LOOKING AHEAD

UPDATE ON THE 2022 CAPITAL NEEDS ASSESSMENT AND THE PATH TO THE 2023 CAPITAL INVESTMENT PLAN

Presented to Bond Oversight Committee | 27 January 2022
TOGETHER, WE WILL ANSWER:

How much? Where? When?
LONG RANGE FACILITIES
MASTER PLAN
Capital Needs Assessment (CNA) is an annual update to CMBE.
Capital Investment Plan (CIP) is the basis for a Bond Referendum.
We will evaluate...

ASSUMPTIONS  METHODOLOGIES  STANDARDS

These factors may be internal or external.
ASSUMPTIONS
INCLUDE:

EXTERNAL FACTORS WHICH MUST BE CONSIDERED

IMPACT OF COVID ON LEARNING AND TEACHING
- CALENDAR
- SCHOOL DAY
- VIRTUAL AND HYBRID ENVIRONMENTS
- TECHNOLOGY AND INFRASTRUCTURE
- BUILDINGS AND BUILDING COMPONENTS
- CLASSROOM FUNCTIONALITY
- REMOTE TEACHER WORKSPACES
- INDOOR AIR QUALITY (IAQ) FACTORS
ASSUMPTIONS
INCLUDE:

INTERNAL FACTORS WHICH MUST BE CONSIDERED

- STUDENT-WEIGHTED STAFFING
- ENHANCED BUILDING UTILIZATION (FLOAT)
- PORTABLES AS TEMPORARY OR PERMANENT CAPACITY
- FOUR-BLOCK SCHEDULE AT SECONDARY SCHOOLS
- STANDARDIZED RENOVATION LIFECYCLE(S)
- GRADE CONFIGURATIONS (ES, K-8, MS, 6-12, HS)
- PRE-KINDERGARTEN EXPANSION
- ASSIGNMENT BOUNDARIES
- POPULATION TARGETS
- CURRENT MAGNETS AND OTHER CHOICE PROGRAMS
- FUTURE MAGNETS AND OTHER CHOICE PROGRAMS
- TECHNICAL AND VOCATIONAL OFFERINGS
- RENEWABLE ENERGY
METHODOLOGIES INCLUDE:

EXTERNAL FACTORS WHICH MUST BE CONSIDERED

- State and/or Federal Capital/Infrastructure Monies
- Available capacity of our Capital Funding Partner(s)
- Timing of Mecklenburg County General Obligation Bond Referendum
- Cost and availability of land
- Cost of construction and availability of materials
- Current and future planning efforts by others
- Current and projected student enrollment
INTERNAL FACTORS WHICH MUST BE CONSIDERED

- EXISTING REAL ESTATE PORTFOLIO
- NON-INSTRUCTIONAL CAPITAL PROJECTS (ADMINISTRATIVE, BUS, WAREHOUSE)
- DATA SYNTHESIS
- FACILITY CONDITIONS
- “RUBRIC” FOR PROJECT RANKING
STANDARDS ENCOMPASS:

EXTERNAL FACTORS WHICH MUST BE CONSIDERED

- BUILDING CODE
- POST-CONSTRUCTION CONTROLS ORDINANCES
- TREE SAVE/WETLANDS/OTHER ENVIRONMENTAL
- NCDOT/CDOT
- NCDPI REVIEW
STANDARDS ENCOMPASS:

INTERNAL FACTORS WHICH MUST BE CONSIDERED

- CURRICULAR REQUIREMENTS
- COMPLEMENT OF ATHLETIC FACILITIES AT SECONDARY SCHOOLS
- EDUCATIONAL SPECIFICATIONS
  - CLASSROOM SIZE(S)
  - ADMINISTRATIVE SPACE(S)
  - SUPPORT SPACE(S)
- CONSTRUCTION SPECIFICATIONS
  - TYPOLOGY/METHODOLOGY
  - ALTERNATIVE ENERGY SOURCES
  - “NET ZERO” SCHOOL BUILDINGS
- “URBAN” BASELINE SCHOOL MODELS
- RELATIVE PRIORITY OF MIDDLE AND HIGH SCHOOL ATHLETICS
- EQUITY
Equity in facilities has historically been defined by classroom counts; custodial staffing; and other quantitative measures. The Educational Environment Index differs from Educational Adequacy. It includes factors like "Stimulation, Naturalness, Individuality," which requires an evaluation of the facility factors that can propel student progress as well as those that can impede learning and teaching.
EDUCATIONAL ENVIRONMENTS INDEX

- Lack of natural daylighting in general education classrooms
- Lack of outside air capability
- Presence of “open” or “California-style” classrooms, with or without partitions/impaired lines of sight to teaching stations
- Ambient/background noise exceeds baseline
- Lighting (foot-candles/non-LED) below baseline
- Presence of directly externally-accessible (“Florida-style”) classrooms (especially PK-6)
- Presence of multiple buildings on a campus (especially PK-6)

CORE/SUPPORT SPACES AS AN EQUITY MEASURE

ATHLETICS

ACCESS TO PROGRAMS
## EQUITY & THE NEXT CAPITAL INVESTMENT PLAN

<table>
<thead>
<tr>
<th>School Name</th>
<th>School Type</th>
<th>Natural daylighting</th>
<th>Without outside air capability</th>
<th>Externally accessed classrooms, specifically on a PK-6 campus</th>
<th>Separate buildings, specifically on a PK-6 campus</th>
<th>&quot;Open&quot; or &quot;California'-style classrooms, whether modified or partitioned</th>
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<th>Below baseline foot-candles/non-LED</th>
<th>Impacted lines of sight to teaching station(s)</th>
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EQUITY & THE NEXT CAPITAL INVESTMENT PLAN

IMPLICATIONS OF APPLYING “EQUITY” IN AN EQUITABLE MANNER:

- Certain choices will guide school site sizing and selection
- Competitive athletics may be conducted differently
- No additional “comprehensive” high schools may be able to be constructed
- Delivery of magnets and other programs (like CTE)
- Affirming or redefining “baseline” standards
- 8 CR addition or less required, school is considered “at baseline standard”
- 9 CR addition or greater required, school is considered “below baseline standard”
EQUITY & THE NEXT CAPITAL INVESTMENT PLAN

ADDITIONAL IMPLICATIONS OF APPLYING “EQUITY” IN AN EQUITABLE MANNER

• Certain choices will render some classrooms and schools automatically “inequitable” by definition

• Application of Educational Environments Index means that:
  ○ Buildings must be replaced, or a campus master-planned, to ensure that buildings can be connected by interior corridors
  ○ Some schools which may have been considered for renovations and additions will instead be programmed as replacement projects
  ○ Schools at the edges of, or even outside, the City of Charlotte may be prioritized for replacement, rather than renovation
EQUITY & THE NEXT CAPITAL INVESTMENT PLAN

PRACTICAL APPLICATION: LEBANON ROAD ES

- Constructed 1990
- No capital program investment since
- Core undersized
- 30-year cycle indicates planning for addition/renovation
- 36 current classrooms
- 14 portable classrooms on-site
- Lack of outside air capability
- Lighting below standard
- Classrooms without daylighting

RECOMMENDATION: REPLACE LEBANON ROAD ES ON-SITE
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EQUITY & THE NEXT CAPITAL INVESTMENT PLAN

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<tr>
<th>Site</th>
<th>Educational Environment</th>
<th>Current CR Utilization</th>
<th>10-Year CR Utilization</th>
<th>Current Core Capacity</th>
<th>10-Year Core Capacity</th>
<th>Condition</th>
<th>Lifecycle</th>
<th>External Mandates or District Initiatives</th>
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<td>None within plan horizon</td>
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TOGETHER, WE WILL ANSWER:

How much? Where? When?
RISING VALUE OF LAND
MECKLENBURG COUNTY

SOURCE: MECKLENBURG COUNTY BUDGET BOOKS
RISING COST OF NON-RESIDENTIAL CONSTRUCTION

MECKLENBURG COUNTY
It is not about the money. It is about our students.
WHAT'S BEST FOR STUDENTS?

WE MODIFY PROJECTS BASED ON OUR PROGRAM

FULLEST POSSIBLE TRANSPARENCY

COST IS NOT THE DRIVING FACTOR
...on 2017 Bond Projects: https://cmsbondconstruction.com/cms-projects/

...on doing business with CMS: https://cmsbondconstruction.com/working-with-cms/

...on the CNA/CIP: https://cmsbondconstruction.com/facility-master-plan/
CONTACT INFORMATION

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