

California School Districts Face New Requirements for Facilities Assessment and Maintenance Funding

Managing aging buildings with limited resources and ever-evolving needs is a struggle for school district officials striving to create optimal learning environments. Having a robust facilities master plan (FMP) is a game-changer, which can impact safety for educators and students as well as procure state funding for the school district.

Brett Mitchell – Associate Vice President, US West PGM – said lack of adequate funding of many of the state's K-12 schools has created a dire need for comprehensive planning and maintenance strategies, especially in the face of new legislation that will require districts to prove they are routinely assessing the maintenance of their assets and infrastructure.



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Mitchell shared a synopsis of how this challenge came to be: California's rapid growth in the mid-20th century led to a surge in school construction. As time passed and these facilities began to deteriorate, the limitations imposed by Proposition 13 on tax revenue allocated for schools exacerbated the problem. This shortfall prompted disparities between affluent and less privileged districts, prompting legal actions and eventually the establishment of the Office of School Construction to address equity concerns.

Despite these efforts, a glaring gap remained: the absence of a statewide policy mandating regular assessments and maintenance of school facilities. Mitchell emphasized that it wasn't until recently, with a \$4 billion maintenance backlog, that the state intervened with Senate Bill (SB28, also known as Public School K12 and College Health and Safety Bond Act of 2024). This bill, a pivotal development, ties funding for school districts to comprehensive inventory assessments and maintenance plans. (The bill will go before California voters in November 2024.)

Under SB28, school districts will be required to conduct detailed inventory assessments, projecting the lifecycle costs of their assets. Mitchell stressed the importance of considering not only growth but also maintenance needs and enrollment patterns. He highlighted the necessity for school boards to actively engage in asset management, understanding the age and condition of key infrastructure components, such as roofs and boilers.

A key challenge identified by Mitchell was the disjointed nature of existing software solutions for facilities management. He praised the emergence of platforms like Kahua, which offer integrated solutions tailored to the needs of school districts. This shift towards comprehensive data management is seen as essential in streamlining planning and budgeting processes.



Dr. Brett A. Mitchell

Dr. Brett A. Mitchell is Associate Vice President, US West PGM at AECOM, focusing on growth within the sector with an emphasis on expanding AECOM's footprint in the K-14 and Healthcare sectors. With a background as both a client and practitioner of project delivery service positions, in addition to his years as an educator, Dr. Mitchell is well equipped to represent his clients' needs. He has rich experience in professional organizations, including serving as a board member for the Design-Build Institute of America (DBIA) Western region, and displays genuine care for the people that he represents. He brings a seasoned perspective from over 30 years of hands-on experience and immense perseverance in building relationships. Dr. Mitchell also received his Doctorate, where his research focused on providing adequate facilities for the K-14 students of California.





Drawing parallels to innovative technologies like those found in Tesla vehicles, Mitchell envisions a future where facilities management becomes proactive rather than reactive. He advocates for technology to enable real-time updates on asset conditions, triggering maintenance actions and updating cash flow projections accordingly.

Looking ahead, Mitchell emphasizes the need for school districts to adapt to the changing landscape of facilities management. With funding becoming more contingent on proactive planning and maintenance, complacency is not an option, he said, adding that AECOM supports districts in this transition by providing expertise and guidance.

Mitchell underscored the importance of collaboration and proactive stewardship in ensuring the longevity and efficiency of school facilities. AECOM is partnering with VM3 and JKAE, both consultants in architecture, engineering and construction (AEC). The team is assisting the San Juan Unified School District (SJUSD) in modernizing its FCA (Facility Condition Assessment) process.

This partnership aims to streamline the district's processes, ensuring that its 65 school sites within the district are well-maintained ... and that SJUSD officials can track their maintenance planning and execution to achieve necessary state funding.

- The AECOM team, which includes VM3 and JKAE, regularly collaborates with the SJUSD facilities team to discuss goals, identify deficiencies and review enrollment projections to align facility needs with student populations. This effort underscores the importance of strategic planning in managing school facilities effectively. VM3 uses Kahua to manage these activities, and the school district utilizes Kahua for its construction project management efforts.
- The team is assisting SJUSD in managing its bond program through robust project controls, financial tracking and contingency planning.
- Over the next three to five years, VM3 is supporting SJUSD in refining its business processes and optimizing the use of Kahua. Although the district implemented Kahua in 2022, it isn't fully utilizing all the PMIS modules.
- Currently, SJUSD, with the AECOM team's guidance, is engaged in extensive data collection to understand the state of its assets and predict future needs.

“Several districts are watching and waiting to see how this is going at San Juan,” Villanueva said. They are a trend-setter in K-12, leading edge in trying to discover how to better run their programs. Everyone is leaning on them. At school district conferences we've heard people ask them, **‘Can I get a copy of your RFP? What was your language to get Kahua?’**

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