



September 22, 2004

**Recommendations from the Superintendent**  
2006 - 2011 Capital Strategy

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**Albuquerque Public Schools**  
**Capital Master Plan**

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**Capital Master Plan Review Committee**

# Great Things Happening

- **Opened three elementary schools summer 04**
  - ✓ *Edward Gonzales (SW)*
  - ✓ *Ventana Ranch (NW)*
  - ✓ *Manzano Mesa (SE)*
- **178 Portables moved for construction projects, shifting populations and all-day kindergarten implementation**
- **Technology needs defined for all APS sites**
- **All district facility needs re-evaluated**

# Great Things Happening

- **APS contributed \$1.2 million / week in economic impact to the local economy due to capital construction**
- **APS, City Council, and County Commission working together to address growth, community schools and Planned Growth Strategy (concurrency)**
- **APS awarded \$52.8 million matching funds from the New Mexico Public Schools Capital Outlay Council / Public School Finance Authority (PSCOC / PSFA)**

# Great Things Happening

- **Sister Schools (Sharing Boundaries) successfully implemented and is relieving overcrowding at West Mesa and Cibola High Schools**
- **Successfully implemented mandatory all-day Kindergarten**

# Goals for the Capital Master Plan

- **Balance needs for new schools with renovation of existing schools**
- **Incorporate Technology into the district's capital strategy**
- **Incorporate capital needs from all APS Departments**
- **Develop a long-term (7 - 10 years) strategic planning guide that identifies needs considering optimum school utilization**
- **Educate the community and APS staff on the capital master planning process**

# Introduction

- **The Capital Master Plan Review Committee (CMPRC) reviewed over \$1.3 billion in capital needs and requests including:**
  - ✓ *Growth and demands for additional classrooms*
  - ✓ *Educational / programmatic requirements of the schools*
  - ✓ *Facility renewal*
  - ✓ *Educational Equipment and Technology*
  - ✓ *District Support and other district needs*
- **Based on this review, the CMPRC recommends to the Superintendent of Schools a strategy for APS capital improvement expenditures from 2006 to 2011 including:**
  - ✓ *A specific HB33 06-10 package for the February 2005 election*
  - ✓ *Recommended contents for GO 06, GO 09 and SB 9 08-11 to be validated prior to their elections and final recommendations made to the Board*

# Introduction

## Capital Master Plan Review Committee

### Four Principals

Deborah Detorie	Montezuma Elementary
Michael Carrillo	New Elementary School
Gary Atwood	Sombra del Monte
Ace Trujillo	Highland HS

### Four Teachers

Susan Geores	Seven Bar Elementary
Joe Vertrees	Freedom High School
Ron Warren	Del Norte High School
Richard Isaacson	Cibola High School

### Four Community Members

Candy Patterson	West Mesa Cluster
Rex King	Rio Grande Cluster
Luz L. Valdes-Norris	West Mesa Cluster
Gail Gardner	Manzano Cluster

*The CMPRC advises the administration and Board on capital financing issues and provides oversight of the APS Capital Master Plan. It is assisted by APS staff.*

## Capital Master Plan Support Staff

Michael Vigil	Chief Business Officer
Brad Winter	Capital Master Plan
Tom Ryan	Learning Technologies
Pat McMurray	Facilities Planning & Construction
Bill Koelm	Facilities & Support Operations
Chuck Atwood	Real Estate
Kizito Wijenje	Planner/Demographer

## Staff support by Architectural Research Consultants, Incorporated

John Petronis	ARC
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## Other Special Knowledge APS Resources included as appropriate:

Steve Gregg	Finance Controller
Bill Jackson	Materials Management
Liz Shipley	Communications Relations
Julie Crespy	Accounting
Angela Lucero	Yes For Our Children's Future
Dave Grieves	Yes For Our Children's Future
Rigo Chavez	Director, Community Relations
Eddie Soto	Schools of Choice Cluster Leader

## Other Special Knowledge Outside Resources included as appropriate:

Paul Cassidy	Bond Consultant
Art Melendres	APS Bond Consultant
Erik Harrigan	Bond Consultant

# Introduction

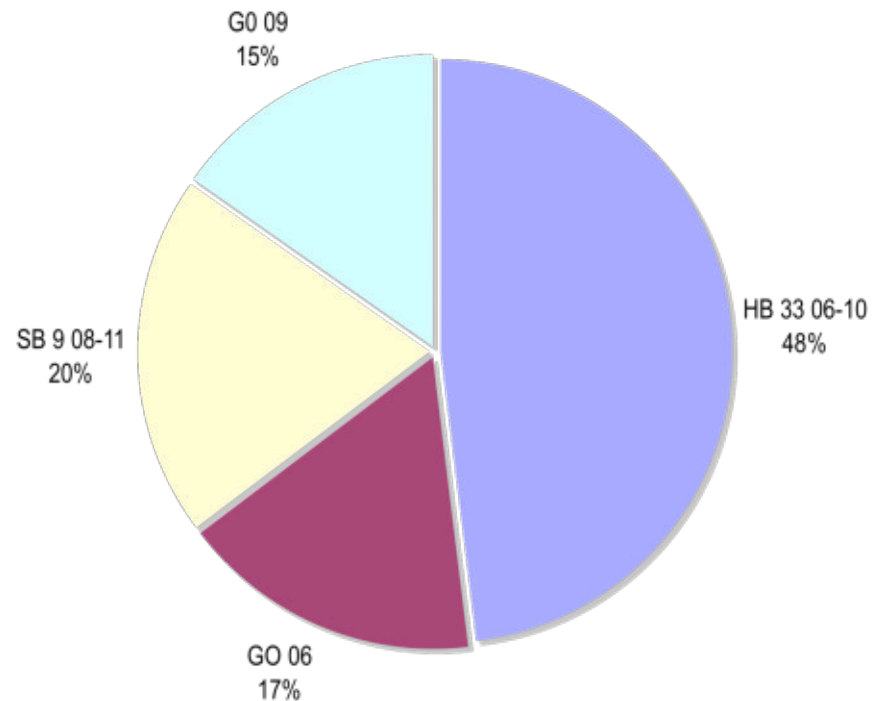
- **The recommendations and strategies incorporated in this plan are based on a thorough facility and technology evaluation of every district facility and the most recent enrollment and classroom utilization / capacity studies. Specifically, the recommendations:**
  - ✓ *Maintain or implement previous commitments and promises.*
  - ✓ *Combine a number of capital funding sources directed to specific purposes to meet the long-range needs of the district. These funding sources all serve multiple needs but each has a specific emphasis:*
    - *HB 33 Mill Levy is oriented primarily towards renewing existing facilities (and as a supplementary source for additional classrooms) and providing educational equipment and district support and renewal;*
    - *GO Bonds are directed primarily for new schools, major additions, educational programmatic needs and school-based technology;*
    - *SB 9 Mill Levy is used primarily for school maintenance and renewal activities.*

# Introduction

- The recommended strategy will provide \$454.25 million in voter approved revenue to meet district needs from 2006 to 2011 maintaining current tax rates.

Expected Revenue: APS 2006-11 Capital Strategy

Expected Revenue Capital Strategy 2006-11*		Election Date
HB 33 06-10	\$218,615,400	Feb-05
GO 06	\$75,000,000	Feb-06
SB 9 08-11	\$90,632,600	Feb-07
GO 09	\$70,000,000	Feb-09
<b>Total</b>	<b>\$454,248,000</b>	



\*Does not include state legislative grants or PSCOC matches

# Introduction

- **The intent of the 2006-2011 Capital Strategy is to:**
  - ✓ *Provide an equitable educational environment for all schools*
  - ✓ *Provide a proper funding balance between the many important needs and requests of the district. Only 1/3 of the identified need can be met by expected revenues*
  - ✓ *Recognizes and focuses other capital resources potentially available to the district*
  - ✓ *Provide a long-range strategy to bring all schools to the same standard with respect to:*
    - *Health/Safety - Code compliance*
    - *Educational/Programmatic (Additions, replacement schools, remodeling to meet various standards)*
    - *Renewal needs (Remodeling, refurbishing, planning studies)*
    - *Provide for additional classrooms (New schools, additions, remodeling, site acquisition, design/planning studies).*
    - *Educational technology*

# Introduction

## ■ Resources are distributed based on need (not demands) considering:

### ✓ **Individual school evaluations**

- *District facility and educational technology standards*
- *Focuses on lowest scoring facilities*
- *What has been done in the past and what needs to be completed*

### ✓ **State and district program requirements**

- *Kindergarten*
- *Science*
- *Gymnasiums*

### ✓ **Health / Safety and code compliance**

### ✓ **Growth**

# Recommendations - Summary

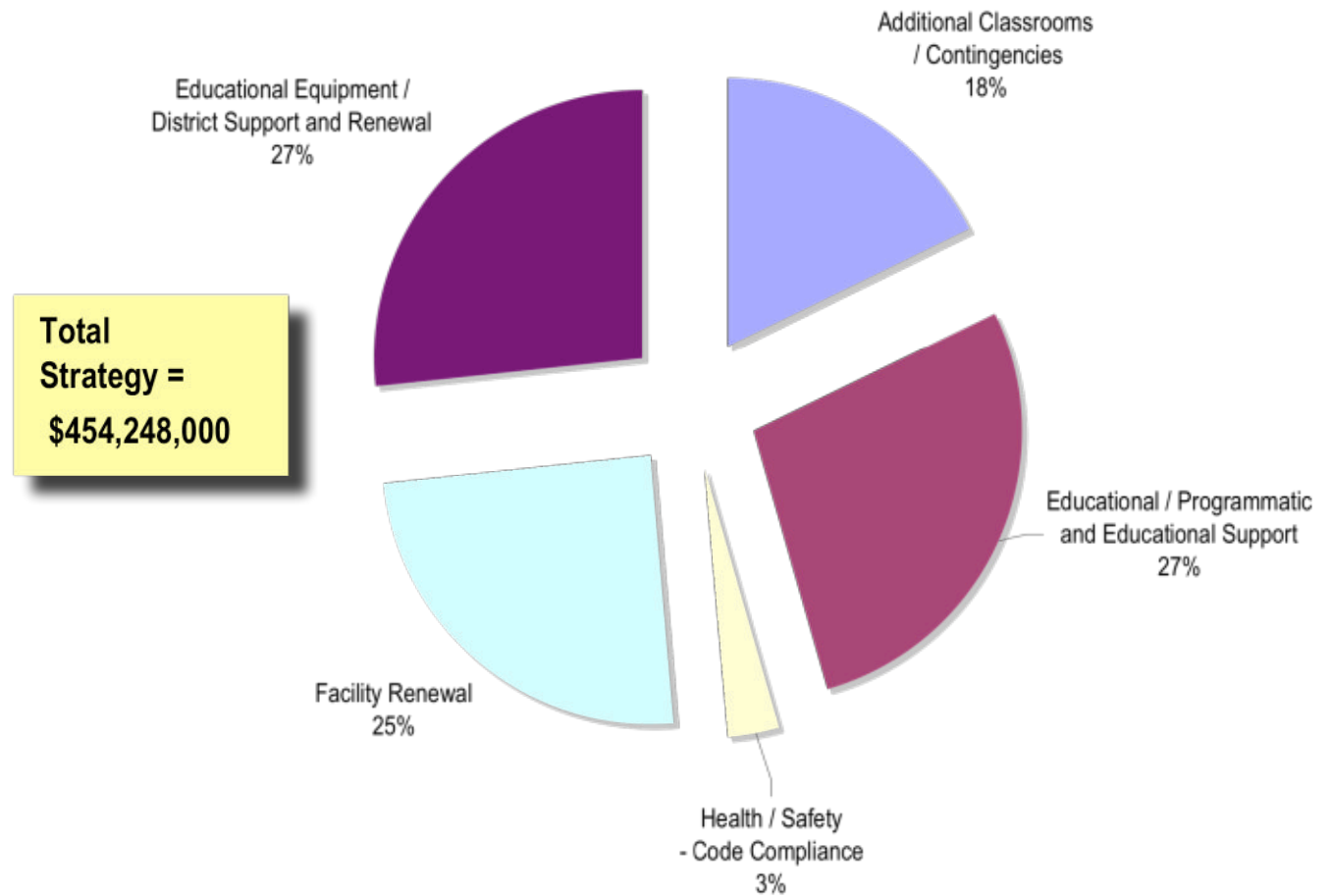
## ■ 2006-11 Capital Strategy Summary

Albuquerque Public Schools Capital Improvement Projects by Category									
Category	Past Elections			2006-11 Capital Strategy				Total 2006-11	% Total
	Total 1990-95*	Total 1996-01	Total 2001-05	HB33 06-10	GO 06	GO 09	SB 9 08-11		
1. Additional Classrooms / Contingencies	\$46,679,263	\$102,495,000	\$36,075,400	\$41,317,200	\$31,550,000	\$6,150,000	\$1,882,600	\$80,899,800	17.8%
2. Educational / Programmatic and Educational Support	\$29,150,020	\$45,538,300	\$93,992,600	\$62,122,000	\$26,220,000	\$37,560,000	\$0	\$125,902,000	27.7%
3. Health / Safety - Code Compliance	\$41,964,316	\$25,991,000	\$18,504,300	\$9,555,000	\$0	\$0	\$5,000,000	\$14,555,000	3.2%
4. Facility Renewal	\$66,341,066	\$96,220,654	\$107,308,800	\$48,097,000	\$8,230,000	\$17,290,000	\$38,000,000	\$111,617,000	24.6%
5. Educational Equipment / District Support and Renewal	\$40,000,000	\$68,385,600	\$67,039,000	\$57,524,200	\$9,000,000	\$9,000,000	\$45,750,000	\$121,274,200	26.7%
	<b>\$224,134,665</b>	<b>\$338,630,554</b>	<b>\$322,920,100</b>	<b>\$218,615,400</b>	<b>\$75,000,000</b>	<b>\$70,000,000</b>	<b>\$90,632,600</b>	<b>\$454,248,000</b>	
			% Total	48.1%	16.5%	15.4%	20.0%	100.0%	

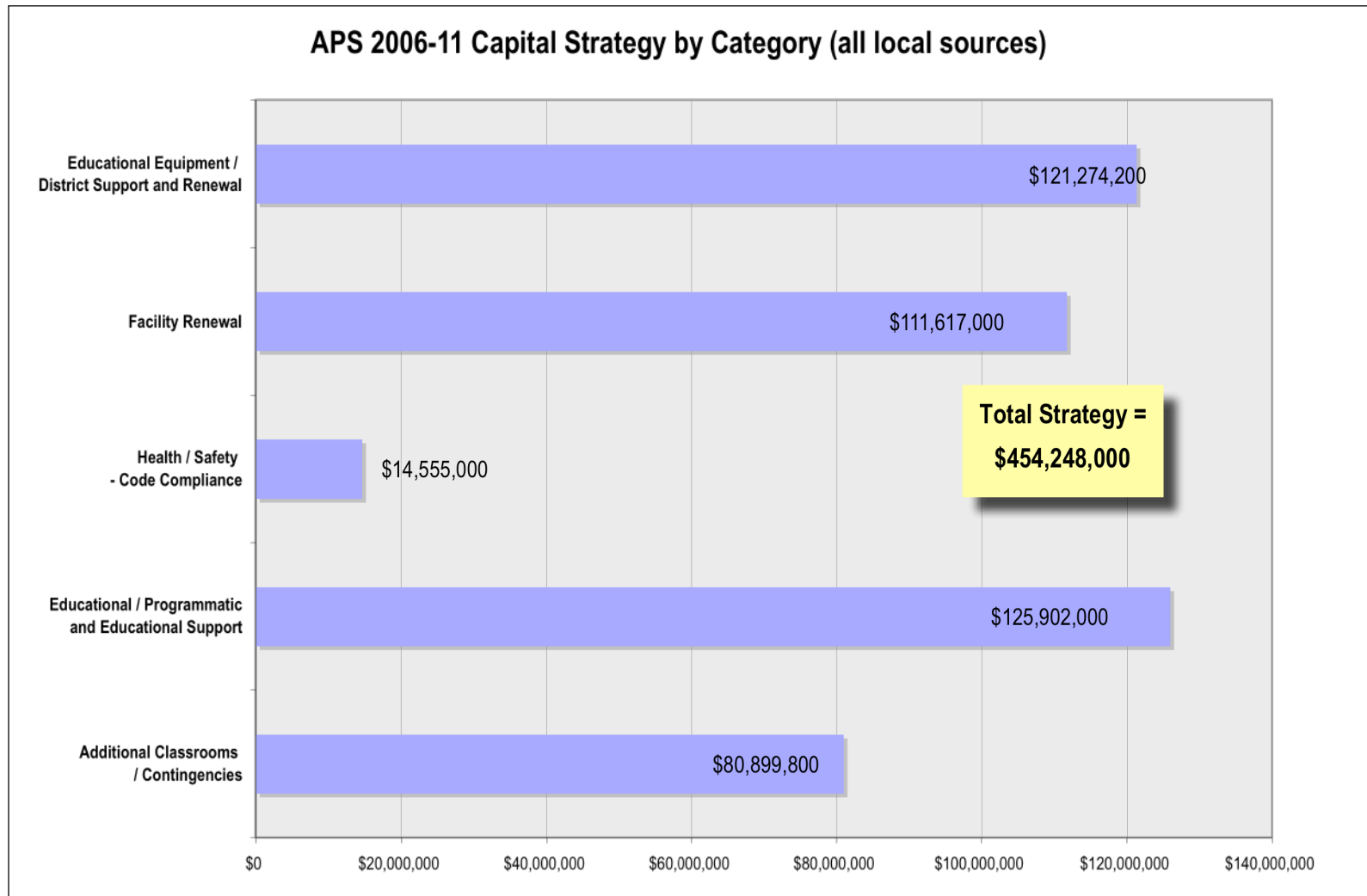
# Recommendations - Summary

## ■ 2006-11 Capital Strategy Summary

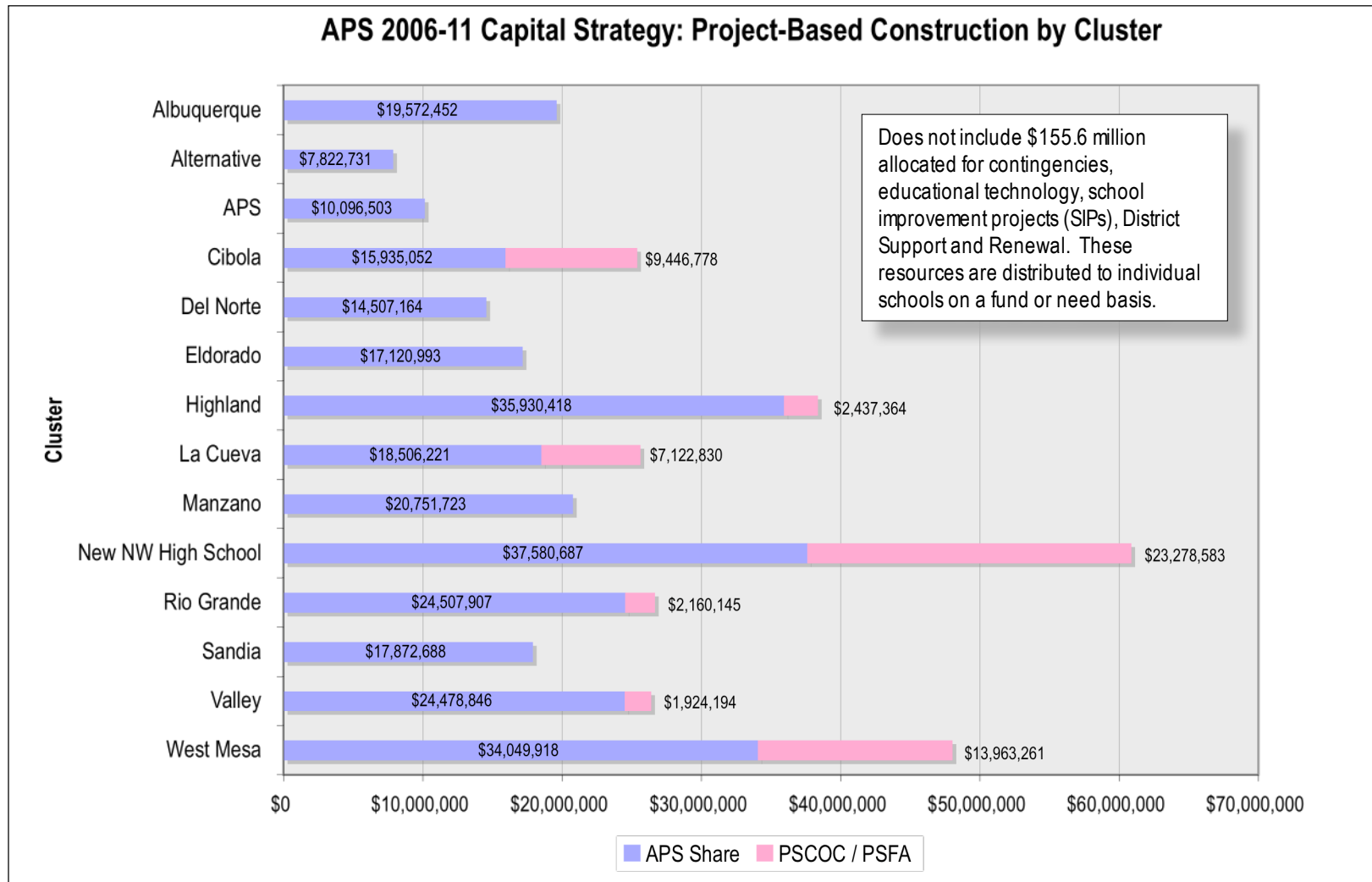
APS 2006-11 Capital Strategy by Category (all local sources)



# Recommendations - Summary by Category



# Recommendations - Summary by Cluster



# Recommendations

- The capital strategy maintains and extends district-based resources for:
  - ✓ ***District-Wide Renewal / Support*** – \$83.7 million is provided to address wide categories of issues and needs
    - *CMP/Property Offices (HB33)*
    - *Special Projects -District-wide (HB33)*
    - *District-Wide Renewal Funds (HB33)*
      - Paving and Utilities Fund
      - Fire Protection
      - Telecommunications Upgrades
      - Electrical Code Compliance
      - Bus and Parent Pick-up/Drop Off Areas
      - Hazardous Materials
    - *School-Based Technology Infrastructure Upgrades (HB33, GO, SB 9) - See Technology discussion*
    - *Security Upgrades to schools (HB33)*
    - *M&O Allocation (SB9)*
    - *Compliance Fund (SB9)*
    - *Equipment Upgrade / Replacement Fund (SB9)*

# Recommendations

- **Educational Equipment / Support –\$51.5 million is allocated for:**
  - ✓ ***Technology (see Technology discussion)***
  - ✓ ***Library book acquisition (HB33, to supplement current operating fund allocations)***
  - ✓ ***Educational Equipment (HB33)***
    - *School-based Equipment Fund (MEC)*
    - *Science and Laboratory Equipment for High Schools and Middle Schools*
    - *Musical Instrument Equipment / Renewal Fund*
    - *Occupational Education*
    - *Athletics*
    - *Administrative / Support Equipment Fund*
    - *Other Small Equipment Allocations*

# Recommendations

- **The 2006-11 Capital Strategy maintains the commitment to upgrade educational technology district-wide.**
  - ✓ *The district has made great strides upgrading school technology infrastructure and acquiring necessary educational technology equipment and software. However, substantial continual investment is still required.*
  - ✓ *\$62 million is provided in the strategy to address a variety of technology issues (HB33 06 / GO 06, GO 09, SB9 08)*
  - ✓ *The schools will supplement local resources as opportunity presents through state legislative appropriations and federal programs. The APS Technology Department will work with schools to focus legislative requests to address real needs measured by district standards.*

# Recommendations

## ■ Upgrade Educational Technology (continued)

- ✓ **Direct school allocations (\$12 million - HB33 06, GO 06, GO 09)**
  - *Allocated to each school on a formula basis. APS will approve and monitor school expenditures based on an approved school Tech Plan taking into account the APS Tech Inventory/Assessment*
- ✓ **School-Based Technology Infrastructure and Equity (\$26 million - HB33 06, GO 06, GO 09, SB9 08)**
  - *The intent of these funds is bring schools up to district technology standards with the initial priority school technology infrastructure*
- **District - Based Technology (\$24 million - HB33 06, GO 06, GO 09, SB9 08)**
  - *These funds provide for district-based software, hardware and maintenance*

# Recommendations

- **Reaffirms the commitment to provide resources to renew existing facilities. The recommended 2006-11 capital strategy devotes more than \$126 million (~28% of total) to direct renewal of district facilities including:**
  - ✓ ***Health / Safety and code compliance***
  - ✓ ***School-based improvements to schools in most need (schools with lowest evaluation scores) including replacing roofs, heating/ventilation and air conditioning (HVAC), electrical and other building systems***
  - ✓ ***Provides renewal funds to every educational facility through the very successful School Improvement Project (SIPs) funds. SIP funds are increased and their effectiveness enhanced by establishment of several district-wide funds and support of the Special Projects staff***

# Recommendations

- **Provides additions/renovations to meet educational/programmatic and educational support needs of district (\$126 million, 28% of total)**
  - ✓ ***Continues replacing four old, modular schools (Matheson Park, Chelwood, Osuna and Navajo elementary schools).***
  - ✓ ***Providing permanent classrooms for schools with an excess of portables and site density issues (Valle Vista, Montezuma, Duranes, Wherry, Oñate, Barcelona, Dennis Chavez, Whittier, and Truman)***
  - ✓ ***Continues to upgrade early childhood needs areas***
  - ✓ ***Provides science, library, cafeteria/kitchen and other essential facility needs***
  - ✓ ***Continues to upgrade school administrative areas***

# Recommendations

- **Addresses growth by providing for additional classrooms and contingencies (~\$81 million in HB33 06, GO 06, GO 09) to:**
  - ✓ ***Relieve existing over-crowding***
  - ✓ ***Accommodate new students in growth areas of the district***
  - ✓ ***Meet growth pressures that address student demographics within each school level***

# Growth Strategies

## ■ Growth Facts:

- ✓ *District will grow at a slow pace (but slighter higher than the past five years)*
- ✓ *Growth will affect all levels, but mostly at elementary and high school levels*
- ✓ *Growth will affect selected geographic areas of the district ...there will be moderate rates of growth on the far northeast (La Cueva Cluster) and high rates of growth on the westside (Cibola and West Mesa Clusters)*

# Growth Strategies

- **The capital strategy seeks to minimize impacts of growth wherever possible by:**
  - ✓ ***Balancing enrollment and existing capacity***
    - *Implementing boundary adjustments to balance enrollments*
    - *Using existing facilities as effectively through renovation and upgrades*
    - *Exploring other programmatic options to decrease new classroom needs*
    - *Creating a committee to recommend how to maximize utilization of school facilities*
  - ✓ ***Taking advantage of state resources***
  - ✓ ***Transferring all areas within the City of Rio Rancho in the APS service area to the the Rio Rancho Public School District.***

# Growth Strategies

- **Minimize impacts of growth (continued)**
  - ✓ *Assigning new outlying annexations to school attendance areas with adequate capacity to accommodate any new students before area actually develops*
  - ✓ *Working with the City and County to promote capital infrastructure concurrency (Planned Growth Strategy)*
  - ✓ *Working with the State to enact school impact fee legislation*
  - ✓ *Seek additional legislative funding for the capital acquisition of more buses and operating monies to support the buses*

# Long Term Growth Outlook

Area		(Funded) 2001-05 Strategy		(Recommended) 2006-11 Strategy			Potential Future Projects	
		HB33 01-05	GO 03	HB33 06-10	GO 06	GO 09	HB33 11-15	GO 12
<b>Elementary Schools</b>								
Manzano Mesa ES*	SE		Phase 1 Construction	Phase 2 Construction				
Far NE Heights ES	NE		Design	Construction				
7-Bar ES	NW	Phase 1 Construction	Phase 2 Construction					
New Ventana Ranch ES	NW		Design / Phase 1 Construction	Phase 2 Construction				
New NW ES	NW						Design Phase 1	Phase 2 Construction
Edward Gonzales ES	SW	Design	Phase 1	Phase 2				
New SW ES	SW			Design Portable School	Phase 1	Phase 1		
Re-Open Coronado ES	Central						Design	Construct
<b>Middle Schools</b>								
Jimmy Carter MS	SW				Phase 2			
New SW MS	SW						Design	Phase 1
James Monroe MS	NW				Phase 2			
Middle School Alternative*	?			Construction				
<b>High Schools</b>								
New Westside HS	WS			Design Phase 1	Phase 2		Supplemental (if required)	
New SW HS	SW				Design		Phase 1	Phase 2
New East Mtn HS							Design	Phase 1
Westside Stadium*	West						Design	Phase 1
New CEC*	?						Design	Phase 1
Soccer Facility*	?						Design Construct	

\* Educational / Programmatic Project

# Recommendations

## APS Growth Projects\*

School	Project Budget	PSFA	APS Share	Fund Source			
				HB33	GO06	GO09	Future
Edward Gonzales ES Phase II	\$4,681,353	\$2,153,422	\$2,527,931	\$2,527,931			
Ventana Ranch ES Phase II	\$9,376,335	\$3,063,663	\$6,312,673	\$6,312,673			
New NE Heights ES (Full)	\$10,591,000	\$4,871,860	\$5,719,140	\$5,719,140			
New SW ES Phase 1	\$9,448,434	**	\$6,309,654	\$2,625,000		\$3,684,654	\$2,519,140
Jimmy Carter MS Phase II	\$6,904,192	\$3,175,928	\$3,728,263		\$3,728,263		
James Monroe MS Phase II	\$6,168,022	\$2,837,290	\$3,330,732		\$3,330,732		
New NW HS (full)	\$60,859,270	\$23,278,584	\$37,580,688	\$16,720,590	\$20,860,098		
New SW HS	\$2,129,580	\$979,607 **	\$1,149,973		\$1,149,973		
<b>Total</b>	<b>\$110,158,186</b>	<b>\$40,360,354</b>	<b>\$66,659,054</b>	<b>\$33,905,334</b>	<b>\$29,069,066</b>	<b>\$3,684,654</b>	<b>\$2,519,140</b>
				<b>Total</b>		<b>\$66,659,054</b>	<b>\$69,178,194</b>

\*APS will only do "APS Share" portion of the projects if PSCOC/PSFA does not match.

\*\*APS will request in future years

\$2.5 million of New Westside ES is not proposed as part of 06-11 strategy.

Phase 2 Manzano Mesa is an educational / programmatic project

# HB33 2006-11

- HB33 06 - 11 will generate about \$218.6 million without a tax increase

HB 33 06-10			
<b>1.0</b>	<b>Additional Classrooms / Contingencies</b>	<b>\$41,317,200</b>	<b>18.9%</b>
1.1	New Schools / Additions	\$33,905,333	
1.2	Contingencies / Portables / Inflation	\$7,411,867	
<b>2.0</b>	<b>Educational /Programmatic and Educational Support</b>	<b>\$62,122,000</b>	<b>28.4%</b>
<b>3.0</b>	<b>Health / Safety / Code Compliance</b>	<b>\$9,555,000</b>	<b>4.4%</b>
<b>4.0</b>	<b>Facility Renewal</b>	<b>\$48,097,000</b>	<b>22.0%</b>
4.1	School-Based	\$42,097,000	
4.2	School Improvement Projects (SIPs)	\$6,000,000	
<b>5.0</b>	<b>District-Wide Renewal / Support</b>	<b>\$31,000,000</b>	<b>14.2%</b>
5.1	FMP/Property Offices	\$1,500,000	
5.2	Special Projects (District-wide)	\$17,800,000	
5.2.1	Special Projects (Minor Construction, Roofing)	\$15,750,000	
5.2.2	Interior Surface Renewal Fund	\$1,250,000	
5.2.3	Portable/Admin Remodel	\$500,000	
5.2.4	Playground Equipment Fund	\$300,000	
5.3	District-Wide Renewal Funds	\$11,700,000	
5.3.1	Paving and Utilities Fund	\$600,000	
5.3.2	Fire Protection	\$800,000	
5.3.4	Electrical Code Compliance	\$600,000	
5.3.5	Bus & Parent Pick-up/Drop-Off areas	\$500,000	
5.3.6	Hazardous Material Fund	\$2,000,000	
5.3.7	School Security	\$1,400,000	
5.3.8	School-Based Technology Infrastructure / Equity	\$5,000,000	
5.3.9	Telecommunications Upgrades	\$800,000	
<b>6.0</b>	<b>Educational Equipment / Support</b>	<b>\$26,524,200</b>	<b>12.1%</b>
6.1	District Technology Funds	\$6,000,000	
6.2	School-Based Techology	\$6,000,000	
6.3	Educational Equipment	\$11,924,200	
6.3.1	MEC	\$3,750,000	
6.3.3	Science and Lab Equipment (High School and Middle Schools)	\$1,400,000	
6.3.4	Musical Instrument Equipment / Renewal	\$4,000,000	
6.3.5	Occupational Ed. Equipment	\$1,750,000	
6.3.6	Athletics	\$400,000	
6.3.7	Administrative / Support Equipment Fund	\$500,000	
6.3.8	Small Equipment	\$124,200	
6.4	Library Materials	\$2,600,000	
<b>Total</b>		<b>\$218,615,400</b>	<b>100.0%</b>

# GO 2006-08

Recommended for consideration - to be validated before February, 2006 election

<b>GO Bonds 06-08</b>		
<b>1.0 Additional Classrooms / Contingencies</b>	<b>\$31,550,000</b>	<b>42.1%</b>
1.1 Additional Classrooms	\$29,069,066	
1.2 Portables/contingencies	\$2,480,934	
<b>2.0 Educational / Programmatic and Educational Support</b>	<b>\$26,220,000</b>	<b>35.0%</b>
<b>3.0 Health/Safety - Code Compliance</b>	<b>\$0</b>	<b>0.0%</b>
<b>4.0 Facility Renewal</b>	<b>\$8,232,626</b>	<b>11.0%</b>
4.1 School-Based	\$3,232,626	
4.2 School-Based Technology Infrastructure / Equity	\$5,000,000	
<b>5.0 Educational Equipment / Support</b>	<b>\$9,000,000</b>	<b>12.0%</b>
5.1 District - Based	\$6,000,000	
5.2 School - Based*	\$3,000,000	
<b>Total Target Budget</b>	<b>\$75,002,626</b>	<b>100.0%</b>

\*Distributed to each school on a per capita basis

# GO 2009-11

Recommended for consideration - to be validated before February, 2009 election

<b>GO Bonds 09-11</b>		
<b>1.0 Additional Classrooms / Contingencies</b>	<b>\$6,150,000</b>	<b>8.8%</b>
1.1 Additional Classrooms	\$3,684,654	
1.2 Portables/contingencies	\$2,465,346	
<b>2.0 Educational / Programmatic and Educational Support</b>	<b>\$37,560,000</b>	<b>53.7%</b>
<b>3.0 Health/Safety - Code Compliance</b>	<b>\$0</b>	<b>0.0%</b>
<b>4.0 Facility Renewal</b>	<b>\$17,287,195</b>	<b>24.7%</b>
4.1 School-Based	\$13,287,195	
4.2 School-Based Technology Infrastructure / Equity	\$4,000,000	
<b>5.0 Educational Equipment / Support</b>	<b>\$9,000,000</b>	<b>12.9%</b>
5.1 District - Based	\$6,000,000	
5.2 School - Based*	\$3,000,000	
<b>Total Target Budget</b>	<b>\$69,997,195</b>	<b>100.0%</b>

\*Distributed to each school on a per capita basis

# SB9 2008-11

Recommended for consideration - to be validated before February, 2007 election

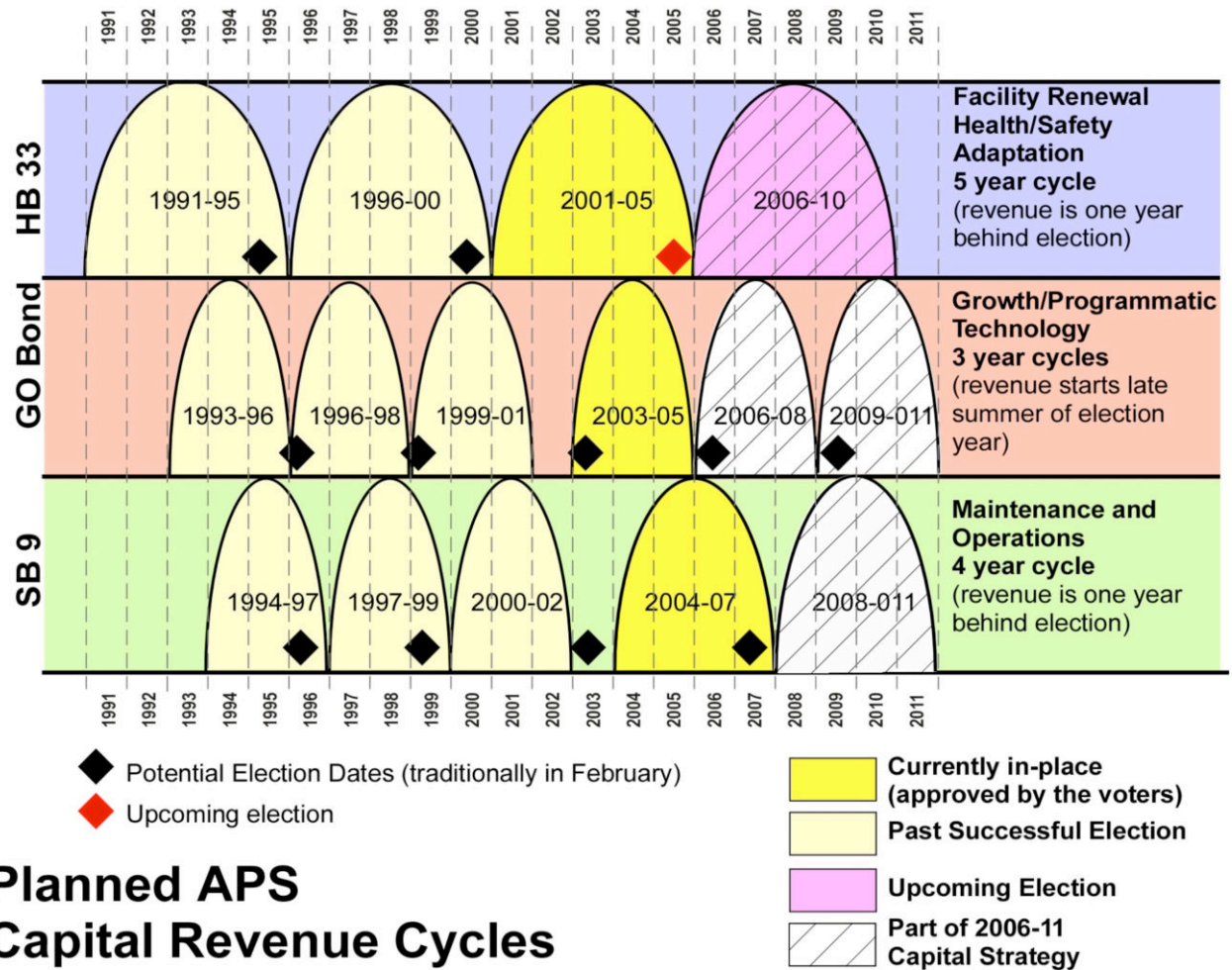
## SB9 08-11 Facility Renewal and Maintenance

Allocation	Amount	% Allocation	Rationale
1. M&O Allocation	\$25,000,000	27.6%	Maintenance is the primary purpose of the fund. This funds M&O school-based maintenance efforts
2. Compliance Fund	\$5,000,000	5.5%	Provide resources to address ADA compliance issues
3. HVAC Upgrades/Renewal	\$15,903,000	17.5%	Continues implementation of HVAC renewal throughout the district.
4. Capital Electrical Needs	\$10,035,000	11.1%	Provides resources to address electrical needs throughout the district.
5. Capital Roofing / Other Needs	\$12,062,000	13.3%	Provides resources to address roofing needs throughout the program.
6. Equipment Upgrade / Replacement Fund	\$1,750,000	1.9%	Provides resources to replacement equipment / vehicles that are used to maintain capital assets.
7. Library Software Maintenance	\$1,000,000	1.1%	Maintains district library software
8. School-Based Technology Infrastructure	\$12,000,000	13.2%	Provides resources to bring schools to district technology infrastructure standards
9. District-wide Technology Upgrades	\$6,000,000	6.6%	Provides resources to address district software, hardware and maintenance
10. Emergency/Contingency	\$1,882,600	2.1%	District contingency fund
<b>Total</b>	<b>\$90,632,600</b>	<b>100.0%</b>	

# Election Cycles

## ■ Upcoming APS capital elections

- ✓ 2005 (HB33)
- ✓ 2006 (GO)
- ✓ 2007 (SB 9)
- ✓ 2009 (GO)



## Planned APS Capital Revenue Cycles





**Architectural Research Consultants, Incorporated**

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