

2019 ANNUAL MEETING

STATES COLLABORATE ON COMPLEX PK-12 FACILITIES ISSUES



NCSF President, Paul Bakalis (AZ) reports out on interactive lunch session facilitated by DLR Group.

On December 1–3, 2019, the National Council on School Facilities (NCSF) convened state level public school facilities officials from 21 states, the Virgin Islands and DoDEA for its seventh annual meeting in Washington, D.C. NCSF welcomed Idaho and Virgin Islands for the first time.

The theme of this year’s annual meeting was “Increasing the Returns from PK-12 Infrastructure Investment”. 2019 National Council President Paul Bakalis, Executive Director of the Arizona School Facilities Board, welcomed the NCSF members and guests and introduced the theme of the annual meeting.

Joining state officials again were our partners, Mary Fialardo, Executive Director and staff from the 21st Century School Fund; Jeff Vincent, Director of Public Infrastructure Initiatives, Center for Cities+Schools at U.C. Berkeley; and Anisa Heming, Director of the Center for Green Schools, U.S. Green Building Council. NCSF has worked closely with these partners on research and policy advocacy. In addition, NCSF was joined by its long time ally Andrea Suarez Falken, Director from the U.S. Department of Education Green Ribbon Schools program.

The industry sponsors at the 7th annual meeting were Cooperative Strategies, a provider of school facilities planning to districts and states; Dude Solutions, a leading software as a service provider to school districts; DLR Group, a global integrated design firm; and Johnson Controls Inc., which provides sustainable and efficient solutions for comfort, safety, and security in K-12 schools and school systems. State officials get the benefit of working

in a non-transactional way with industry experts, as state officials wrestle with issues of standards, funding, equity, and affordability.

The annual meeting is a unique event for state PK-12 school facilities leaders. During these three days, they have an opportunity to share best practices, learn about recent educational facility research and policy reforms, and educate representatives on Capitol Hill on the urgent issues facing school districts in their states.

KEYNOTE SPEAKER

A responsibility of public school facilities officials is helping educators understand the importance and impact of facilities condition, design, and utilization on student and teacher performance. To aid school facilities officials with this, NCSF invited Mark Schneider, Director of the Institute of Education Science (IES), U.S. Department of



Keynote Speaker, Mark Schneider, Director of Institute of Education Sciences, U.S. Department of Education.

Education, to be our Keynote speaker. Before joining IES, Schneider was a Vice President at the American Institutes for Research (AIR). Prior to joining AIR, he was Commissioner of the National Center for Education Statistics from 2005 to 2008. In 2000, in collaboration with the 21st Century School Fund, Dr. Schneider did a research review of the impact of facilities on learning and studied teacher perceptions of facility conditions and this impact of these conditions on teaching.

In his remarks he acknowledged that school facilities as an education research topic was not on the radar in the

education research field. As evidence, he estimated that IES, with nearly \$1 billion in research funding over 5-6 years, had only spent \$1 million studying facilities and learning. He encouraged state officials to reach out to their Regional Education Labs (RELs) for help in answering key facilities research questions.

LANDSCAPE OF PK-12 PUBLIC SCHOOL FACILITIES

An advantage to the focused convening of state facilities officials at the Annual Meeting is that each of the state agency directors or lead officials has time on the agenda to share with their colleagues the key developments from their states. During the two sessions starting Sunday evening and finishing Monday AM, states reported on developments and challenges associated with facilities governance, information systems, policy, standards and funding.



Guy Bliesner, School Safety and Security Analyst, Idaho Office of School Safety and Security, reports out on Idaho's K-12 facilities.

Governance

Each state emphasized that facilities are a local responsibility, with the Virgin Islands and DoDEA as exceptions, since their "state" agencies are responsible for the operation of schools, not just state support for local district operations. Most state facilities officials are part of the Department of Education in their states, but other models for state facilities programs are well represented. Massachusetts and New Mexico reported on their independent facilities authorities. Wyoming and Ohio described their new agency structures, where what were once only school facilities agencies, now include responsibilities for all state owned building assets. Maryland and West Virginia share some similarities with their governance structure, in that the Department of Education is involved, but also another state agency, cre-

ating a sort of hybrid system for sharing decision making and operational responsibilities.

Facilities Information

Facility data and information management continues to be a responsibility that states are engaged in at varied levels. Some have developed their own data and information systems, like Washington State, while others have worked with facilities software vendors at the state level, like Arkansas. Still other states manage data, on a siloed, as needed basis, like California. States, however, are ending up with more and more data. Some states are required to maintain inventory and condition data; others end up with data sets on items of current concern, such as school security, natural disaster and recovery, and others have data just on projects they fund, while others just maintain data on dollars they allocate.

Policies

State legislatures throughout the nation were active on school facilities issues in 2019. A number of states wrestled with how to allocate state funding more equitably. This was the case in Arkansas, which recalculated its wealth index, on which it determines levels of state funding eligibility and in California, which has bond language that is attempting to make the facilities program more equitable. Laws were put into effect to respond to concerns with security and with lead in water. Maine and New Jersey strengthened requirements for lead testing in schools. Delaware is requiring new major capital improvements to include safety measures. New Hampshire introduced a requirement that any school using over \$1 million in state aid for school construction must hire an Owner's Project Manager. Maryland is exploring funding incentives for building facilities with total costs of ownership that are below traditional levels. Federal policies related to FEMA public assistance program and to the Department of Defense school construction program affect the Virgin Islands recovery after Hurricane Maria and the DoDEA school modernization program.

Standards

Alaska completed a study on developing school construction standards. Delaware strengthened safety standards with standards for secured vestibules, emergency panic buttons, double sided locks on classroom doors. Maryland adopted new gross square footage baselines that were calculated to be sufficient for delivering State-required educational programs and services. New Hampshire required schools to remediate anything over

15 ppm of lead. New Mexico is pushing through changes to statewide adequacy standards, the first changes since 2012. In North Carolina, facilities managers are working to figure out how to meet K-3 class size standards with a maximum of 16-17 students.

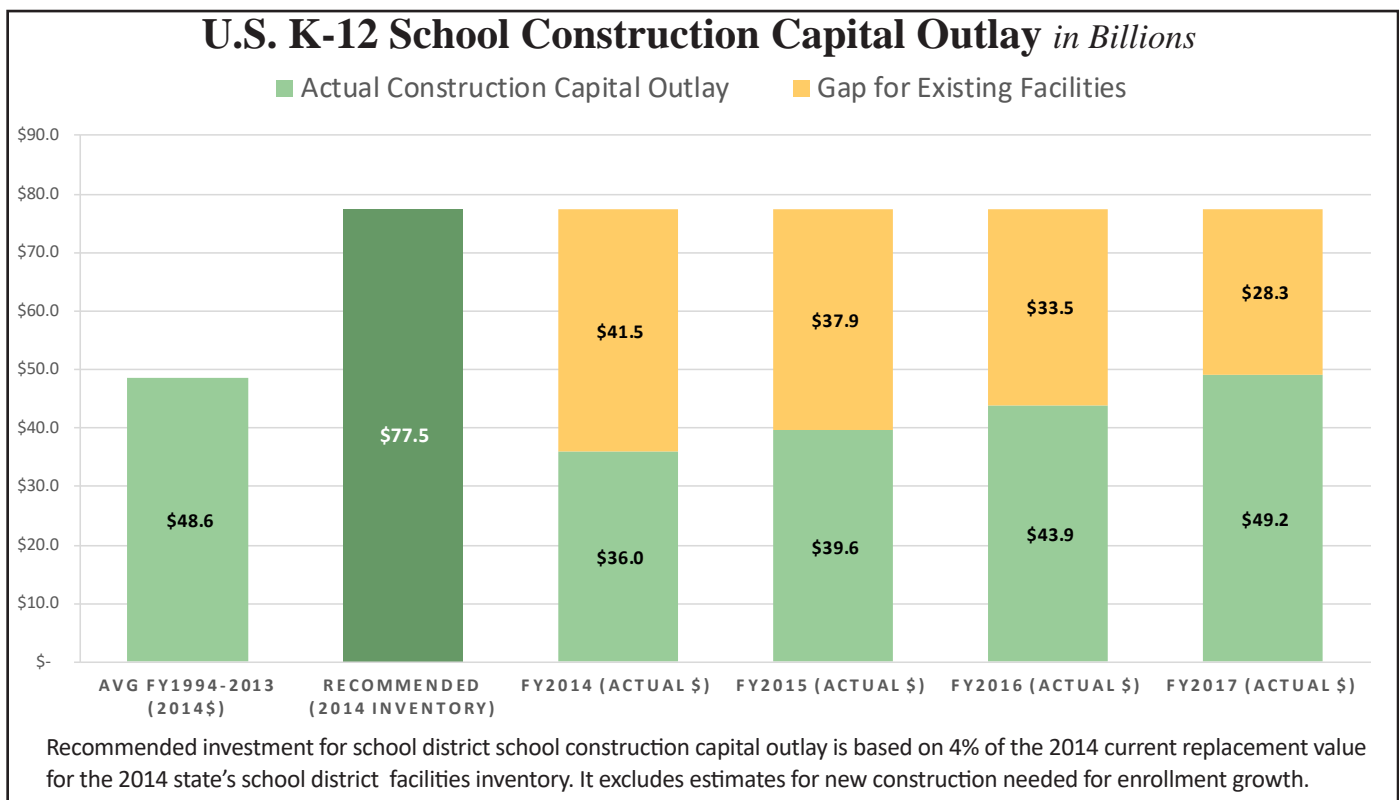
Funding

Although states have increased school construction capital outlay since the recession, as illustrated in the chart of U.S. K-12 School Construction Capital Outlay below, there is still a tremendous gap between what capital outlay is needed for school facilities improvements as recommended by good practice standards, and what is actually being spent by districts and states to modernize their school facilities.

Alaska and Wyoming which depended on natural resources—oil, gas, or coal—to fund their school construction programs, are struggling to sustain the funding levels of their historic programs. In Alaska, there is no longer state-aid for debt reimbursement. In Wyoming, they are looking at the Legislative Stabilization Reserve Account to sustain school construction funding. California has a



Working through breakfast, Dionne Wells-Hedrington, Chief Operations Officer, Virgin Islands Department of Education, discussed the tremendous challenges to modernizing a hurricane impacted school building portfolio. Pamela Loeffelman, Principal, K-12 Education Leader, DLR Group.

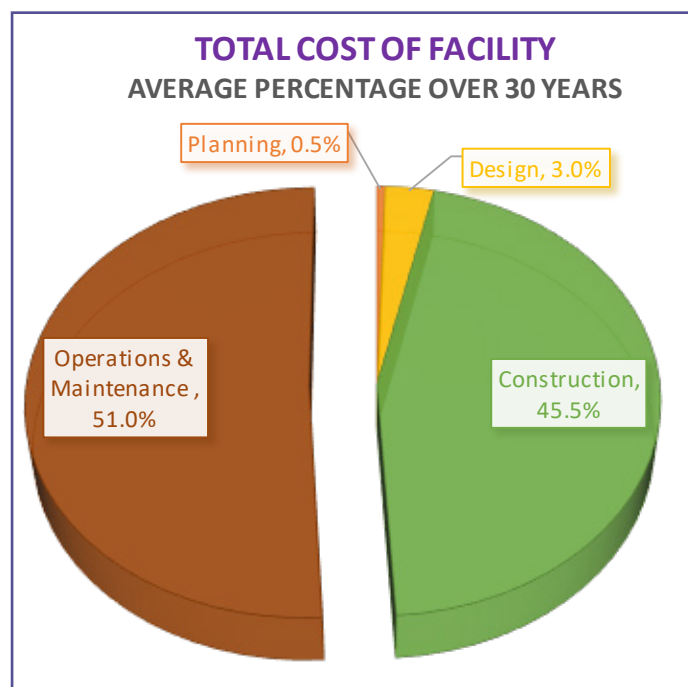


March 2020 statewide ballot for \$15 billion in school construction, with \$9 billion for PK-12 facilities. Iowa legislators passed an extension of their Local Option Sales Tax through 2050 for school facilities. While funding in Maine from the state has been stable, the increases in construction costs are leading to fewer projects. New Hampshire

finally lifted its 10-year moratorium on new school construction aid. However, the funding is still very limited. West Virginia amended funding for square footage, first change since 2013. In New Jersey, a lawsuit has been filed with NJ Supreme Court to force the state to provide additional school facilities funding.

TOTAL COST OF OWNERSHIP

Bob Gorrell, Executive Director of the Maryland Inter-agency Commission on Public School Construction presented and led a discussion on how and why managing the total cost of ownership of K-12 facilities is essential



to fiscal sustainability. Bob explained that school facilities are multigenerational and not set-and-forget assets. He introduced two guiding principles for facility stewardship: educational effectiveness and fiscal sustainability. To sustain in the long-term an understanding of the total cost of ownership of each facility over time is needed.

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Bob described the four primary phases of a facility's cycle of life: planning, design, construction, and operations and maintenance. Operations & maintenance over the 30 years during which a facility should serve its intended purposes before needing a major renovation can make up more than HALF of the total cost of ownership over those 30 years. Good planning and design are vitally important. [See presentation.](#)

STATE CONSTRUCTION STANDARDS

Tim Mearig, Facilities Manager at the Alaska Department of Education & Early Development (DEED) presented on Alaska's experience in addressing K-12 construction standards. Tim noted the motivation behind the state's research into state standards is the increase in school construction costs. Urban school construction costs in Alaska have increased by 220% in the last 20 years, but remote school construction has increased by 384%. The Alaska legislature mandated in Alaska Statute (AS) 14.11.017(d) that the Department investigate whether construction standards would enable the Department to reduce construction costs by standardizing building systems.



Tim Mearig, Alaska Department of Education & Early Development.

Tim described [key findings from this study](#). Alaska got the benefit of hearing from over 20 states on their varied experiences with school construction standards. States discussed the challenges of saving funds through standardization.

CALIFORNIA STATE FACILITIES FUNDING

Juan Mireles, Director of School Facilities and Transportation Services at the California Department of Education and Jeff Vincent, Director of Public Infrastructure Initiatives at the Center for Cities + Schools at U.C. Berkeley presented on recent work to develop equitable funding formulas.

California legislature just approved AB 48, which puts a \$15 billion school construction bond on the March ballot. Nine billion of these funds would be for PK-12 public school facilities. Director Mireles described how with



Juan Mireles, Director of School Facilities and Transportation, California Department of Education.

the 2020 bond, this would be the first time the state will use a wealth based approach to build in equity as a weighted factor for prioritizing state facilities funding for projects.

The new criteria for state allocation of facilities funds is a start at addressing the inequities that have been a part of the 1998-2017 school facilities program of California, which is illustrated in a recent report that Dr. Vincent co-authored: [Financing School Facilities in California: A Ten-Year Perspective](#).

FACILITIES LANDSCAPE AND TRENDS

The annual meeting sponsors, Cooperative Strategies, Dude Solutions, DLR Group, and Johnson Controls Inc., shared their perspectives on the current and future trends of K-12 facilities.

Some of the perspectives that came forward included:

- The impact of AI (artificial intelligence) on school building components and the way districts and states will monitor their capital investment in the future.
- The continuing importance of data systems for monitoring capital investments.
- The impact of school facilities design on student achievement and teacher retention.

FEDERAL POLICY ON SCHOOL INFRASTRUCTURE

PK-12 public schools are the second largest national infrastructure sector for capital investment. In 2016, the Council passed a resolution calling for “PK-12 public school buildings and grounds [to] be included in federal programs to address infrastructure needs.” In support of this resolution, the Council became part of the leadership team of a non-partisan coalition advocating for a federal investment in America’s public PK-12 school facilities, the [Re\[Build\] America’s School Infrastructure Coalition \(BASIC\)](#).

Following the 2019 two-day annual meeting, state facilities officials were accompanied to Capitol Hill by other members of the BASIC coalition: including, the Blue-Green Alliance, the National Association of Federally Impacted Schools, the Association of School Administrators, the School Superintendents Association, International Union of Bricklayers and Allied Craftworkers, National Association of Elementary School Principals, and also with the American Federation of Teachers, our Industry Sponsors, and NCSF staff. The state facilities leaders had a chance to talk about public school facilities to members of Congress and their staffs.

This was the third year of Capitol Hill visits and State officials have now completed nearly 200 meetings in both the House and Senate and have been able to educate elected officials about public school facility challenges across the nation. Van Heuvelen Strategies, a government relations advisory to NCSF, organized the meetings on Capitol Hill.

NCSF GOVERNANCE

The non-profit National Council on School Facilities is governed by state facilities officials. It is managed and staffed by the [21st Century School Fund](#), a long-standing research and advocacy non-profit dedicated to improving our nation’s public school infrastructure.

On December 2, 2019, President Paul Bakalis, Executive Director of the Arizona School Facilities Board, passed the gavel to 2020 President Scott Brown, Director of School Construction Programs, Maine Department of Education.

The member-states had four open positions to fill. They elected:

- 2021 President-Elect: Juan Mireles, Director of Facilities & Transportation Services, California Department of Education



Paul Bakalis, Arizona School Facilities Board, passes the NCSF President gavel and also a NCSF logo LL Bean bag to 2020 President, Scott Brown, Maine Department of Education.

- Treasurer: Tim Mearig, Facilities Manager, Alaska Department of Education & Early Development
- Western Region Representative: Brandon Finney, School Facilities Division Administrator, Wyoming State Construction Department
- At-Large Representative: Melody Will, Director of Military Construction Program, Department of Defense Education Activity

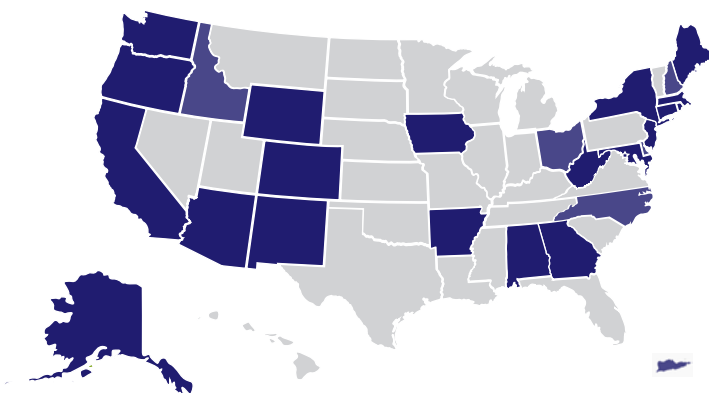
NCSF PLANS FOR 2020

In strategic-planning discussions, participants and the NCSF Board of Directors identified the following key Council priorities for 2020:

- Support the network of state officials in communication with each other.
- Expand state memberships, including states that do not fund public school construction directly.
- Participate in the research and writing of the upcoming 2020 State of Our Schools, a report on our nation's public school facilities.
- Pilot an open source facilities data structure for managing public school facility data elements.
- Actively participate in Re[Build] America's School Infrastructure Coalition (BASIC) to ensure that state voices are heard regarding the need for public school construction to be in a federal infrastructure package.



Melody Will, Department of Defense Education Activity, Bob Gorrell, Maryland Interagency Commission on School Construction, and Amy Clark, New Hampshire Department of Education collaborate on strategies to improving PK-12 facilities planning.



2019 Member States ■ Participating States ■



www.FacilitiesCouncil.org

For general inquiries and partnering/sponsorship opportunities, contact the Council at FC.Admin@facilitiescouncil.org.

JOIN THE NCSF!

State membership in the National Council is available to the 50 U.S. States, D.C., U.S. Territories, Bureau of Indian Affairs, and DoDEA. The annual state membership assessment is \$5,000, which covers the state's participation in the Council as well as the Annual Meeting.

See more on becoming a member
at www.FacilitiesCouncil.org/members