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SB 1124 - Board of Education Recommendations on Establishing Standards for School Facilities Pursuant to SB 1124

Introduction

The 2023 General Assembly passed SB 1124 requiring the Board of Education to make recommendations to the General Assembly for amendments to the Standards of Quality establishing standards for the maintenance and operations, renovation, and new construction of public elementary and secondary school buildings. This legislation also requires the inclusion of standards for the percentage of the current replacement value of a public school building that a school board should budget for the maintenance and operations of the building as well as other standards as the Board deems appropriate. To develop these recommendations, the Board was required to solicit the input of relevant stakeholders including the public. The Board's final recommendations are to be submitted to the Chairmen of the House Committee on Education and the Senate Committee on Education and Health no later than July 1, 2024.

Stakeholder Workgroup Process

To seek input from relevant stakeholders, Department of Education staff established a formal workgroup comprised of various stakeholders. Department staff on the workgroup included the Chief of Staff, Deputy Superintendent of Operations, Assistant Superintendent of Policy and Government Relations, and the Director of Support Services.

External stakeholder members of the workgroup included representatives from the following organizations:

- Office of the Secretary of Education
- Virginia School Plant Managers Association
- Virginia School Boards Association
- Virginia Association of Counties
- Virginia Municipal League
- Virginia Association of School Business Officials
- Virginia Association of Elementary School Principals
- Virginia Association of Secondary School Principals
- Virginia Association of School Superintendents
- Association for Learning Environments
- National Council on School Facilities
- Virginia PTA
- Department of General Services
- American Institute of Architects - Virginia Chapter

The workgroup meetings were led by the Chief of Staff and the Deputy Superintendent of Operations. The dates and topics of the workgroup meetings were as follows:

- October 4, 2023 - Organizational Meeting: welcome/introductions, purpose, overview of topics for future meetings, discussion of current school facilities issues, proposed schedule of workgroup meetings and activities.
- November 8, 2023 - Standards for Building Planning and Design: overview of topics related to standards for school facilities planning and design, workgroup discussion and feedback, other topics or areas for consideration from workgroup.
- December 13, 2023 - Standards for Construction/Renovation: overview of current VDOE Guidelines for School Facilities, other factors to consider (Mary Filardo, Coordinator, National Council on School Facilities), workgroup discussion and feedback.
- January 3, 2024 - Standards for Post-Construction Operations and Maintenance: VDOE staff overview, percentage of Current Replacement Value for budgeting, presentation on CRV scenarios and standards using Virginia data sources, workgroup feedback and discussion.
- February 14, 2024 - Discuss and Draft Recommendations: overview of key priorities, themes, and focus areas for recommendations to Board of Education in April, format of recommendations document, standards content applicable to all divisions (planning/design, construction phase, operations and maintenance).
- March 13, 2024 - Finalize Workgroup Input for Recommendations for Consideration by Board of Education in April.

The SB 1124 workgroup provides the following recommendations related to school facilities standards as outlined in the remaining sections of this report.

School Facilities Maintenance and Operations Standards

School facilities maintenance and operations standards should reflect the vision and mission of the school board and locality for their schools by establishing industry level acceptable plans for maintenance and housekeeping of school facilities that will extend facility lifespans, result in increased efficiency, reduction in energy usage/cost, and improved overall health and safety and quality of learning space environments.

Specific school facilities maintenance and operations standards recommendations include:

1. Local school boards will develop a School Facilities Maintenance Plan that provides a detailed strategy for proactively maintaining school facilities.
2. Local school boards will prepare an annual budget to support their established School Facilities Maintenance Plan. When establishing this budget, it is recommended that school boards develop Key Performance Indicators (KPIs) that help identify areas of savings/efficiencies relative to resource levels and that help support positive impacts on student outcomes and wellbeing. Such KPIs may include custodial workload (district wide as well as by site), work order completion time and rate, supply costs, and worker turn-over ratios as well as time to fill-in-vacancies. Local school boards will include local stakeholders in developing the School Facilities Maintenance Plan to be reviewed and updated annually.

3. In alignment with *Code of Virginia § 22.1-138.1. School Maintenance Program Established*, school boards will evaluate existing facilities through facility audits and regular inspections using a Building Conditions and Maintenance Checklist that includes the physical structure, building systems, playgrounds, and athletic facilities. These inspections may include quarterly visual inspections and an annual detailed inspection using the Building Conditions and Maintenance Checklist or scheduled based on industry best practices or the local School Facilities Maintenance Plan.
4. School divisions will establish standard cleaning protocols and will implement maintenance, repair, and service plans to include the scheduling of routine maintenance, keeping maintenance equipment and spare parts inventory up to date, and develop a program for ongoing school maintenance needs.
5. It is recommended that school divisions provide regular training opportunities to ensure that their facilities, operations, maintenance, and housekeeping personnel are knowledgeable of and can apply the latest industry standards and best practices associated with their areas of responsibility.
6. Local school boards will calculate the Cost Replacement Value (CRV) and a Facility Condition Index (FCI) for all school facilities on a rotating schedule, not to exceed three years per facility, or more frequently in the event of a major physical or structural change to a facility. This replacement cost is defined as actual cost of replacing the facilities (not the cost of original construction) and total expenditure to meet current acceptable standards of construction, facility regulatory requirements, and changing needs of instructional activities housed within the building (current and emerging instructional programming and approaches).

CRV = *(Gross square footage of existing building) X (Estimated Cost per square foot to design and build a new school of comparable size)*

Additionally, the Facility Condition Index (FCI) is used to provide a benchmark to compare the relative condition of a group of facilities and to support asset management initiatives.

FCI = *Cost to Correct Deficiencies / Current Facility Replacement Value (CRV)*
7. Local school boards will seek to enter into cost or service sharing agreements and cooperative procurement arrangements with their locality or with other school divisions or localities for school facilities-related operations and maintenance purchases or provision of services.

School Facilities Renovations Standards

School facilities standards should include expectations for key facilities planning processes such as master planning, capital projects planning, individual project planning, maintenance and operations planning, and emergency preparedness planning. The planning process should consider current and future student enrollment trends affecting the need for new and renovated facilities and possible future school consolidations. Changes in educational best practices and learning that impact the design of educational spaces should be considered in the early planning and design process. Public school facilities should be designed and built to

support these best practices. The design of public schools shall maximize shared community use of the school property and buildings.

It is recommended school facilities renovation be defined in two categories: major and minor. Major renovation projects involve structural changes to the foundation, roof, floor, exterior or load-bearing walls of an existing facility, envelope improvements including complete replacement of windows and doors, upgrades to building systems including HVAC and plumbing. The definition extends to building wide interior upgrades and extensive alteration of the facility to achieve a modernized facility and to extend the life of the building for at least 20 years. Minor school facilities renovations would be improvements to the interior or exterior of an existing facility to include replacing broken individual doors or windows, upgrade of interior walls and floor finishes, small bathroom updates and minor interior non-structural improvements such as adding new entry vestibules, small media center, cafeteria or theater alterations, and ADA bathroom, ramps, and handrails upgrades.

Specific school facilities renovations standards recommendations include:

1. School divisions planning a capital project, irrespective of funding source, shall establish a Local Building Committee that may be used to assist the school division with large-scale or complex projects or those with significant community impact as deemed necessary by the local school board. This Local Building Committee may be comprised of, but not limited to, an architect, planner, parent representatives, project management personnel, local stakeholders (including local government representatives), business representatives, and others. This Committee will support the school division in the implementation of the project by participating in the process of designing, bidding, evaluation of proposals for Design Build, bidder prequalification, or other project delivery methods such as Public Private Partnership (PPP) and Construction Management At-Risk (CM At-Risk).
2. As part of the master, capital, and project planning, finance and budget planning processes will consider budgeting for long-term capital projects, financing, and project delivery methods, building longevity, all-in cost of school facilities, and the indebtedness level of the associated locality. School divisions should aim to provide high-performance buildings as a valued community asset by minimizing negative impacts of all renovation and new construction projects, including limiting harm to the site and surrounding area, including soil, water resources, air quality, and noise.
3. Quality school design will reflect the needs of a community for a quality educational program in modern facilities and provide a safe and secure environment for all users that supports overall student and staff success and well-being. Site factors such as local zoning, physical hazards, ease of access, proximity to student populations, roadways, and public utilities, and adequate acreage should be considered. Consideration shall also be given to possible future expansion requirements or school consolidations based on current and future student enrollment trends.

4. The VDOE [Guidelines for School Facilities in Virginia's Public Schools](#) shall be used as the operational minimum design and maintenance standard, with flexibility for school divisions' educational and space requirements such as class size standards and local instructional initiatives. Key features in the design include a healthy indoor school environment with adequate ventilation, air quality, lighting, space per student, and absence of hazardous materials, as well as prioritizing building security through intentional building design approaches. It will also provide for instructional and support space to include technology, media center, school counseling, health clinic, teacher workroom/lounge spaces, and lab spaces.
5. Building plans shall comply with applicable *Code of Virginia* requirements for public school building design and maintenance including all local, state, and federal building codes, regulations, and guidelines. Designs should seek to meet or exceed industry standards for high efficiency buildings, and applicable industry standards including Leadership in Energy and Environmental Design (LEED), American Society of Heating, Refrigerating, and Air- Conditioning Engineers (ASHRAE), and EPA's ENERGY STAR program.
6. Local school boards will seek to enter into cost or service sharing agreements and cooperative procurement arrangements with their locality or with other school divisions or localities for school facilities-related renovation purchases or provision of services.

New School Facilities Construction Standards

New school facilities construction standards will include considerations for use of new and sustainable materials and construction practices that promote health, energy-efficiency, and environmentally friendly schools that have a positive impact on student learning, teacher and staff well-being, and the community resulting in reduced emissions and lowered operating costs. This will create healthier indoor environments, improve student attendance rates, and facilitate higher productivity.

It is recommended that local school boards develop a master school facilities plan that reflects the long-term goals of the school board and that considers current and future student enrollment trends at the school and division levels, including school consolidation opportunities. The goals of the master plan should be used to develop a Capital Improvement Plan (CIP) for the school division.

School facilities should be designed and built in a manner that supports educational best practices. Desired learning approaches should impact the design of educational spaces and should be considered in the early planning and design process with the goal of creating safe and secure, flexible, efficient, multi-purpose learning spaces. The design and construction of school facilities should also facilitate and enhance shared community use of the school property.

It is recommended that new school construction be defined as a new school facility, including replacement of an existing facility or an additional school on an existing site. Renovations/alterations to an existing building layout that results in the net increase of the

square footage of the existing facility would also be included in the category of new construction.

Specific new school facilities construction standards recommendations include:

1. The scope of a construction project may include new construction and replacement construction. All applicable codes, regulations, and guidelines and industry best practices are to be followed.
2. It is recommended that a construction monitoring team be set up to develop a construction schedule and to ensure project supervision including on-site administrative supervision by a qualified construction representative to protect the interest of the school board, the local governing body, and the community during construction.
3. Health and safety concerns to be addressed during construction will include protection of construction workers and building occupants from pollutants and excessive noise and preventing the accumulation of potential pollutants and hazardous materials on the site. Health and safety plans will follow the Occupational Safety and Health Administration's (OSHA) guidelines, and include education and training of workers, promote waste prevention, and proper handling of hazardous and non-hazardous materials.
4. Building integration steps will maintain the transparency necessary to keep community stakeholders updated on construction progress, and coordinate site issues with the locality. Construction phases should be phased to prevent indoor air quality issues and protect mechanical systems to ensure good indoor air quality after completion of the construction phase.
5. A commissioning process should be considered to ensure equipment, systems, and controls providing light, heat, cooling, and ventilation are effectively working together in conformance with the design intent. Local school boards shall evaluate the costs and benefits associated with commissioning their project upon completion.
6. Permanent project documentation including As-Build final drawings, equipment manuals and warranties, and other documents shall be provided to the school division at this stage for retention.
7. Local school boards will seek to enter into cost or service sharing agreements and cooperative procurement arrangements with their locality or other school divisions or localities for new school facilities-related construction purchases or provision of services.

Conclusion

These school facilities standards recommendations will assist school divisions in developing local best practices for the operation and maintenance, planning and design, and construction and renovation of their school buildings, with the goal to provide cost effective, healthy, safe, and secure learning environments that support quality instructional delivery and student services. An additional goal of these standards recommendations is to maximize the impact of local and state funding investments in local school facilities and to maximize facility longevity. As required in the SB 1124 legislation, the workgroup recommends as a best practice the

inclusion of a percentage of the current cost replacement value of school facilities as an aspirational funding goal that may be included in the annual school board budget process as local fiscal conditions and resource availability allow.

As an additional consideration, the stakeholder group recommends that any school facilities standards ultimately codified in the Standards of Quality within the Code of Virginia be operationalized in more detail within the [Guidelines for School Facilities in Virginia's Public Schools](#) to facilitate local implementation of the standards. This would require longer-term development and decision-making by the Department and the Board of Education.

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