired school sizes, grade level configuration, special programs, technology, after hours use of the building, etc.
- Examination of Preventive Maintenance Plan (PMP) - The district’s preventative maintenance plan (PMP) identifies maintenance tasks the district needs to perform to ensure its systems and equipment remain in working order. The PMP defines the district’s maintenance processes and goals while delineating organizational responsibilities for effectively accomplishing all maintenance activities. The district should also use the plan to identify end of life cycle dates for facility-related equipment in order for the FMP to plan for its replacement and budget accordingly. While the purposes of the two plans are different, they are interrelated. Maintenance prolongs a building and its system’s life span, however, they also require cyclical renewal necessitating capital funding. Alternatively, improperly maintained capital investments significantly decreases useful life.
- Public process – Develop a community engagement process to view data and develop consensus on the plan’s priorities.



PART II: FMP CHECKLIST AND GUIDELINES



PART II: FMP CHECKLIST AND GUIDELINES

Part II of this document contains the checklist and supporting guidelines PSFA requires for a school district FMP document. The checklist identifies the elements the FMP should address. In certain areas, guidelines sections or sidebars provide a more detailed explanation about the checklist requirements. Given the charter school's unique facility needs and program, PSFA has a separate checklist for preparing a FMP/Educational Specification document for state-authorized charter facilities located at:

<https://www.nmpsfa.org/wordpress/facility-master-planning-fmp-and-procurement/>

PSFA requires the following for the final deliverables for a completed FMP document:

- 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 2023 and is does not complete the project by July 1st of 2023, the plan's start year shall automatically default to January of the following year (2024). 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....)

PART II: FMP CHECKLIST AND GUIDELINES

Required deliverables for a completed FMP document (continued):

- 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 I 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>

The next sections discuss the requirements for completing a facilities master plan for a school district.



Section I.
FMP Introduction
& Executive
Summary



Section II.
Existing and
Projected
Conditions



Section III.
Capacity and
Utilization.



Section IV.
Capital
Improvement
Program &
Planning Strategy



Section IV.
Technical
Appendix

STRUCTURE OF FACILITIES MASTER PLAN

I. FMP INTRODUCTION & EXECUTIVE SUMMARY

This section should provide a brief overview of the FMP document.

- A. Discuss district's vision and goals for its facilities during this planning cycle
- B. Provided bulleted list of issues/findings that guide plan's recommendations
- C. Planning Process – Describe the process for obtaining feedback. The process could vary depending on the district and its community. The district and consultant team can determine the most effective way to obtain planning input.
- D. Executive Summary of Priority Capital/Systems/Security/Technology Needs
 - 1. Identify priority projects and/or schools for
 - a) Capital/Standards Based Projects
 - b) Systems
 - c) Security
 - d) Broadband/Technology
 - 2. Identify estimated costs for priorities
 - 3. Identify potential funding sources for addressing priorities

* A table or graphic is acceptable for displaying items 1-3 for this section

A district's vision and goals for its facilities should provide a general statement of future condition or function that help form plan recommendations. For example, a goal could be to move 6th grade to middle schools, which could require renovation or addition to district middle schools.

PUBLIC PARTICIPATION: A KEY TO SUCCESSFUL PLANNING

Input, ideas, and opinions from the district and school community drive a successful planning process. The public process gives students, teachers, and staff the opportunity to discuss issues beyond the building's physical conditions. For example, teachers may collaborate and need flexible space conducive to group activity. As everyday users of the facility, students may discuss issues related to the site or cafeteria.

The public process could vary depending on the district. For some districts, a steering committee may be the best way to provide input while others may rely on community wide public meeting. For others, a combination of steering committee and public meetings could work. In addition, including people from the community such as city planners could identify other variables occurring in the community. The planning team and district can determine the best approach at the start of the project. At a minimum, the process should include:

- District administration (superintendent, business manager, program coordinators)
- School Board members
- Teachers
- Support staff (maintenance, IT, custodial)
- Students
- Special program staff (OT/PT, SLP)
- Neighborhood organizations
- City, county, tribal, regional planners
- Business leaders



II. EXISTING AND PROJECTED CONDITIONS

This section provides an overview of existing conditions within the district including educational program information, current school inventory, and enrollment demographics.

- A. Educational Program/Structure – Describes the composition of the district’s facilities and potential changes to the programs.
 - 1. School district composition – identifies the following
 - a) Number of schools in the district
 - b) Types of schools (traditional, magnet, alternative, district authorized charter)
 - c) Grade level configuration of each school (i.e. Pre-K-5th, 6th-8th, 9th-12th)
 - d) Special features or programs (i.e. year round schools, online academies, etc...)
 - e) Other special factors or considerations
 - 2. Anticipated or projected changes in district composition during this planning cycle such as:
 - a) New schools
 - b) Disposal of schools/properties
 - c) Changes in grade level configuration
 - d) Re-designation or repurposing of schools
 - e) Alternative schools
 - f) Implementation of new programs
 - g) Charter schools
 - h) Other

II. EXISTING AND PROJECTED CONDITIONS

This section provides an overview of existing conditions within the district including educational program information, current school inventory, and enrollment demographics.

B. Site/Facilities

1. Discuss school district boundaries and school attendance zones for districts with multiple schools
 - a) Include mapping of the school district, school district subareas, and attendance zones as applicable (create maps in a format that is supported in or capable of being imported into GIS platform).
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) State identification number
 - c) Physical address
 - d) Date of opening
 - e) Date of major renovations
 - f) Facility condition index (FCI) and weighted New Mexico Facility Condition Index (wNMCI)
 - g) Total building gross square feet (GSF)
 - h) Teacher housing units in the district, if any
 - i) Other support facilities (may or may not be PSCOC funding eligible)



DISTRICT FACILITY INVENTORY TABLE EXAMPLE

District Name

| School | State ID | Physical Address | Date of Opening | Date of Renovations | FCI | wNMCI | Permanent GSF | Portable GSF | Total GSF | # of Teacher Housing Units |
|---------------------|----------|------------------|-----------------|---------------------|-----|-------|---------------|--------------|-----------|----------------------------|
| Elementary School A | | | | | | | | | | |
| Elementary School B | | | | | | | | | | |
| Elementary School C | | | | | | | | | | |
| Middle School A | | | | | | | | | | |
| High School A | | | | | | | | | | |
| Teacher Village | | | | | | | | | | |

II. EXISTING AND PROJECTED CONDITIONS

This section provides an overview of existing conditions within the district including educational program information, current school inventory, and enrollment demographics.

C. Demographics and Enrollment

1. Identify and discuss all relevant factors influencing enrollment trends over the previous ten years such as:
 - a) Regional/County/Municipal demographic and socioeconomic variables that impacted district enrollment such as births, in/out migration, cohort survival rates, etc...
 - 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 variables and 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 or chart that summarizes the previous 10 years of enrollment (based on 40-day count) by:
 - District-Wide Trends (Pre-K-12th)
 - District Wide by Grade Level corresponding to the district's grade level configuration (i.e. Pre-K-5th, 6th-8th, 9th-12th)
 - Individual school by grade level
- b) Provide table or chart that summarizes student enrollment projection over the next five years by:
 - District-Wide Trends (Pre-K-12th)
 - District Wide by Grade Level corresponding to the district's grade level configuration (i.e. Pre-K-5th, 6th-8th, 9th-12th)
 - Individual school by grade level

II. EXISTING AND PROJECTED CONDITIONS

- c) Provide brief analysis of projection for the most likely growth scenario including relevant variables contributing to the likely projection (i.e. what variables will influence the projections for the district and schools) **as applicable**:
 - o Some relevant variables may include:
 - Previous enrollment trends
 - Survival ratios
 - Birthrates
 - Housing development
 - Municipal/County/Regional demographic changes
 - School boundary adjustments
 - Student location within the district
 - Economic development initiatives
 - Changes to a school's educational program (i.e. grade level changes, addition of Pre-K, addition of certain programs, etc..)
 - Impact of alternative educational programs (other governmental such as Bureau of Indian Education, or private providers, charter schools, etc.)
 - Military installations (if any)
 - Others

This section supports the likely enrollment projection scenario by discussing enrollment, demographic, and socioeconomic variables in the district. PSFA staff relies on the information in this section to provide justification for the FMP's enrollment projection. If the district is growing, PSFA staff will need to discuss drivers of growth. If the district is not growing, we may not need as rigorous of an analysis. The bulleted list on the left serves as a guide as not every district or community will feature each variable.

ESTABLISHING THE BASELINE: COHORT SURVIVAL METHOD

The standard method for projecting school enrollments uses a cohort-survival approach. This method tracks the number of students in the same grade level cohort as they move from one grade to the next within the school. The number of students who move from one grade to the next results in a survival ratio based on the change in the number of students who “survive” and progress to the next grade the following school year.

- Cohort survival is the primary method to project school enrollment
- Treats grades as “cohorts” and monitors them as they progress over school years
- Establishes a “survival ratio” for each grade level to use as a multiplier to project enrollment
- 100 second graders in a school become 105 third graders – survival ratio = 1.05
- Ratios may need adjustment to reflect demographic or socioeconomic changes within the district as a whole or specific school attendance areas such as variables listed on the previous page

| Grade Levels | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | Trend Line |
|---------------|------------|------------|------------|------------|------------|------------|------------|
| Pre-K | 14 | 11 | 16 | 16 | 29 | 32 | |
| K | 100 | 77 | 98 | 97 | 95 | 104 | |
| 1st | 104 | 135 | 83 | 108 | 109 | 113 | |
| 2nd | 102 | 122 | 127 | 84 | 102 | 113 | |
| 3rd | 91 | 116 | 123 | 128 | 103 | 114 | |
| 4th | 105 | 97 | 121 | 121 | 120 | 117 | |
| 5th | 91 | 102 | 102 | 114 | 118 | 122 | |
| TOTALS | 607 | 660 | 670 | 668 | 676 | 715 | |

- Chart tells us historically, 1st gains students from Kindergarten
- Survival ratios, on average of 1.1, suggest stability to growth over the next five years

ESTABLISHING THE BASELINE: BIRTHS

Birth rates are critical for projecting enrollment since they can predict the potential size of district and/or an individual school’s kindergarten class. Kindergarten students typically do not have a preceding cohort from which to calculate survival ratios. The consultant can calculate survival ratios for kindergarten classes by examining county births five years prior to create a ratio.

- Examines births by County
- Compares births to kindergarten enrollment five years later – see table
- Establishes trend data we use to project kindergarten enrollment
- Data collected based on mother’s address
- The NM Department of Health/Vital Statistics provides birth numbers by County on its website at the following link:
 - [NM-IBIS - Query Result - New Mexico Birth Data - Count](#)

| Farmington Municipal School District | | | | |
|--------------------------------------|--------|----------------------------|----------------|-------|
| Births | | Kindergarten 5 Years Later | | |
| Year | Births | Year | K 5 Year Later | Ratio |
| 2010 | 1928 | 2015 | 836 | 0.43 |
| 2011 | 1910 | 2016 | 839 | 0.44 |
| 2012 | 1862 | 2017 | 842 | 0.45 |
| 2013 | 1901 | 2018 | 827 | 0.44 |
| 2014 | 1839 | 2019 | 844 | 0.46 |
| 2015 | 1826 | 2020 | 707 | 0.39 |
| 2016 | 1722 | 2021 | 723 | 0.42 |

III. CAPACITY AND UTILIZATION

This section provides an overview of each school's capacity and instructional space utilization.

A. Maximum/Functional Capacity Analysis

1. For each school site, identify

- a) Maximum capacity with and without portables (capacity that treats every instructional space like a fully loaded classroom)
- b) Functional capacity with and without portables (capacity that applies the school's educational program to each classroom)

2. Identify factors affecting capacity

B. Utilization Analysis

1. For each school site, prepare utilization overview that identifies utilization rate, vacant instructional spaces, classroom seat occupancy, and overall district utilization (*please note, provide a detailed utilization analysis in Section V*)

Utilization measures frequency the school uses its instructional spaces during the school day. Some factors that could affect space utilization in a school may include:

- Special education programs
- Unique or specialty curriculum or programs such as vocational/career programs, advanced placement, college credit, virtual instruction
- Program expansion
- Instructional spaces repurposed for other functions
- Changing demographics that cause enrollment increase or decline
- FTE availability or school limiting of enrollment for certain classes
- Educational adequacy (loading of classrooms due to size constraints)
- Others, as applicable

III. CAPACITY AND UTILIZATION

This section provides an overview of each school's capacity and instructional space 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

Strategies to meet space needs could range from:

- Building addition
- Repurposing of existing space
- Attendance boundary adjustment
- New School

In some cases, a school may have excess space and the strategy could involve reduction of space.

CAPACITY/UTILIZATION OVERVIEW EXAMPLE

| School | Grade Level | 2022-23 Enrollment | School Functional Capacity | Available Capacity | Vacant Classrooms or Classrooms Repurposed for Non-instruction | Average Seat Occupancy | School Utilization Rate |
|---------------------|-----------------------------------|--------------------|----------------------------|--------------------|--|------------------------|-------------------------|
| Elementary School A | Pre-K-5th | 392 | 473 | 81 | 0 | 95% | 90% |
| Elementary School B | Pre-K-5th | 243 | 308 | 65 | 0 | 89% | 90% |
| Middle School A | 6 th -8 th | 594 | 881 | 287 | 2 | 55% | 67% |
| High School A | 9 th -12 th | 891 | 1,521 | 630 | 3 | 47% | 60% |

School Functional Capacity is the capacity of the school's instructional spaces after applying the school's program.

Available Capacity – Number of seats available after subtracting the functional capacity from the latest enrollment figure.

Vacant Classrooms or Classrooms Repurposed for Non-Instruction – Vacant classrooms have no assigned activity based on the school's utilization analysis. The room is empty. Classrooms repurposed for instructional purposes are those rooms originally intended as a classroom that have some activity assigned unrelated to instruction (i.e. storage, book room, office).

Seat Occupancy – The average number of occupied seats in a classroom during the school day

School Utilization Rate – The average utilization rate of all instructional spaces

CAPACITY/UTILIZATION OVERVIEW

A capacity and utilization analysis is an important planning tool since it provides the district with useful information on how space availability in each school and the extent it uses its instructional spaces. Along with the Space Needs Analysis (next section), the district can use this information to determine whether it has enough seats to accommodate projected growth or has surplus space that could strain its maintenance and operations budget.

Maximum Capacity – Capacity of the school that counts every instructional space fully loaded based on New Mexico Public Education Department recommended Pupil/Teacher ratio (PRT) and/or full number of students that a room can hold based on NM Statewide Adequacy Standards (i.e. if a school has 20 classrooms that can hold 22 students, maximum capacity totals 440 students.) Maximum capacity is useful for setting a benchmark.

Functional Capacity – The actual number of students a school's instructional space can accommodate after applying a school's educational program. Design capacity takes into consideration the educational programs of each facility, which includes regular and special use classrooms, special educational programs, federal and categorical programs, and permanent/portable location of these uses. Even if a classroom is full sized, it may not be able to accommodate a full class load based on its program or subject matter. The school may use some classrooms for special education or other programs that limit loading. When we apply the educational program the school that can hold 440 students (maximum capacity above) may only be able to hold 390.

CAPACITY/UTILIZATION OVERVIEW

A capacity and utilization analysis is an important planning tool since it provides the district with useful information on how space availability in each school and the extent it uses its instructional spaces. Along with the Space Needs Analysis (next section), the district can use this information to determine whether it has enough seats to accommodate projected growth or has surplus space that could strain its maintenance and operations budget.

Utilization – Utilization relates to capacity but measures the frequency and the way the school uses its instructional spaces. PSFA examines utilization in two ways:

- **Frequency of room use** – the number of hours per day a school utilizes its instructional spaces based on hours in a school day or number of class periods. For example, if a high school holds seven periods per day, utilization will analyze how many of those periods the school uses a classroom. If the room is in use all seven periods, the room's utilization rate is 100%. Please note, PSFA counts ONE prep period as utilized since the teacher typically stays in the room. For an elementary school, PSFA considers the room utilized when the students go to pull outs, recess, lunch, or other activities. Looking at each room, we are able to determine an average utilization rate for the entire school.
- **Percentage of room occupied** – Percentage of occupied seats in a classroom. If a room can hold 22 students but due to enrollment issues (i.e. enrollment decline), only 12 students occupy the room, the seat occupancy is 54%. A school can have full utilization meaning all classrooms are in use throughout the day but are only half-full. A school with a Design capacity of 400 students with enrollment of 300 might suggest the school has empty rooms but this is not always the case. It might be using all of its instructional spaces within the optimal utilization rates but each room is not loaded to the maximum it can hold for its program.

IV. CAPITAL IMPROVEMENT PROGRAM/PLANNING STRATEGY

- A. Available Funding for Capital, Systems, Security, and Technology Needs
 - I. Identify current and future financial resources available (indicate years available) to meet capital, systems, security, maintenance, and technology needs. Discuss whether the district intends to use PSCOC funding.
 - a) List source of funds for maintenance
 - b) List source of funds for capital needs
 - c) List source of funds for systems needs
 - d) List source of funds for security needs
 - e) List source of funds for broadband/technology
- B. Planning Issues and Prioritization Process
 - I. Summarize issues the district is facing that help form the planning strategies and priorities

The district's bond advisor will be able to discuss the current bonding capacity and indebtedness.

IV. CAPITAL IMPROVEMENT PROGRAM/PLANNING STRATEGY

C. Planning Strategy and Implementation

1. When developing the planning strategy and implementation, consider:
 - a) Does the district need a new school to accommodate growth/relieve overcrowding? Does the district have options in addressing growth (i.e. attendance zone adjustments, additions, portables)?
 - b) Which facilities need to be fully or partially replaced due to condition?
 - For combined campuses, can some buildings be retained or repurposed?
 - c) Which facilities need renovation?
 - Identify type and level of renovation
 - Identify building systems that could be replaced as part of renovation
 - Identify capital needs as part of renovation project
 - d) Which facilities only need general maintenance
 - Identify priority and major maintenance needs that could lead to system or capital needs if left unaddressed
 - e) Which facilities or structures need to be closed, demolished, downsized, consolidated, or repurposed. Discuss options the district can explore to address underutilized or surplus facilities and operate more efficiently.
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

IV. CAPITAL IMPROVEMENT PROGRAM/PLANNING STRATEGY

D. Master 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

In addition to identifying the priorities, this section should discuss the anticipated costs and available resources the district can use to meet the priorities. Financial resources can include:

- General obligation bonds
- Mill levies
- Legislative appropriations*
- Federal Impact Aid
- Public School Capital Outlay
- Other Resources

*Legislative appropriations will create an off-set, which will need to be paid down before a district can receive PSCOC capital outlay funding.

PLANNING STRATEGY GUIDELINES

The FMP's Capital Improvement Program/Planning Strategy should provide the district a thoughtful, clear, and implementable program based on data and available resources. The FMP does not need to identify minor maintenance issues but instead provide key priorities, recommendations, and options for each of the district's facilities. The following table provides an example for displaying the capital plan strategy and priority (table can be modified to meet the district's needs).

| School | Priority | wNMCI | Primary Recommendation | Analysis | Estimated Total Project Cost (millions) | Potential Source of Funds |
|---------------------|----------|-------|---|--|---|---------------------------|
| Elementary School A | 1 | 68.75 | Full Replacement for enrollment of 400 K-5th | Most systems beyond useful life, structural and foundation issues throughout | \$60.50 | PSCOC, GO Bond |
| High School A | 2 | 40.75 | Replacement of classroom building and old gym, renovation of cafeteria, general maintenance for remaining buildings | Structural and systems issues in classroom building and old gym. Cafeteria serving line inadequate for enrollment | \$75 | PSCOC, GO Bond |
| Elementary School B | 3 | 24.85 | HVAC Replacement | System beyond expected life | \$5.60 | GO Bond |
| Middle School A | 4 | 5.5 | General maintenance | School five years old; replace door knobs in gym, unclog scuppers | \$1.20 | GO Bond |
| Elementary School C | 5 | 18.55 | Potential consolidation, repurpose, or disposal | School's utilization rate is 50% with 12 vacant classrooms. Potential for increasing enrollment in Elementary School A project and dispose of site | | |

PRIORITIZATION PROCESS GUIDELINES

Some criteria to use when arriving at consensus and developing priorities include:

- Life, Health, and Safety issues
- Addressing rapid growth that leaves a school overcapacity or decline leaving some facilities underutilized or with vacant space
- Correcting space deficiencies as measured against the statewide adequacy standards
- Ensuring suitable and adequate space for educational programs in accordance with NM Public Education Department (PED) standards, statewide adequacy standards, PSFA adequacy planning guide, district policies, and changing education needs
- Facility renewal (system life cycles, FAD identified issues)
- Addressing any preventive maintenance needs that left untreated could lead to system failure or larger scale capital needs

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 priority capital, systems, security, and broadband needs
 - b) Provide illustrative photographs as necessary
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

At the beginning of the project, PSFA staff will provide master plan consultants access to the FAD in order to obtain the FAD executive summaries for each school

V. TECHNICAL APPENDIX

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 by adequacy
 - e) Number of the students assigned to the classroom by school day or by 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 overview of current Preventive Maintenance Plan
6. Additional supporting material as needed

Questions or Comments?

For more information, visit: www.nmpsfa.org

Or call PSFA Facilities Master Planner at:
505-843-6272

THANK YOU!

