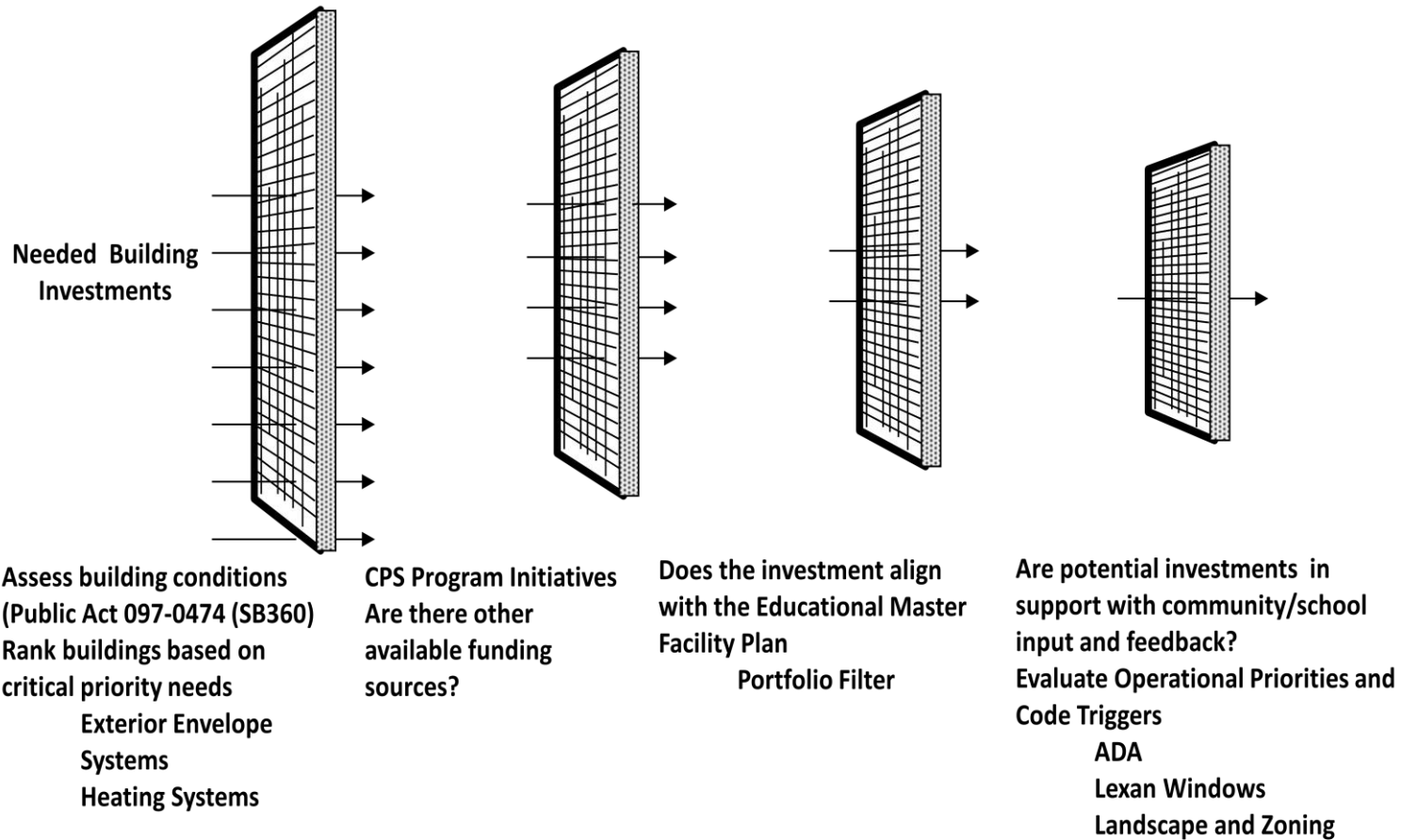


Planning and Prioritization

Projects were selected using a rigorous filtering process



Explaining the facility assessment process and capital planning approach

Assessment

- Determine building condition and need using:
 - FACT's database
 - Portfolio Manager and School Capital Requests
 - Targeted assessments (Structural, Masonry, Roof, etc...)
- Evaluate and rank the critical needs for each facility from 100% replacement to a state of good repair and prioritize the improvements for each system separately (Exterior Envelope/Masonry system and Mechanical/Heating system):
 - Exterior Priorities: evaluate the condition of the following critical components:
 1. Roof/Parapet – Identifying active leaks, excessive moisture or where system is beyond repair
 2. Masonry – Identifying cracked, displaced or falling masonry or where failures are permitting water infiltration
 3. Chimney – Identifying where temporary stabilization is beyond useful life or displaced /falling masonry
 - Mechanical/Heating Priorities: evaluate the condition of the following critical components:
 1. Boilers / Roof Top Units (RTU) – Identifying systems that are beyond repair or there is a lack of boiler redundancy
 2. Unit Ventilators – Identifying units or systems that are failing and beyond repair
 3. Air Handling Units – Identifying units or systems that are failing and beyond repair
- Scope highest need projects for both Envelope and Mechanical (independently). Scope will only include critical need(s) and code compliance.
- Submit the list of highest need projects to Portfolio for advance review.
 - Portfolio will comment whether the selected projects align with preliminary findings of the Educational Master Facility Plan
- Establish preliminary budgets
- Refine budgets to reflect the comprehensive scope of work

Proposed project budget

Timeline

As part of the FY13 capital budget process, we have developed a new timeline for preparing and releasing the Annual and Five-Year Capital Budget each year. This timeline meets all SB630 requirements.

January 1: A list of all property owned by or leased to the Board shall be published on the district's Internet website, and shall be updated annually.

January-April: Preparation and planning for One- and Five-Year Capital Budget, including project assessment, request and needs analysis and formal approval process.

May 1: One-Year and 5-Year Capital Improvement Plan, containing all information below on projects for which funds are to be appropriated:

1. description of the scope of the project
2. justification for the project
3. status of the project, including, if appropriate, percentage funded, percentage complete, and approved start and end dates
4. original approved cost and current approved cost for each project
5. the impact of the project on the district's operating budget
6. the name of each school and facility affected by a project
7. all funding sources for the project
8. any relationship of the project to the needs assessment submitted by the attendance center
9. any relationship to the district's 10-year Educational Facilities Master Plan

October 1: Annual Capital Expenditure Report including the following information:

1. expenditures on all facilities in which students enrolled in the district receive instruction for all capital projects on which funds were expended in that fiscal year, even if the project was not initiated or completed in the fiscal year
2. identification of capital projects that aligned with the school-based facility needs assessment and recommendations of school principals or were the result of other public input
3. the levels of appropriation actually provided to the district for capital projects in the fiscal year by the city, the State, and the federal government, with a comparison of the level of such funding against funding levels for the prior 5 years
4. a summary comparison of annual capital expenses and the corresponding one-year capital improvement plan

January 1: Preliminary Ten-Year Educational Facility Master Plan

The educational facility master plan shall provide community area level plans and individual school master plans with options for addressing the facility and space needs for each facility operated by the district over a ten-year period.

1. a description of the district's guiding educational goals and standards
2. a brief description of the types of instructional programs and services delivered in each school

3. a description of the process, procedure, and timeline for community participation in the development of the plan
4. the enrollment capacity of each school and its rate of utilization
5. a report on the assessment of individual building and site conditions
6. a data table with historical and projected enrollment data by school by grade
7. community analysis, including a study of current and projected demographics, land usage, transportation plans, residential housing and commercial development, private schools, plans for water and sewage service expansion or redevelopment, and institutions of higher education
8. an analysis of the facility needs and requirements of the district
9. identification of potential sources of funding for the implementation of the Educational Facility Master Plan

July 1: Approved 10-Year Educational Facility Master Plan, with updates 2 1/2 years after the approval of the initial 10-year plan