



ISD 861 – Winona Area Public Schools

Facility Analysis Report

May 20, 2021



Agenda

- Definitions
- Process
- Findings
- Next Steps

Definitions

What is Deferred Maintenance?

Necessary repairs or restorations that are put off due to lack of funding or priorities.

- Also known as asset preservation

What is LTFM?

Long Term Facilities Maintenance is a state funding source for school districts. Authorized expenditures are:

- Deferred Capital Expenditures and maintenance projects necessary to prevent further erosion of facilities
- Increasing accessibility of schools
- Health and Safety capital projects

Definitions

What is Project Cost vs. Construction Cost?

Project cost is the total cost a school district would pay to accomplish a project. It includes construction cost, permits, fees, testing etc.

Construction cost is a component of the Project Cost. This represents the cost to hire a construction contractor to perform work. These are the people who build the work.

District Participation:

- **Dr. Annette Freiheit**, Superintendent
- **Kristy Millering**, Director of Finance
- **Michael McArdle**, Director of Buildings & Grounds
- **Dawn Lueck**, Principal, Washington Kosciusko Elementary School
- **Maggie Maine**, Principal, Jefferson Elementary
- **Emily Cassellius**, Principal, Winona Area Learning Center, Goodview Elementary School
- **Mark Anderson**, Principal, Winona Senior High School
- **Mark Winter**, Principal, Winona Middle School

1. Architects and Engineers tour all facilities
 - Interview key staff like Director of Buildings and Grounds, Principals
2. Review all known facility data
 - Past facility analysis documents, existing plans etc.
3. Administration Meetings
 - Develop Priorities, review identified items
4. Budget identified items & develop report

Process

- **SITE**

This section describes the site and its surroundings.

- **EXTERIOR**

This section describes the exterior envelope including roofing information supplied by the District.

- **INTERIOR**

This section describes the physical condition of the interior spaces and finishes within the facility.

- **ACCESSIBILITY**

This section addresses the conformance of the facility to the intentions of accessibility requirements with focus on the following issues: accessible parking, an accessible route to the main entrance, ability to attain all levels of the facility, and access to each teaching space.

- **LIFE SAFETY**

This section explains life safety and code deficiencies as noted and as discovered during field observation.

- **HAZARDOUS MATERIALS**

This section covers the information provided by the District concerning asbestos materials present and lead in the water.

- **MECHANICAL SYSTEMS**

This section documents the existing mechanical systems and components, and their known deficiencies.

- **ELECTRICAL SYSTEMS**

This section documents the existing electrical systems and components, and their known deficiencies.

- **PROGRAM**

This section consists of facility programmatic and deficiency issues as addressed by the various facilities' Site administration and staff.

- **TECHNOLOGY**

This section documents the existing technology systems and components, and their known deficiencies. It covers only non direct instructional technology infrastructure for the various buildings.

Process

● Priority 1 (0 - 2 years)

Life Safety Issue	As typically noted by Fire Marshal/Life Safety Officials.
Deterioration Item	Further deterioration will create higher future repair costs or will damage other areas in the building.
Health Issue	Rooms with no ventilation or items that do not meet state health code requirements and have been tagged.
Accessibility Issue	Must complete to provide access into the building, to the curriculum within the building, to access a restroom or to obtain a drink of water.
Hazardous Materials	Item posing a significant impact on building occupants.

● Priority 2 (2 - 5 years)

Energy Issue	Item replaced results in a payback in 10 years or less.
Deterioration Item	Material or system that currently functions but will require replacement or maintenance within 5 years.
Accessibility Issue	Modification required to meet state code guidelines.
Modernization	Modifications required to support future modernizations.
Hazardous Materials	Removal of items affected by other changes occurring in Group 2.
Health Issue	Inadequate exhaust and ventilation in lab environments and other areas lacking adequate ventilation.

● Priority 3 (6 - 10 years)

Energy Issue	Item replaced results in a payback in more than 10 years.
Health Issue	Non-tagged items that do not meet state health code requirements.
Deterioration Item	Material or system that currently functions but will require replacement or maintenance in 6-10 years.
Hazardous Materials	Removal of items affected by other changes occurring in Group 3.

● Priority 4 (Would like to do within 10 years)

Aesthetics	Item which impacts the visual environment.
Hazardous Materials	Removal of items affected by other changes occurring in Group 4.
Accessibility Issue	To meet full requirements of federal guidelines as stated in the ADA (American with Disabilities Act).

Budgets:

- Costs used are based on similar projects in school districts in MN
- Budgets are intended to be conservative. These are recommended values to hold so that School Districts can accomplish the projects.
- Budgets represent total project costs. They include construction cost, permits, fees, testing etc.
- Items identified include 2 years of construction inflation
- Budgets include a contingency
- Budgets are based upon an agreed upon scope with administration; a change in scope will affect budgets
- Budgets are not:
 - Bids from contractors
 - A fully designed project

Findings

	Jefferson	Goodview	Washington - Kisciusko
Site	\$400,000	\$182,856	\$99,463
Exterior	\$3,029,014	\$1,236,525	\$3,367,787
Interior	\$1,116,247	\$964,084	\$753,405
Accessibility	\$2,058,071	\$316,000	\$1,825,626
Mechanical	\$6,786,003	\$2,168,870	\$5,283,216
Electrical	\$719,349	\$439,055	\$715,034
Technology	\$38,911	\$11,218	\$25,641
Total	\$14,147,595	\$5,318,608	\$12,070,173

Findings

	Middle School	High School	ALC	Paul Giel Field
Site	\$2,524,527	\$321,750	\$224,000	\$1,330,000
Exterior	\$3,023,567	\$5,363,200	\$415,000	\$0.00
Interior	\$2,271,690	\$4,961,893	\$250,106	\$25,000
Accessibility	\$0.00	\$733,231	\$0.00	\$465,000
Mechanical	\$1,744,260	\$3,704,134	\$167,682	\$0.00
Electrical	\$1,864,535	\$1,942,635	\$143,143	\$3,000
Technology	\$47,070	\$45,034	\$11,500	\$0.00
Total	\$11,475,648	\$17,071,878	\$1,211,431	\$1,823,000

TOTAL (ALL FACILITIES)

\$63,118,334

Findings- Jefferson

CATEGORY:	Priority 1:	Priority 2:	Priority 3:	Priority 4:	Priority 5:	Priority 6:	Not Prioritized	Total
SITE	\$400,000	\$0	\$0	\$0	\$0	\$0	\$0	\$400,000
EXTERIOR	\$2,058,284	\$933,848	\$36,882	\$0	\$0	\$0	\$0	\$3,029,014
INTERIOR	\$768,136	\$128,407	\$73,677	\$146,027	\$0	\$0	\$0	\$1,116,247
ACCESSIBILITY	\$1,731,964	\$95,119	\$97,140	\$133,848	\$0	\$0	\$0	\$2,058,071
MECHANICAL SYSTEMS	\$6,489,627	\$43,435	\$22,995	\$229,947	\$0	\$0	\$0	\$6,786,003
ELECTRICAL SYSTEMS	\$692,579	\$26,770	\$0	\$0	\$0	\$0	\$0	\$719,349
PROGRAM	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TECHNOLOGY	\$24,039	\$14,872	\$0	\$0	\$0	\$0	\$0	\$38,911
Totals:	\$12,164,629	\$1,242,450	\$230,694	\$509,822	\$0	\$0	\$0	\$14,147,595

Findings - Jefferson

Jefferson Elementary Priority 1 Summary:

- Site: Playground Replacement
- Exterior: Window Replacement
- Interior: Gym Door Replacement, Cafeteria Door Replacement
- Accessibility: Playroom access, classroom toilets
- Mechanical: Convert building from steam to hot water, new boilers, new chillers, HVAC replacement
- Electrical: LED lighting and ceiling replacement, Panelboard replacement

Findings - Goodview

CATEGORY:	Priority 1:	Priority 2:	Priority 3:	Priority 4:	Priority 5:	Priority 6:	Not Prioritized	Total
SITE	\$0	\$182,856	\$0	\$0	\$0	\$0	\$0	\$182,856
EXTERIOR	\$0	\$221,525	\$1,015,000	\$0	\$0	\$0	\$0	\$1,236,525
INTERIOR	\$351,664	\$447,087	\$165,333	\$0	\$0	\$0	\$0	\$964,084
ACCESSIBILITY	\$316,000	\$0	\$0	\$0	\$0	\$0	\$0	\$316,000
HAZARDOUS MATERIALS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
MECHANICAL SYSTEMS	\$1,967,924	\$177,952	\$22,995	\$0	\$0	\$0	\$0	\$2,168,870
ELECTRICAL SYSTEMS	\$439,055	\$0	\$0	\$0	\$0	\$0	\$0	\$439,055
PROGRAM	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TECHNOLOGY	\$11,218	\$0	\$0	\$0	\$0	\$0	\$0	\$11,218
Totals:	\$3,085,861	\$1,029,420	\$1,203,328	\$0	\$0	\$0	\$0	\$5,318,608

Findings - Goodview

Goodview Elementary Priority 1 Summary:

- Interior: Ceiling replacement, flooring replacement
- Accessibility: Early childhood and gym toilets remodel
- Mechanical: Boiler plant replacement, Add VAV boxes for zone control, water heater replacement
- Electrical: Replace electrical service, LED lighting replacement

Findings - WK

CATEGORY:	Priority 1:	Priority 2:	Priority 3:	Priority 4:	Priority 5:	Priority 6:	Not Prioritized	Total
SITE	\$0	\$99,463	\$0	\$0	\$0	\$0	\$0	\$99,463
EXTERIOR	\$3,130,943	\$148,802	\$0	\$88,042	\$0	\$0	\$0	\$3,367,787
INTERIOR	\$636,520	\$80,635	\$23,220	\$13,030	\$0	\$0	\$0	\$753,405
ACCESSIBILITY	\$1,639,206	\$0	\$49,598	\$136,822	\$0	\$0	\$0	\$1,825,626
MECHANICAL SYSTEMS	\$5,216,787	\$43,435	\$22,995	\$0	\$0	\$0	\$0	\$5,283,216
ELECTRICAL SYSTEMS	\$715,034	\$0	\$0	\$0	\$0	\$0	\$0	\$715,034
PROGRAM	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TECHNOLOGY	\$25,641	\$0	\$0	\$0	\$0	\$0	\$0	\$25,641
Totals:	\$11,364,132	\$372,335	\$95,813	\$237,894	\$0	\$0	\$0	\$12,070,173

Washington-Kisciusko Elementary Priority 1 Summary:

- Exterior: Tuckpointing and Windows
- Interior: Ceiling replacement, Replace gym doors
- Accessibility: Playroom access, classroom toilets, Pre-K Ramp
- Mechanical: Convert building from steam to hot water, new boilers, new chillers, HVAC replacement
- Electrical: Replace electrical service, LED lighting replacement

Findings-MS

CATEGORY:	Priority 1:	Priority 2:	Priority 3:	Priority 4:	Priority 5:	Priority 6:	Not Prioritized	Total
SITE	\$0	\$0	\$0	\$2,524,527	\$0	\$0	\$0	\$2,524,527
EXTERIOR	\$0	\$2,974,000	\$49,567	\$0	\$0	\$0	\$0	\$3,023,567
INTERIOR	\$1,387,310	\$13,707	\$196,834	\$673,839	\$0	\$0	\$0	\$2,271,690
MECHANICAL SYSTEMS	\$1,202,919	\$0	\$541,341	\$0	\$0	\$0	\$0	\$1,744,260
ELECTRICAL SYSTEMS	\$1,864,535	\$0	\$0	\$0	\$0	\$0	\$0	\$1,864,535
TECHNOLOGY	\$47,070	\$0	\$0	\$0	\$0	\$0	\$0	\$47,070
Totals:	\$4,501,834	\$2,987,707	\$787,742	\$3,198,366	\$0	\$0	\$0	\$11,475,648

Winona Middle School Priority 1 Summary:

- Interior: Carpet replacement, Toilet Partition Replacement
- Mechanical: Energy Efficiency Upgrades including a condensing boiler, boiler burner replacement, chilled water coils, domestic water plant
- Electrical: LED lighting replacement

Findings-HS

CATEGORY:	Priority 1:	Priority 2:	Priority 3:	Priority 4:	Priority 5:	Priority 6:	Not Prioritized	Total
SITE	\$0	\$35,750	\$286,000	\$0	\$0	\$0	\$0	\$321,750
EXTERIOR	\$0	\$3,827,000	\$1,536,200	\$0	\$0	\$0	\$0	\$5,363,200
INTERIOR	\$3,957,136	\$421,870	\$446,720	\$136,167	\$0	\$0	\$0	\$4,961,893
ACCESSIBILITY	\$246,000	\$487,231	\$0	\$0	\$0	\$0	\$0	\$733,231
MECHANICAL SYSTEMS	\$346,518	\$1,657,907	\$1,699,709	\$0	\$0	\$0	\$0	\$3,704,134
ELECTRICAL SYSTEMS	\$93,959	\$1,848,676	\$0	\$0	\$0	\$0	\$0	\$1,942,635
PROGRAM	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TECHNOLOGY	\$0	\$45,034	\$0	\$0	\$0	\$0	\$0	\$45,034
Totals:	\$4,643,613	\$8,323,469	\$3,968,629	\$136,167	\$0	\$0	\$0	\$17,071,878

Winona High School Priority 1 Summary:

- Interior: Auditorium Upgrades, Ceiling replacement, casework and flooring
- Accessibility: Lift to Pool Seating Area
- Mechanical: Boiler replacement, Domestic Water Plant & Softeners
- Electrical: Switchboard, LED lighting replacement

Findings - ALC

CATEGORY:	Priority 1:	Priority 2:	Priority 3:	Priority 4:	Priority 5:	Priority 6:	Not Prioritized	Total
SITE	\$0	\$0	\$224,000	\$0	\$0	\$0	\$0	\$224,000
EXTERIOR	\$0	\$0	\$40,000	\$375,000	\$0	\$0	\$0	\$415,000
INTERIOR	\$9,000	\$0	\$236,106	\$5,000	\$0	\$0	\$0	\$250,106
MECHANICAL SYSTEMS	\$0	\$108,566	\$59,116	\$0	\$0	\$0	\$0	\$167,682
ELECTRICAL SYSTEMS	\$0	\$143,143	\$0	\$0	\$0	\$0	\$0	\$143,143
PROGRAM	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TECHNOLOGY	\$11,500	\$0	\$0	\$0	\$0	\$0	\$0	\$11,500
Totals:	\$20,500	\$251,709	\$559,222	\$380,000	\$0	\$0	\$0	\$1,211,431



Findings - ALC

Winona ALC Priority 1 Summary:

- Interior: Early Childhood Door Access
- Electrical: PA System replacement



Findings – Paul Giel Field

CATEGORY:	Priority 1:	Priority 2:	Priority 3:	Priority 4:	Priority 5:	Priority 6:	Not Prioritized	Total
SITE	\$0	\$680,000	\$0	\$650,000	\$0	\$0	\$0	\$1,330,000
INTERIOR	\$0	\$0	\$25,000	\$0	\$0	\$0	\$0	\$25,000
ACCESSIBILITY	\$0	\$225,000	\$0	\$240,000	\$0	\$0	\$0	\$465,000
ELECTRICAL SYSTEMS	\$0	\$0	\$3,000	\$0	\$0	\$0	\$0	\$3,000
PROGRAM	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Totals:	\$0	\$905,000	\$28,000	\$890,000	\$0	\$0	\$0	\$1,823,000

Findings – Paul Giel Field

Paul Giel Field Priority 1 Summary:

- N/A

Next Steps

Next Steps:

- Update 2 and 10 year Maintenance Plan / LTFM Funding Projection
- LTFM funding source likely cannot cover all identified items, need to study how to accomplish some of these items
 - Phased implementation
 - Other funding sources

Conclusions:

- It is typical for a School District to have a deferred maintenance list
- Funding typically does not allow to address all maintenance at one time
- Depending on District priorities, maintenance plans could range from \$5 million to \$50+ million
- Now that maintenance needs are quantified, additional discussion is needed to determine the best funding plan for the District regarding facility needs

Questions?



Facility Planning

June 2018 School Board Report:

- Finalize Phase I details, including financing
- Board Meeting: Thursday, July 19 at 6pm
- Timeline to Election on November 6, 2018:
 - » Adopt Resolution Calling Election, Notify Auditor & Commissioner: 74 days prior
 - Needs final ballot language
 - Recommended schedule: July 19 Board Meeting
 - » Review and Comment: +/- 90 days
 - MDE Review Period: 60 days
- Establish a process to address Phase 2 needs
 - » Study Timeline: next 2-3 years
 - » Examination of remaining asset preservation needs
 - » Study of long-term District facility needs
 - » Alignment of facilities with District educational mission and vision

Facility Planning

- That board created a financial opportunity for this board in 2022
- If you are going to take advantage of that, now is the time to start the planning process.
- Funding –
 - 2018 levy expires in 2023
 - To replace the current levy, a successful vote would be needed in November 2021, Feb 2022, August 2022 or November 2022
 - The current tax shelf provides some opportunities for a zero tax impact question

Order of Operations:

- Board Direction on planning parameters: 1 to 2 months
- Task Force / Planning Work: 1 to 4 months
- Board Resolution: 74 days prior to vote
- Vote Date

Superintendent's Recommendation

- Next steps: Suggest a Work session in June to discuss board goals / direction
 - Should we take advantage of the tax shelf?
 - What should the scope of facility expenditure be?
 - What should the process look like? Task Force?
 - Should we preserve the options for a 2nd chance election?
 - Facilitator?