Poway Unified School District
Presented to the Board of Education – 2/14/2019
## Key Deliverables

| **Quantify Renewal Needs** | • Created Life Cycle Profiles for major building components and systems; |
| **Multi-Year Capital Plan** | • Forecast how capital needs will grow in both the short and long term (5-year & 30-year plan) as the buildings continue to age; |
| **Evaluate Building Performance** | • Calculated building performance using industry standard metrics to evaluate overall building risk and continued asset sustainability; |
| **Risk Mitigation** | • Developed Cost by Discipline, Unfunded Liability, & Facility Condition Index (FCI) profiles for the portfolio; |
| **Asset Sustainability** | • Introduced Asset Sustainability targets, as a measure of FCI, to demonstrate funding required for effective management of resources; |
ASG AssetPlanner™ Approach

Disparate data:
- Excel Spreadsheets
- PDF’s
- Institutional Knowledge
- Drawings / Schedules

Basic Asset Details:
- Age
- Size
- No. of floors
- Functional use
- Site Address

Validation:
- Incorporation of detailed datasets
- Knowledge transfer
- On-Site Condition Assessments

Benefits:
- Rapid data development process
- Institutional knowledge transfer
- Single data repository
- Dynamic dashboards for entire portfolio
Age Profile – Average Age of Buildings per School

Average Facility Age: 29 years (1990)
Total Facility Size: 4.15 million SF
Total Replacement Value: $1.332 billion
AssetPlanner™: Executive Dashboard

After a series of Quality Control steps, PUSD’s portfolio is uniquely configured within the AssetPlanner™ platform. Condition data is live, rolling up to the dynamic Executive level dashboard for views by district, school, and other groupings.
AssetPlanner™: Executive Dashboard – School View
Highland Ranch Elementary
Capital Needs By Discipline

Life cycle renewal costs for the major building elements have been established for each building to determine the Capital Renewal budget requirements over the next 30 years.

2019 Deferred Backlog: $94.7 M

$1.0 M average annual funding
Projected Total Liability

The total liability represents the cumulative renewal needs of the portfolio based on the findings and results obtained from the life cycle renewal cost analysis.

Unfunded Liability Impacts
Years 2019 - 2048 and where Asset Status = Active for Asset Class Building, Site

2019 Liability: $94.7 M
(Deferred Backlog)

2048 Liability: $811 M

Total Liability

(as of 2019-01-23 18:05:07)
Projected Unfunded Liability

Cumulative lifecycle renewal costs (top line) and the *annual capital funding allocation* (green area) of $1.0M per year.

Unfunded Liability Impacts
Years 2019 - 2048 and where Asset Status = Active for Asset Class Building, Site

Average Annual Funding: $1.0 M

Asset Sustainability Target

(as of 2019-02-05 11:33:53)

Unfunded Cost  ▲  All Assets-$1M Deferred Maintenance Funding Strategy (Evenly)
The **FCI** is an industry standard index used to track condition performance of facilities and capital/asset portfolios. The FCI provides a consistent measurement of condition for a single building, group of buildings, or total portfolio.

**Standard metric to identify and quantify Risk**

- **GOOD Range:** FCI (0% - 5%)
- **FAIR Range:** FCI (5% - 10%)
- **POOR Range:** FCI (10%-30%)
- **CRITICAL Range:** FCI (> 30%)

\[
\text{FCI} = \frac{\text{Renewal and Repair Costs}}{\text{Replacement Cost ($1.332 B)}}
\]
Asset Sustainability Target

Establishing an **Asset Sustainability Target of 8% (Fair)** will “sustain” the assets at an acceptable level of risk. This will require **$23.5 million per year over the next 30 years**.
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**Cumulative FCI - Needs Analysis**
Target FCI of 8% in 30 Years Year 2019-2048 and where Asset Status = Active for Asset Class Building, Site

- **2019 FCI = 7.1%**
- **With funding, FCI migrates to Poor by 2022**
- **With funding, FCI migrates to Critical by 2033**
- **Average Annual Funding: $1.0 M per year**
- **8% FCI Target (Average Funding: $23.5 million)**
## FCI Forecast

**Name** | **Size (Sq.Ft.)** | **2019** | **2023** | **2028** | **2033** | **2038** | **2043** | **2048**
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Abraxas High School | 37,196 | 8.6% | 15.7% | 22.8% | 29.4% | 35.4% | 41.8% | 48.8%
Adobe Bluffs Elementary School | 61,791 | 6.8% | 11.5% | 24.5% | 35.0% | 47.2% | 63.6% | 59.9%
Bernardo Heights Middle School | 151,287 | 8.4% | 15.6% | 26.0% | 36.6% | 44.0% | 49.4% | 58.0%
Black Mountain Middle School | 131,219 | 12.6% | 15.0% | 23.3% | 27.0% | 35.2% | 42.2% | 52.9%
Canyon View Elementary School | 54,794 | 9.7% | 15.4% | 24.4% | 33.1% | 44.3% | 47.6% | 57.5%
Chapparral Elementary School | 67,022 | 10.1% | 13.7% | 25.1% | 35.6% | 44.7% | 53.4% | 59.5%
Creekside Elementary School | 63,237 | 5.5% | 6.1% | 13.2% | 34.9% | 47.3% | 54.9% | 57.0%
Deer Canyon Elementary School | 49,165 | 5.1% | 12.7% | 18.7% | 31.1% | 44.3% | 47.6% | 53.3%
Del Norte High School | 249,102 | 1.3% | 3.9% | 8.1% | 20.4% | 29.0% | 46.1% | 55.7%
Del Sur Elementary School | 88,863 | 2.2% | 8.3% | 15.3% | 28.1% | 44.7% | 55.4% | 71.7%
Design 39 Campus | 187,191 | 0.0% | 0.2% | 0.1% | 8.6% | 15.8% | 23.4% | 46.3%
Garden Road Elementary School | 55,625 | 9.4% | 16.0% | 28.2% | 38.2% | 49.0% | 58.0% | 65.9%
Highland Ranch Elementary School | 66,284 | 6.0% | 16.6% | 24.6% | 33.2% | 46.8% | 52.8% | 62.0%
Los Penasquitos Elementary School | 54,454 | 12.6% | 16.0% | 23.5% | 32.6% | 43.9% | 45.6% | 60.0%
Meadowbrook Middle School | 113,371 | 9.5% | 13.2% | 28.5% | 35.0% | 42.9% | 58.0% | 66.9%
Mesa Verde Middle School | 127,183 | 9.3% | 17.7% | 31.0% | 36.6% | 46.3% | 57.7% | 62.9%
Midland Elementary School | 79,691 | 2.0% | 5.2% | 17.0% | 29.6% | 46.1% | 58.0% | 66.9%
Monte Vista Middle School | 102,371 | 1.5% | 2.9% | 11.1% | 27.9% | 40.8% | 53.2% | 59.0%
Morning Creek Elementary School | 68,491 | 6.8% | 11.5% | 19.2% | 31.2% | 40.6% | 49.6% | 59.0%
Oak Valley Middle School | 134,493 | 4.2% | 5.8% | 16.3% | 25.8% | 38.5% | 48.8% | 59.3%
Painted Rock Elementary School | 54,995 | 5.4% | 8.6% | 15.0% | 33.6% | 41.4% | 49.0% | 54.6%
Park Village Elementary School | 51,017 | 7.8% | 16.9% | 20.8% | 30.5% | 43.6% | 51.8% | 59.3%
Pomerado Elementary School | 47,353 | 1.3% | 1.5% | 7.5% | 16.2% | 27.1% | 42.5% | 48.5%
Poway High School | 318,206 | 11.0% | 15.8% | 27.3% | 32.1% | 45.9% | 55.7% | 61.2%
Rancho Bernardo High School | 291,100 | 7.3% | 13.4% | 25.2% | 31.7% | 37.3% | 49.9% | 52.9%
Rolling Hills Elementary School | 52,732 | 10.9% | 13.0% | 33.1% | 34.7% | 34.7% | 48.8% | 59.1%
Shoal Creek Elementary School | 54,995 | 5.4% | 8.6% | 15.0% | 33.6% | 41.4% | 49.0% | 54.6%
Stone Ranch Elementary School | 95,060 | 3.6% | 3.6% | 9.3% | 20.2% | 34.5% | 45.8% | 53.7%
Sunset Hills Elementary School | 50,840 | 1.3% | 1.5% | 7.5% | 16.2% | 27.1% | 42.5% | 48.5%
Sunset Hills Elementary School | 52,179 | 3.2% | 4.3% | 9.1% | 17.0% | 30.7% | 44.7% | 51.3%
Twin Peaks Center Support Site | 50,840 | 16.0% | 23.5% | 32.4% | 38.5% | 45.2% | 56.2% | 69.5%
Twin Peaks Elementary School | 64,205 | 5.7% | 9.7% | 20.3% | 39.0% | 49.7% | 54.2% | 56.7%
Valley Elementary School | 65,712 | 9.4% | 11.6% | 25.3% | 35.9% | 48.5% | 68.8% | 75.2%
Westview High School | 270,248 | 2.5% | 2.8% | 17.2% | 31.4% | 45.0% | 54.0% | 62.8%
Westwood Elementary School | 69,853 | 11.9% | 14.0% | 16.0% | 28.5% | 41.2% | 45.4% | 57.8%
Willow Grove Elementary School | 81,115 | 0.8% | 2.9% | 7.4% | 24.2% | 35.8% | 43.2% | 55.1%
**Totals:** | **4,081,849** | **7.1%** | **11.3%** | **21.2%** | **31.0%** | **41.7%** | **51.8%** | **60.9%**