

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS

FACILITY PROJECTS

WHERE TO START?

ARCHITECT

Dusty Eaton



create **impact.**

OWNER'S CONSTRUCTION REPRESENTATIVE

Shane Swandal



CONTRACTOR

Marty Schuma



**DICK ANDERSON
CONSTRUCTION**

1. Pre-Bond Steps

- Who to hire and when
- Identifying Needs
- Master Plan Process
- Community Engagement
- Pre-Bond Outreach and Marketing

2. Bond Passes – What's Next?

- Design Team Procurement
- Schedule for design, construction, and fund management
- Budget Control

Are Your Current Facilities Supporting Or Inhibiting 21st Century Education?

- Systems (heating, cooling, environment, technology)
- Safety & Security
- District Growth
- School Capacity & Over Crowding
- Educational Goals and Spaces
- Maximizing Facility Potential
- New Buildings / Expansion



WHO TO HIRE AND WHEN?

1

Owner's Construction Representative

2

Architect / Planner

3

Contractor

WHO TO HIRE AND WHEN?

1

Owner's Representative

- Manage entire process from pre-bond through construction
- Manage budgets and required funds
- Coordinate overall timeline
- Facilitate fair and legal procurement of architects and contractors
- School Administrators already have a full-time job
- Coordination with legal council

WHO TO HIRE AND WHEN?

1

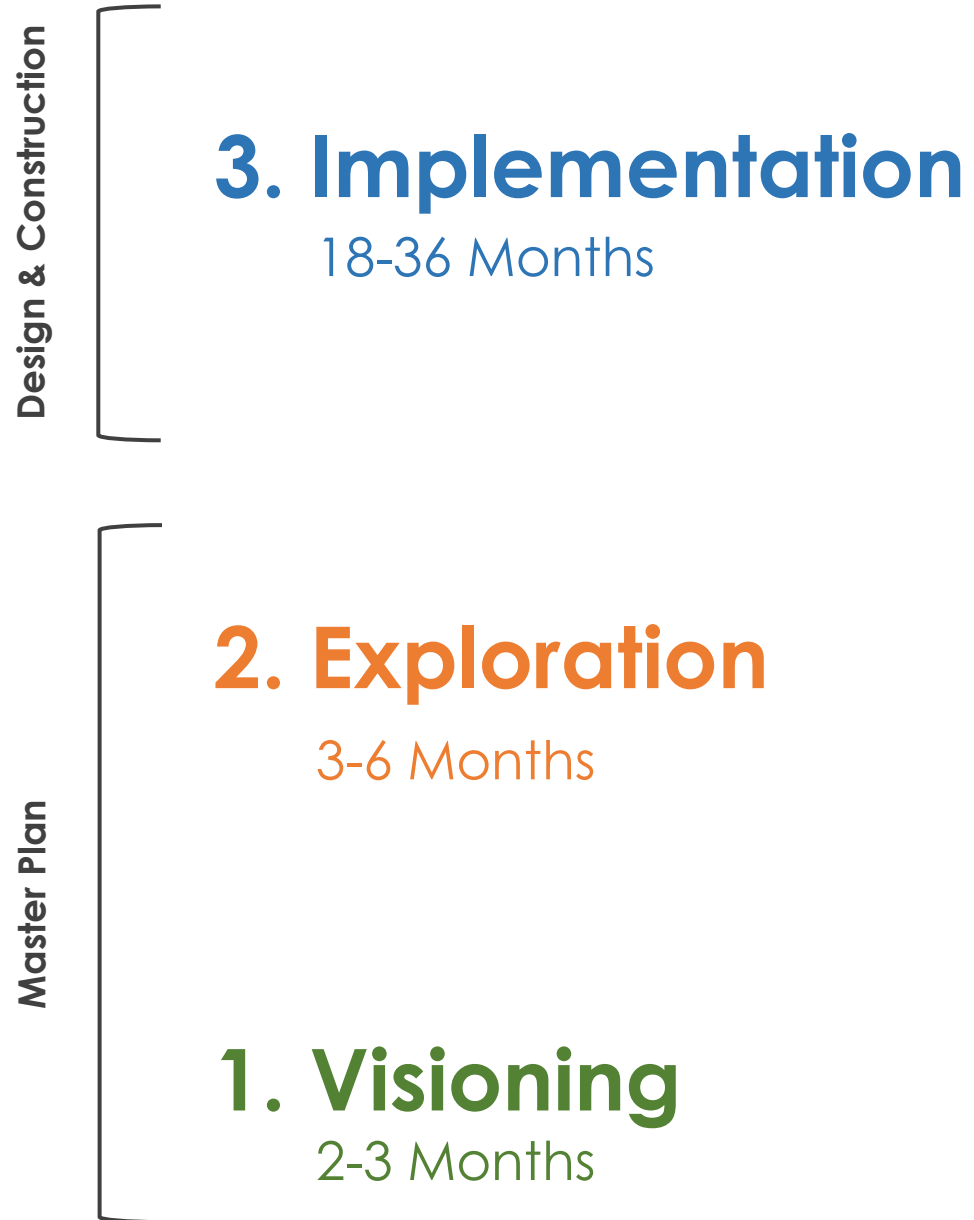
Owner's Representative

- Manage entire process from pre-bond through construction
- Manage budgets and required funds
- Coordinate overall timeline
- Facilitate procurement of architects and contractors

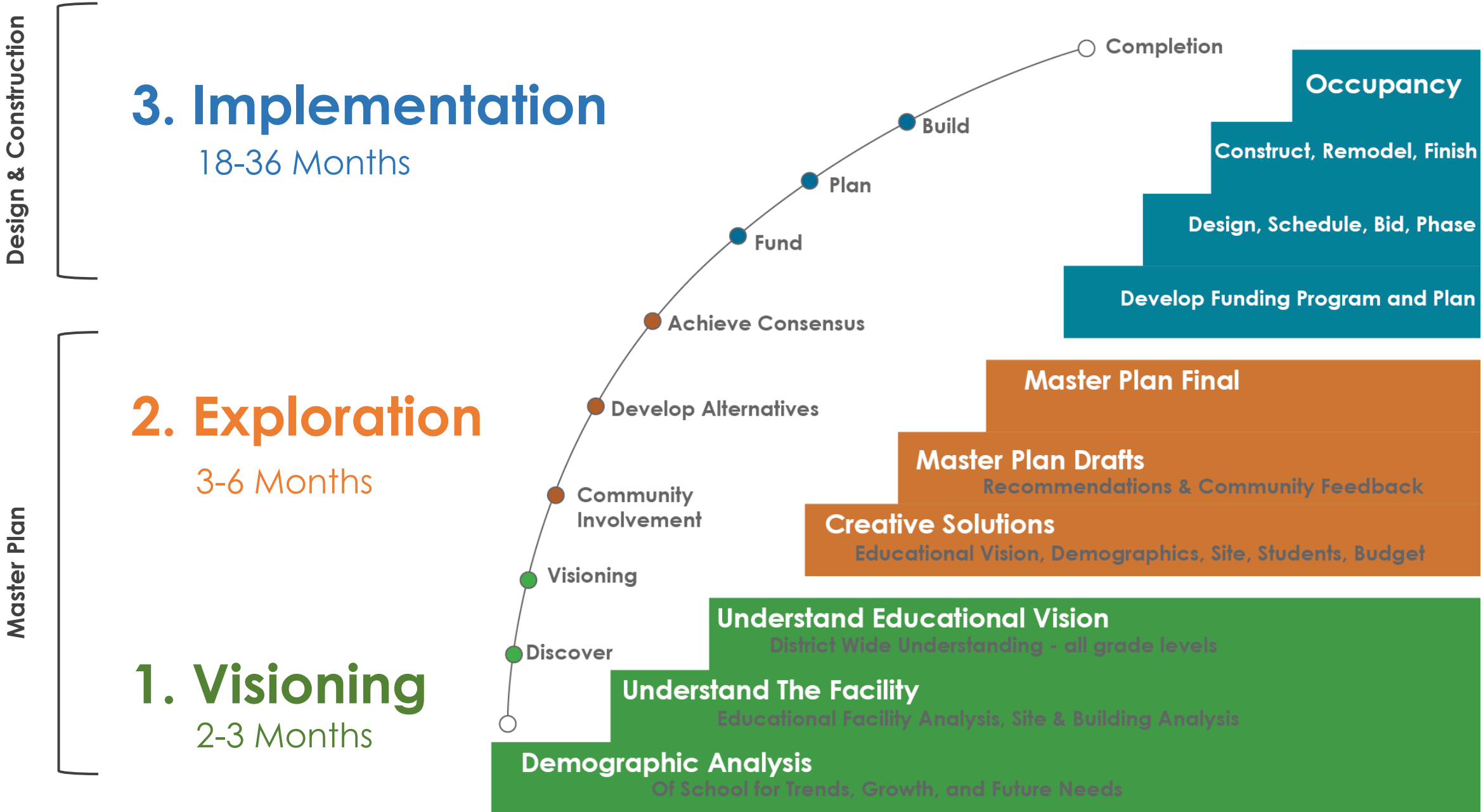
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Architect / Design Team

- Master Plan
- Pre-bond Marketing
- Building Design



PLANNING PROCESS



1. Visioning

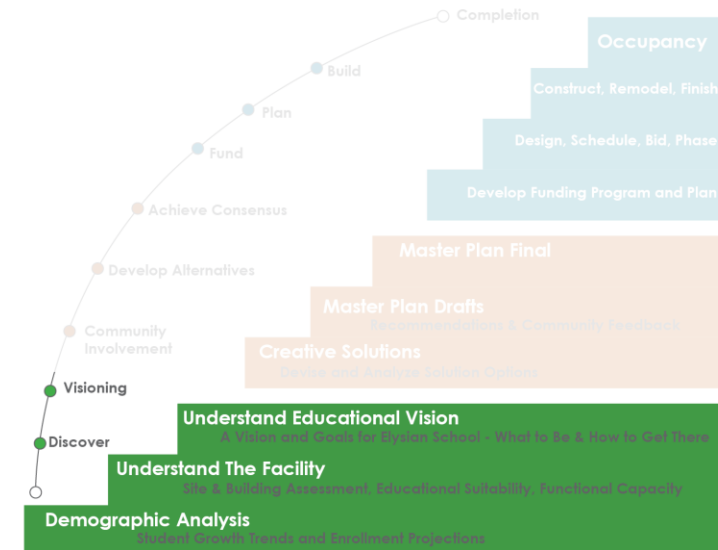
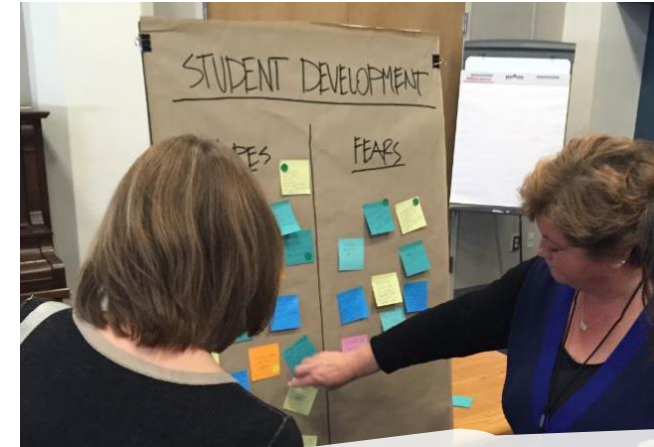
Who:

Building Committee

Architect / Planning Team
District Leadership
Teachers
Community Members
School Board

Issues Explored:

Building Conditions
Student Growth
Capacity Analysis (OPI vs. Functional)
Educational Vision



1. Visioning: goals & opportunities

What do we want to accomplish as a District and Community?

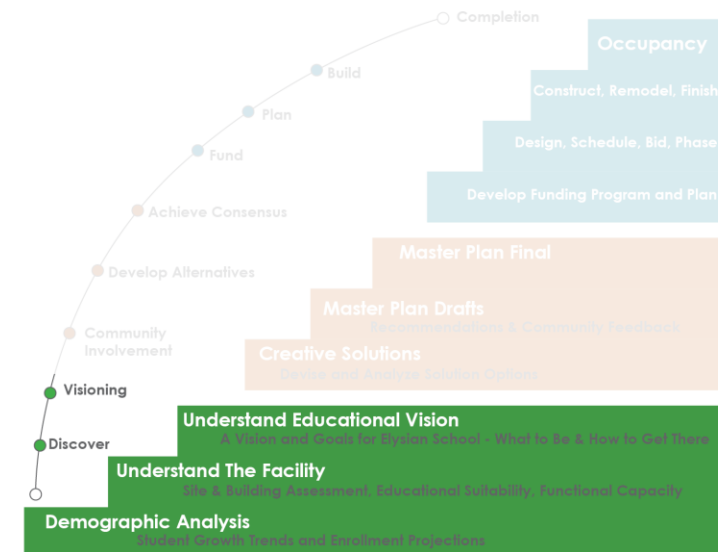


Set Goals that clarify the reason for the process

Goals should be inspiring

Goals should serve as pathway to define success

Provide a variety of educationally focused spaces that have the adaptability to provide for changing technology, instruction, and curriculum.



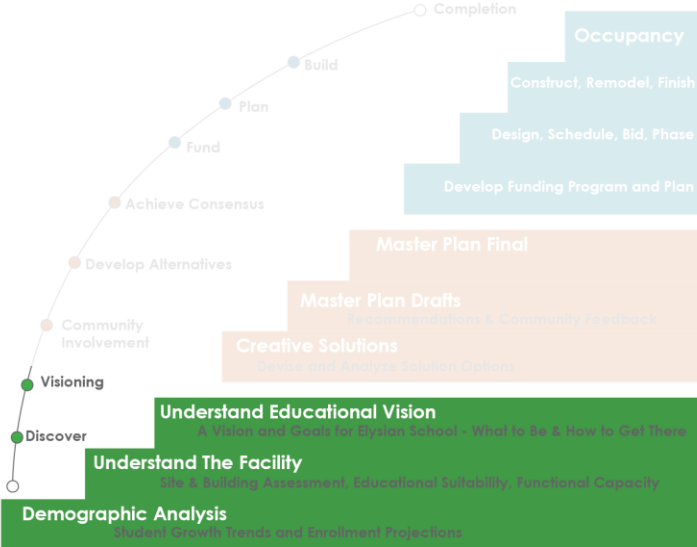
1. Visioning: Facility Assessment

Facility Assessment



- Replacement Costs
- Code Assessment
- ADA Accessibility
- Critical Failure Potential
- Cost Estimates
- Safety & Security

Educational Suitability



1. Visioning: Capacity Analysis

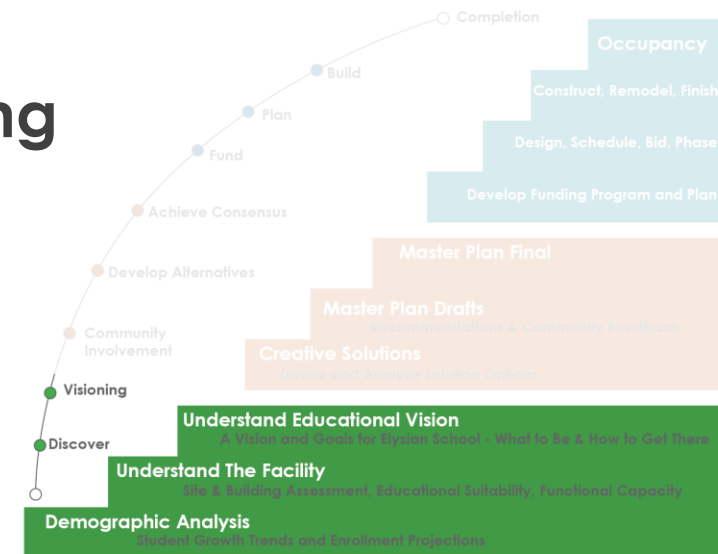
OPI CAPACITY

K-2: 20 Students
3-4: 28 Students
5-8: 30 Students
9-12: 30 Students

FUNCTIONAL CAPACITY

Educationally appropriate capacity for a building

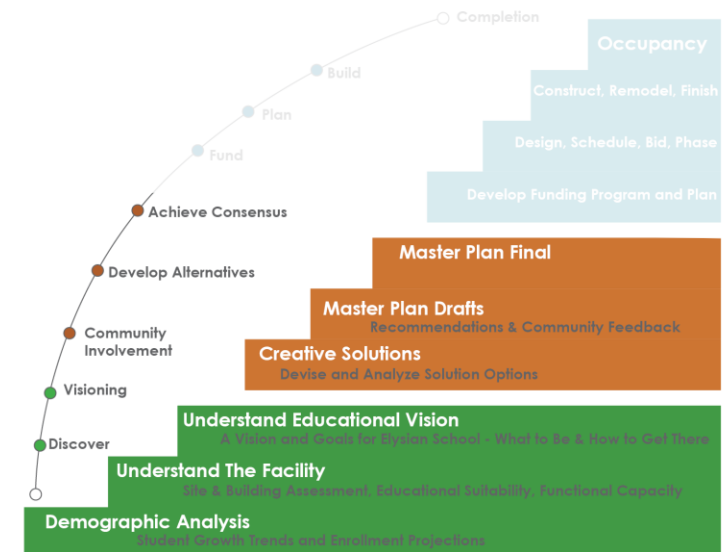
- Room Size
- Student Learning Needs
- Teaching/Learning Style
- Educational Philosophy and District Goals



2. Exploration

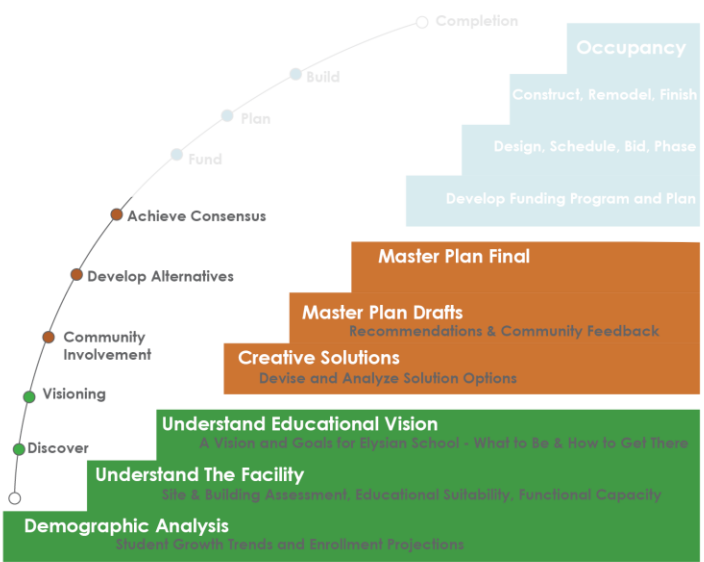
Exploring Ideas & Opportunities:

Develop Options
Funding Capacity
Community Engagement
Master Plan



2. Exploration: Development Options

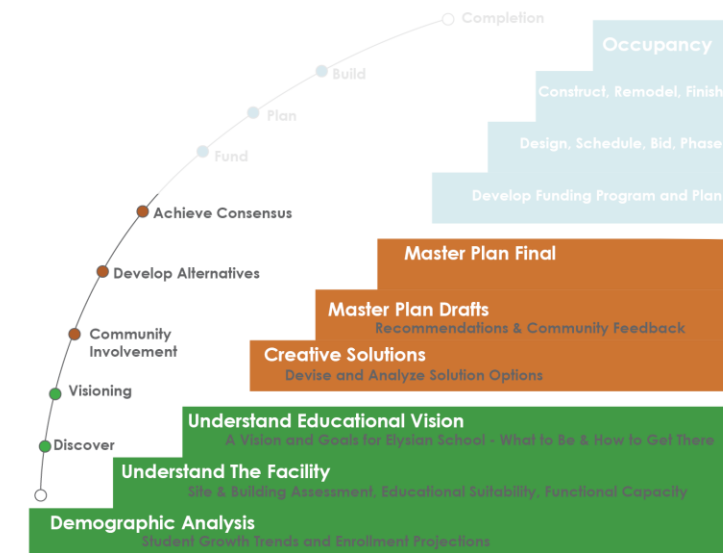
Explore solutions based on visioning work



2. Exploration: Development Options

Compare and Contrast Options

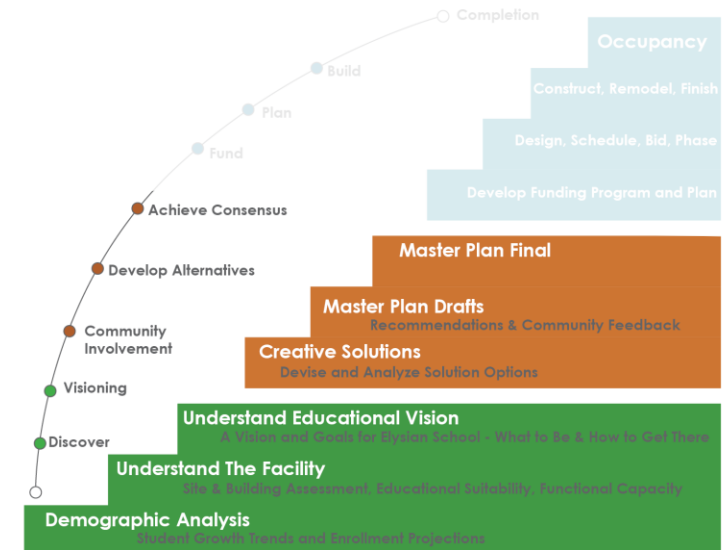
	ALTERNATIVE "A"	ALTERNATIVE "B"	ALTERNATIVE "C"
APPROACH	<ul style="list-style-type: none"> Renovation & repair per Facility Evaluation Report. Add recommended educational spaces to existing building for space needs of a projected 480 K-8 students. 	<ul style="list-style-type: none"> Renovation & repair per Facility Evaluation Report. Add recommended educational spaces for a small 6-8 middle school for 150 students. Construct a small new K-5 elementary school for 340 students on a new site. 	<ul style="list-style-type: none"> Construct a new K-8 elementary school for 480 students on a new site. Sell the existing Elysian School.
PROS	<ul style="list-style-type: none"> Makes use of serviceable existing building. A long term solution that addresses existing & projected space needs. Keeps a single campus with no duplication of staff or facilities. Allows mentoring among younger and older students. 	<ul style="list-style-type: none"> Makes use of a serviceable existing building. Existing building serves well as a middle school with its grade pod potential and large gym. Smaller number of 6-8 students requires less additional space. New elementary can be located within walking distance of most students. 	<ul style="list-style-type: none"> Locates a K-8 school within walking distance of most patrons. Locates all students on a single campus in a developing family oriented residential area. A new facility can be designed to provide 21st century learning environment. Proceeds from sale of existing building and site would help fund new school.
CONS	<ul style="list-style-type: none"> Large addition & middle school PE program will reduce an already small site area. Requires acquisition of about 16.5 acres. Existing site may not be ideal for school over time. No public water or sewer available. 	<ul style="list-style-type: none"> About 10 acres additional land needed to accommodate building expansion & a middle school PE/athletic program. Existing site may not be ideal for a school over time. No public water or sewer is 	<ul style="list-style-type: none"> The existing facility may or may not sell within the time frame desired to assist in funding a new school or at a price to make a new facility feasible. About 20 to 22 acres of new land must be acquired.



2. Exploration: Budget Target

Budget Capacity and Target Funds

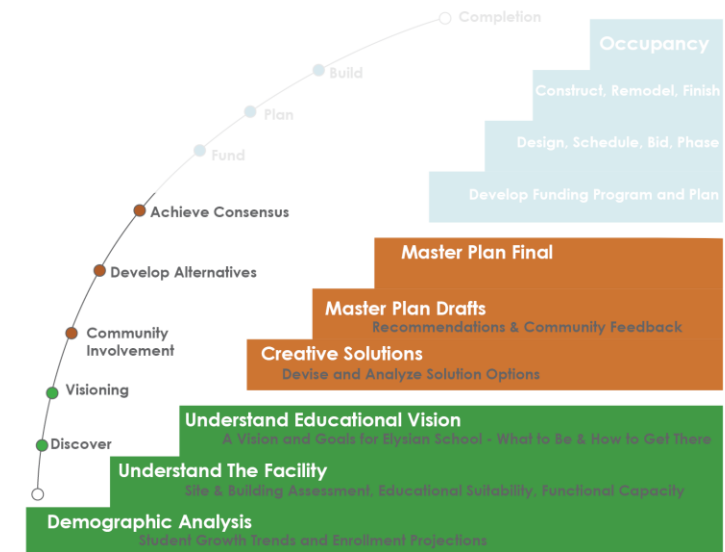
- What is the bonding capacity of the District?
- What will the community support?
- Understanding tax-payer impact
- Elementary and High School Districts
- Cash flow analysis



2. Exploration: Community Outreach

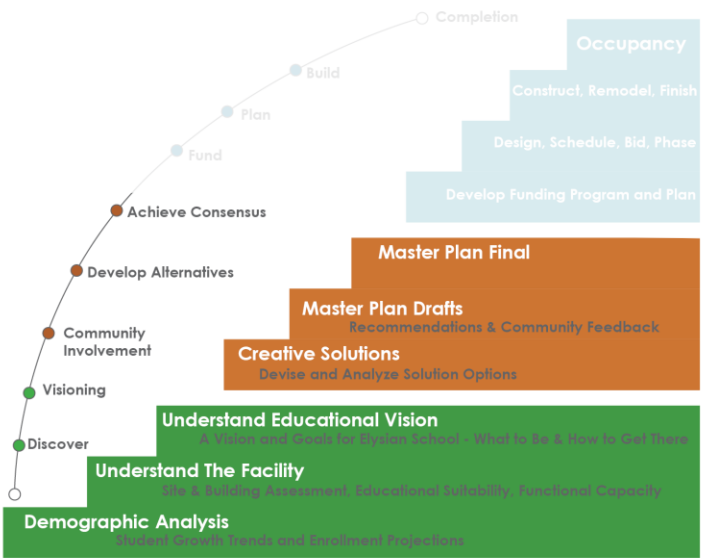
Community Input Must Drive the Outcome

- Community Meetings
- Surveys
- Design Charrettes



2. Exploration: Community Outreach

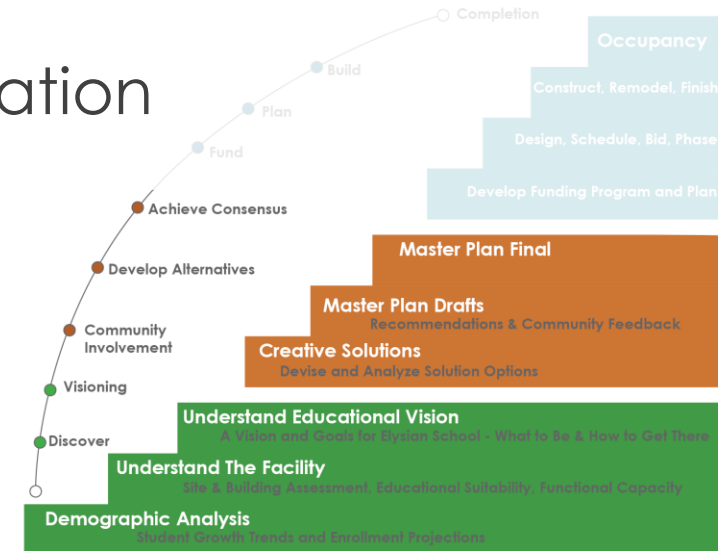
Community Input Must Drive the Outcome



2. Exploration: Master Plan

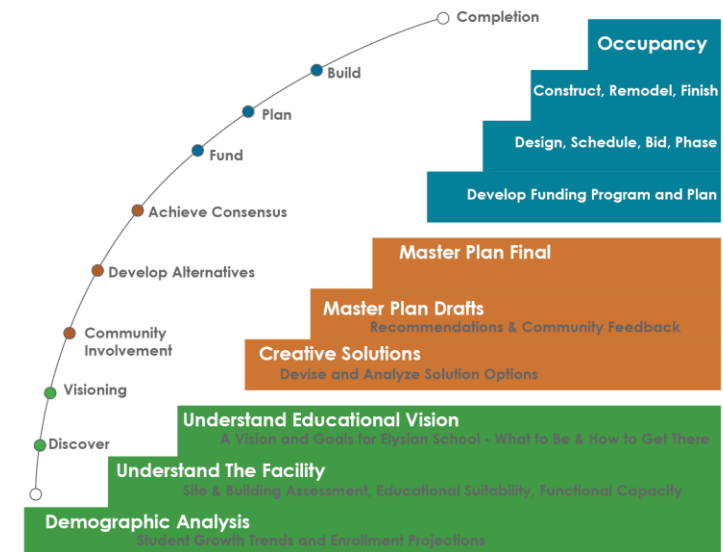
Master Plan serves as the framework for the District

- District Goals & Vision
- Facility Condition Analysis
- Program Needs & Opportunities
- Educational Capacity & Growth Accommodation
- Development Scenarios & Budget



3. Implementation

- Pre-Bond Outreach & Marketing
- Design Team Procurement
- Construction Team Procurement
- Roll-out of multiple projects simultaneously
- Strategies for Success



3. Implementation: Pre-Bond Outreach

Public School

Team

- School District Admin
- Design Team
- Parent / Staff Volunteers

Objectives / Strategy

- Present the facts
- Utilize informational brochures / posters
- Community Presentations by Superintendent and Team

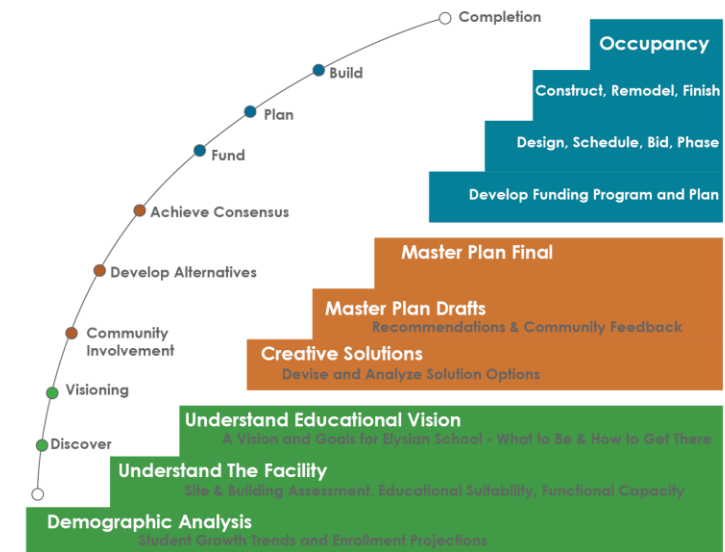
Civic “Vote Yes” Campaign

Team

- Community Volunteers

Objectives / Strategy

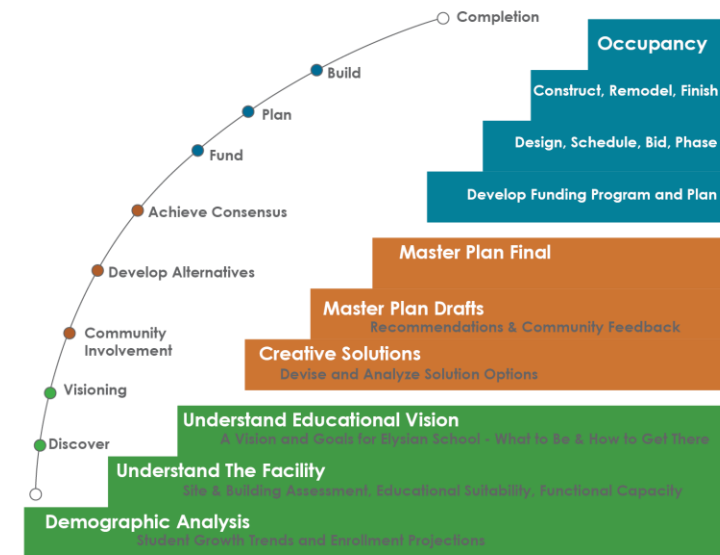
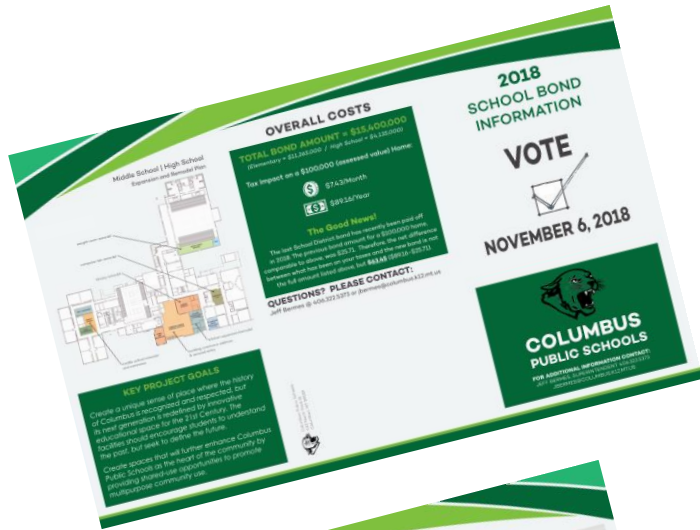
- Market campaign with a “vote yes for kids” message
- Weekly meetings for approx. 8-10 weeks
- Neighborhood canvassing
- Letters to the editor
- Yard signs
- Media interviews



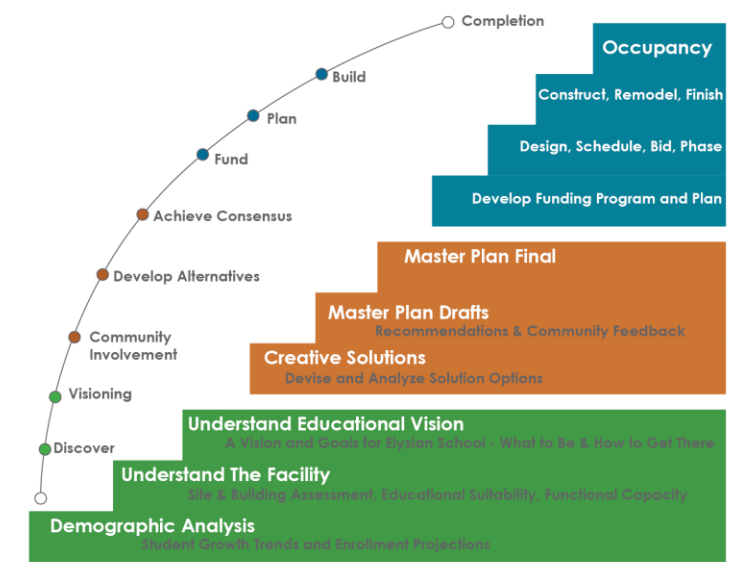
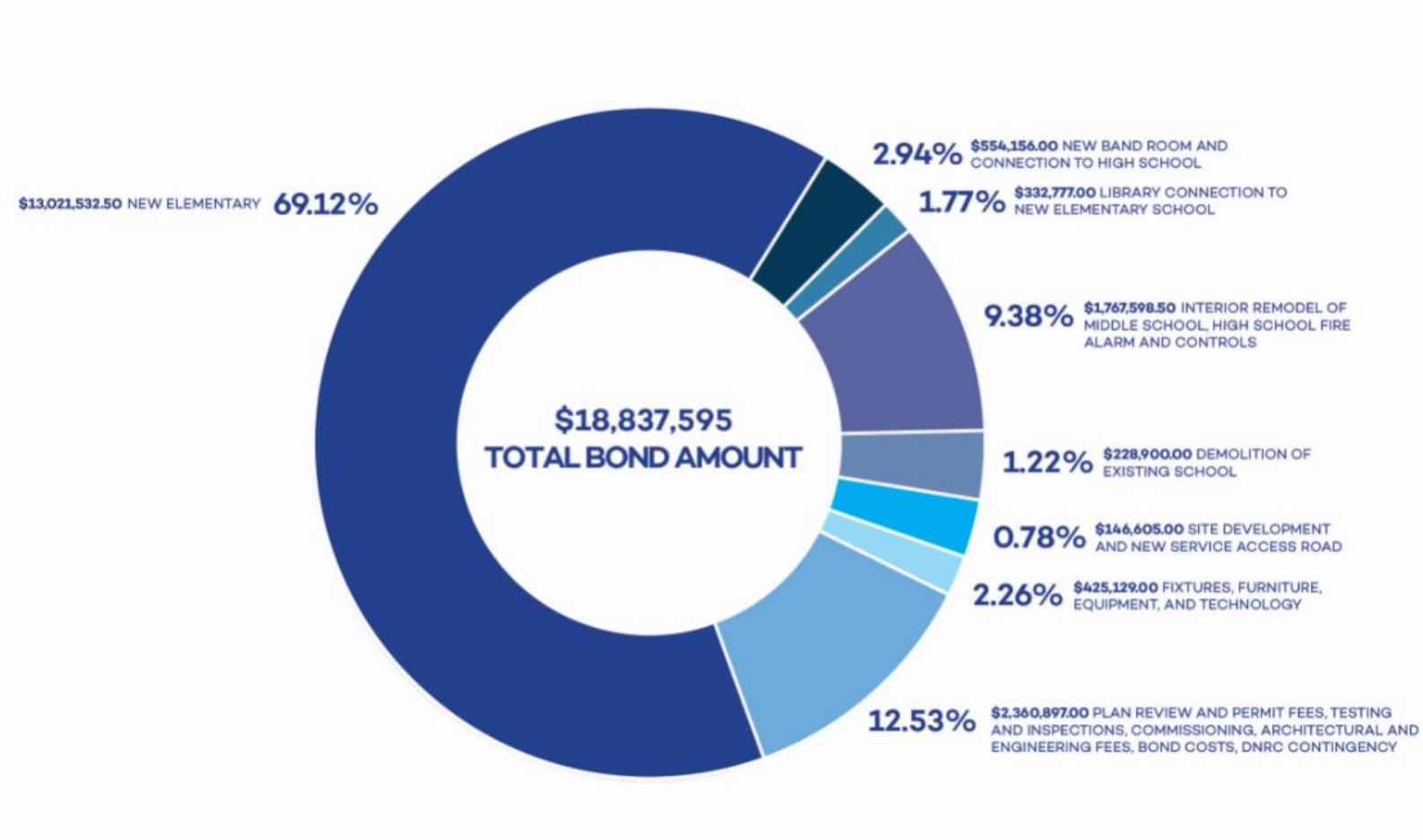
3. Implementation: Pre-Bond Outreach

Public School

Civic "Vote Yes" Campaign



3. Implementation: Pre-Bond Outreach

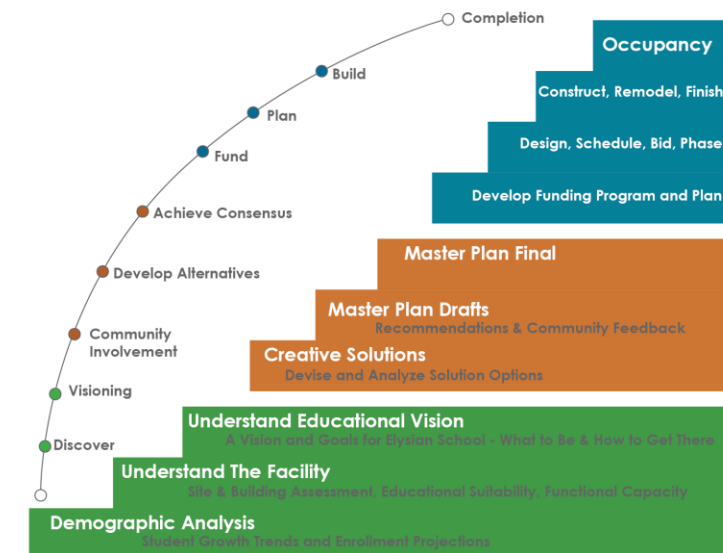


3. Implementation: Pre-Bond Outreach

Tax Base

Ex: Top 11 Tax Payers = nearly 50% of the Bond

Elementary District Top 22 Taxpayer Impact Summary Sample \$32,000,000 Bonds - 20 Year Term			Estimated "ANNUAL" Mills (152.89 Mills)	Estimated "MONTHLY" Tax Impact
Taxpayer Name	2018-19 Taxable Value <small>(applying applicable tax rates)</small>	2018-19 Percent of District Taxable Valuation	152.89	
1 MONTANA DAKOTA UTILITIES	2,451,538	14.61%	\$374,816	\$31,235
2 BNSF RAILWAY CO	2,238,677	13.34%	\$342,271	\$28,523
3 WBI ENERGY TRANSMISSION INC	1,531,548	9.13%	\$234,158	\$19,513
4 BRIDGER PIPELINE LLC	737,952	4.40%	\$112,825	\$9,402
5 CHS INC	263,702	1.57%	\$40,317	\$3,360
6 CENEX PIPELINE LLC	217,361	1.30%	\$33,232	\$2,769
7 MID RIVERS TELEPHONE COOPERATIVE	211,143	1.26%	\$32,282	\$2,690
8 TESORO HIGH PLAINS PIPELINE COMPANY	155,949	0.93%	\$23,843	\$1,987
9 WESTERN CATERING SERVICES INC A MT CORP	132,789	0.79%	\$20,302	\$1,692
10 VERIZON WIRELESS	122,461	0.73%	\$18,723	\$1,560
11 CENTURYLINK INC	99,312	0.59%	\$15,184	\$1,265



“When we passed the bond, everyone broke out their party hats and kazooos. I broke into a cold sweat and started studying.”

- Superintendent

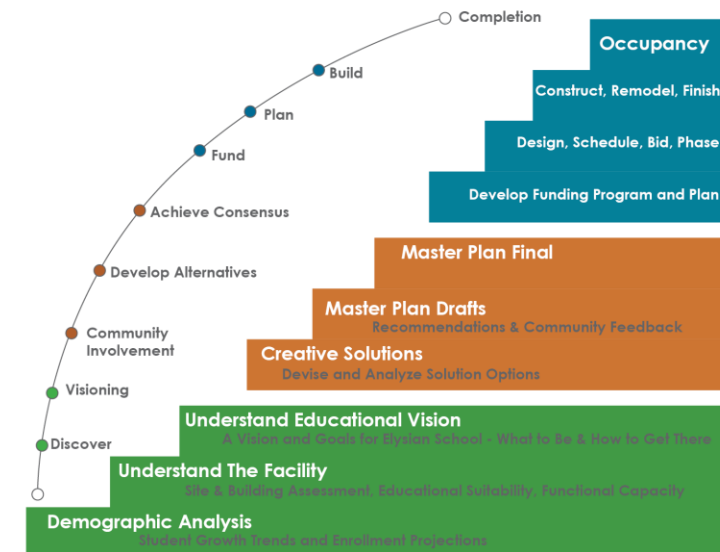
3. Implementation: Project Types

Deferred Maintenance Projects

- Mechanical, Electrical, Plumbing, Roofs, Windows, Safety & Security
- IDIQ

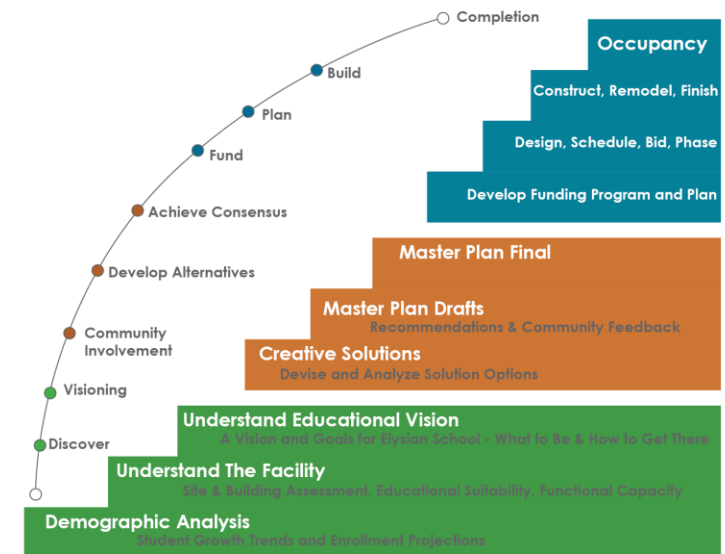
Capital Projects

- New Buildings, Remodel/Addition Projects
- Architectural Team Selection

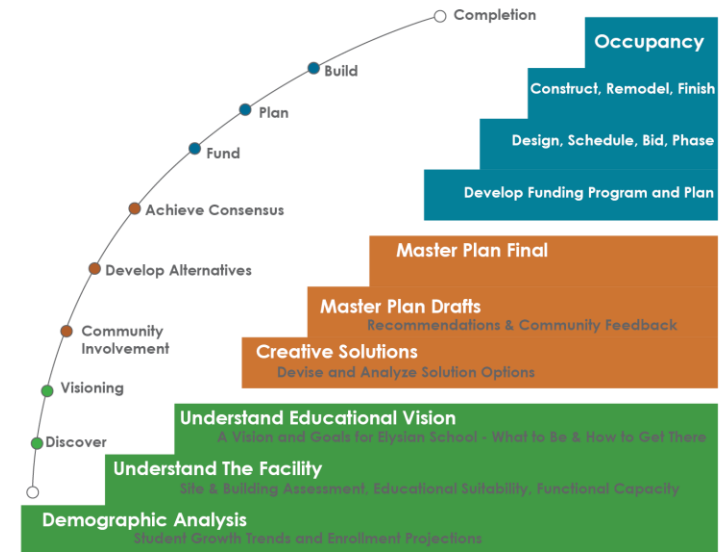
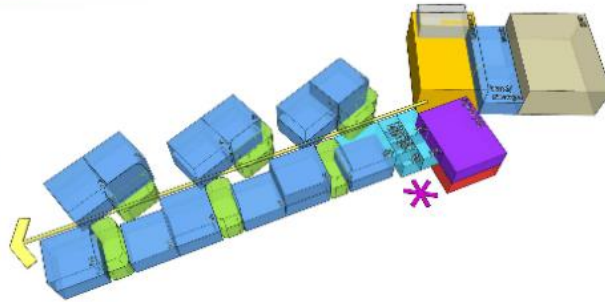
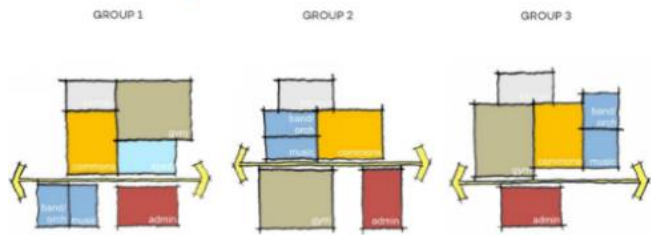
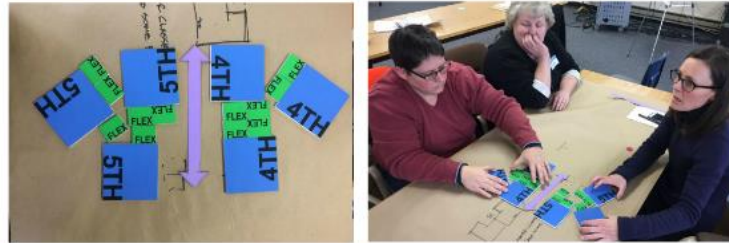


3. Implementation: Design Process

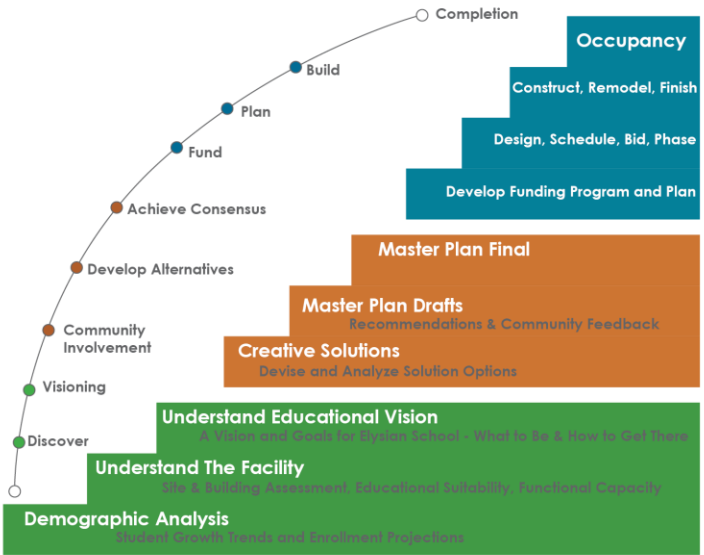
Building Committee
Teacher / Staff Involvement
Community Involvement
Student Design Participation



3. Implementation: Design Process



3. Implementation: Student Design



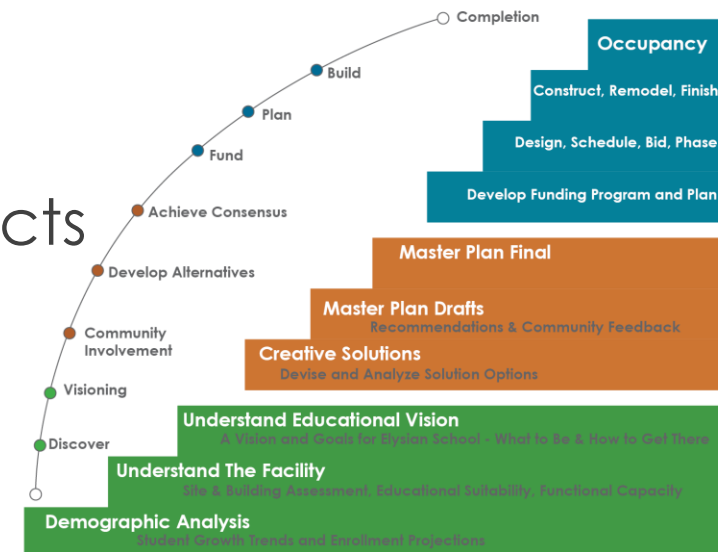
3. Implementation: Delivery Methods

GC/CM

- Contractor selected early in design process
- Part of the team early
- Provides cost estimates and constructability reviews
- Allows for early work amendments
- Open and transparent process per MCA

DESIGN – BID - BUILD

- Can provide a competitive process for right projects
- Lowest responsible bidder will be the contractor



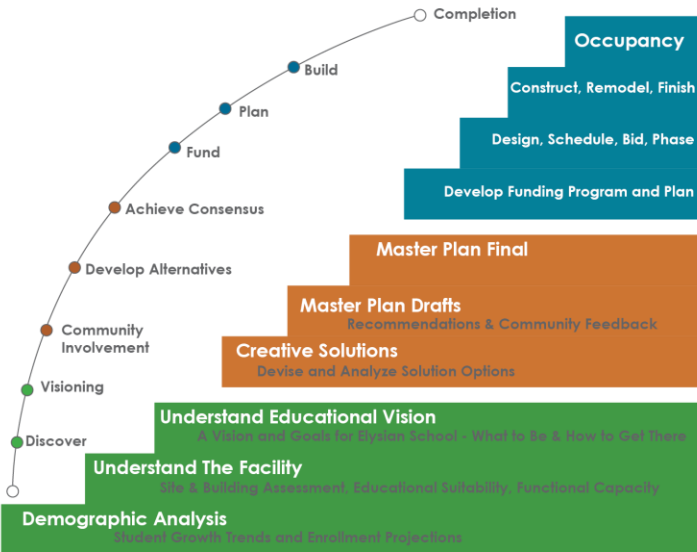
3. Implementation: Construction

OWNER'S REP.

DESIGN TEAM



CONTRACTOR



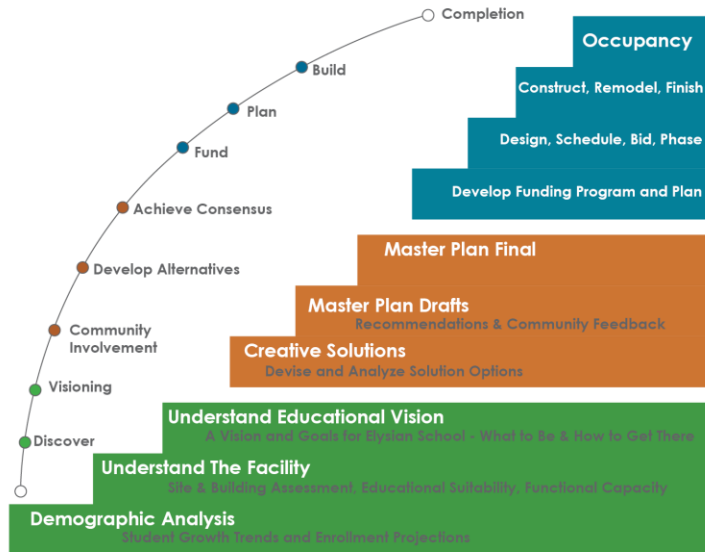
3. Implementation: Construction

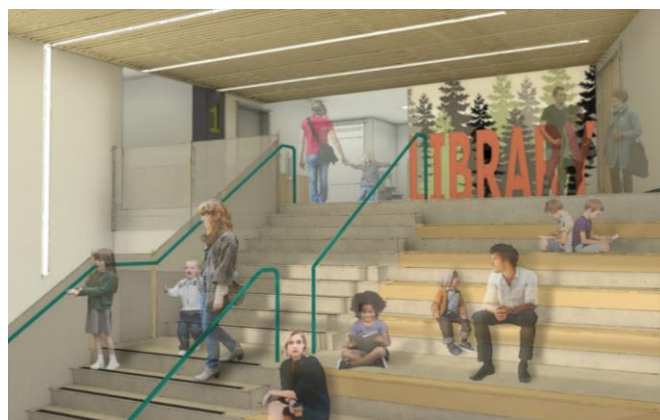


Student Involvement

Teacher Involvement

Community Involvement





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