



DEJONG

CASE STUDY

District & Statewide Facility Pre-Assessments: Time and Money Well Spent

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Mandated responses to lawsuits alleging inequitable educational facility conditions, whether district or statewide, can be a difficult and laborious process. A facility pre-assessment, on the other hand, is a cost effective first step in ensuring adequate and equal learning environments.

Facility pre-assessments are an extremely efficient way for districts and states to determine baseline school data, such as number of buildings, basic floor plans, square footage, year built, additions, renovations, number of classrooms, etc. It also provides a cursory review of the current building conditions. This basic information can be used to compare the relative condition from one school to another, giving administrators an idea of which facilities should be examined more fully when funds become available for repair or renovation.

Some districts and states conduct complete, detailed facility assessments, using professional architect or engineering firms, rather than cost-effective pre-assessments, using educational facility planners like DeJONG. A complete assessment involves a lot of time and money to obtain specific information regarding the condition of major building systems, noting any and all deficiencies. These systems include but are not limited to HVAC, plumbing, roofing, technology, ADA, electrical, etc. Deficiencies can range from a single ceiling tile replacement to recommended replacement of all interior ceilings. Unfortunately, by the time funding is accessible (which can take years), the information is outdated and must be recalculated. However, pre-assessment data is basic and can be used months or years later by administrators, engineers, and architects as they prepare to upgrade facilities to comply with new educational facilities standards, current building codes, or up-to-date technology support system requirements.

The Objective

The Massachusetts School Building Authority (MSBA) was very intuitive and fiscally prudent when it conducted a pre-assessment in late 2005 to identify baseline facility information and general conditions of each instructional building within the Commonwealth. This pre-assessment (called a Needs Survey) focused on 160 million square feet of school facility space and helped MSBA's board of directors determine which facilities should receive funding for repair and/or renovation.

The Strategy

When a team of retired administrators and principals gathered baseline information for the Needs Survey, they recognized firsthand how a pre-assessment can benefit a district before beginning a building program. Retired superintendent John MacLean said now he understands the scope of work involved with a renovation or building project. "People tend to look at what is problematic with a building rather than taking a comprehensive look at it. A pre-assessment provides that comprehensive view. It gives you a better sense of what is within the building and how it compares with standards. That way you know what must happen on the grand scale."

Robert Neely served as a superintendent for nearly 20 years. He said it makes all the sense in the world to conduct a pre-assessment. "Then administrators understand what schools are in bad shape and which require

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construction. A pre-assessment also tells a legislature roughly how much money will have to be spent to bring school facilities up to code.”

Ken Grew has been a superintendent in three states and an elected member of a town council. “Pre-assessments are a cost-effective way to get an overview of the condition of existing facilities,” he said. “You don’t have to spend a lot of time and money to get specifics, which would be outdated anyway by the time funding came through.”

The Results

Since its inception in 2004, the MSBA’s goal has been to ensure communities waiting for school project funding receive it quickly, saving local taxpayers millions of dollars in avoided interest costs. Pre-assessments helped them attain that goal.

By the end of 2006, MSBA made more than \$3 billion in accelerated payments to communities long awaiting school project payments. The infusion of cash helped many cities, towns, and regional school districts with local operating budget shortfalls by lowering local tax rates. It also enabled recipients to use funds formerly tied up in school debt service for other local capital improvement projects.

A facility pre-assessment is an efficient, effective, and affordable way for districts and states to establish baseline facilities conditions, thereby providing an initial understanding of needs. If the cost of renovating or constructing school facilities is outpacing the ability to pay for them, a pre-assessment is the first step in securing equal and adequate educational environments.

*For more information about pre-assessments, please contact **Carolyn Staskiewicz, REFP**, vice president for DeJONG. She has worked on a number of large-scale facility assessment and planning projects, including statewide initiatives in Arkansas and Massachusetts, as well as Orange County Public Schools in Florida. To reach her directly, please call (614) 798-8828 or send email to cstaskiewicz@dejonginc.com*