EXHIBIT NO. 9 JES
DATE 3-30-05
BILL NO. Discussion

Policy Issues on Facilities

Background

Currently the design and space allocations regarding a school are in the hands of the local district with no available references to minimum space requirements for a student in a classroom. Currently there is little oversight regarding facilities from the state level. There are building code and fire code regulations that must be followed and the state typically provides technical assistance, code review and annual fire inspections in these areas. Broad guidelines from the accreditation standards are listed below.

Montana Accreditation Standards rules for schools describe six areas of compliance:

1. School facilities shall be constructed, maintained, and supervised in accordance with all applicable local, state, and national codes, regulations, and laws.
2. School facilities shall be of sufficient size and arrangement to meet all programs' educational goals.
3. The board of trustees shall provide for educational facilities which are pleasant and reasonably safe for the conduct of the educational and extracurricular activities of students and which will meet federal accessibility standards.
4. The school shall provide the necessary equipment for emergency nursing care and first aid.
5. When the board of trustees considers major remodeling or building a facility, it shall seek facility expertise in all affected program areas as well as comments from faculty, students and community.
6. The board of trustees shall have in writing a policy that defines the use of the school facilities and resources.[1]

Policy Questions- These policy issues are an effort to generate thought and questions regarding how to manage facilities, understand what schools have for facilities and how to fund and implement a facilities program.

1. Should the state have a facilities management plan for school districts?
   - What length of time should the plan encompass? 5 or, 10 years?
   - The state could have a commission or board to establish and maintain the plan and make recommendations to the Legislature and Governor on improvements needed.
   - Should the districts be solely responsible for a long term plan more localized control, provided for in # 6 of accreditation standards

2. Should the state conduct an inventory of school facilities?
   Data gathered:
   - Inventory- size, age, location
   - Condition- safe, healthy, good repair
   - Design- adequate, efficient, supportive of best educational practices

[1] Montana Standards of Accreditation: School Facilities, 10.55.201, ARM

- Utilization-accommodating to current enrollment, changing enrollment, up or down
- Management- effective and efficient, who manages
- Budgeting and Finance- adequate, efficient (I am not sure that they gather the last two points, did you talk to Joe?)

Approach 1: State personnel conduct a facilities condition inventory. Estimates from Architecture and Engineering division provide an estimate of the total square footage of K-12 buildings. This estimate is based on an average square-foot-per-student averages compiled by the American School & University Magazine.

The 30th Annual Official education Construction Report, published by American School & University Magazine in May of 2004 lists sq ft per student averages at 133gsf for elementary, 141gsf middle school and 178gsf for high school. These are nationwide averages for new construction and therefore only provide a rough estimate of the total sq footage in Montana schools. In Montana the 2004 total number of students was 148,356. The table below is an estimate of sq ft for all schools.

Estimated Total Gross Square Footage K-12 Buildings			
	# Students	gsf/student	Total sq footage
Elementary school gross sq ft	71,554	133	9,516,682
Middle school gross sq ft	29,128	141	4,107,048
High school gross sq ft	47,674	178	8,485,972
Total K-12 school gross sq ft	148,356		22,109,702

A and E estimate for cost per square foot to maintain								
$	**4.50**	**$**	**5.00**					
Number of square feet per student								
			133		141		178	
Per square foot maintenance FY 2006 ANB								
			Elementary		Middle school		High school	Totals
Square feet			9,507,638		3,517,104		8,760,092	21,784,834
Low	$	4.50	42,784,371		15,826,968		39,420,414	98,031,753
High	$	5.00	47,538,190		17,585,520		43,800,460	108,924,170
Cost per student								
Low			$ 576	$	629	$	789	$ 656
High			$ 640	$	699	$	876	$ 729

Approach 2: Contract with independent consultants to conduct a facilities inventory.

3. Include a Needs Assessment? (Wyoming School Facilities, Arizona, SFB)
Survey schools to conduct a self-assessment. A self-assessment can involve the school and promote buy-in to an overall facilities inventory. A self-assessment will provide data in addition to facilities inventory data in #2 above.

Approach: A possible way to conduct this survey might be to require a self-assessment from the schools to determine what is currently available and what are the goals of the district.

4. Management Controls
- Procedural plan- district-wide maintenance goals and policy
- FTE allocation, scheduling
- Reporting system-

5. Funding of system?
- Entitlement?
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6. How do we implement a state plan for facilities?
- Phase-in
- Needs based, deficient, critical or unsafe buildings first
- 2009 biennium
- State priorities for developing appropriate space needs.

Year		Facilities Acquisition & Construction Services	Elementary	Middle school	High school	Total ANB		Average Cost per year
1995	$	35,067,407	87,989	26,783	47,818	162,591	$	216
1996	$	35,984,324	87,531	27,203	49,045	163,779	$	220
1997	$	33,252,392	86,708	27,452	50,582	164,742	$	202
1998	$	56,713,295	85,381	27,068	51,432	163,881	$	346
1999	$	55,307,933	83,037	26,824	51,892	161,753	$	342
2000	$	40,083,870	81,101	26,523	51,968	159,592	$	251
2001	$	43,883,385	79,901	26,113	51,524	157,538	$	279
2002	$	54,370,323	78,129	25,505	50,787	154,421	$	352
2003	$	60,317,661	76,051	25,082	50,366	151,499	$	398
2004	$	56,886,741	74,289	25,147	49,989	149,425	$	381
2005			73,248	24,937	49,422	147,607		
2006			71,486	24,944	49,214	145,644		
2007			71,027	24,308	48,734	144,069		
average	$	47,186,733						

Year	Operation and Maintenance of Plant Services	Elementary	Middle school	High school	Total ANB	Average Cost per year
1995	$ 90,245,960	87,989	26,783	47,818	162,591	$ 555
1996	$ 92,277,241	87,531	27,203	49,045	163,779	$ 563
1997	$ 95,802,413	86,708	27,452	50,582	164,742	$ 582
1998	$ 95,941,059	85,381	27,068	51,432	163,881	$ 585
1999	$ 97,462,033	83,037	26,824	51,892	161,753	$ 603
2000	$ 104,636,095	81,101	26,523	51,968	159,592	$ 656
2001	$ 110,022,542	79,901	26,113	51,524	157,538	$ 698
2002	$ 110,520,673	78,129	25,505	50,787	154,421	$ 716
2003	$ 116,421,064	76,051	25,082	50,366	151,499	$ 768
2004	$ 118,905,785	74,289	25,147	49,989	149,425	$ 796
2005		73,248	24,937	49,422	147,607	
2006		71,486	24,944	49,214	145,644	
2007		71,027	24,308	48,734	144,069	

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