Excellence, Equity and Efficiency Plan for All SAISD School Facilities

Community Engagement Model through a

Facility Advisory Committee

Board Meeting

May 21, 2007

Facility Advisory Committee Members

- James Aguilar
- Susie L. Alfaro
- Helen Ballew
- Dr. Joe Bernal
- Mary Esther Bernal
- T.C. Calvert
- Nathaniel Davis
- Ramon Duran
- Arthur Emerson
- Doug Endsley
- Ruben Fernandez
- Deborah Flach
- Don Gadberry
- Alejandrina Garcia
- John Gomez
- Frances Guzman
- Trey Jacobson
- Jim Jamison
- Lisa Kuehl
- Charles Lampe
- Gonzalez Lisa
- Martin Marin
- Iyesha Moore
- Jessica Moreno
- Joel Pacheco
- Maria Palacios-Gribben
- Rachel Ponce
- A.J. Rodriguez
- Arturo Sanchez
- Adela Segovia
- Gilbert Sepulveda
- Alejandro Soto
- Maria Talamantez
- Mark Wolf

What is the Purpose of the Facility Advisory Committee?

- Provide input on the proposed benchmarks (criteria, filters, considerations) defining excellence, equity and efficiency for SAISD school facilities and related operations

Calendar of Activities

December 2006

- Superintendent met with board members and reviewed initial criteria for school consolidation and recommended establishing a community based committee

January 22

- Board approved formation of a Facility Advisory Committee (FAC)

February 15

FAC meeting at Margil ES

- Presented surplus capacity and physical condition of schools.
- Proposed list of criteria and a process to implement school consolidation strategy.
- Received input from FAC to include additional criteria.

March 1

FAC meeting at Margil ES

- Presented modified process to include input from FAC.
- Provided scores from quantitative criteria and identified schools in the lowest 10% of each group.
- Presented a second set of filters (Qualitative Criteria)
- Received input from FAC

Calendar of Activities

March 8

FAC meeting at Brackenridge HS.

- Provided detailed data on scoring process and detailed scores for lowest scoring schools.
- Presented evaluation using qualitative criteria with schools meeting consolidation filters.
- Open forum for public input
- FAC proposed slower pace of process review and input with results to be presented directly to Board.

March 29, April 12 & April 19

FAC meetings at COLT

- FAC reviewed and discussed each criteria in detail and voted to accept, modify or reject them.

April 3 & 4

- Community meeting at Cooper MS
- Community meeting at Bowie ES

What are the Staff Proposed Quantitative Criteria?

Facility Criteria

1. Site Acreage
2. School Capacity
3. Building Physical Condition

Enrollment Criteria

4. Enrollment Trend Between 2000 and 2005
5. Enrollment Projection Between 2006 and 2011
6. Student Enrollment
7. Enrollment versus School Capacity (Utilization Efficiency)

Financial Criteria

8. Major Expenditures since 1995
9. Expenditures per Student
10. Expenditures versus Revenues (Financial Efficiency)

What are the Recommended Benchmarks for Excellence, Equity and Efficiency?

Elementary Schools (Pk-6)

Criteria	Benchmarks	Current Range Low	Current Range High
Site Acreage	7 Acres	2.84	9.76
School Capacity	700 Students	342	900
Buildings Physical Condition	Excellent	Fair	Excellent
Enrollment Trend (2000-2005)	5% Increase	-27.70%	33.00%
Enrollment Projection (2006-2011)	5% Increase	-29.50%	18.60%
Student Enrollment	650 Students	252	902
Utilization Efficiency	>90%	45%	130%
Major Expenditures Since 1995	>$10M	$2.72M	$13.04M
Expenditures per Student	<$7K	$6,331	$9,821
Financial Efficiency	<90%	85.30%	118.60%

What are the Recommended Benchmarks for Excellence, Equity and Efficiency?

Academy Schools (Pk-8)

Criteria	Benchmarks	Current Range Low	Current Range High
Site Acreage	12.5 Acres	2.93	14.29
School Capacity	875 Students	306	780
Buildings Physical Condition	Excellent	Fair	Excellent
Enrollment Trend (2000-2005)	5% Increase	-17.4%	54.2%
Enrollment Projection (2006-2011)	5% Increase	-18.8%	11.6%
Student Enrollment	825 Students	291	621
Utilization Efficiency	>90%	54%	107%
Major Expenditures Since 1995	>$11M	$3.21M	$4.84M
Expenditures per Student	<$7K	$6,923	$8,640
Financial Efficiency	<90%	97.3%	116.4%

What are the Recommended Benchmarks for Excellence, Equity and Efficiency?

Middle Schools (6-8)

Criteria	Benchmarks	Current Range Low	Current Range High
Site Acreage	12.5 Acres	6.62	15.15
School Capacity	1100 Students	660	1280
Buildings Physical Condition	Excellent	Fair	Excellent
Enrollment Trend (2000-2005)	5% Increase	-52.0%	21.6%
Enrollment Projection (2006-2011)	5% Increase	-14.5%	24.5%
Student Enrollment	1000 Students	379	819
Utilization Efficiency	>90%	50%	110%
Major Expenditures Since 1995	>$12M	$4.30M	$19.23M
Expenditures per Student	<$7K	$6,926	$9,426
Financial Efficiency	<90%	89.3%	125.7%

What are the Recommended Benchmarks for Excellence, Equity and Efficiency?

High Schools (9-12)

Criteria	Benchmarks	Current Range Low	Current Range High
Site Acreage	27.5 Acres	19.65	38.36
School Capacity	2000 Students	1520	2360
Buildings Physical Condition	Excellent	Fair	Average
Enrollment Trend (2000-2005)	5% Increase	-25.4%	4.1%
Enrollment Projection (2006-2011)	5% Increase	-40.1%	-1.1%
Student Enrollment	1750 Students	937	2034
Utilization Efficiency	>90%	44%	119%
Major Expenditures Since 1995	>$17.5M	$12.98M	$21.28M
Expenditures per Student	<$7K	$7,614	$9,508
Financial Efficiency	<90%	101.8%	126.0%

How are these Benchmarks used in Analyzing School Facilities and Operations?

- All schools are compared to benchmarks.
- Schools meeting benchmarks for excellence, equity and efficiency receive highest scores of 5
- Schools furthest away from benchmarks receive lowest scores of 1
- General Guide for Scoring
  - Excellent → 5
  - Good → 4
  - Average → 3
  - Fair → 2
  - Bad → 1
- General Guide for Weights Referencing the Importance of the Criteria:
  - High → 3
  - Average → 2
  - Low → 1

Criterion 1: Site Acreage

- Schools with sufficient acreage are more functional with potential to meet standards and offer sufficient programs
- Council of Education Facilities Planning International (CEFPI) recommends 1 acre for every 100 students plus 10 acres @ ES, 20 acres @ MS or 30 acres at HS.
- ES with 600 students should have 16 acres per CEFPI

Criteria	PK-6 School	PK-8 School	Middle School	High School
Site Acreage	< 4 AC → 1	< 8 AC → 1	< 8 AC → 1	< 20 AC → 1
[Acreage → Score]	4 - 5 AC → 2	8 - 9.5 AC → 2	8 - 9.5 AC → 2	20 - 22.5 AC → 2
	5 - 6 AC → 3	9.5 - 11 AC → 3	9.5 - 11 AC → 3	22.5 - 25 AC → 3
Weight = 1	6 - 7 AC → 4	11 - 12.5 AC → 4	11 - 12.5 AC → 4	25 - 27.5 AC → 4
	> 7 AC → 5	> 12.5 AC → 5	> 12.5 AC → 5	> 27.5 AC → 5

Criterion 2: School Capacity

- Maximum capacity of a school is calculated using standard methods - 22 students per home room for ES and 25 student per core classroom for secondary schools. Special Education classes are assigned smaller capacity.
- Surveys by American Schools & University (ASU) magazine provide information about standard practices in school designs. NISD & NEISD design guidelines were also reviewed.

Criteria	PK-6 School	PK-8 School	Middle School	High School
Maximum Student Capacity	< 400 → 1	< 500 → 1	< 625 → 1	< 1250 → 1
ES & Acd 22 to 1, MS 25 to 1	400 - 500 → 2	501 - 625 → 2	625 - 750 → 2	1250 - 1500 → 2
(No Portables)	501 - 600 → 3	626 - 750 → 3	751 - 875 → 3	1501 - 1750 → 3
[Student Capacity → Score]	601 - 700 → 4	751 - 875 → 4	876 - 1000 → 4	1751 - 2000 → 4
Weight = 2	> 700 → 5	> 875 → 5	> 1000 → 5	> 2000 → 5

Criterion 3: Buildings Physical Condition

- This is represented by the cost of needed improvements compared to the replacement cost of the building as follows:
  - <10% → Excellent
  - 10-30% → Good
  - 30-50% → Average
  - 50-70% → Fair
  - >70% → Bad

- School conditions are evaluated annually to determine critical needs for repairs

Criteria	All Schools
Buildings Physical Condition [Condition → Score] Weight = 2	**Bad → 1** **Fair → 2** **Average → 3** **Good → 4** **Excellent → 5**

Criterion 4: Enrollment Trend Between 2000-2005

- Enrollment affect space needs, staffing allocations, program offerings and other operational issues.
- Enrollment trend is reviewed annually

Criteria	All Schools
Enrollment Trend between 2000 and 2005 [% Change → Score]	**> 5% decrease → 1** **2-5% decrease → 2** **± 2% → 3** **2-5% increase → 4** **> 5% increase → 5**
Weight = 1	

Criterion 5: Enrollment Projection Between 2006-2011

- Enrollment projection is used for planning for facilities, staffing, budgeting, etc.
- Demographic Study and Student Projections Report for SAISD provided the data for this criteria

Criteria	All Schools
Enrollment Projection Between 2006 and 2011 [% Change → Score]	**> 5% decrease → 1** **2-5% decrease → 2** **± 2% → 3** **2-5% increase → 4** **> 5% increase → 5**
Weight = 1	

Criterion 6: Student Enrollment

- Public Education Information Management Systems (PEIMS) uses the last Friday in October enrollment to determine student membership for the school year
- Statewide student membership data available through TEA website. Specific campus enrollment data for NISD and NEISD were reviewed

Criteria	PK-6 School	PK-8 School	Middle School	High School
Student Enrollment	**< 350 → 1**	**< 450 → 1**	**< 550 → 1**	**< 1000 → 1**
[# of Students → Score]	**350 - 450 → 2**	**450 - 575 → 2**	**550 - 700 → 2**	**1000 - 1250 → 2**
	451 - 550 → 3	**576 - 700 → 3**	**701 - 850 → 3**	**1251 - 1500 → 3**
Weight = 3	**551 - 650 → 4**	**701 - 825 → 4**	**851 - 1000 → 4**	**1501 - 1750 → 4**
	> 650 → 5	**> 825 → 5**	**> 1000 → 5**	**> 1750 → 5**

Criterion 7: School Utilization Efficiency

- Utilization efficiency represents a percentage of student enrollment compared to school capacity as provided in Criteria 6 and 2
- An 85% average utilization efficiency is a standard used for planning new facilities

Criteria	All Schools
Utilization Efficiency	**< 70% → 1**
(No Portables)	**70-75% → 2**
[Student Enrollment /	**75-80% → 3**
Student Max Capacity → Score]	**80-90% → 4**
Weight = 2	**> 90% → 5**

Criterion 8: Major Expenditures Since 1995

- Facilities Investments over the past decade have improved safety conditions for all schools. A limited number of schools were allocated sufficient funds to be brought up to current conditional and programmatic standards
- All figures represent actual investments for additions, renovations or complete replacement of school facilities

Criteria	PK-6 School	PK-8 School	Middle School	High School
Major Expenditures	< 4M → 1	< 5M → 1	< 6M → 1	< 10M → 1
Since 1995	4 - 6M → 2	5 - 7M → 2	6 - 8M → 2	10 - 12.5M → 2
[Cost → Score]	6 - 8M → 3	7 - 9M → 3	8 - 10M → 3	12.5 - 15M → 3
Weight = 2	8 - 10M → 4	9 - 11M → 4	10 - 12M → 4	15 - 17.5M → 4
	> 10M → 5	> 11M → 5	> 12M → 5	> 17.5M → 5

Criterion 9: Expenditures per Student

- Accounting of all expenditures budgeted directly or associated with the operation of schools divided by student enrollment
- Statewide average expenditures per student for payroll and other operating cost is $7,229

Criteria	All Schools
Expenditures / Student	**> 8.5K → 1**
[Expenditures → Score]	**8 - 8.5K → 2**
	7.5 - 8K → 3
Weight = 3	**7 - 7.5K → 4**
	< 7 K → 5

Criterion 10: Financial Efficiency

- Ratio of all expenditures to revenues attributed to each school
- In order to allocate revenues equitably between campuses, each school must retain a financial efficiency at or below 100%

Criteria	All Schools
Financial Efficiency	**> 115% → 1**
% expenditures to revenues	**105 - 115% → 2**
[Financial Efficiency → Score]	**95 - 105% → 3**
Weight = 3	**90 - 95% → 4**
	< 90% → 5

What are the Qualitative Criteria?

- Space Accommodations at Other SAISD Schools
- Ease of Consolidation
- Programmatic Spaces
- Campus Layout and Organization
- Site Characteristics
- Environmental Condition
- Neighborhood Accessibility
- Boundary Considerations
- Sustained Academic Performance
- Internal Charter
- Feeder Pattern Impact

How are the Qualitative Criteria Evaluated?

- Each school is evaluated using Pros and Cons as follows:

  Pros (For) Consolidation –
  Criteria supports consideration for consolidation

  Cons (Against) Consolidation –
  Criteria does not support consideration for consolidation

Space Accommodations at Other SAISD Schools

- Analysis for proposed attendance boundaries and projected enrollment compared to school capacities

Pro (For) - Accommodations available to relocate students to adjacent schools

Con (Against) – Accommodations <u>not</u> available to relocate students to adjacent schools

Ease of Consolidation

- Accounts for impact on number of schools, grade organization and transportation of students

  Pro (For) - Impacts limited number of other schools with no grade reorganization and limited added transportation

  Con (Against) - Impacts several schools, involves grade reorganization or adds significant transportation

Programmatic Spaces

- Types and sizes of spaces available at this campus including classrooms, science, fine arts, gyms, library and cafeteria compared to standards

  Pro (For) – Most room sizes <u>do not</u> meet standards

  Con (Against) – Most room sizes meet standards

Campus Layout and Organization

- Arrangement of building and spaces to allow for safety, effectiveness and efficiency

  Pro (For) – Mostly <u>in</u>adequate space arrangement issues

  Con (Against) – Mostly adequate space arrangement issues

Site Characteristics

- Geographic and infrastructure conditions for safety and planning purposes

  Pro (For) - Several site circulation, drainage, easement and utility issues

  Con (Against) - No or limited site circulation, drainage, easement and utility issues

Environmental Condition

- Remediation requirements including asbestos, lead, fuel tanks, etc.

Pro (For) - Extensive remediation

Con (Against) - No or limited remediation

Neighborhood Accessibility

- Safety concerns and conditions related to nearby sidewalks, bus drop-off, traffic and route to school issues

  Pro (For) - Significant safety concerns

  Con (Against) - No or limited safety concerns

Boundary Considerations

- Safety concerns and conditions related to pedestrian traffic due to major roads, railroads, creeks and zonings within school attendance boundary

  Pro (For) - Significant safety concerns

  Con (Against) - No or limited safety concerns

Sustained Academic Performance

- Texas Education Agency (TEA) rating of campus academic performance

  Pro (For) - No ‘Recognized’ rating during the last three years

  Con (Against) - ‘Recognized’ rating twice during the last three years

Internal Charter

- Availability of open enrollment for student beyond campus and district attendance boundaries

Pro (For) - No charter program

Con (Against) - Charter Program cannot be accommodated at any adjacent school

Feeder Pattern Impact

- Impact on alignment of schools from elementary to middle and from middle to high schools

  Pro (For) - Consolidation does not impact feeder pattern

  Con (Against) - Consolidation negatively impacts feeder pattern

Facility Advisory Committee Input on Criteria:

- ❑ Criteria accepted as described
- ❑ Criteria needs modification as follows:

- ❑ Criteria should not be used because:

How the Facility Advisory Committee Voted on Quantitative Criteria? *

Criteria	Accepted as Described	Modify Criteria as Follows	Do Not Use Criteria	FAC Consensus
1. Site Acreage	9	4	2	Use criteria considering usable acreage
2. School Capacity	6	4	6	Use programmtic capacity instead of design capacity
3. Building Physical Condition	13	2	1	Accepted as is
4. Enrollment Trend 2000-05	9	3	3	Accepted as is
5. Enrollment Projection 2006-11	11	2	2	Accepted as is
6. Student Enrollment	8	4	3	Accepted as is
7. School Utilization Efficiency	11	3	1	Accepted as is
8. Major Expenditure Since 1995	8	7	2	Lower Weight to 1
9. Expenditures per Student	3	8	4	Do Not Use
10 Financial Efficiency	12	0	1	Accepted as is

*See Attachment A for details.

How the Facility Advisory Committee Voted on Qualitative Criteria? *

Filters	Accepted as Described	Modify Filters as Follows	Do Not Use Filters	FAC Consensus
1. Space Accommodation at Other SAISD Schools	9	2	0	Accepted as is
2. Ease of Consolidation	11	1	0	Combine filters 2, 7, & 8
3. Programmatic Spaces	8	2	2	Accepted as is
4. Campus Layout and Organization	6	1	4	Accepted as is
5. Site Characterisctics	7	2	3	Accepted as is
6. Environmental Conditions	1	1	10	Do Not Use
7. Neighborhood Accessibility	2	7	2	Combine filters 2, 7, & 8
8. Boundary Considerations	2	8	1	Combine filters 2, 7, & 8
9. Sustained Academic Performance	4	0	10	Do Not Use
10 Internal Charter	13	0	3	Modify to include ability to attract from outside SAISD
11 Feeder Pattern Impact	9	2	4	Accepted as is

*See Attachment A for details.

Administration Recommendations

- Form an expanded facilities committee to review and provide input on the ongoing facilities assessment and planning
- Contract with a professional facilitator to work with the Board and Superintendent on developing a long range plan for facilities.
- Incorporate school consolidation within the long range plan using criteria and processes developed with the Facilities Advisory Committee.