



MONTANA LEGISLATIVE BRANCH

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Legislative Fiscal Analyst
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DATE: Thursday, May 22, 2008

TO: Legislative Finance Committee (LFC)

FROM: Cathy Duncan, Senior Fiscal Analyst, Legislative Fiscal Division

RE: K-12 Facility Condition and Needs Assessment and Energy Audit – Phase II

The following report presents an update of the progress in the K-12 Facility Condition and Needs Assessment and Energy Audit, Phase II. There will not be a presentation of this information at the Legislative Finance Committee (LFC) meeting of June 5th and 6th. If you have questions concerning this report, please contact me at (406) 444-4580.

Background

During the December 2005 Special Session, the legislature passed HB 1, requiring Legislative Finance Committee (LFC) participation in the design of a K-12 condition and needs assessment and energy audit. The bill also contained a deadline of “on or before July 1, 2008” for the assessment report. The first phase of the assessment, completed in FY 2007, provided the data to develop the parameters of the study. In September, 2007, staff from the Department of Administration, Division of Architecture and Engineering (A&E), presented a proposal to the LFC on the scope of phase II of the facility condition and needs assessment. The committee approved the proposal and requested that A&E return to the committee with the results of phase II.

Progress

Phase II of the K-12 Facility Condition and Needs Assessment and Energy Audit will be completed and the resulting summary report will be available to the public by July 1, 2008. However, the report will not be available by the June meeting of the LFC. Upon completion, LFD staff will distribute the executive summary to the members of LFC. Additionally, with the agreement of the committee, the staff of A&E will be available to present the results at the October, 2008 LFC meeting. Eventually, the executive summary and the individual school assessments will be posted to the A&E Division website. When the web address is known, staff will inform members of the LFC.

The proposal for the assessment, as approved in September, was designed with three main components. A fourth component, technology assessment, was added to the total assessment regime before the assessments began. The components, as seen in the September report, are listed below with a brief description of the component and a statement of the progress. In summary, the inventory and assessment is complete, and the final report is now in drafting.

The development of an assessment tool

- o A facility condition assessment tool will be developed, following the Montana University System (MUS) FCI model. The tool will be used to gather and analyze the data needed for this assessment. The functionality will be developed to allow the tool to be used in future assessments and in an ongoing process
- o Progress: The facility condition assessment tool has been developed. At this time, a process is being developed to train individuals to populate the data base and assess the information. The training for these tasks will insure ongoing support for the tool and continued functionality

A point-in-time facility condition assessment

- o Facility inspections will consist of the assessment of facility conditions and deficiencies and full documentation of facility functions (academic, athletic, administrative, physical plant, non-school, community, etc.), attributes (bus drop off, occupancy sensors, type of light fixtures, fire alarms and protection systems, site security, dual-circuit lighting, etc), and uses (music, computer lab, etc.)
- o Progress: The condition assessment of all the K-12 facilities has been completed. Documentation for the resulting inventory details both the attributes and deficiencies for each of the facilities. The condition assessment resulted in more than 20,000 pages of facility condition documentation. The information will be reported in an executive summary that will condense the information to provide the typical attributes and deficiencies found in the schools. The report, along with the more detailed results, will be available through the A&E Division, for those interested
- o Progress: During the condition assessments, there were occasions when serious life/safety and building integrity problems were discovered. In such cases, a safety protocol was developed. When serious hazards were discovered, the inspectors immediately informed the facility managers. In all cases, the facility managers at those schools implemented corrective actions before the inspectors finalized the assessment

An energy use assessment

- o The consultant will analyze a minimum of two years of utility history, and/or other industry-recognized methodology, to create energy benchmarks for the facilities, detect consumption trends, and identify those facilities that exhibit excessive energy consumption. For facilities that benchmark poorly, a higher level audit will be recommended. More detailed energy audits will not be conducted as part of this project
- o Progress: The energy use assessment is complete. Energy use at school facilities was assessed using two different but interrelated energy audit procedures, meant to provide meaningful information for immediate action, as well as to identify facilities that exhibit abnormally high energy usage for further study and determination. To discover specific energy improvements that directly address reductions in energy consumption, the site assessments included an “observable systems survey”, which served to visually identify possible energy saving repairs and upgrades. To identify facilities that exhibit excessive energy consumption, but which may not have an obvious observable deficiency, the consultant has been working with utility companies to provide two years of utility history to show the representative range of energy consumption on a per square foot basis. The report will recommend targeting those facilities exhibiting energy consumption at the

high range of the historical data. Those detailed audits will not be conducted as a part of this project

New: Technology availability assessment

- o In the course of the facility condition assessments, an inventory of information systems will be documented. Information on phone systems, cable availability, and internet access will be documented
- o Progress: The technology availability assessment is complete. The inventory will aid in the future planning for technology development in the schools

In summary, the K-12 facility condition and needs assessment and energy audit is complete and the summary report will be completed by July 1, 2008. Staff will distribute the executive summary to the members of the LFC as soon as they are completed. The A&E Division, by request, will be able to supply the greater detail compiled through the study by school. In the near future, the full report will be available on the A&E Division website, and staff will inform the committee members of the web address as soon as is possible. To hear a report of the final results of the assessment, members of the LFC might request that the staff of A&E present the final report at the October meeting.