Operations Report

September 2025 Board of Education meeting

5 Year Capital Needs Assessment

Every five years, local boards of education are required by N.C. General Statue, G.S. 115-521 (a) to submit a facility needs assessment to the North Carolina Department of Public Instruction (NCDPI). The results are made available to the North Carolina State Board of Education and the North Carolina General Assembly. The findings reported represent the facility needs for all public school systems in North Carolina for the next five years and an estimated cost are included.

Montgomery County Schools

2020 Capital Needs Assessment

- Performed by Dr. Jim Watson, educational consultant for Pinnacle Architecture. Identified needs: $6,253,000
- Cost of Study: $24,842.21
- As a result of the 2020 study and submission of Needs Based Public School Capital Fund grant applications, MCS was awarded funds to meet all the identified needs at 4 schools:
  - East Middle School: $1,146,654
  - Candor Elementary School: $1,062,987
  - Greenridge Elementary School: $84,431
  - Page St. Elementary School: $351,093

Montgomery County Schools

Selecting a Partner to Complete the 2025 Study



Montgomery County Schools

No Upfront Cost / No future Obligation



Providing Facility Needs Surveys for North Carolina K-12 Districts at no cost.

The 2025-2026 Facility Needs Survey is required by the NC Department of Public Instruction (NCDPI) (North Carolina G.S.115C-521(a). Local boards of education shall submit their long-range plans for meeting school facility needs to the State Board of Education every five years. ***Not sure where to start?*** **We're here to help!**

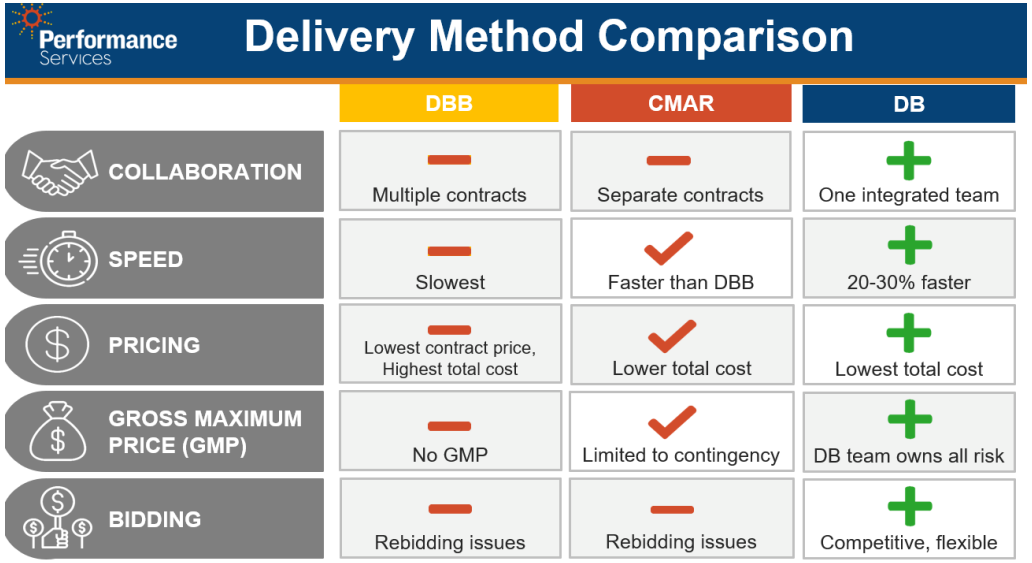
Our Services Include:

- Overall facility plan
- Building condition evaluation
- Capacity calculations
- Utilities cost and consumption
- Mobile unit evaluation
- 5 year capacity planning
- 6-10 year capital project planning
- School questionnaire support
- Evaluation of school additions or consolidation based on ADM
- Assessment of renovation/optimal learning environment projects
- Reporting summaries
- Assistance with final submission to NCDPI

Montgomery County Schools

The Quid Pro Quo

- Presentation to the Board of Education, preferably with County Commissioners in attendance.
- Comparison of Construction Delivery Methods
- Advocate for Design Builder method of construction



Montgomery County Schools

Looking Ahead:

- MCS has an unallocated balance of $1,418,843.67 in Repair and Renovation Lottery funds.
- The 2025 Assessment Study will prioritize the current needs, such as:
  - West Middle Chiller: preliminary quote $280,000
  - Troy and Mt. Gilead Cooling Towers (identified as a top need 12 years ago): $324,000
- Additionally, the 2025 study will be used as the basis for presenting the Board with projects to submit for future Needs Based Public School Capital Funds (NBPSCF) grants.

Montgomery County Schools

Questions/Actions:

- Justin Stephens, Performance Services, available for immediate questions.
- **Recommendation: For the Board to consider approval of :
    - Selection of Performance Services for 2025 Needs Based Assessment

FACILITY NEEDS SURVEY ASSISTANCE AGREEMENT
Between Performance Services, Inc. and Montgomery County Schools

This Agreement is entered into as of August 15, 2025, by and between **Performance Services, Inc.**, an Indiana corporation with expertise in K–12 facility assessment and design services ("**Performance Services**"), and **Montgomery County Schools**, a public school district organized under the laws of the State of North Carolina ("**District**").

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1. PURPOSE

The purpose of this Agreement is for Performance Services to assist the District in the preparation and submission of the 2025 Facility Needs Survey ("FNS") as required by the North Carolina Department of Public Instruction ("NCDPI") pursuant to N.C. Gen. Stat. §115C-521(a).

To support this effort, Performance Services will conduct a comprehensive evaluation of all sites and facilities owned or operated by the District. These services will be provided **at no cost to the District** and are intended to establish the foundation for a potential long-term partnership.

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2. SCOPE OF SERVICES

Performance Services shall provide the following services in support of the District's FNS submission:

- Development of a district-wide facility plan
- Building condition evaluations
- Student capacity calculations
- Utility usage and cost analysis
- Evaluation of mobile classrooms and temporary structures
- Five-year student capacity planning
- Six- to ten-year capital improvement planning
- Assistance in completing NCDPI-required questionnaires
- Analysis of potential facility additions or consolidations based on Average Daily Membership (ADM) trends

- Prioritization and budgeting of renovation and capital projects
- Recommendations to optimize educational and learning environments
- Preparation of summary reports
- Support with the final submission to NCDPI

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3. DISTRICT RESPONSIBILITIES

The District agrees to provide the following materials and access necessary for Performance Services to complete the Scope of Services:

- Current architectural drawings and schematics for all facilities
- Details of construction projects completed since 2020
- Copy of the 2020 Facility Needs Survey submission
- Enrollment data based on the previous school year's ADM
- Access to NCDPI survey tools and platforms
- Supporting documentation from previous assessments or inter-governmental agreements (IGAs)
- Utility data including consumption and cost records
- A prioritized list of known or planned capital improvement projects

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4. FEES AND CONSIDERATION

Performance Services shall provide all services outlined in this Agreement **at no cost to the District**.

In consideration of the services provided, the District agrees to:

- Host an in-person presentation by Performance Services on Design-Build procurement methods, preferably at a District facility with the School Board in attendance
- Permit Performance Services to present the Facility Needs Survey findings to the District School Board and County Commissioners

- Approve Design-Build as a recognized procurement method within the District, if not already adopted

These provisions are intended to promote collaboration and transparency between the parties.

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5. TERM

This Agreement shall take effect upon the date of execution by both parties and remain in force until all deliverables described in Sections 2 and 4 are completed.

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6. MISCELLANEOUS

- **Entire Agreement**: This document represents the complete agreement between the parties and supersedes any prior understandings, written or oral.
- **Amendments**: No modification of this Agreement shall be valid unless in writing and signed by both parties.
- **Governing Law**: This Agreement shall be governed by and construed in accordance with the laws of the State of North Carolina.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the date first above written.

PERFORMANCE SERVICES, INC.
By: _____
Name:
Title:
Date:

MONTGOMERY COUNTY SCHOOLS
By: _____
Name:
Title:
Date: