

Board Guidance and Principles for BTA III Levy Planning

Overarching considerations applicable to all three areas

Use “Excellence for All” as overarching guidance for spending priorities. All projects should align with the District’s strategic plan.

Develop and understand options for projects in BEX IV. Determine preliminary direction(s) and area(s) of focus or concentration for the 2013 BEX IV levy. Start with options for areas of conceptual focus. Present those options for Board review. Then use Board guidance for projected areas of BEX IV to align BTA III projects with BEX IV.

Review and analyze projects in previous BTA and BEX levies (i.e., back to 1998 BTA I levy) to determine whether previous commitments were completed and, if not, whether the uncompleted projects are still feasible and still a priority, and whether they should be included in BTA III.

Using this Board guidance, develop proposals for BTA III packages with range of \$210m to \$300m (e.g. approximately \$210m, \$240m, \$270m, \$300m)

Percentage allocation among Buildings, Technology, and Academics/Athletics to be determined subsequently. (Note, in 2004 BTA II with \$178m total, allocation was \$95m Buildings, \$43m Technology, \$40m Academics/Athletics).

Buildings

Guidance for selection of BTA III Buildings projects (Note: Listed in rough descending order of priority, i.e. highest first, but no single factor or priority is determinative).

1. Align projects with projected focus and direction of BEX IV and with Facilities Master Plan. If a project does not align with BEX IV, need strong rationale.
2. Use the Meng analysis as a guide for prioritizing projects, with an emphasis on those projects replacing items with a remaining useful life of fewer than four years and with a priority placed on student and staff safety and on protection of building envelopes.
3. Include possible projects that position District to meet capacity management needs, especially increased enrollment in specific areas of the District.
4. Align with long-term building maintenance plans to address and reduce the building maintenance backlog. Include an analysis of possible projects focusing on preventative maintenance.
5. Include project(s) that reduce energy usage and enhance environmental stewardship, especially projects using new “green” technologies.

6. Ensure the preservation of the value of our properties by addressing items that threaten damage (e.g. exterior envelope, roof replacements, window repair, flooding issues, etc.)
7. Address capital needs issues raised by School Design Teams from school closures.
8. Use project suggestion input from school sites as an additional means of identifying projects that meet these priorities
9. Align and select projects that can be efficiently and effectively carried out with an appropriate schedule, recognizing that levy monies are collected over six years and that projects within a given school must be coordinated.

Technology

Invest in priority projects using the following as guidance:

1. Deliver first-hand capabilities to enhance a student's learning experience so as to leverage academic results for our students.
2. Improve teaching performance and the learning experience in the classroom.
3. Raise student achievement to or above district standards at every school.
4. Increase quality of academic and operational service support, with an emphasis on projects that improve service delivery efficiency and reduce support costs across the District.
5. Provide core instructional technology services needed to support Excellence for All by improving the District IT infrastructure.

Academics/Athletics

1. Invest in capital expenditures that enhance student learning
2. Invest in projects that improve the learning environment
3. Replace turf sports fields where needed. Improve field lighting as needed and to improve energy cost efficiencies.