

APPENDIX IX-1



MULTI-YEAR FACILITIES PLAN

Tucson Unified School District

Based on the results of the assessments using the FCI and the ESS, the District shall develop a multi-year plan for facilities repairs and improvements

USP IX (A) (1-3)

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MULTI-YEAR FACILITIES PLAN 2020

I. DEFINITIONS

Multi-Year Facility Plan (MYFP) – A Capital Improvement Program (CIP) derived from the priority needs for major repairs and improvements to be completed by the District based on the FCI and ESS scores. MYFP provides a prioritized list of needed repairs, renovations, and replacements that should be addressed. The repairs will be completed in the order defined by the MYFP, following the guidelines stated in the USP. **Timing will depend on available funds. There is no guarantee that any project listed in the MYFP will be completed. It is dependent upon funding.**

Facility Condition Index (FCI) – Rates the condition of school buildings along multiple structural dimensions and provides a composite score for each school’s condition.

Educational Suitability Score (ESS) - Rates the suitability to provide an equitable education of all facilities that house educational programs, using the seven factors identified by the USP.

Racially Concentrated School (RCS) - A racially concentrated school is any school in which any racial or ethnic group exceeds 70% of the school’s total enrollment, and any other school specifically defined as such by the Special Master in consultation with the Parties.

II. EXECUTIVE SUMMARY

The District utilizes the multi-year facilities plan to select projects, as funds are available. It is based on the results of the assessments using the FCI and ESS.

FCI is a measurement of the condition of a facility at any given time. Low scores are priorities in deciding which projects to seek to address for the MYFP. The composite score is based on a percentage regarding the condition of facility components: grounds (10 percent), parking (5 percent), roofing (20 percent), building structures (30 percent), building systems (20 percent), special systems, (10 percent) and technology/communications systems (5 percent).

ESS is a measurement of the quality or appropriateness of the design of a school for educational purposes. The ESS evaluates: (i) the quality of the grounds, including playgrounds, playfields, and other outdoor areas, and their usability for school-related activities; (ii) library condition; (iii) capacity and utilization of classrooms and other rooms used for school-related activities; (iv) textbooks and other learning resources; (v) existence and quality of special facilities and laboratories (i.e., art, music, band, shop rooms, gymnasium, auditoriums, theaters, science, and language labs); (vi) capacity and use of cafeteria or other eating space(s); and (vii) current fire and safety conditions and asbestos abatement plans.

The ESS has less opportunity for change or affected weathering. Age does not change the appropriateness of a design, so we don't have an expected lifecycle for repairs and eventual replacement. Therefore, the ESS scores are less likely to change unless improvements dollars are allocated and improvements made.

Both the FCI and the ESS are living documents that are updated as improvements to facilities are completed, or as systems are seen to be deteriorating. The data is available on all schools, and the District utilizes these documents to establish and assist in prioritizing the District's Capital Improvement Projects.

The MYFP provides an equitable framework for prioritizing short-term and long-term needs for facilities. The MYFP assigns priorities in the following order: (1) resolution of health and safety issues at any school, (2) schools that score below 2.0 on the FCI or below the District average on the ESS, and (3) racially concentrated schools that score below 2.5 on the FCI. These priorities align with the guidance provided by the USP.

While the Unitary Status Plan requires that the District renew the FCI and the ESS biennially, the District actually updates these two indices on a continual basis. Processes are in place to evaluate conditions any time changes are made to determine a change in score is appropriate. While few changes are made to ESS scores, FCI scores change frequently. Therefore, the biennial update is merely a snapshot of these two tools at the time that the Multi-Year Facility Plan is updated.

III. FACILITES FUNDING

Typical funding for these projects can come from, but are not limited to, available Capital Funds (610), Outlay or Capital Overrides, School Bonds, Adjacent Ways (Fund 620), and Desegregation Funds. To a lesser degree projects are either partially funded or could be funded from Gifts and Donations, Grants, or SFB (School Facilities Board) Building Renewal Grants. These later three are directed funds from the donor, with no allowance for change or flexibility to choose the recipient building or department. To a lesser degree, both Bonds and Desegregation have limited direction, but require steps for compliance.

This MYFP is dependent on having adequate funding. Without funding, projects cannot be completed. Therefore the MYFP is focused on defining the projects that need to be completed and the order in which they will be addressed. It is not a guarantee that the projects will be completed within the next three years.

- A. Capital Funds** – Fund designated for any capital expenditure including capital overrides. These funds, once placed into Fund 610 are discretionary funds for capital or facilities improvements or repairs, and capital purchases. The state no longer provides capital funds as part of its formula for schools.

- B. School Bonds** - If a district determines that it has needs beyond the capacity of the district's maintenance and operations budget, it may suggest that the board issue a bond. The school board decides whether or not to call a bond election for part or all of the items initially identified by the district staff. The District currently has no outstanding bonds.
- C. Adjacent Way Funds** - Fund designated for expenditures related to the improvement of public ways adjacent to school property.
- D. Desegregation Funds** - These funds are provided pursuant to A.R.S. §15-910(g) through district levy of specific taxes. Funds are used by the district as directed by the Unitary Status Plan, or as otherwise permitted by that statute.
- E. Gifts and Donation** – These Funds (530) consist of donations to the School District. Some are specific, and the donor's request must be followed if the monies are accepted. Others have no direction, and may be used at the District's discretion on how they benefit the school(s).
- F. School Facilities Board (SFB) Monies** - These monies can be used for major renovations and repairs of a building, for upgrades to building systems (e.g. heating, cooling, plumbing, etc.) that will maintain or extend the useful life of a building, and for infrastructure costs. The School Facilities Board distributes building renewal monies in the form of a grant on each project they deem appropriate. These funds are not discretionary, and must be used in accordance with the grant and SFB regulated processes. ARS §15-2002.A.3 requires the SFB to perform preventative maintenance inspections on 20 school districts every 30 months.

IV. IMPLEMENTATION PROCESS

The first priority for major repairs, renovations, and replacements must be facility conditions that impact the health and safety of the District's students and staff. Those items cannot wait for a biennial review. They will be addressed as they occur, or as they are identified as a safety issue, and will always be completed ahead of whatever condition is next on the prioritized list, consistent with the USP.

MYFP provides a prioritized list of needed repairs, renovations, and replacements that should be addressed. The repairs will be completed in the order defined by the MYFP, following the guidelines stated in the USP. Timing will depend on available funds. There is no guarantee that any project listed in the MYFP will be completed. It is dependent upon funding.

The USP language gives priority to schools with an ESS score below the District average. By definition, that would always be roughly half of the schools. Because recommendations were made to have the ESS be similar in process to the FCI, such as making the ESS a weighted system to give priorities to important components, it also makes sense to treat the ESS in the

same manner as the FCI in evaluating school priorities. We are, therefore, using the same threshold of 2.0 for the first priority of schools as we did in the 2019 MYFP. If this is not the intent of the court, the District will adjust the process accordingly.

It is difficult to blend the FCI and ESS list of priorities. The District has kept the lists separate as it did in the 2019 MYFP. They must be budgeted separately.

Priority between FCI and ESS projects

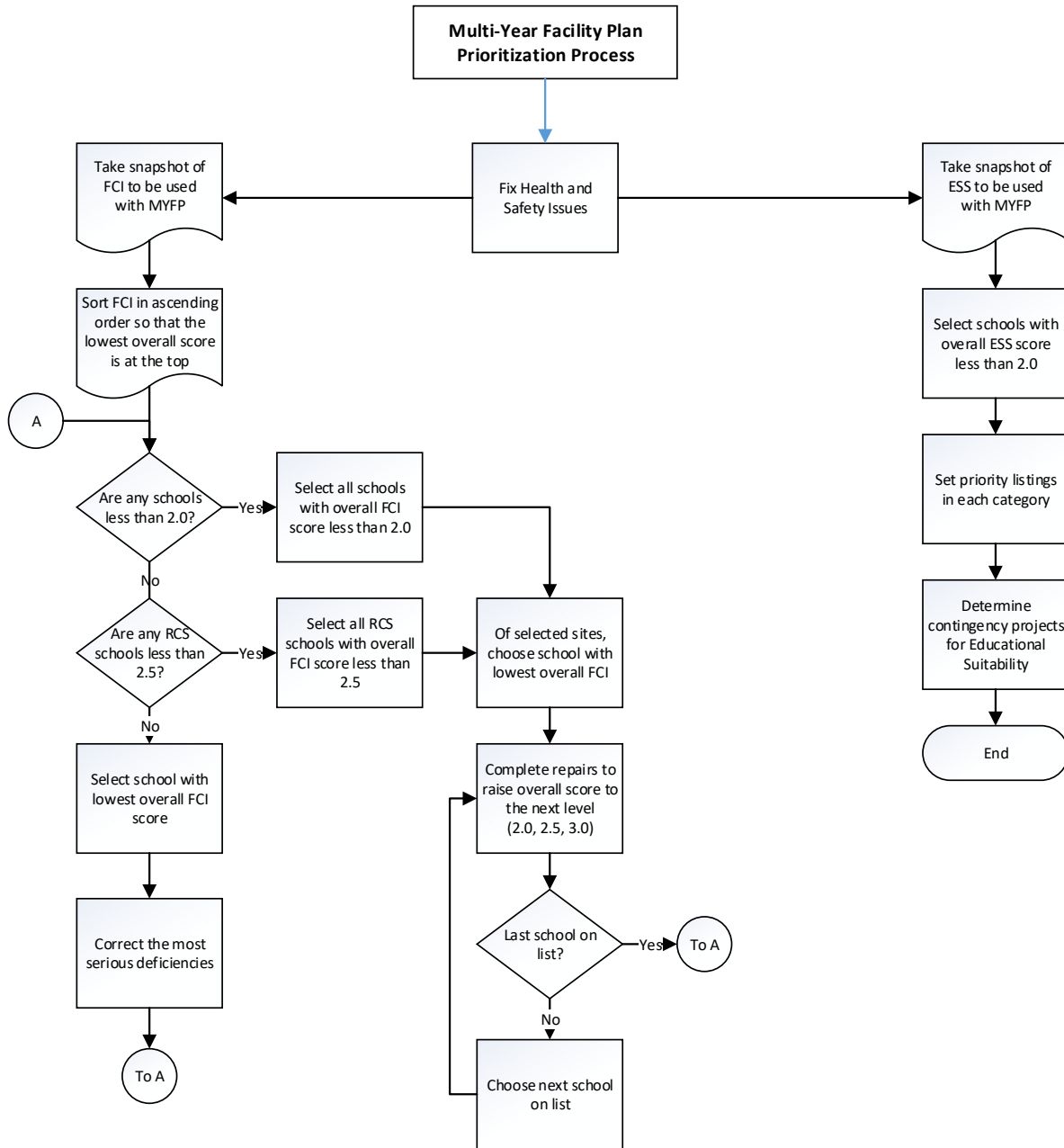
Having appropriate funding is the largest and most important component of the MYFP. The FCI protects the District's ESS investments, keeping both them and the building's students and employees safe, sound and without exposure to the elements. Additionally, ESS and FCI improvements often overlap where some improvements within FCI will be seen in ESS. For this reason the FCI naturally will take priority over the ESS until all overall FCI scores are over 3.0. It is the district's intent to be ready to address ESS issues, although these typically are funded out of contingency funds rather than facilities budgets.

In times when TUSD has limited capital funds, the FCI will take priority, and in times of normal funding, or when School Bonds are approved, the decision tree likely will permit improving both.

Experience has shown that it is difficult to calculate the cost of correcting items such as classrooms that are sized incorrectly, spaces with inappropriate adjacencies, the lack of a variety of teaching and learning spaces, etc. A priority plan was developed for suitability improvements based on the overall suitability score of a particular school and team experience in correcting the overall deficiencies based on that score.

V. PROCESS FLOW

A graphical view of the process is provided below.



This Flowchart is independent of funding. It shows how to prioritize projects.

Actual completion of projects is entirely dependent upon funding. If funds are not available, projects will not be completed.

VI. LIST OF FACILITIES IMPROVEMENT PROJECTS

The following projects were on the District's list of facilities improvement projects to be implemented when funds are available, as of June 30, 2020. Many of these projects were also on the list as of June 30, 2019, and remain on the list because (a) there were no funds to commence them during the SY2019-20, and (b) repair projects with higher priority, or more urgent needs within a priority level, were funded by the SFB during SY2019-20. The list below is not prioritized, because it is unlikely that funds will become available this year for any of these projects. Other emergent repair projects during the 2019-2020 school year will likely take precedence as the school year progresses. Should funds for improvement projects become available, the list will be prioritized based on the current FCI values at the time. Cost estimates, while providing some indication of the general and relative size and scope of projects, are likely out of date.

School	Project	Estimate
Safford	Roofing Renovations	400,000.00 **
	HVAC Upgrades	1,000,000.00 **
	Security Upgrades	125,000.00
	Building Upgrades	1,025,000.00
Hollinger	Building Upgrades	1,400,000.00
	Roofing Renovations	400,000.00 **
	Grounds Improvements	80,000.00
	HVAC Upgrades	185,000.00
	Security Upgrades	125,000.00
Roskrige	Building Upgrades	250,000.00 **
	Roofing Renovations	500,000.00 **
	Grounds Improvements	200,000.00
Cholla	Building Upgrades	165,000.00 **
	Grounds Improvements	350,000.00
	Security Upgrades	250,000.00 **
	Security Upgrades	100,000.00 **
Robison	Roofing Renovations	200,000.00 **
	Security Upgrades	50,000.00 **
	HVAC Upgrades	300,000.00 **
	Building Upgrades	300,000.00
Santa Rita	Security Upgrades	285,000.00
	HVAC Upgrades	1,190,000.00 **
	Roofing Renovations	2,000,000.00 **
	Building Upgrades	75,000.00
2110 Warehouse	Roofing Renovations	110,000.00
	Security Upgrades	150,000.00
	Grounds Improvements	75,000.00
Campbell Warehouse	Roofing Renovations	100,000.00 **
	Security Upgrades	70,000.00

	Grounds Improvements	100,000.00
Sabino	Plumbing Upgrades	250,000.00 **
	Security Upgrades	1,200,000.00
Secrist	HVAC Upgrades	185,000.00 **
	Roofing Renovations	800,000.00 **
	Building Upgrades	100,000.00
	Grounds Improvements	1,100,000.00
	Security Upgrades	100,000.00
Rincon/UHS	HVAC Upgrades	320,000.00 **
	Security Upgrades	400,000.00 **
	Roofing Renovations	1,500,000 **
	Plumbing Upgrades	1,000,000.00
Catalina	Roofing Renovations	1,500,000.00 **
	Security Upgrades	50,000.00
	HVAC Upgrades	50,000 **
	Building Upgrades	100,000.00 **
Wakefield	Roofing Renovations	400,000.00 **
	Building Upgrades	495,000.00 **
	Security Upgrades	450,000.00 **
Starr/TAPP	Building Upgrades	10,000.00 **
	Security Upgrades	250,000.00
Blennman	Roofing Renovations	375,000
Doolen	Roofing Renovations	425,000
Lawerence	Roofing Renovations	345,000
Hughes	Roofing Renovations	400,000
Cragin	Roofing Renovations	375,000
Dunham	Roofing Renovations	375,000
Pistor	Grounds Improvements	300,000
	Roofing Renovations	325,000
Manzo	Roofing Renovations	325,000
	HVAC Upgrades	285,000
Roberts Naylor	Roofing Upgrades	325,000
Vail MS	Roofing Upgrades	350,000
Sewell	Roofing Renovations	300,000
	Special Systems	175,000
Magee	Roofing Renovations	295,000
Mansfeld	Roofing Renovations	275,000
Tucson High	Roofing Renovations	1,875,000

**** Identifies projects currently in design or construction with Arizona State Facilities Board. The FCI score will change when project is completed.**

VII. LIST OF ESS IMPROVEMENT PROJECTS

The list of projects to improve educational suitability below is not prioritized, because it is unlikely that funds will be available this year for any of these projects. Should funding become available, the list will be prioritized based on current ESS values at the time. We have not estimated the cost for these projects. Cost estimates would likely be outdated before funding becomes available. We will move forward with actual estimates if and when we have funding available for these types of projects. The District did not have funds available for any of these projects in SY 2019-20.

<u>School</u>	<u>Project</u>
TAPP	Improve exterior lighting Improve perimeter fencing Improve access control Improve parent drop-off Improve classroom storage Improve technology environment Improve safety of technology devices Improve textbook electronic materials Improve building ventilation and replace/repair noisy heat pumps
Howell	Improve intercom system Improve cafeteria space Improve food service prep area Improve Health Office Improve faculty work space Improve technology in the classroom Improve textbook electronic devices
Pueblo Gardens	Improve perimeter fencing Improve non-instruction clinic space Improve safety of technology devices Improve technology in the classroom Improve performing arts storage Improve physical education hard surfaces
Sewell	Improve access control Improve parent dropoff Improve technology equipment in the buildings Improve technology in the classroom Improve textbook supplemental materials/kits

Warren	<ul style="list-style-type: none"> Improve crosswalk safety Improve Fire Marshall reports for the school Improve administration space Improve classroom storage Improve size of performing arts area
Bloom	<ul style="list-style-type: none"> Improve perimeter fence height Add storage to Performing Arts Add storage to Music
Roberts-Naylor	<ul style="list-style-type: none"> Improve exterior lighting
Palo Verde	<ul style="list-style-type: none"> Improve classroom storage Improve safety of technology devices Improve textbook supplemental materials/kits Improve science classroom storage Install eyewash and showers in science classrooms
Henry	<ul style="list-style-type: none"> Improve parent pick-up area Improve Fire Marshall's Report Provide additional storage for Performing Arts and Music
Gale	<ul style="list-style-type: none"> Improve Food Service prep area Provide technology equipment for lab Provide COWs Improve Instruction resource room Improve textbook electronic materials Improve performing arts storage Improve music environment, size, location, and storage
Robison	<ul style="list-style-type: none"> Improve performing arts storage Improve parent pick-up area
Carillo	<ul style="list-style-type: none"> Improve fence height Improvement placement of exterior signage Provide intercom system and speakers for cafeteria and classrooms Provide technology equipment for the building and classrooms Improve size and condition of library Provide supplemental materials, books, and electronics for library
Myers-Ganoung	<ul style="list-style-type: none"> Provide access control Evaluate and improve placement of exterior signage Improve technology equipment for classrooms Improve library and purchase additional materials