

Facilities Management: How to Take the Long View

(And Why You Should)



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Twenty-six years in Texas public education
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Joined TASB in 1998.

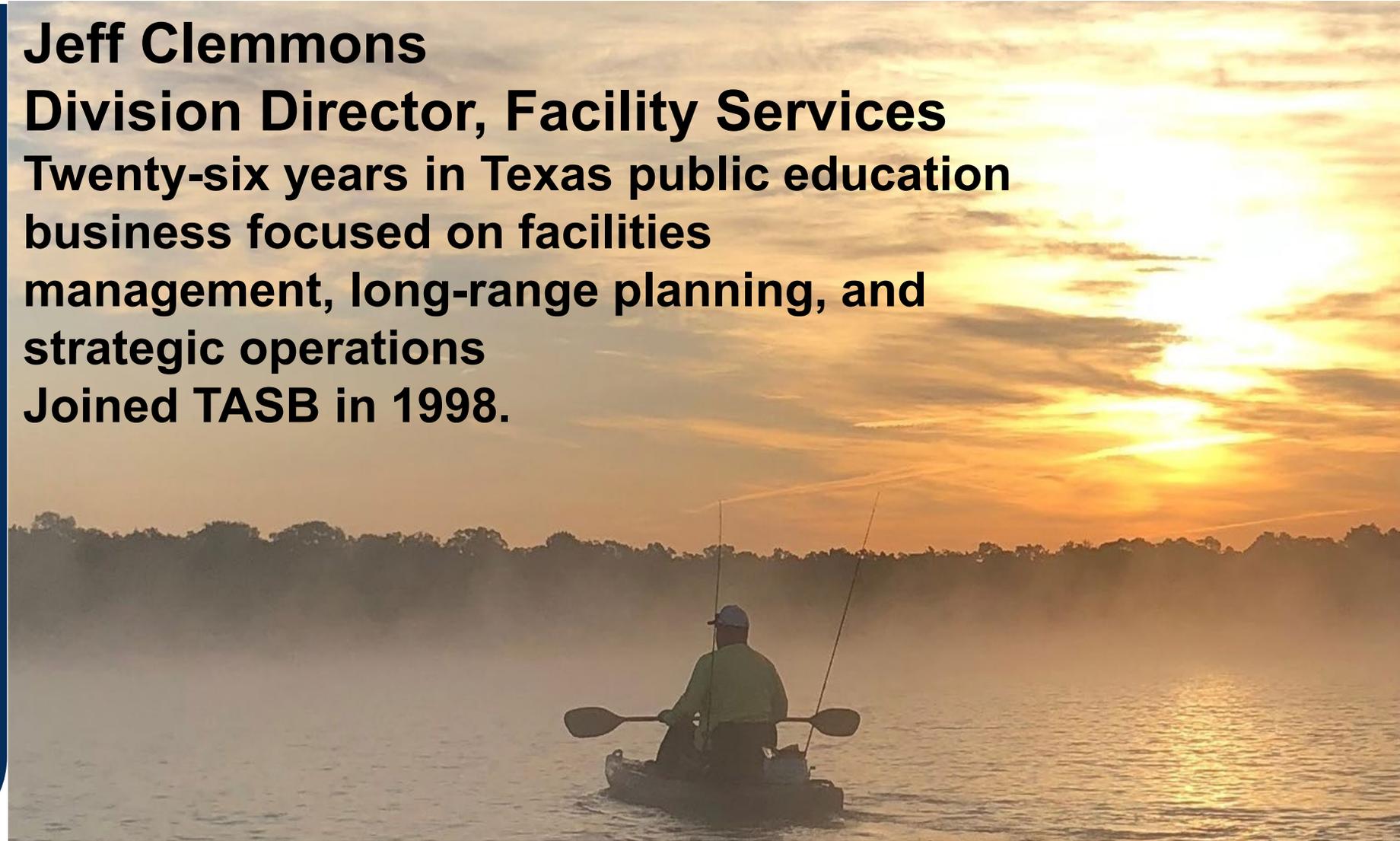


Image source: Grady Slaydon





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23 Years in Property Adjusting. Started work in the insurance field in 1989. Joined TASB as a Claims Representative in 2015. Worked as both staff adjuster and independent adjuster throughout TX for many years prior to TASB, most of them inspecting school districts for TASB.



Image source: Grady Slaydon

Today's agenda

- Stuff Happens?
- Educational Facility Assessment (EFA)
- Capital Planning – LRFP Process
- Maintenance Planning
- Be Prepared!



Stuff Happens (OUT OF YOUR CONTROL)

HAIL EVENTS



Image source: Texas school district staff

FLOOD EVENTS



Image source: Texas school district staff

WIND EVENTS

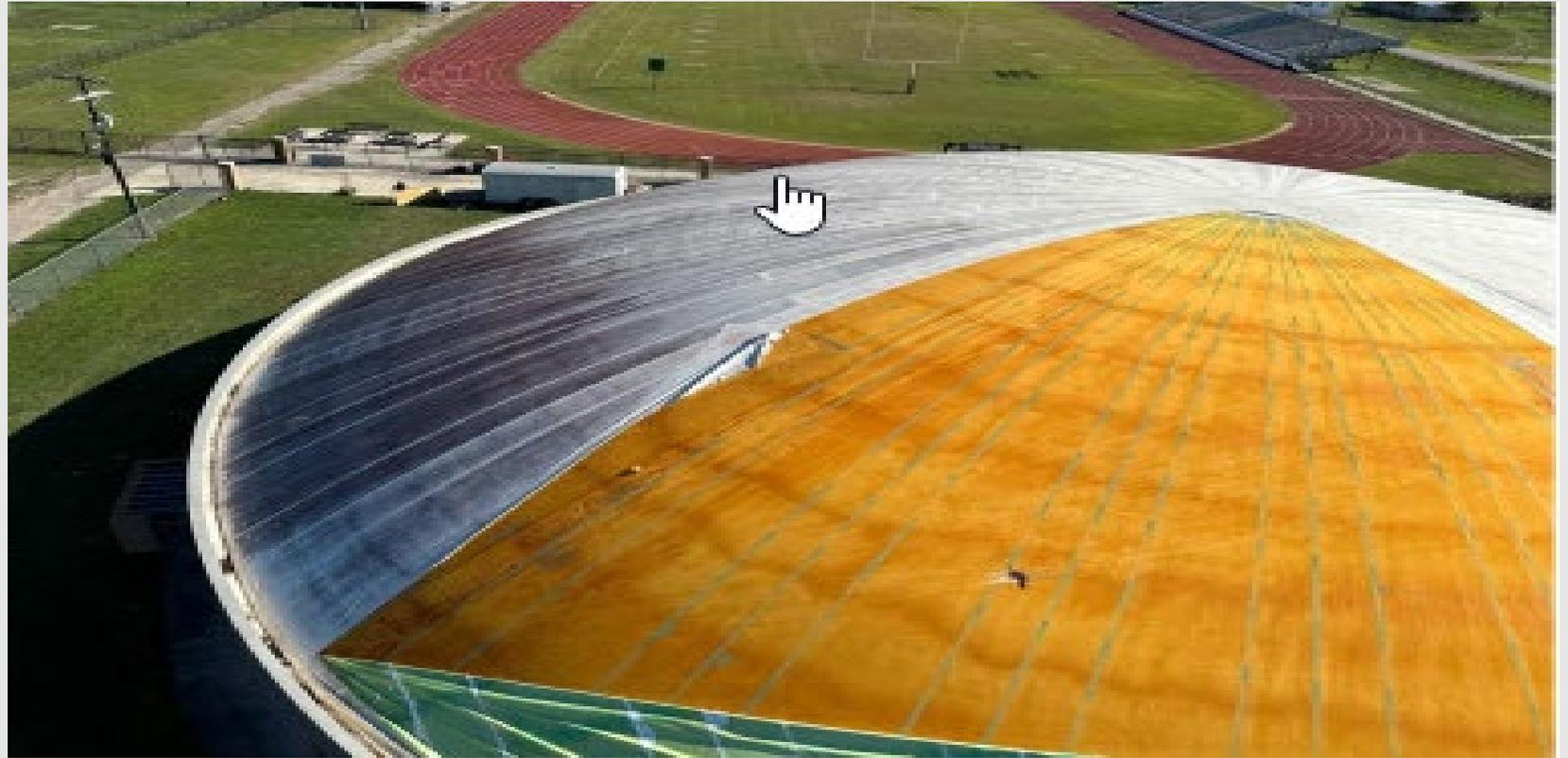


Image source: Texas school district staff/drone

THEN THERE IS BAD LUCK



Image source: Texas school district staff

PREVENTABLE DAMAGE



Image source: Eberl Claim Services



Image source: Capital Claims



Image source: Eberls Claims Service

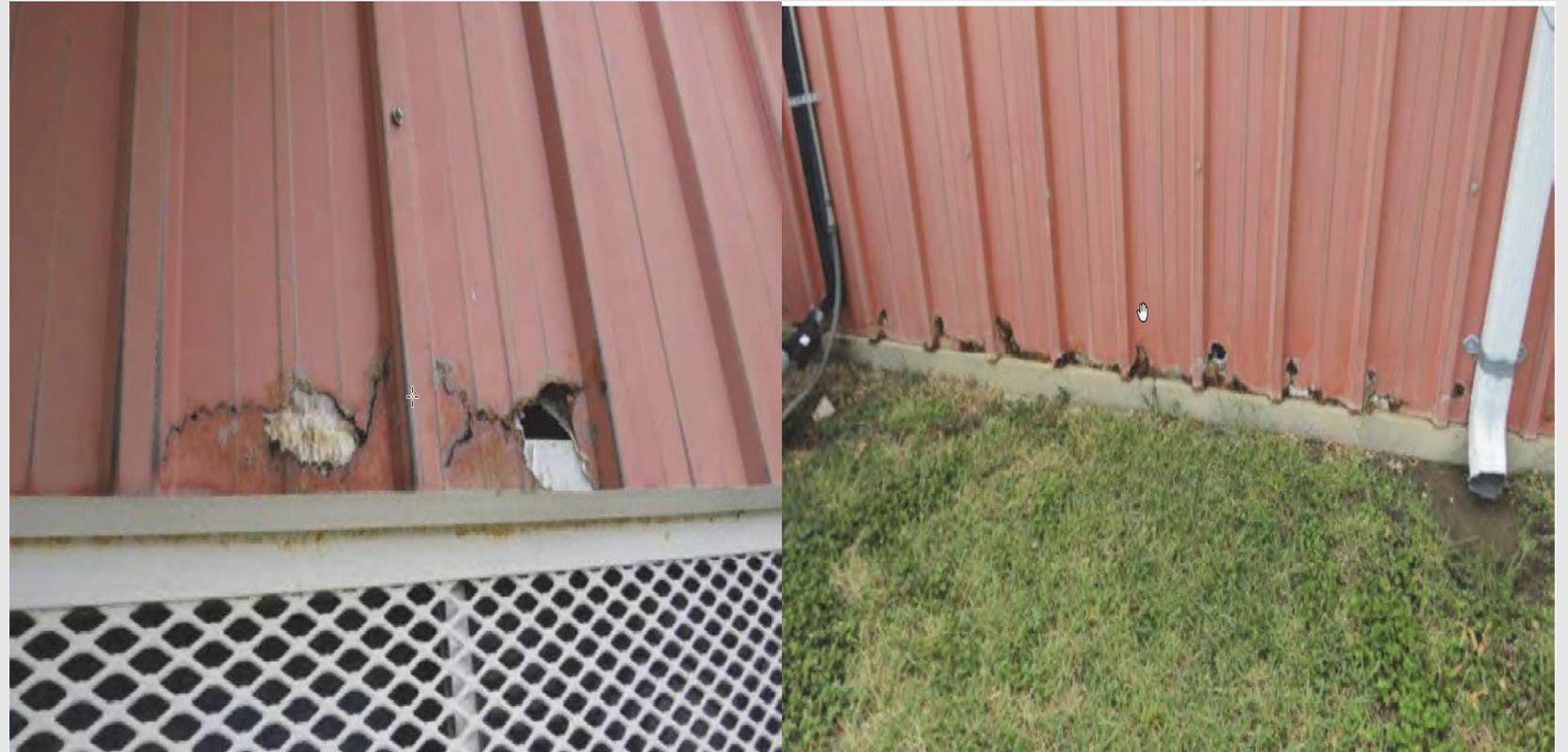


Image source: Eberls Claims Service

HVAC WITHOUT GUARDS



HVAC WITH GUARDS





We need a plan?

How'd we get here?

- ★ Deferred Maintenance
- ★ Aging Facilities
- ★ Budget
- ★ Grade Realignment
- ★ Capital Improvements
- ★ Growth
- ★ Strategic Planning
- ★ Catastrophic Events
- ★ Statutory Requirements

How'd we get here?

*Do we know ALL
of our needs?*





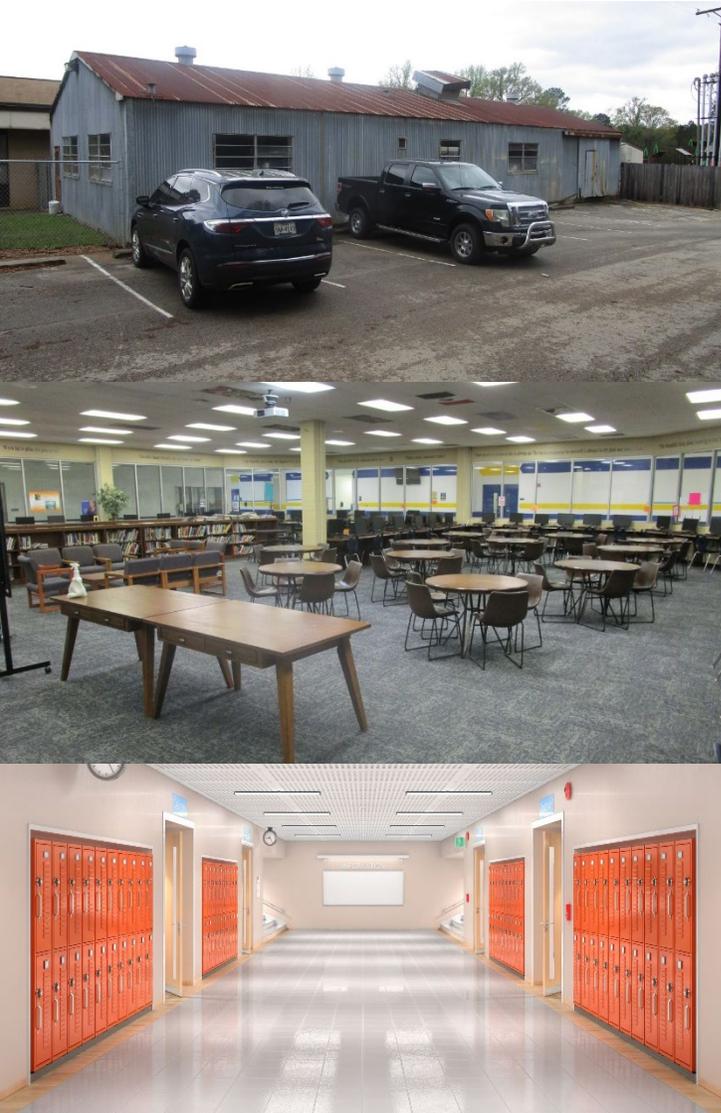
Words...

What word would you use to describe your facilities ?

Educational Facility Assessment



Image source: Texas school district staff



Educational Facility Assessment

Every campus, building, system and room

3rd Party Advantages

Facility Condition Snapshot

TEA and Other Regulatory Standards

It's not a 'Gotcha!'

Image source: Texas school district staff



TASB
FACILITY SERVICES



TASB
RISK
FUND





Educational Facility Assessment

Site

Systems & Components

Security & Safety

Educational Adequacy

Image source: Texas school district staff

Educational Facility Assessment

Products:

Deficiency List

Inventories

Replacement Schedules

Baseline Established

Budgetary Planning

M&O Project and Plan Development

Capital Planning Data



Image source: Texas school district staff

So.....

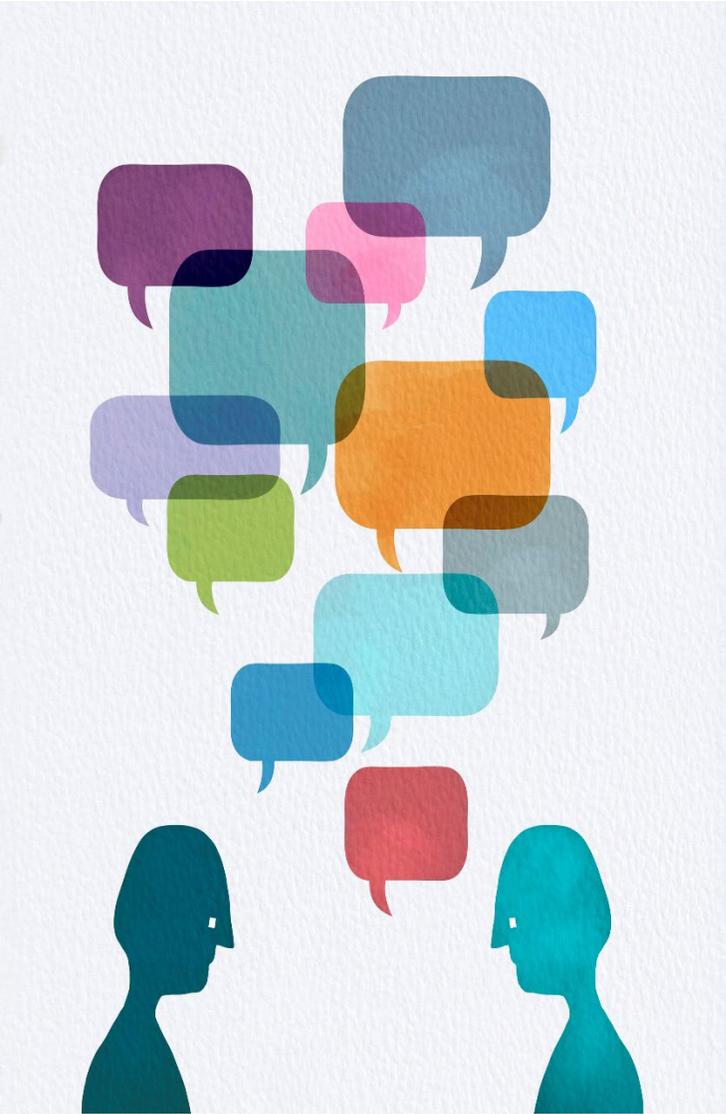
Now
what?!?





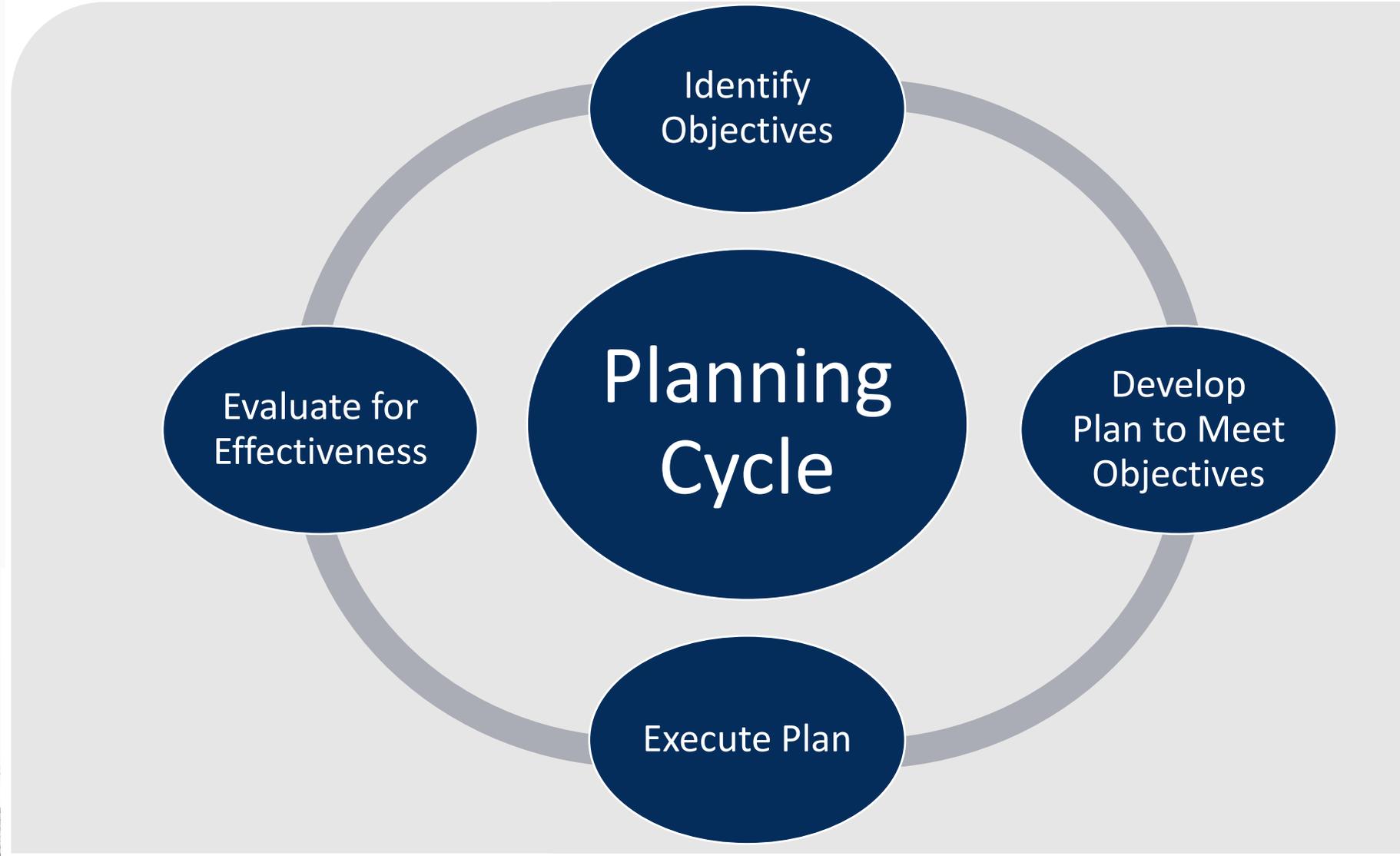
Strategic Facility Planning

- Provides direction for future boards and administrators
- Aligns facilities with educational vision
- Communicates needs to the community



Words...

What words do you WANT used to describe your facilities?



Strategic Facility Planning

Goals & Targets

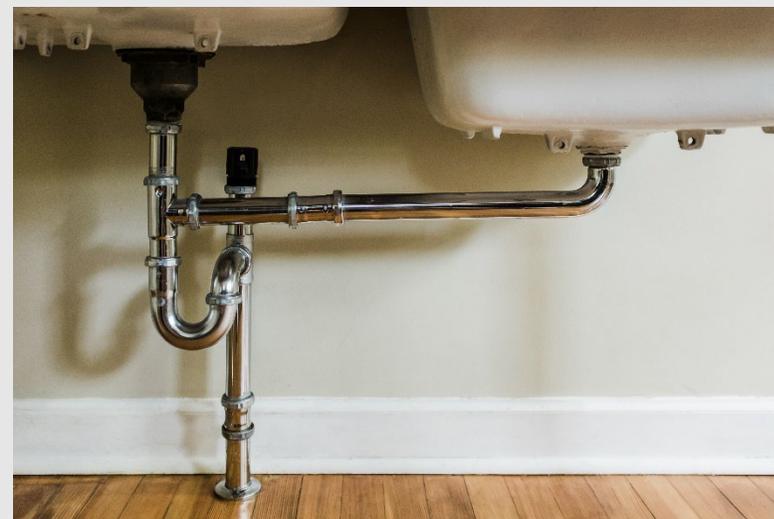
External & Internal Conditions

Action Steps



Strategic Facility Planning

- Capital or Maintenance?





Long-Range Facility Planning

LRFP Overview

Components

- Demographics
- Financial Capacity
- Instructional Assessment
- Facilities Assessment
- Representative Community Committee



LRFP Overview

Process

1. Data Collection
2. Establish and Charge Committee
3. Data Presentation
4. Visioning & Guiding Principles
5. Prioritization & Phasing
6. Plan Presentation & Adoption



Long-Range Planning Process

Planning Inputs

Financial Assessment

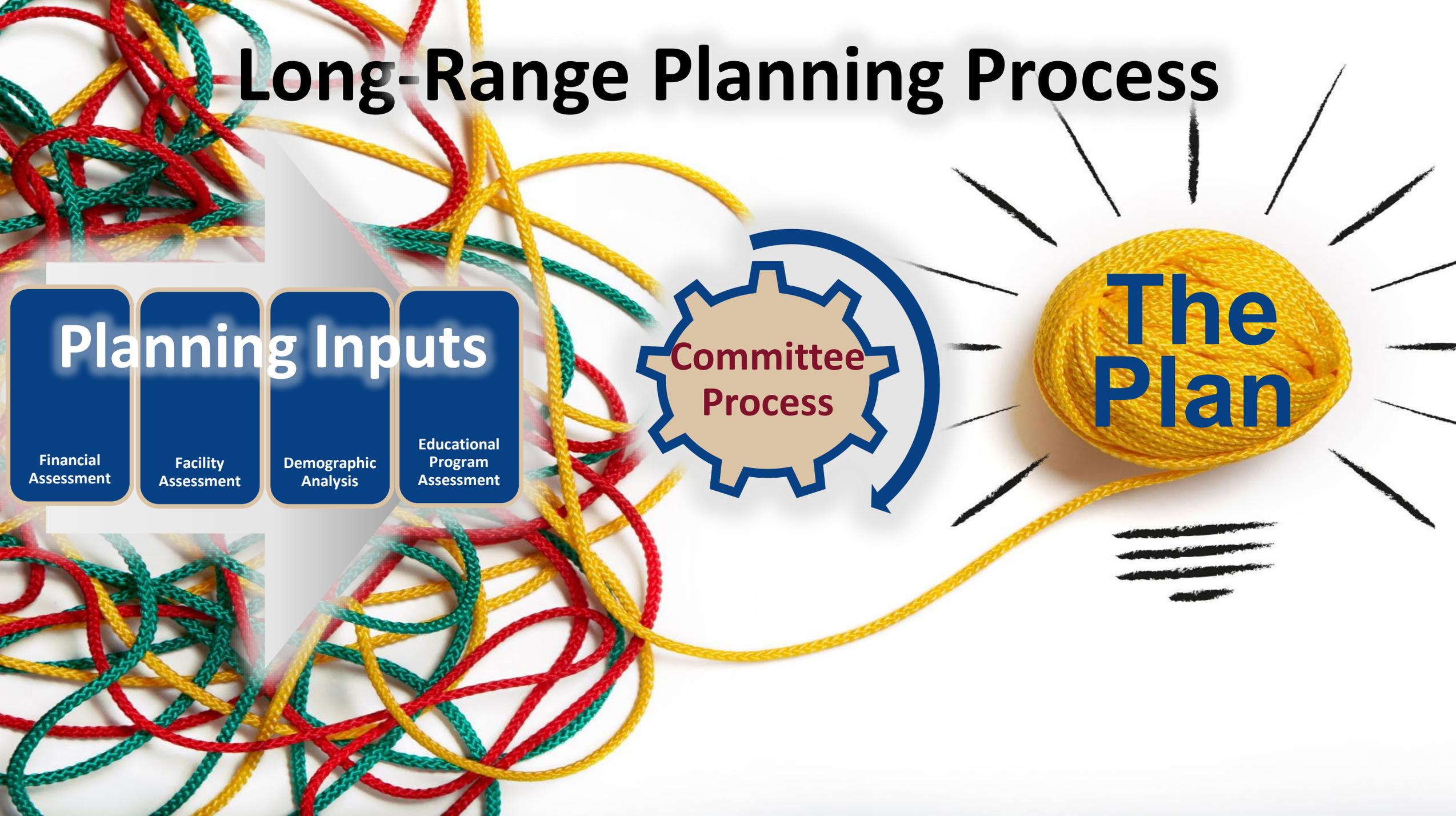
Facility Assessment

Demographic Analysis

Educational Program Assessment

Committee Process

The Plan



LRFP Benefits

1. Community Engagement
2. Transparency
3. Getting the RIGHT Story Out
4. Guide for Future Boards & Administrations
5. Establish a Baseline Plan
6. Builds Community Trust





Maintenance Planning

Maintenance Planning

- Projects
- Organization
- Procedures
- Processes

Which districts have a maintenance plan?



Maintenance Planning

Components:

Data

Priorities

Systems and Procedures

Funding Capacity



Maintenance Planning

Process:

Gather Data

Form Committee

Establish Goals Aligned with District's Goals

Establish Program Capacity

Establish Schedule and Priorities



Maintenance Planning

Benefits:

Preventive Approach vs. Reactive Approach

Efficient Use of Resources

Transparency

Communicates Good Stewardship

Early Wins



Maintenance Planning

Resulting Tools:

Project Lists

Replacement Schedules

Building and Equipment Inventories

Preventive Maintenance Schedules

Emergency Planning

Weather Event Preparedness





Be Prepared!

COMMON RISKS

- Roofs, vehicles, outdoor equipment, and exterior doors and windows damaged by hail or fallen trees
- Flooded facilities
- Power and business interruptions
- Infestation of animals seeking shelter
- Power surges and fires caused by lightning strikes



BONUS TIP

Choose hail-resistant roof material.

Research by FM Global, a leading third-party, global testing laboratory and certification agency of property loss prevention products and services, shows that most of Texas falls in a “severe hail” zone. Consult the agency’s roof system certifications, which include “Very Severe Hail” ratings, before investing in new roofs.

GOOD HOUSEKEEPING

- Move Vehicles Under Cover
- Monitor the Weather
- Respond to Hail Notifications
- Store Athletic Equipment Inside

GOOD HOUSEKEEPING CONT'D

- Inspect roofs at least twice a year and practice preventative maintenance.
- Establish rooftop control procedures, log roof access, and advise contractors to use caution with heavy tools and equipment.

GOOD HOUSEKEEPING CONT'D

- Clear gutters, roof drains, and downspouts of debris. Otherwise, water could overflow and enter facilities.
- Maintain all records of roof maintenance and inspection reports. Be ready to submit documentation to claims adjusters if a storm claim is filed for roof damage.

WHAT TO DO AFTER A STORM

- Secure the area and protect property against further damage.
- Cover building contents and other exposed property.
- Tell your adjuster immediately if you believe a building may be structurally unsafe.

WHAT TO DO AFTER A STORM

- Board up broken windows, holes in walls, leaking roofs, and other damaged property.
- If emergency repairs are necessary, take photographs and keep a record of costs. Photos and receipts will be required for reimbursement.
- File a claim immediately (or as soon as possible).

CE Code: BYO4

Questions?

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