



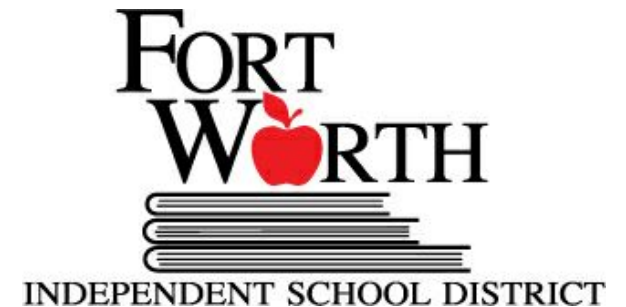
Straight to the Classroom

2007 Capital Improvement Program Scope to Budget Validation

Recommendations Based on the Information provided in the Magellan K12 Needs Assessment

Fort Worth Independent School District

July 24, 2007



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Understanding the mission of the Program and the message to the Community



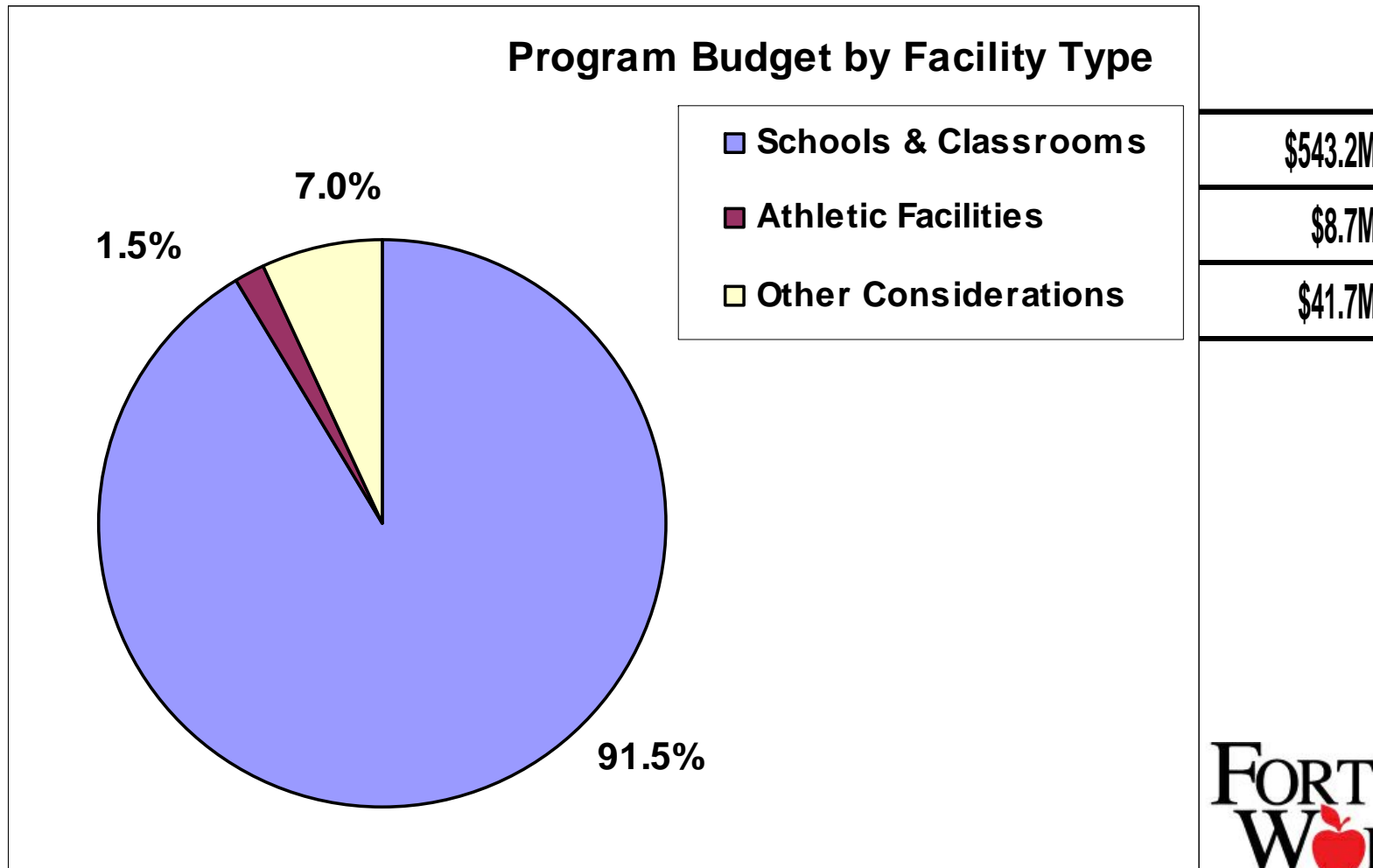
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Scope and Budget Validation Process:

1. Analyze findings & recommendations of the Needs Assessment
2. Define parameters for scope-to-budget validation
 - Program Duration & Budget Range
3. Identify trends and define program areas
 - Potential projects, Delivery & Procurement Strategy
4. Determine scope by building/projects & by priority/timelines
 - Program Definition and Scope Validation
5. Reconcile needs with budget and scope
6. Recommend Best Value
Scope-to-Budget

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Budget Distribution - *By Facility Type*



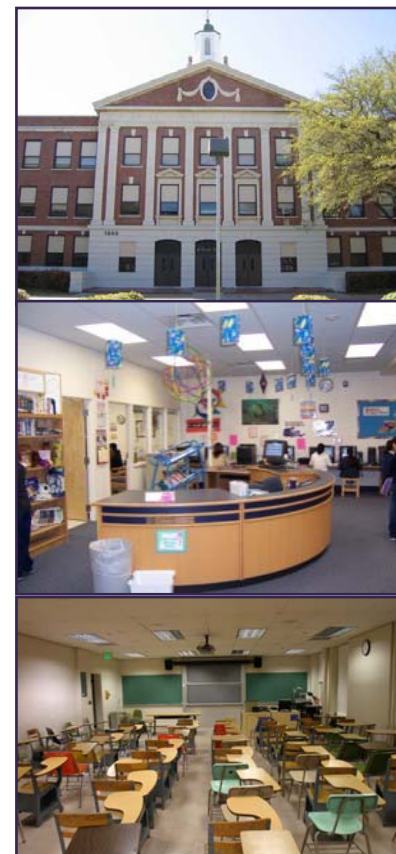
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Scope to Budget Recommendations - *By Project Type*

School Classrooms & Buildings - \$543.2M

(91.5% of total program budget)

- **District wide Renovation of Existing Classrooms & School Buildings- \$370.3M (62.4%)**
 - All FWISD Schools will be renovated to provide equal opportunity to learn
- **New Classrooms for Overcrowded Schools - \$33.1M (5.6%)**
 - 122 new Classrooms to be added to 8 existing schools
 - All Additions recommended in the Assessment
 - Reduce dependence on temporary facilities
- **New Schools for New Growth - \$139.8M (23.6%)**
 - 221 new Classrooms to be built in 6 new school sites
 - Two new Middle and Four new Elementary Schools
 - All new construction recommended in the Needs Assessment
(except for Washington Heights renovation in lieu of replacement)



INDEPENDENT SCHOOL DISTRICT

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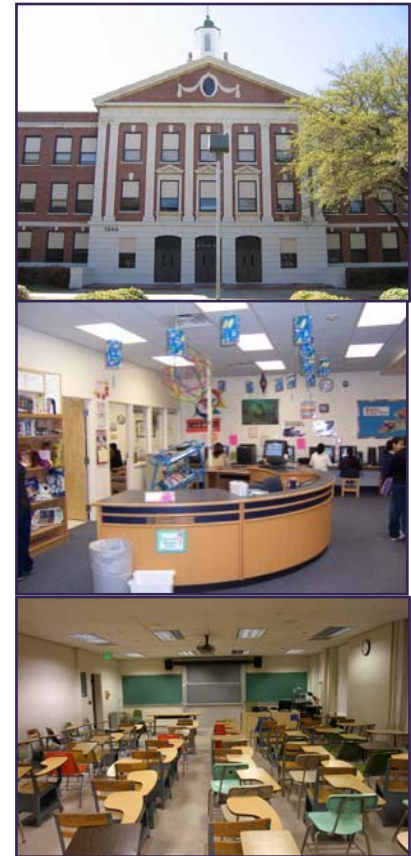
Scope to Budget Recommendations - *By Project Type*

- **FWISD Athletic Facility Upgrade - \$8.7M**
(1.5% of total program budget)
 - **Renovation of Existing Athletic Facilities**
 - Improve Athletic Facilities for enhanced community access and recreation

- **FWISD Technology & Efficiency – \$41.7M**
(7.0% of total program budget)
 - As recommended in the Needs Assessment
 - Restructuring M&O Debt
 - Buses, Vehicles, Technology and Extracurricular Uniforms/Instrument Refresh

Total Recommended Budget = \$593.6M

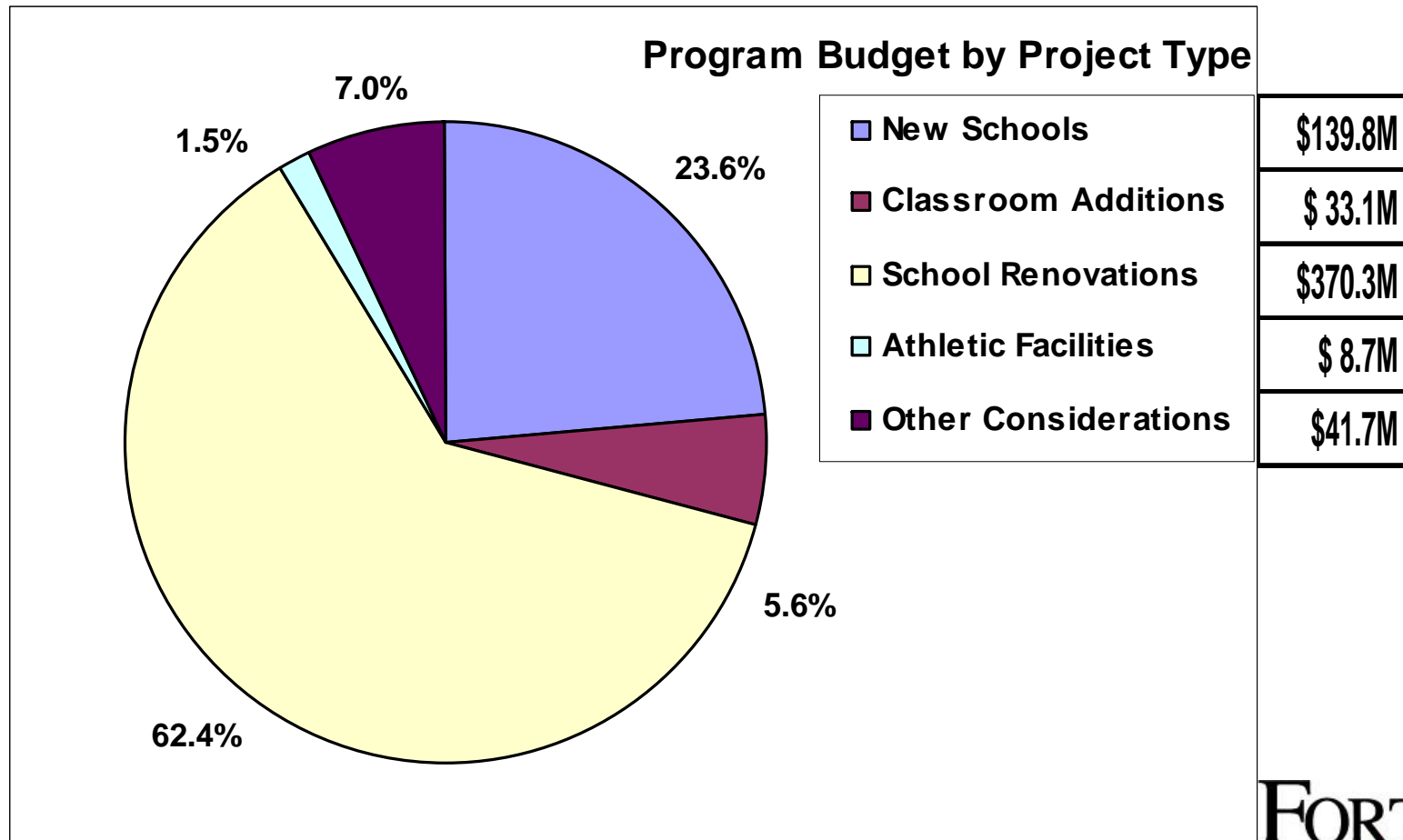
Over 90% of the budget is allocated to school and classroom instructional environments in support of academic excellence for all FWISD students



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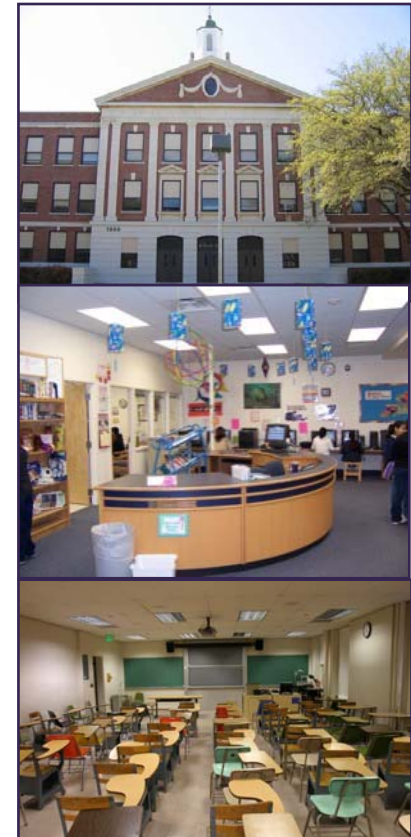
Budget Distribution - *By Project Type*



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Scope to Budget Recommendations – *By Work Type*

- **Priority 1: Safety and Security of Students & Teachers**
 - **Evaluation: Urgent Needs**
 - Directly affect the school's ability to fulfill its mission
 - **Time Line: Year 1 of the Program**
 - **Budget Recommendation: \$36.7M (6.2% of program budget)**
 - **Work Categories:**
 - Fire Sprinkler Installation
 - Technology Repair and Replacement
 - Fire/Security Alarm Repair and Replacement
 - Emergency Lighting Repair and Replacement
 - **Scope Recommendation:**
 - Include all Priority 1 Needs identified in the Needs Assessment



Student & Teacher Safety is priority ONE

Scope to Budget Recommendations - *By Work Type*

- **Priority 2: Renovate Critical Building Systems**
 - **Evaluation: Immediate Needs**
 - Indirect Impact to the school's mission
 - **Time Line: Year 2 of the Program**
 - **Budget Recommendation: \$75M (12.6% of program budget)**
 - **Work Categories:**
 - Mechanical Repairs (Air Conditioning)
 - Roof Repairs (Re-roofing)
 - Electrical Repairs
 - Exterior Door and Window Replacement
 - **Scope Recommendation:**
 - Include all Priority 2 Needs identified in the Needs Assessment



Operational Efficiency through state-of-the-art systems

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Scope to Budget Recommendations – *By Work Type*

- **Priority 3A: Improve Existing Classrooms and Learning Environments across the FWISD**
 - **Evaluation: Short Term Needs**
 - **Time Line: Year 2 – 3 and 4 of the Program**
 - **Budget Recommendation: \$117.9M (19.9% of program budget)**
 - **Work Categories:**
 - Classroom Technology
 - ADA Compliance
 - Interior Repair and Remodeling
 - **Scope Recommendation**
 - Include all Priority 3 Needs identified in the Needs Assessment

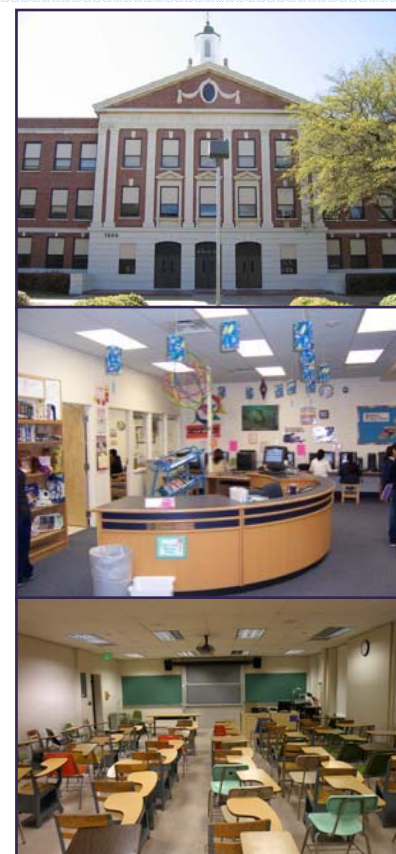
Improving Instructional Technology is a key element of the Program



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Scope to Budget Recommendations – *By Work Type*

- **Priority 3B: Build New Sustainable Schools and Classroom Additions**
 - **Evaluation: Short Term Needs**
 - **Time Line: Year 2 - 3 and 4 of the Program**
 - **Budget Recommendation: \$172.9M (29.1% of program budget)**
 - **Work Categories:**
 - 343 New Classrooms
 - 6 new schools
 - New additions to 8 existing campuses
 - **Scope Recommendation**
 - **Include all new construction recommended in the Needs Assessment**
(exception - Renovate Washington Heights in lieu of replace)



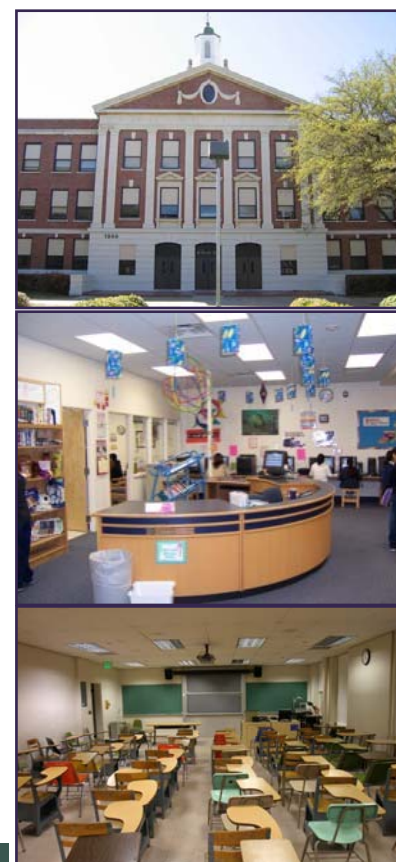
One of the program goals is to bring sustainability practices into existing buildings. In addition, all new buildings will be LEED certified.

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Scope to Budget Recommendations – *By Work Type*

- **Priority 4: Ensuring Equity in Classroom Improvements Throughout FWISD**
 - **Evaluation: Mid Term Needs**
 - **Time Line: Year 3 and 4 of the Program**
 - **Budget Recommendation: \$70.3M (11.8% of program budget)**
 - **Work Categories:**
 - Interior Finishes and Lighting Repairs
 - Site Repairs and Upgrades
 - Classroom Instructional Aids Upgrades
 - **Scope Recommendation**
 - Include all Priority 4 Needs recommended in the Needs Assessment

62% of FWISD Schools are over 50 years old...
Improvements to these older schools district wide is a
high priority



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Scope to Budget Recommendations – *By Work Type*

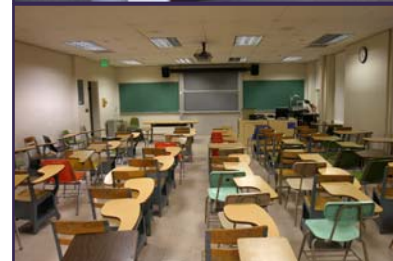
- **Priority 5A: Classroom and School Enhancements Directly Related to the Program Goals**
 - **Evaluation: Long Term Needs**
 - **Time Line: Year 4 of the Program**
 - **Budget Recommendation: \$60.1M (10.1% of program budget)**
 - **Work Categories:**
 - **Electrical Upgrades**
 - **Drop Offs and Covered Walkways**
 - **Playground Repairs**
 - **Security and Surveillance Upgrade to Existing Facilities**
 - **Scope Recommendation**
 - **Incorporate Selective Priority 5 Needs recommended in the Needs Assessment to supplement program goals**



INDEPENDENT SCHOOL DISTRICT

Scope to Budget Recommendations – *By Work Type*

- **Priority 5B: Life Cycle Needs that will develop while the program is ongoing**
 - **Evaluation: Long Term Needs**
 - **Time Line: Year 4 of the Program**
 - **Budget Recommendation: \$18.9M (3.2% of program budget)**
 - **Work Categories:**
 - **Projected Life Cycle Needs for 2009, 2010 and 2011**
 - **Scope Recommendation**
 - **Incorporate 3 Years of Life Cycle Needs identified in the Needs Assessment**
 - **Life Cycle Needs involve replacement of major components that will reach the end of their life expectancy before the end of the Program**
 - HVAC systems
 - Re-roofing



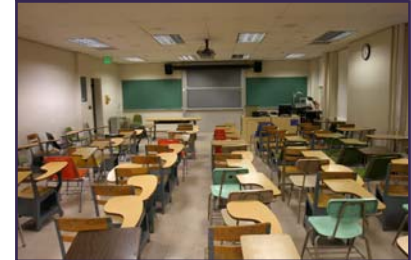
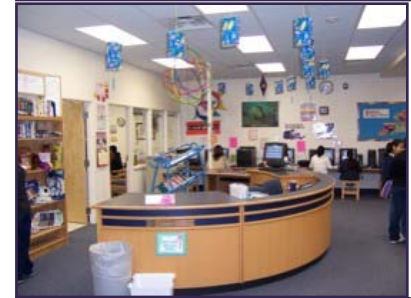
Fixing future needs at a lower cost

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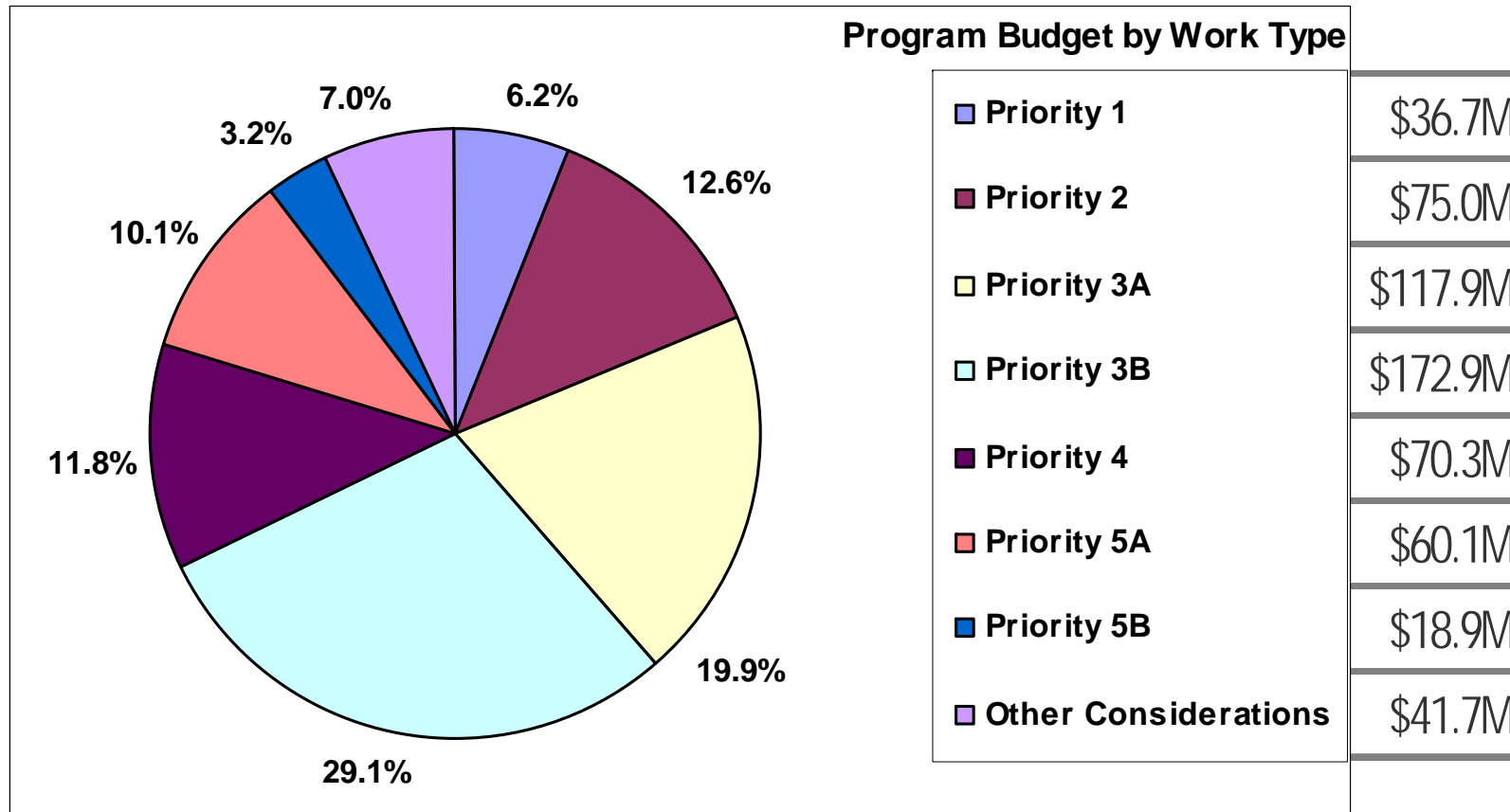
Scope to Budget Recommendations – *By Work Type*

- **FWISD Technology & Efficiency**
 - **Other Bond Considerations - \$41.7M**
(7.0% of program budget)
 - Restructuring M&O Debt
 - Buses, Vehicles, Technology, Extracurricular Uniforms/Instrument Refresh
 - All items recommended in the Needs Assessment

Total Recommended Budget: \$593.6M



Budget Distribution - *By Work Type*



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Scope to Budget Summary

Budget Line Items								
Priority 1	Priority 2	Priority 3A	Priority 3B	Priority 4	Priority 5A	Priority 5B	Technology & Efficiency	
Urgent	Immediate	Short Term	Short Term	Mid Term	Long Term	Long Term		
Safety and Security of Students and Teachers	Renovate Critical Building Systems	Improve Existing Classrooms	Build New Sustainable Schools and Classroom Additions	Equity in Classroom Improvements	Classroom and School Enhancements related to program goals	4 Year Program = Current + 3 yr of Life Cycle Need	Other Bond Considerations	
Budget \$	\$36,725,236	\$74,970,457	\$117,956,058	\$172,920,637	\$70,323,549	\$60,057,868	\$18,941,732	\$41,710,000
Sub Totals	Priority Needs 1 - 5		\$360,033,168	All Priority Needs 1-4 & selective Priority 5 Needs (Approx.50%)				
	New Construction		\$172,920,637	All recommended New Construction (Exc. Washington Hts. Renovation only)				
	Life Cycle		\$18,941,732	Current plus 3 Yr Life Cycle Needs (Excludes last 2 life cycle years)				
	Other Considerations		\$41,710,000					
Total	Program Budget		\$593,605,537	Recommended CIP Budget		\$593.6M		

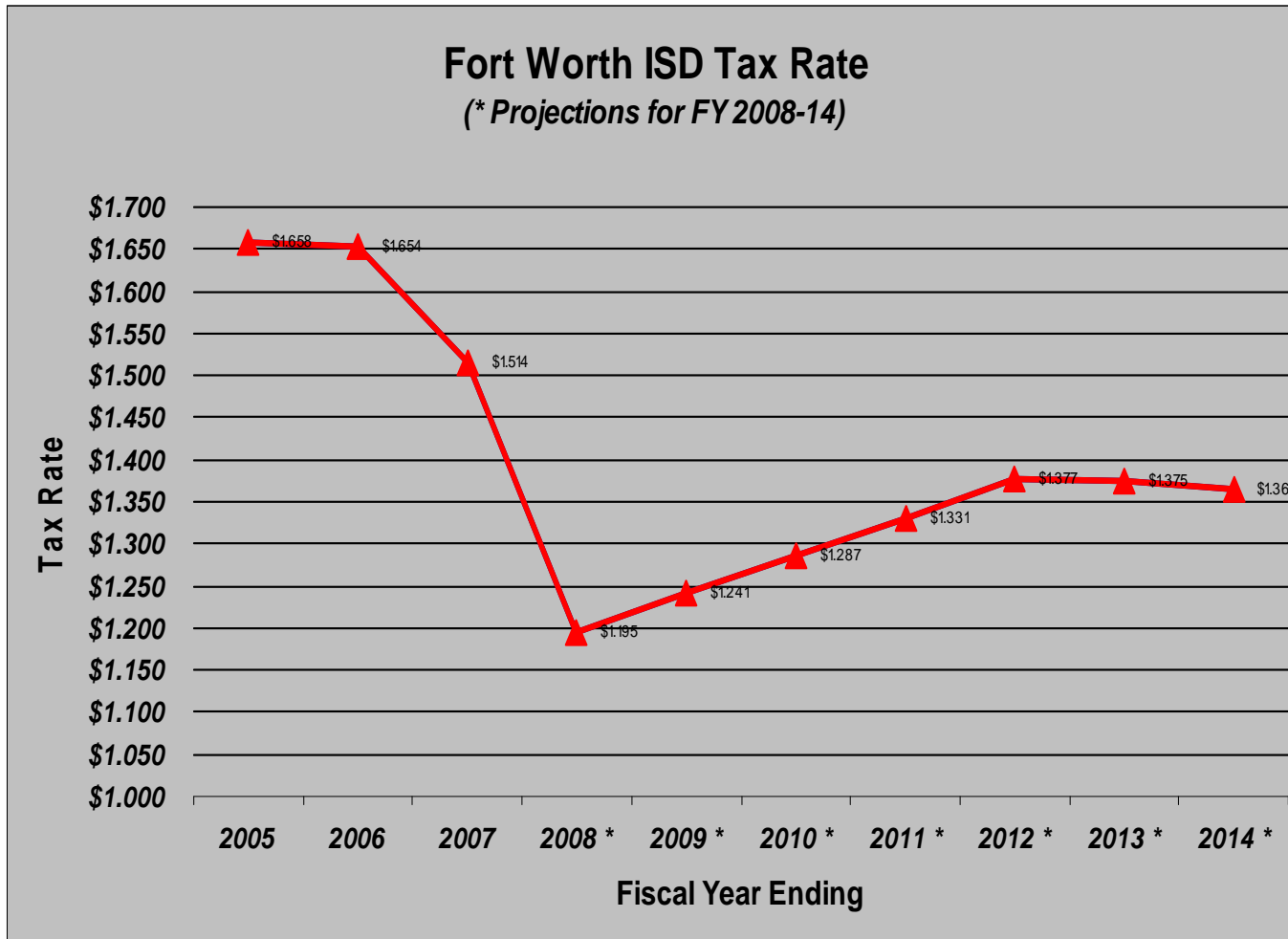
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Relating Recommended Scope to Budget to Vision 2010

How do we integrate the Capital Improvement Program into Vision 2010?

STRATEGIC GOALS	PERFORMANCE STANDARDS
I - Student Achievement - <i>the achievement gap will be eliminated</i>	1.1. Equity of access and opportunity to learn
.....through comparable facilities District-wide – PRIORITY 1, 3, 4 AND 5	
II – Operational Efficiency & Effectiveness – <i>District’s operations will be efficient and effective</i>	2.1. Organizational structure...efficient, effective 2.2. Organizational climate...conducive, productivity 2.9. Technology infrastructure...integration, communications
.....through policies, procedures and state-of-the-art systems – PRIORITY 2	
III – Family Involvement and Community Partnership – <i>an integral part of the education of all children</i>	3.1. Comprehensive plan...meaningful engagement 3.4. Opportunities for youth to play meaningful role in decisions 3.5. Parents connected 3.6. Relationships with community-based organizations
.....through community outreach and MWBE participation – ALL PRIORITIES	

Projected Tax Rate



Fiscal Year Ending	Actual or Projected Tax Rates
2005	\$ 1.658
2006	\$ 1.654
2007	\$ 1.514
2008 *	\$ 1.195
2009 *	\$ 1.241
2010 *	\$ 1.287
2011 *	\$ 1.331
2012 *	\$ 1.377
2013 *	\$ 1.375
2014 *	\$ 1.365

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Effect on Average Homeowner

Year Ending	2006	2007	2009	2012
Appraised Value	\$115,000	\$115,000	\$115,000	\$115,000
Homestead Exemption	(\$15,000)	(\$15,000)	(\$15,000)	(\$15,000)
Taxable Value	\$100,000	\$100,000	\$100,000	\$100,000
Tax Rate	1.654	\$ 1.514	\$ 1.241	\$ 1.377
Tax Bill	\$ 1,654	\$ 1,514	\$ 1,241	\$ 1,377

- A net tax rate reduction over current year
- No bond tax paid by Senior Citizens

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**A program that
supports Vision
2010**



Scope to Budget Validation Summary

1. Objectives

- **Improve school safety and security**
- **Renovate critical building systems**
- **Emphasis in classroom technology**
- **Comparable classrooms & schools district wide**
- **Modernize Athletic Facilities**
- **Build sustainable/cost effective schools**

2. Scope:

- **Extensive renovations to all existing schools and athletic facilities**
- **343 new classrooms**
- **Other bond considerations**

3. Budget

- **\$593.6M**