

The National Council on School Facilities is the nonprofit association representing the 58 U.S. states, territories, and federal agencies responsible for K–12 public school facilities. The mission of the Council is to educate, serve, and support its members so that the nation’s public school buildings and grounds are planned, designed, constructed, operated, and maintained to maximize and sustain student learning, as well as student and staff health, safety, performance, and productivity.

Whereas: The states play a vital role in supporting the planning, design, construction, operation, and maintenance of high-quality public K–12 school buildings and grounds;

Whereas: Accurate, up-to-date, and comparable data on public-school facilities is needed to inform federal, state, and local policy making and practice relating to K–12 infrastructure;

Whereas: The National Center on Education Statistics (NCES) and the U.S. Census of Governments (USCOG) guide state and local fiscal data management and reporting of capital and operating expenditures for data on capital and operating expenditures for public K–12 facilities; and

Whereas: The school-facilities data collected by NCES/USCOG do not differentiate between types of facilities-related expenditures for which separate accounting is needed;

Whereas: School districts and states need clear definitions for key school-facilities data elements that permit the differentiation and classification of activities and expenditures based on their nature and/or function;

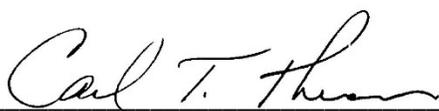
Be it resolved that:

The National Council on School Facilities adopts the draft Definitions of Key Facilities Data Elements presented on December 7, 2015 to the members, subject to technical revisions to be made by the NCSF Data & Definitions Committee.

Approved by unanimous vote of the members of the National Council on School Facilities present on December 7, 2015.

E. Perry Taylor (Alabama)
Mike Rowland (Georgia)
Dann Carlson (Hawaii)
Gary Schwartz (Iowa)
Barbara Bice (Maryland)

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Carl Thurnau, President



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Definitions of Key Facilities Data Elements (2015)

For the purposes of classifying expenditures and budgeting, facilities-related activities should fall into one of the six following categories, regardless of funding source.

PLANNING—Determining What Is Needed	
<i>The identification and maintenance of the next steps—including funding sources and planning coordination with 'outside' entities—that are required to most efficiently and effectively provide the facilities necessary to adequately support the institution's intended outcomes.</i>	
Long-term capital planning	The creation of comprehensive plans, often looking out further than five years, for the funding, establishment, acquisition, maintenance, and disposal of school facilities deployed to meet a district's needs.
Short- or near-term capital planning	The creation of detailed plans to meet a district's needs during the upcoming five years. Such plans include preliminary or pre-design project information such as educational specifications, potential sites, facility/building(s), budgets, and timelines.
ACQUISITION—Obtaining the School Facility	
<i>Activities that result in a facility or asset becoming available in a like-new condition to a school district.</i>	
Acquisition of Land	Obtaining the use of land through purchase in fee simple or through lease-purchase (lease duration must be longer than one year), including environmental, legal, and other activities required to make the land usable for its intended purposes.
Acquisition of Facilities	Obtaining a preexisting facility through purchase in fee simple or lease-purchase (lease duration must be longer than one year). Includes costs associated with eminent domain (including purchase of rights-of-way); and tax or special assessment foreclosure.
Construction of New or Replacement Facility	Construction of a new or replacement campus, including support infrastructure—both on-site and off-site—such as water, sewer, drainage, gas, power, access roads, etc. Includes all steps from planning to occupancy that are necessary to achieve a facility that has an initial lifespan of 30 or more years before comprehensive renewal would be required to gain back the learning and operational advantages of a new facility.
Renewal of Existing Facility (Full Modernization)	Renovation of an entire campus to like-new condition (equal to an Facility Condition Index* of 15% or lower) during a period of time not to exceed four years, including its support infrastructure both on-site and off-site. *The Facility Condition Index figure is derived by dividing the estimated cost to repair a complete facility to a like-new condition by the estimated current replacement (new) cost of a facility of the same class and type.

ALTERATION—Permanent Facility Modification	
<i>Building addition, renovation, modernization, or other major modification to a school campus that may add or reduce capacity and otherwise supports the facility’s function but is insufficient to renew the facility (see Acquisition).</i>	
NONPERMANENT ADDITION—Adding Temporary Capacity	
<i>Augmentation of the capacity of a facility through the installation of portable classrooms or similar assets—along with associated support systems—that are not permanent.*</i>	
<i>*When deinstalled, any recovered value remaining in the portable assets should be deducted from this account code.</i>	
MAINTENANCE—Tending the School Facility	
<i>The work required to keep a facility (plant, building, structure, ground facility, utility system, or other real property) in such condition that it may be fully functional and continuously utilized for its expected lifespan, for its intended purpose, and at its maximum energy efficiency. Includes both routine and capital maintenance.</i>	
Routine Maintenance	Routine, preventive, predictive, and emergent unscheduled tasks and repairs required to ensure that a facility functions according to its design and for its expected lifespan. Includes scheduled inspections, record keeping, equipment servicing, replacement of lamps and filters, replacement of failed equipment components such as motors, pumps and switches, responding to calls for emergency repairs, patching holes, and repairing furniture and fixtures.
Facility System(s) & Component(s) Renewal (Capital Maintenance)	Major repair, alteration, and replacement of building systems, equipment, finishes and components, including their removal and disposal. These system and component renewals occur more often at the end of a building system’s or equipment’s useful life. They will sustain or extend the useful life of the entire facility but are insufficient to result in the facility becoming “like new.” Includes improvement of roadways and drainage; replacement of playing fields, roofs, HVAC systems, windows, and doors; structural repairs; and installation or replacement of long-life assets in a facility such furniture, fixtures, and equipment.
OPERATIONS—Supporting Occupancy Needs	
<i>The services required to keep a facility clean, sanitary, and tidy such that its occupants are comfortable, healthy, and productive. Includes the provision of utilities such as fuel, electricity, water, and sewerage; support services to assist occupants; and disposal and recycling of unnecessary structures, equipment, and trash.</i>	
Short-Term Lease	A lease for 1 year or less.
Utilities	The energy, water, communications, and waste disposal services purchased to enable the operation of a school facility. Includes but is not limited to electricity, natural gas, liquid propane, oil, water, sewerage, telephone, Internet access, recycling, and trash disposal services.

<p>Custodial Services</p>	<p>The day-to-day janitorial and grounds tasks necessary to keep a facility sanitary, polished, and tidy. Includes trash removal, cleaning, waxing, weed removal, trimming, mowing, irrigating, snow and ice removal, and otherwise caring for school facilities and grounds. Also includes non-cleaning tasks such as opening the school, checking for vandalism, and identifying safety and maintenance needs.</p>
<p>Support Services</p>	<p>Routine and non-routine work tasks to support occupant functions. Includes responding to teachers’ and principals’ requests; setting up spaces for special activities and events; ordering and delivering supplies; raising and lowering the flag; and management of equipment for physical-education and athletic activities.</p>
<p>Demolition and Disposal of Facilities</p>	<p>End-of-life removal of assets including furniture, equipment, and buildings. Includes spot removal of any unsafe product such as lead or asbestos as well as cleanup of spills, mold, and other contaminants. Does not include demolition, disposal, or environmental cleanups as part of facility acquisition (construction or replacement of a new facility, or renewal of an existing facility) or capital maintenance.</p>

APPENDIX A: Supporting Definitions

(Drawn from national sources)

Building—A single continuous enclosed structure that may or may not be connected with other structures by passageways, including the structure itself with all plumbing, sanitary, heating, ventilation, mechanical, and electrical systems in the structure as well as all fixed equipment.

Building Gross Area Square Footage— The gross square footage of a building calculated and measured in accordance with the American Institute of Architects, Document D101: The Architectural Area and Volume of Buildings (latest edition). Generally, the total physical footprint of a building measured in square feet, including all occupiable floor levels.

Building Gross Educational Square Footage—The gross square footage of a building (including portables) utilized for direct support of instruction. Generally, this will be the same gross area square footage of a school facility unless a part of the facility is used for a specific non-instructional related function such as a district office.

Capital Outlay— Direct expenditure for purchase or construction, by contract or government employee, construction of buildings and other improvements; for purchase of land, equipment, and existing structures; and for payments on capital leases. .

Employee Benefits Maintenance & Operations—Amounts paid by the school system for fringe benefits and not included in salaries and wages paid directly to employees. Includes contributions on behalf of employees for retirement coverage, social security, group health and life insurance, tuition reimbursement, worker's compensation, and unemployment compensation.

Enrollment—The fall membership count of pupil rolls of the fall of the school system's fiscal year for which data are shown.

Expenditure— All amounts of money paid out by a government during its fiscal year (net of recoveries and other correcting transactions) other than those paid out for retirement of debt, purchase of investment securities, extension of loans, and agency or private trust transactions. Under this definition, expenditure relates to external payments of a government and excludes amounts transferred to funds or agencies of the same government (other than payments to intragovernmental service funds – see Section 3.9.2). Expenditure includes payments from all sources of funds, including not only current revenues but also proceeds from borrowing and prior year fund balances. Note, however, that the statistics do not relate expenditure to the source of funding. Expenditure includes amounts spent by all agencies, boards, commissions, or other organizations categorized as dependent on the government concerned. Stated in terms of the accounting procedures from which these data originate, expenditure covers outlays of all accounting funds of a government other than intragovernmental service (revolving), agency, and private trust funds.

Facility— A single site or contiguous adjacent site(s) in which typically a building or buildings house and/or support educational activities.

Facility Condition Index (FCI)—A measurement used in facilities management to provide a benchmark to compare the relative condition of facilities. FCI of a facility is calculated by estimating the cost to repair all building systems (that make up a complete facility) to a like-new condition divided by the current replacement (new) cost of that facility (FCI = repair costs / replacement cost).

Facility-Related Capital Outlay— School construction capital outlay and land and existing structures

outlay.

Interest On Debt Expenditures—Interest expenditures on long term debt.

Long-Term Debt, End of FY—Debt payable more than 1 year after date of issue.

Other Capital Outlay—Expenditures for instructional equipment, other equipment, and non-specified equipment.

Purchase of Equipment— Purchase and installation of apparatus, furnishings, motor vehicles, office equipment, and the like having a life expectancy of more than five years.

Salaries Maintenance & Operations—Amounts paid for compensation of school system officers and employees. Consists of gross compensation before deductions for withheld taxes, retirement contributions, or other purposes.

School Construction Outlay—Production of fixed works and structures and additions, replacements, and major alterations thereto, including planning and design of specific projects, site improvements and provision of equipment and facilities that are integral parts of a structure. Includes both construction undertaken either on a contractual basis by private contractors, or through a governments own staff.

Short-term Lease—A lease for one year or less.

Utility Type—The type of utility used in the operation of a facility.