CAPITAL NEEDS SURVEY INSTRUCTIONS

SCHEDULE:

The completed report is due to the General Assembly on December 30, 2016. Since a draft report must go to the State Board for review and approval, **YOUR DISTRICT'S INPUT MUST BE RECEIVED BY OR BEFORE OCTOBER 28, 2016.**

2013 SURVEY FORM:

The 2013 Capital Needs Report of all districts is located at http://ed.sc.gov/districts-schools/school-planning-building/, school facilities building funds. The survey information is provided as a reminder of your district's last submitted data, and as a guide to filling out the new 2016 Capital Needs Report survey form.

Your district name is located on the tabs at the bottom of the screen. Use the arrows at the lower left corner to scroll through the tabs to locate your district.

NEW 2016 CAPITAL NEEDS REPORT SURVEY FORM

The 2016 STATEWIDE CAPITAL NEEDS REPORT has been distributed to the district contact. For a copy, please contact Juliet Berry, jsberry@ed.sc.gov or 803-734-4835. It should be used to record your district's current five (5) year capital improvement program, as required by the Public School Facilities Assistance Act. It should be possible to extract the required information from the district's capital improvement program. Each question on the CAPITAL NEEDS REPORT survey form is explained below in the order in which it appears on the survey form.

The process for undertaking a Capital Needs Plan is set forth herein and is intended to enable you to roughly define your needs for the purpose of the CAPITAL NEEDS REPORT using a quick and simple projection and estimation process.

STATEWIDE CAPITAL NEEDS REPORT

Q1. **2013 Capital Needs Estimate:** The information for this item is the same as Question 9, TOTAL ESTIMATED COST OF NEW AND RENOVATED FACILITY REQUIREMENTS on the previous 2013 Statewide Capital Needs Analysis form attached. Simply repeat that number here.

Q2. **Capital Improvement Expenditures 2013/2014 – 2015/2016:** The total for this line can be drawn from the district's annual financial reports or audits for each of the last three (3) years.

Q3. **2015/2016 Student Population:** This line is the appropriate number from the district's 2015/2016 135-day Average Daily Attendance as reported to SDE.

Q4. **Projected Student Increase (Decrease):** This line is the district's projected/estimated increase in students for the next five (5) years. This number should **only** be the **INCREASE (or DECREASE) in students** and should **NOT** include the current student population count. Consequently, we are not looking for the total number of students but the **INCREASE** over the next five (5) years. Also, make certain that you have considered your dropout rates. SDE maintains its own set of projections. You may want to review these for your district. They can be found in the document *"*Membership Projections 2013 through 2016 and Student Counts At Selected Intervals From Birth to College Entrance*".*

Q5. **Existing Teaching Stations:** This answer can be calculated by increasing or decreasing the 2013 Statewide Capital Needs Analysis Form, attached, in accordance with what facilities have been added or eliminated since 2013. Alternatively, the district could choose to recount all teaching stations. This number should include all classrooms, special classrooms, and areas where any teaching occurs, including relocatable classroom units, but not including such areas as libraries, gymnasiums, and other supplemental resource areas.

Q6. **Relocatable Classrooms:** This answer can also be drawn from 2013 Statewide Capital Needs Analysis form (attached) and increased or decreased in accordance with what has occurred since 2013. Alternatively, a new count of all relocatable classrooms can be taken.

Q7. **Additional Teaching Stations Needed:** A quick, simple method of coming up with the need for new teaching stations is to: (a) determine the student population growth (already done in item #3, above), (b) establish the existing or desired student/teaching station ratio, and (c) divide the student population growth by that number.

Example:

Projected 5-year student population growth	660 students
Existing student/teaching station ratio (3,750 students / 240 teaching stations)	15.37 per teaching station
Additional teaching stations needed (660-student population increase / 15.37 existing student/teaching station ratio)	43 additional stations

If the district's strategic plan includes a district objective to reduce the instructional student/teaching station ratio, the district may want to add existing students to the 5-

year projected student growth and divide the total number of projected students by the district's instructional student/teaching station goal. See the example of the sample district presented below.

Example: The District has:

182	Existing teaching stations,
3,750	Existing student population,
660	Projected 5-year student growth,
4410	Total student population at the end of the 5-year planning period.

The District's 16.00 instructional students/teaching station ratio goal will require an additional 63 Teaching Stations

Calculated:

4,410	Student population / 16.00 = 245 total teaching stations required, minus
182	Existing teaching stations, equals
63	**ADDITIONAL** teaching stations, needed over 5 years to achieve goal.

An additional factor to be considered is whether it is necessary to **replace** existing teaching stations, such as existing portables, the replacement of an existing school considered to be obsolete or replacement of inappropriate spaces currently being used as teaching stations. To determine this part of the district's need, at least a cursory review of the general condition of existing facilities will be necessary. An example that addresses replacement calculations is presented below, along with the addition of all projected teaching station requirements for the sample district.

Example:		**Teacher Stations**
Permanent teaching stations		140
Relocatable Classrooms Teaching Stations		42
Replacement of Relocatable units over 15 years old	22	
Replacement of one elementary school of 450 students (constructed in 1952)	15	
Total Replacement teaching station needs (22 relocatable and 15 permanent classrooms)		37
New Teaching Stations Needed (see previous example)		63
Total New & Replacement Teaching Stations Required		**100**

Once the total required teaching stations has been quantified, the next question is how and where will the needed teaching stations be provided. That is, to what extent will

needs be met by constructing new schools, adding to existing schools, or acquiring relocatable units in next five years. Following through with the earlier example, we know we will need to house 660 new students, replace 22 relocatable units and renovate or replace a 15-classroom elementary school.

First, the student growth must be attributed to the appropriate grade level. For purposes of this example, assume the following: Pre-School/Kindergarten: 140 students; Elementary: 260 students; Middle: 120 students; and High School: 120 students. Following through on our example district, assume the agreed on plan is as follows:

Example:

Construct one (1) elementary school (to house 450 students)

Renovate one (1) existing elementary school (of 15 classrooms, about 38,000 SF)

Construct additions to a middle school and high school to eliminate 8 obsolete relocatable classrooms at each school (total 16) plus 4 classrooms to accommodate up to 120 new students expected during the 5-year plan period. Each school addition to be 12 classrooms at about 16,000 SF.

These capital needs should be recorded on the appropriate lines in Question 7 on the Report Form.

The district will already have decided how the increased student population will be housed, that is either through constructing new schools, renovations, additions to existing schools, and/or the use of relocatable classrooms. Costing any of these is made simple by using average square footage and the actual costs experienced in recent construction throughout the Southeast as published by the *National Clearing House for Educational Facilities.* The square footage and costing factors to be used for calculating the district's capital needs are as follows:

New Schools:

To determine the cost of a new school, first multiply the planned student population by the average square feet per student to determine the total building square feet required.

Average Square Feet Per Student:

Elementary	130 SF/Student
Middle	160 SF/Student
High	185 SF/Student

These are median averages. The range is: Elementary 115-140 SF/Student, Middle 145-175 SF/Student, and High 170-200 SF/Student.

The total square feet for the facility is then multiplied by the cost per square foot. Costs recently experienced in South Carolina have been as follows:

Average Cost Per Square Foot:*	
Elementary	$175
Middle	$164
High	$194

*Data obtained from National Clearing House for Educational Facilities.
These are median averages again. Use a range of $15 below and above these averages to get a reasonable range of cost.

Example: For a middle school of 1,000 students,
Multiply 1,000 students times 160 SF per student equals 160,000
160,000 SF times $164 per square foot, equals
$26,240,000.

Renovations:
Renovation projects (and therefore, costs) can vary significantly depending upon what is included in the renovation. A full-scale renovation typically includes the following items:

ADA Compliance
Flooring
Electrical upgrade
HVAC
Lighting/ceilings
Painting
Plumbing
Windows/doors
Alarm/computer/communication systems
Roofing
Corridor and other fire rated walls
Fire sprinkler system

Extensive renovation may required an upgrade to contemporary code standards. Design professionals and/or estimators are recommended to assist with these costs. When costs are projected to be high, replacement should be considered.

Additions:
The addition of classrooms is usually a multiple classroom project and often will include other facilities and renovations of some existing spaces as well. Typically, because the project is smaller but demands as much or more attention than new construction, these

projects run somewhat higher in average cost per square foot. Design professionals or estimators are recommended to provide cost.

Relocatable Units:

Relocatable units cost vary dependent on whether districts have an existing stock that can be moved about. Code compliance issues such as OSF approval of the manufacturer site work requirements and proper foundation constructions all affect cost. Again a design professional and/or estimator is recommended.

Q8. Other Facility Needs:

Gymnasiums, cafeterias, and auditoriums normally run higher in average cost per square foot. Administrative areas may be lower. Please consult with your design professional and/or estimator for these cost.

Other miscellaneous (as listed on the form) is intended to include certain types of improvements often made individually rather than part of a general building renovation. These specifically include roofs, HVAC replacements, and energy savings projects. Cost estimates are not offered for these type projects because they vary so greatly. Design professionals and/or estimators are recommended for definition of costs for these type projects.

Q9 and Q10. Other Cost Considerations*: These cost projections (Q7 and Q8) are contract amounts for 2016 school construction. They do not include cost for land, site improvements, roadway improvements, furnishings, design fees, surveys, testing, inspections, or legal fees. Districts may also incur costs for demographers and educational facility programmers as well. Since these cost estimates represent 2016 school construction cost, inflation projections will need to be added into future projections. These additional costs should be shown with capital needs projections on Q9 and Q10.

Q9. Total Cost of New and Renovated Facility Requirements:

The individual costs for your district's capital needs should be entered under Questions 7 and 8 on the Capital Needs Report Form and then added. The TOTAL Estimated Capital Needs to be entered on line 9 should include this total plus other cost considerations noted above*.

Q10. Capital Improvements Schedule:

This Section should set forth the dollar amount of capital improvements in the current (2016/17) budget and future anticipated improvements, based on the district's best estimate of available resources, including anticipated borrowing. Planned referendums should be noted including estimated date and amount in Q12.

(2016/17)_____
(2017/18)_____
(2018/19)_____
(2019/20)_____
(2020/21)_____

Q11. Funding Shortfall:

The funding shortfall is simply the Total Estimated Capital Needs (line 9) minus anticipated available resources (line 10).

Q12. If a local referendum is being planned, please indicate when it is scheduled and the amount that is being planned or considered during the 5-year plan period.

Q13-Q15. These are for informational purposes only and are reported on Page 2 of the CAPITAL NEEDS REPORT FORM.