

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 2019

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. FACILITIES FUNDING

Typical funding for these projects may come from, but are not limited to, available Capital Funds (610), Outlay or Capital Overrides, School Bonds, Adjacent Ways (Fund 620), Desegregation Funds, Gifts and Donations, Grants, or SFB (School Facilities Board) Building Renewal Grants. Application of funds from the latter three sources are directed by 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.

- 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. In FY18-19, the district had no significant funds from this source for school repair, maintenance or improvement.
- 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. These funds are generally not available for school building repair, maintenance or improvement.

- 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. The District had extremely limited funds available from this source in SY2018-19.
- 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). In FY18-19, the district had no significant funds from this source for school repair, maintenance or improvement.
- F. School Facilities Board (SFB) Funds** - These funds can be used for repairs and renovations 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. Most of the repairs undertaken in SY2018-19 were funded by grants from the SFB.

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.

IV. IMPLEMENTATION PROCESS

The first priority for major repairs, renovations, and replacements is 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 2015 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 2015 MYFP. They must be budgeted separately.

Priority between FCI and ESS projects

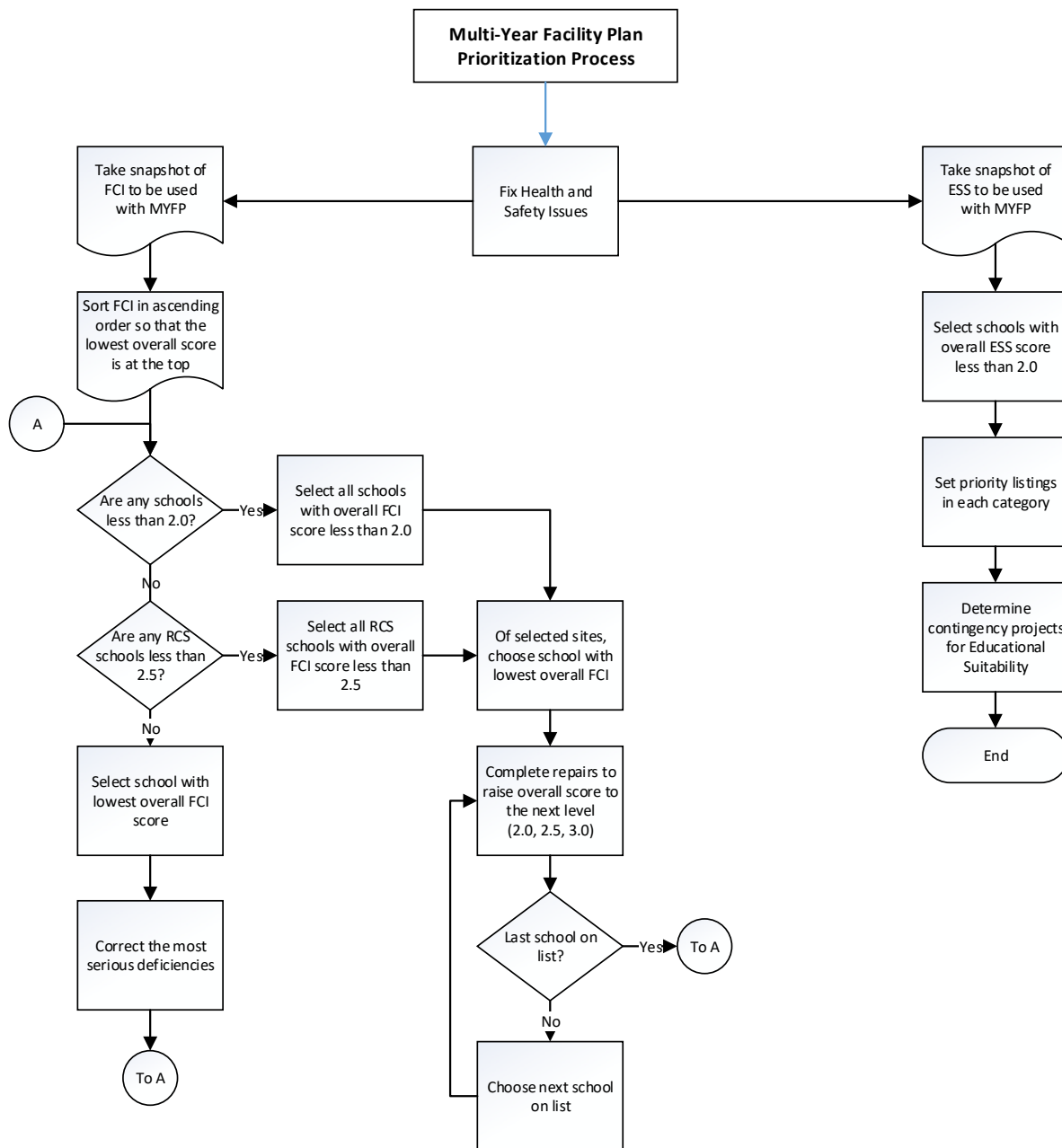
Having appropriate funding is the largest and most important component of the MYFP. The FCI protects the District's ESS investments, keeping both them and the building's students and employees safe, sound and without exposure to the elements. Additionally, ESS and FCI improvements often overlap where 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 undertaken when funds are available, as of June 30, 2019. All of these projects were also on the list as of June 30, 2018, and remain on the list because (a) there were no funds to undertake them during SY2018-19, and (b) repair projects with higher priority, or more urgent needs within a priority level, were funded by the SFB during SY2018-19. 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 2019-20 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 current FCI values at the time. Cost estimates, while providing some indication of the general and relative size of projects, are likely out of date.

School	Project	Cost Estimate
Safford	Roofing Renovations	400,000
Safford	HVAC Upgrades	1,000,000
Safford	Security Upgrades	125,000
Safford	Building Upgrades	1,025,000
Hollinger	Building Upgrades	1,400,000
Hollinger	Roofing Renovations	400,000
Hollinger	Grounds Improvements	80,000
Hollinger	HVAC Upgrades	185,000
Hollinger	Security Upgrades	125,000
Roskruge	Building Upgrades	250,000
Roskruge	Roofing Renovations	500,000
Roskruge	Grounds Improvements	200,000
Cholla	Building Upgrades	165,000
Cholla	Grounds Improvements	350,000
Cholla	Security Upgrades	250,000
Cholla	Security Upgrades	100,000
Robison	Roofing Renovations	200,000
Robison	Security Upgrades	50,000
Robison	Building Upgrades	300,000
Santa Rita	Security Upgrades	285,000
Santa Rita	HVAC Upgrades	1,190,000
Santa Rita	Roofing Renovations	2,000,000
Santa Rita	Building Upgrades	75,000
Sabino	Plumbing Upgrades	200,000
Sabino	Security Upgrades	1,200,000
Secrist	HVAC Upgrades	185,000
Secrist	Roofing Renovations	800,000
Secrist	Building Upgrades	100,000
Secrist	Grounds Improvements	1,100,000
Secrist	Security Upgrades	100,000

Rincon/UHS	HVAC Upgrades	320,000
Rincon/UHS	Security Upgrades	400,000
Rincon/UHS	Plumbing Upgrades	1,000,000
Catalina	Roofing Renovations	1,500,000
Catalina	Security Upgrades	50,000
Catalina	Building Upgrades	100,000.00
Wakefield	Roofing Renovations	400,000.00
Wakefield	Building Upgrades	495,000.00
Wakefield	Security Upgrades	450,000.00
Starr/TAPP	Roofing Renovations	500,000.00
Starr/TAPP	Building Upgrades	10,000.00
Starr/TAPP	Security Upgrades	250,000.00

VIII. 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 funds 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 funds become available. We will move forward with actual estimates if and when we have funds available for these types of projects. The District did not have funds available for any of these projects in SY2018-19.

<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	Improve crosswalk safety Improve Fire Marshall reports for the school Improve administration space Improve classroom storage Improve size of performing arts area
Bloom	Improve perimeter fence height Add storage to Performing Arts Add storage to Music
Roberts-Naylor	Improve exterior lighting
Palo Verde	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	Improve parent pick-up area Improve Fire Marshall's Report Provide additional storage for Performing Arts and Music
Gale	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	Improve performing arts storage Improve parent pick-up area
Carillo	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	Provide access control Evaluate and improve placement of exterior signage Improve technology equipment for classrooms Improve library and purchase additional materials