

DISTRICT-WIDE FACILITY STUDY GUIDELINES

Basic Education Circular (BEC) 24 P.S. § 7-733, "School Construction Reimbursement Criteria," explains the requirement for school building district-wide facility studies as a condition for reimbursement.

School districts must develop a complete building facility study of all district educational facilities including the district administration office. The study must be completed prior to, and within two years of, the Department's receipt of the PlanCon Part A "Project Justification" submission. The study must provide an appraisal as to each facility's ability to meet current and planned educational program requirements, the degree to which the present facilities meet reasonably current construction standards, and an estimated cost of necessary repairs and improvements. Facility studies must contain documentation regarding the authors' credentials for producing the document.

The Department no longer requires the entire facility study to be submitted. In lieu of the study, Page A23, District-Wide Facility Study Certification, must be submitted. The Department of Education, however, reserves the right to request a copy of the entire district-wide facility study. Completion of a district-wide facility study is a prerequisite to submission of Part A. A PlanCon project must be one of the options evaluated and considered in the study.

Before the Commonwealth will consider a building project for reimbursement, school districts must demonstrate that they have evaluated all of their facilities. The purpose of the district-wide facility study is to develop a plan for addressing the **entire** school district's facility needs. The study must consider how well each building lends itself to the school district's current and planned educational program, both in terms of the building's **design** (e.g., arrangement, number, layout and size of various spaces relative to current and projected enrollment) and **structure** (e.g., soundness, compliance with codes, access, environmental conditions). When the study indicates some inadequacy or deficiency, it must provide an estimate of the cost to correct the problem.

It is important to remember that PlanCon is designed as an administrative tool with the primary purpose of documenting planning and determining subsidy. It contains assumptions that may not apply to a particular school district. PlanCon, for instance, computes full time equivalent elementary capacity based on the assumption of 25 students per room. Secondary capacity presumes a 90 percent utilization rate. Capacity for special education rooms is calculated only for reimbursement purposes. It is important that facility studies provide a clear explanation of methodologies used to determine such things as capacity and enrollment.

District-wide facility studies must contain all of the following elements and include answers to all of the questions asked:

1. An overview of the school district that considers such factors as geography, population, wealth. The overview must include:
 - a. population and wealth statistics
 - b. a map showing the general location of the school district in the state or geographic region
 - c. a map of the school district showing the general location of all existing buildings and owned sites in the school district
 - d. information on any distinguishing characteristics, such as geographically separate population centers, that will have an impact on facilities.

2. An overview of the school district's educational program. The overview must address for all grades (K-12):
 - a. instructional practices or planned curriculums by grade structure (elementary, middle, secondary, etc.)
 - b. special facility needs, if applicable, needed to support planned curriculums.
3. An analysis of projected enrollment. The analysis must include:
 - a. the likely enrollment for each grade structure ten years into the future
 - b. a discussion of the reliability of the enrollment projections.
4. An analysis of each building's capacity as it relates to the educational program. The analysis must address:
 - a. how many students a building can house
 - b. the types of educational spaces required by the educational program described above
 - c. grade alignments
 - d. length of the school day and number of classes per day, if applicable
 - e. size of particular rooms and adequacy of those rooms, if applicable.
5. An analysis of each building's condition. The analysis must address:
 - a. the building's physical condition
 - b. the projected useful life of each building's major components (electrical, HVAC, plumbing, etc.)
 - c. code violations
 - d. universal accessibility
 - e. Energy Portfolio Surveys
 - f. the cost to upgrade each building to current standards.
6. An analysis of construction options. The analysis must address:
 - a. the alternatives available to the school district based on the above analysis
 - b. cost estimates for each alternative
 - c. the pros and cons for each alternative
 - d. a summary page depicting options and costs.
 - e. Energy Portfolio Surveys
7. Documentation regarding the authors' credentials. This section must include the education, registration or licensure and experience for each author.

Energy Portfolio Surveys:

Within the District-Wide Facility Study, Energy Portfolio Surveys must be included for each existing building and for each construction option that is being considered. The specific requirements for these Surveys are as follows:

1. Surveys for each Existing Building:

This Survey entails facility benchmarking, using the EPA/DOE Portfolio Manager Tool, identifying the annual site and source energy and annual water consumption.

Portfolio Manager is an interactive energy management tool that helps track and assess a building's energy and water consumption. Portfolio Manager requires the input of existing utility bills and basic facility data.

Accessing Portfolio Manager:

Portfolio Manager is a no-cost online tool that can be accessed at <http://www.energystar.gov/schools>. Under "Quick Finder," select "Portfolio Manager Login." Follow steps to register as a new user. When entering information in the "Facility Name" field, use the following standard naming format: School District Name, School Name, Administrative Unit Number (AUN). For example: Harrisburg City SD Harrisburg HS 115222752.

To allow the PDE Administrator to view data, follow the steps in the "Share Facilities" feature. In Step 1, in the field labeled "Select a Portfolio Manager Master Account," select "PDE School Facilities - PDEPLANCON" from the dropdown list. On the next screen, select the access role of "Read Only." Under "Optional Rights," retain all defaults at "No."

Portfolio Manager Training Recommendations:

Under "Quick Finder," select "Training." On the next screen, select "pre-recorded trainings." From the Topic list (Page 2), select "K-12 Benchmarking 101."

The Benchmarking Starter Kit, designed to assist users to get started quickly, can be accessed from the Home Page. Under "What You Can Do," click on "Portfolio Manager" to access the "Benchmarking Starter Kit."

2. Surveys for each Construction Option (ie: for each New Building, Building Alteration, and/or Building Additions/Alterations)

This Survey entails providing a predictive utility budget, using the EPA/DOE Target Finder tool, identifying the annual site and source energy and annual water consumption.

Target Finder helps establish an energy performance target for new design projects and major building renovations.

Accessing Target Finder:

Target Finder is a no-cost online tool, that can be accessed at <http://www.energystar.gov/schools>. A login process is not required to access Target Finder. Under "Quick Finder," select "Target Finder." Click on the green box, "ENTER TARGET FINDER."

Reports generated in Target Finder are not stored in Target Finder. They must be printed or stored electronically.

Note: Career and Technology Centers/Area Vocational Technical Schools must use the "Other" category when defining "Space Type" within Portfolio Manager and Target Finder.