

The State of Montana K-12 Public Schools Facility Condition Assessment in Brief
prepared for the School Funding Interim Commission, December 2015,
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This brief is intended to provide a high-level overview/introduction to the K-12 Public Schools Facility Condition Assessment that was conducted as a multi-phase project from 2006 through 2008 and administered by the Architecture & Engineering Division (A&E) of the Department of Administration. The assessment was conducted as a result of a \$2.5 million legislative appropriation in [House Bill 1](#) of the Special Session of December 2005, and a 59-page [final report executive summary](#) was published July 1, 2008. The entire report and associated data reports exceed 30,000 pages.

A&E contracted with Omaha-headquartered architectural design firm DLR Group to manage and execute the assessment. DLR utilized the Facility Condition Inventory (FCI) system developed by Montana State University as the database tool for the assessment and contracted with Montana architectural and engineering consultants so that subsequent updates to the assessment could be made with local resources and support. The state was divided into three regions and multiple teams of inspectors (usually an architectural consultant and engineer) trained to consistently assess and record the condition of school facilities made site visits in a 12-week window between Jan. 14 and April 4, 2008, to provide a “snapshot in time”.

The site visit inspections focused on four areas:

1. Facility Condition
2. Energy Use
3. Educational Characteristics
4. Technology Infrastructure

<u>The assessment by the numbers:</u>	
Field inspectors	42
Buildings assessed	2,200
Square footage assessed	31 million
Hours spent assessing	15,000
Cost to address deficiencies (est.)	\$360 million

The facility condition inspections identified deficiencies, calculated “cost allowances” to remediate these deficiencies, and further calculated “deficiency ratios” as the cost allowances divided by the estimated cost of replacing the entire building.

$$\text{Deficiency Ratio} = \frac{\text{estimated cost of repairs}}{\text{estimated replacement cost}}$$

Low deficiency ratios (<10%) indicate good overall condition and as ratios increase, condition worsens. Buildings with ratios exceeding 50% warrant consideration of replacement rather than repair. Inspection reports that include cost allowances and deficiency ratios for every building inspected are available here: www.mtk12facilitysurveys2008.com. Statewide cost allowances totaled \$360 million.

The executive summary includes the following in its recommendations section:

- Each district should have in place a long-range capital improvement program that identifies facility goals and outlines procedures and guidelines to be followed to approach and accomplish those goals.
- It is highly recommended that districts continue to update this baseline data by performing FCI observations on a 2-4 year recurring basis to achieve maximum benefit from this powerful and worthwhile tool in the overall management of their facility maintenance operations and long-range planning. [MSU can provide training and support in using FCI system.]
- Prioritization of facility improvements goals should clearly realize the relationship between facilities utilization and operational program objectives.
- A comprehensive cost estimate should be developed for each and every proposed project to ensure accuracy of budget requests and the ultimate ability to complete the improvements intended without additional or supplemental funds.