



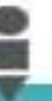
BUILDING Excellence

MADISON METROPOLITAN SCHOOL DISTRICT 

July 10, 2017 OWG

Need a Consistent, Intentional Approach to Facility/Capital Planning

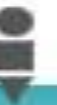
- Health, safety, and welfare of students and staff
- Support instruction, minimize operational distractions
- Parents/students expect it, enrollment is impacted +/-
- Reinvesting in facilities is good stewardship
- Size and age of physical plant requires it
 - Average age of schools = 53 years
 - 4.5 million square feet



Purpose Statement:

Long Range Facility Planning

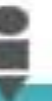
- Build a cyclical process to proactively identify/prioritize facility needs **matched with** a reliable, consistent funding source
- Build a new set of (higher) expectations and a consistent way of working that will stick
- Organize all data in an online resource to improve transparency, accountability, and continuity



What is the community telling us?

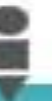
Fall 2016

- **It's about school culture, climate, and learning – not just bricks and mortar**
- **Substandard facility conditions do not make students and staff feel valued or mirror the high expectations we have for them**
 - “If we are making sure kids are career, college ready, we should be sure the environment supports this.” – *Staff*
- **Substandard facility conditions are not welcoming to the community and detract from our reputation**
 - “Don't just make it a school issue – make it a community issue – not just about keeping up with athletic facilities...show people this is a great place to live” – *Community member*
- **Maintaining facilities and making them safe is a top priority**
 - “Don't need new – we need fixed.” – *Staff*
 - “Two big things – safety and accessibility.” – *Community member*



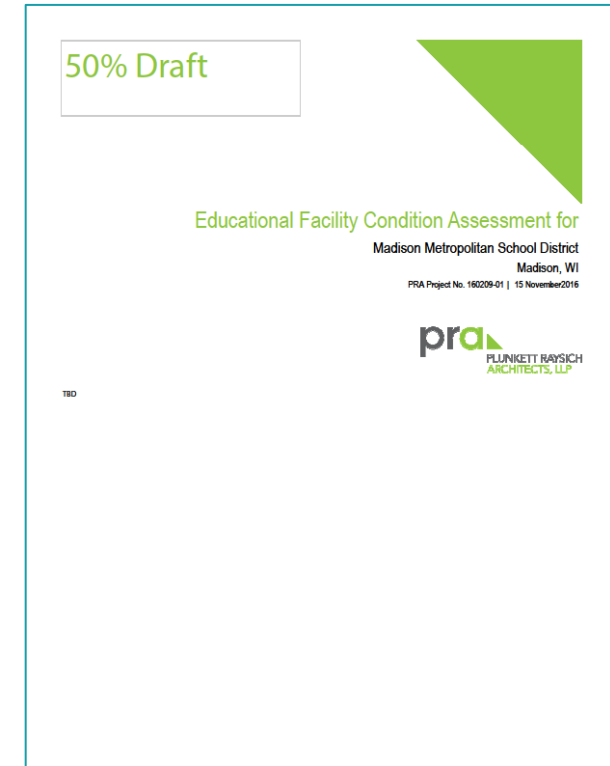
What is the community telling us?

- **It's about school culture, climate, and learning** – not just bricks and mortar
- Substandard facilities **do not make them feel valued or mirror our high expectations**, and they **detract from our reputation**
- **Maintaining facilities and keeping them safe** is a top priority
- Gave us a [set of principles](#) (refined this spring) to guide our future work:
 1. Prioritize health, safety, and accessibility
 2. Promote academic and co-curricular excellence
 3. Adequately and consistently invest in the MMSD facilities
 4. Treat MMSD buildings as community hubs, not just schools
 5. Keep equity at the forefront of decision-making
 6. Demonstrate a strategic approach to facility investments

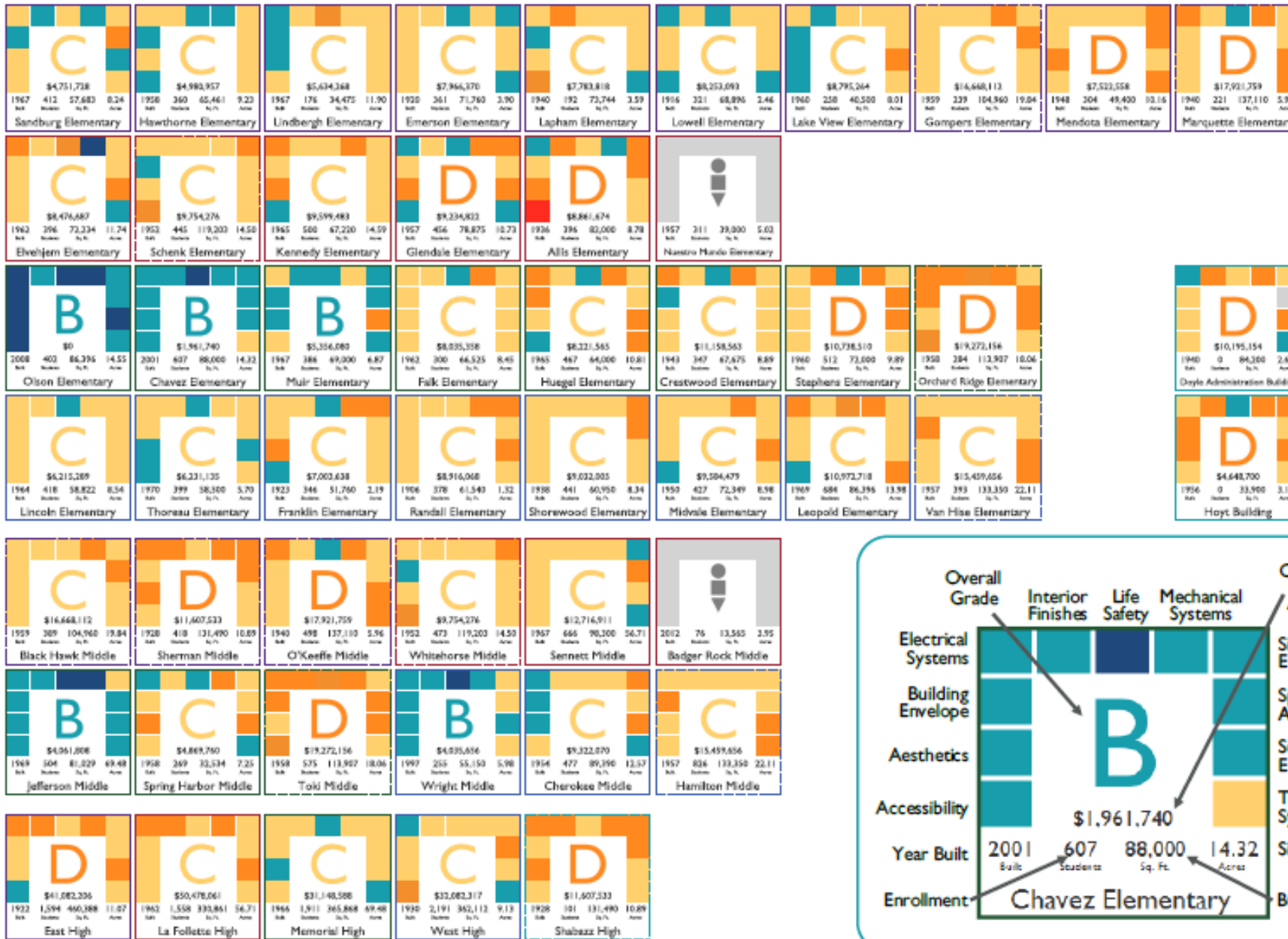


What do the facility assessments tell us?

- Assessed each of the existing schools
- Identified key improvements needed to extend the life of the asset
- Determined new FCI Letter Grade and range of improvement costs
- *Low end to bring everything up to standard is \$220 million*
- Updated Building Condition on next slide and an [interactive online resource](#)



Building Condition in MMSD - 2017



This table represents building condition across MMSD. Data comes from the 2017 Educational Facility Condition Assessment conducted by Plunkett Raysich Architects, LLP.

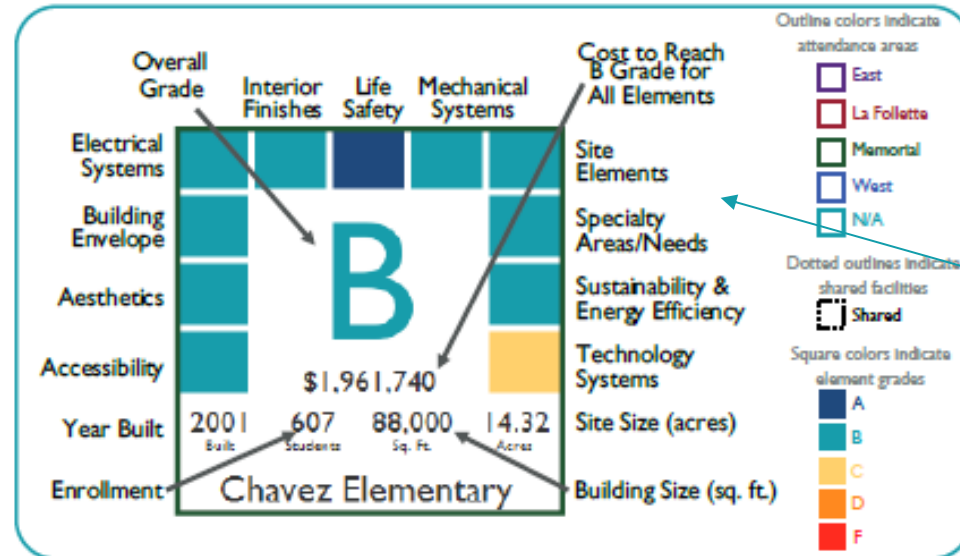
[Click here to access an interactive online tool showing this information.](#)

Buildings are organized by level (elementary, middle, high, other).

Nuestro Mundo Elementary and Badger Rock Middle occupy facilities not owned by MMSD and were not rated in this assessment.

Shared Facilities	Sherman-Shabazz	Gompers-Black Hawk
	Marquette-O'Keefe	Schenk-Whitahorse
	Orchard Ridge-Toki	Van Hise-Hamilton

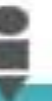
MADISON METROPOLITAN SCHOOL DISTRICT
 Built by Bo McCready,
 MMSD Research & Program Evaluation Office,
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Note
 Wider Scope of CMP

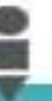
Positive Planning Conditions

- Low level of existing MMSD debt
- Strong local economy and job growth forecast
- Large and growing MMSD tax base
- Slow, moderate enrollment growth
- Positive community support for public education
- Many iconic school buildings as neighborhood anchors



Classifying the Work

- Capital Maintenance Plan (CMP)
- Capital Improvement Plan (CIP)
- Routine Maintenance (Not Part of this Work)



Capital Maintenance Planning – 4 Year Cycles

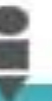
Adding structure and consistency to prioritize and fund projects

- Reallocate dollars w/in operating budget, and
- Combine with new short-term notes on a recurring 4-Year cycle
- Will provide \$10 million per year for CMP
- Aligns with operational capacity and levy
- Minimize interest expense
- Starting in 2020:
 - allows time to build up CMP in the operating budget
 - manage the tax levy impact

Example:

Operating Budget contributes: \$ 14 million (\$3.5 MM/YR)

Maintenance Referendum contributes: \$ 26 million (Every 4 Years)



CMP Model Distribution – 4-Year Cycle 2020-2023

This Model Expands the CMP Scope Beyond General Building Maintenance

General Building & HVAC Maintenance

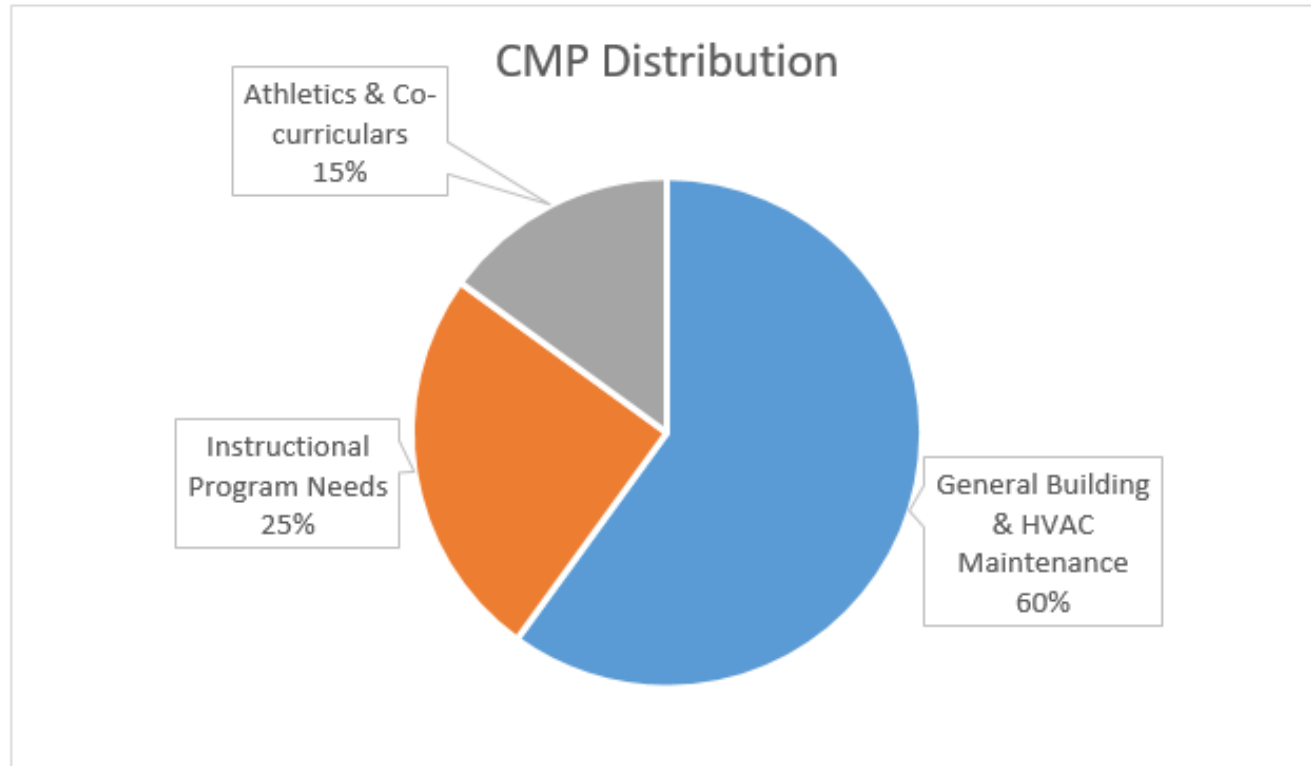
- Roofs & Window Systems*
- HVAC & Energy Efficiency*
- Bathroom and Locker Room Upgrades*
- Electrical & IT Network Capacity*
- Ceilings, Lights and Carpets*
- Parking Lots & Outdoor Spaces*
- Safety / Security*
- Aesthetic Upgrades*

Instructional Program Needs

- Libraries*
- Theaters*
- 4K Spaces*
- STEM Spaces*
- Flex Learning Spaces*
- Alternative Program Spaces*

Athletics

- Swimming Pools*
- Sport Turf Fields*
- Stadium Renovations*
- Spec Gyms - High Schools*
- Tennis Courts*

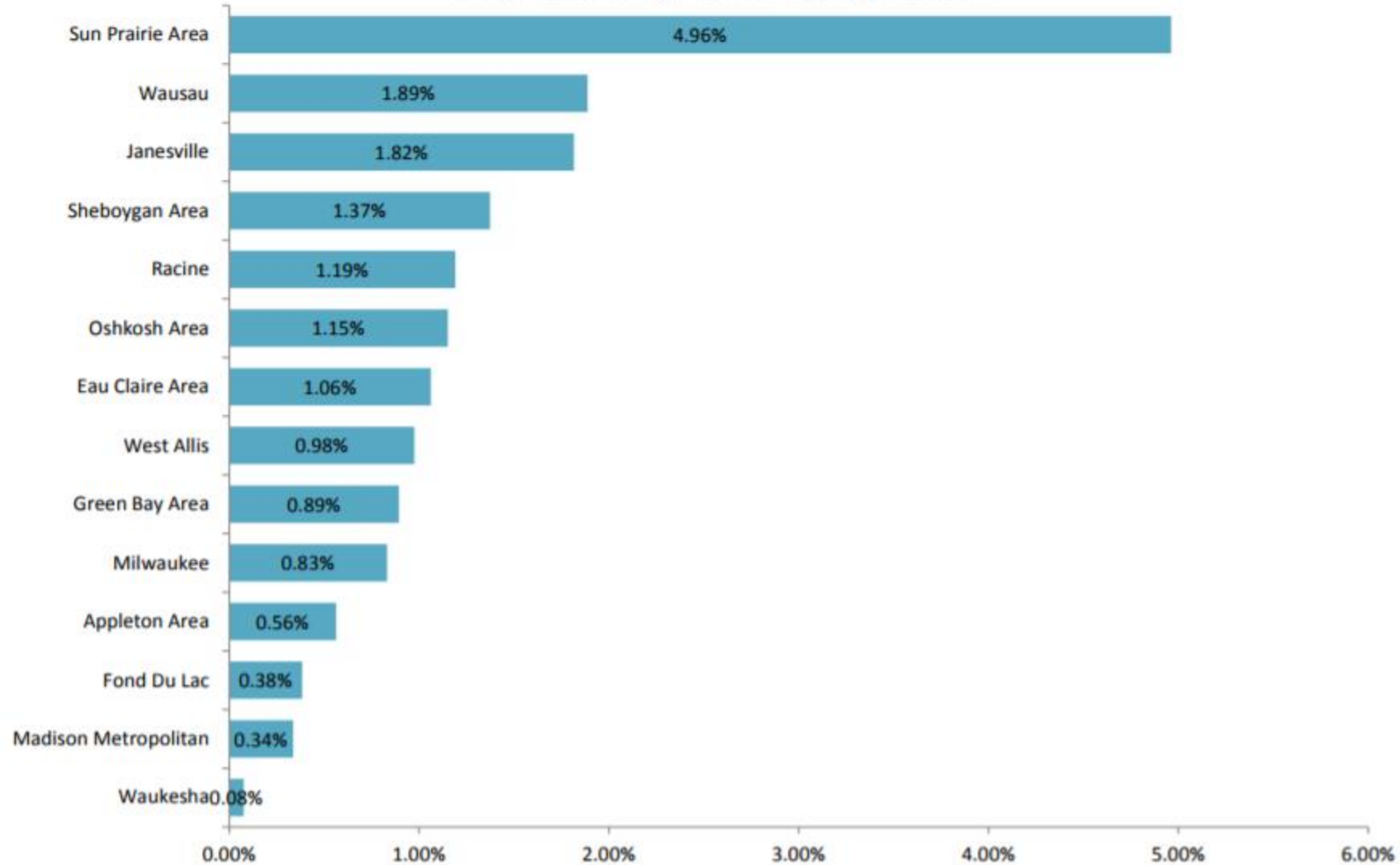


General Building & HVAC Maintenance	24,000,000
Instructional Program Needs	10,000,000
Athletics & Co-curriculars	6,000,000
Total	40,000,000



Debt Outstanding as a % of Property Valuation

Debt Outstanding / 2016 Property Valuation



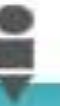
Source: Department of Public Instruction, MSRB EMMA website

Note: Debt outstanding, net of 2017 Payments and Sinking Fund Deposits made on QTCB

Existing Referendum-Approved Debt

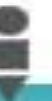
Fund 39

Calendar Year	Principal	Interest	Total
2017	6,920,000.00	1,751,500.00	8,671,500.00
2018	6,755,000.00	1,545,825.00	8,300,825.00
2019	6,975,000.00	1,328,725.00	8,303,725.00
2020	7,205,000.00	1,095,900.00	8,300,900.00
2021	5,445,000.00	882,475.00	6,327,475.00
2022	5,640,000.00	687,056.25	6,327,056.25
2023	5,855,000.00	475,562.50	6,330,562.50
2024	6,035,000.00	295,043.75	6,330,043.75
2025	6,200,000.00	132,600.00	6,332,600.00
2026	1,320,000.00	19,800.00	1,339,800.00



Capital Improvement Plan (CIP):

- For major new construction or major renovations
- Use long term bonds (10-20 year amortization)
- Major changes in school configuration
- Must develop criteria, identify and prioritize needs



CIP Examples – Types of Issues

- Nuestro Mundo long-term solution
- Growth on far east side: construction on Sprecher Road
- Growth on far west side: construction near Olson Elementary
- Leopold >700 students
- Other(s)



CIP Criteria

- Need a set of criteria for determining which projects to prioritize at what time
- Created these criteria through a review of best practices nationwide and incorporating the *Guiding Principles*
- Want your feedback on these criteria and how they are operationalized so we can refine moving forward

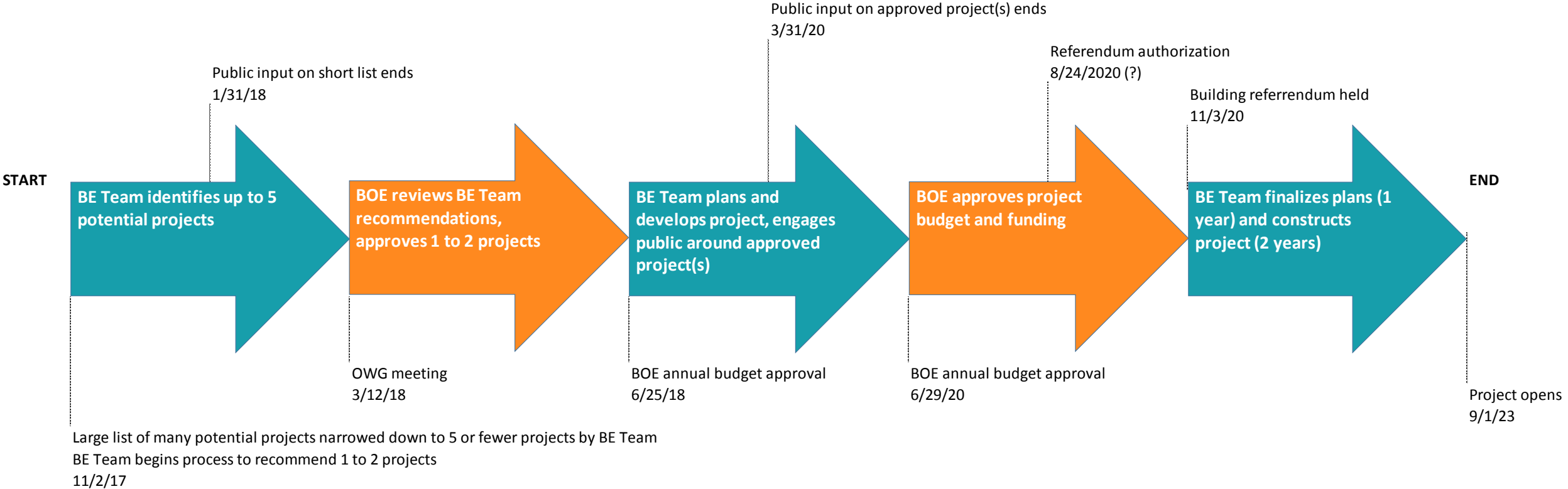


CIP Criteria (con.)

Prioritize Health, Safety, Accessibility	<ul style="list-style-type: none"> • Will the project improve facilities that had a C or below in the life safety, accessibility, and mechanical systems grades as measured by the PRA facility assessment scale?
Promote Equity	<ul style="list-style-type: none"> • Does this project improve facilities for schools with more diverse student populations than district averages (looking at race/ethnicity, income, ELL, and/or disability status)? • Does this project improve facilities for schools who have not received renovations within the last ten years? • Does this project improve facilities for schools with a C or lower rating on the Facility Condition Index?
Support Academic and Co-curricular Excellence	<ul style="list-style-type: none"> • Does this project impact one of the identified priority academic areas? • Does this project improve academic functionality through increased classroom space or accommodation of curricular needs? • Can existing facilities accommodate a program without remodeling or renovation?
Expand Community Use	<ul style="list-style-type: none"> • Does this project expand MSCR programming potential (including athletic spaces) or other community partnerships? • Does this project impact an existing or planned Community School or a school that feeds from an existing or planned Community School?
Bolster Retention and Recruitment	<ul style="list-style-type: none"> • Does this project improve facilities for schools with significant net losses in enrollment due to internal transfer or open enrollment? • Would this project improve facilities with a C grade or lower on building aesthetics and interior finishes as measured by the PRA facility assessment scale?
Improve Space Use and Operational Efficiency	<ul style="list-style-type: none"> • Will this project produce enrollment totals at or below 90% of capacity over the next 15 years based on current projections? • Are attendance boundary changes an effective alternative to alleviate capacity concerns? • Are the costs of the project (short and long-term) reasonable given the benefit?



Draft CIP Timeline



Process runs every other year - four-year plan with a two-year revisit
Possibility to batch or stagger projects (i.e. work on more than one at a time)