

**STATE OF NEW MEXICO
PUBLIC SCHOOL CAPITAL OUTLAY COUNCIL
PUBLIC SCHOOL FACILITIES AUTHORITY**

**CUBA MIDDLE SCHOOL
GYMNASIUM**



**2006
ANNUAL REPORT**

State of New Mexico
Public School Capital Outlay Council
Public School Facilities Authority

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December 31, 2006

On behalf of the PSCOC and the PSFA, I'm delighted to present this overview on our work during a busy and eventful 2006.

In this past funding cycle, the PSCOC provided \$259.2 million in assistance to 139 construction and facilities projects throughout New Mexico, including school buildings, new classrooms, improvement and modifications to life/safety systems, emergency repairs to school buildings, advances for high priority projects, and financial assistance to charters and other schools for leasing adequate facilities.

It wasn't so long ago when total state public school capital outlay was averaging about \$10 million per year. On behalf of the PSCOC, I'd like to thank and acknowledge Governor Richardson and the New Mexico Legislature for these dramatic increases in funding over the past few years, which are leading to more and better school buildings throughout the state.

I would also like to thank PSFA staff, my colleagues on the PSCOC, our private sector partners in design and construction, and especially all 89 New Mexico school districts and their communities throughout the state, who have freely provided their time, their talent and their good will to this process.

As a lifelong educator, it has been rewarding and humbling to chair this Council, and to have had the pleasure of working with so many dedicated and capable people throughout the state, all united in the goal of providing the best possible education for our children and grandchildren.

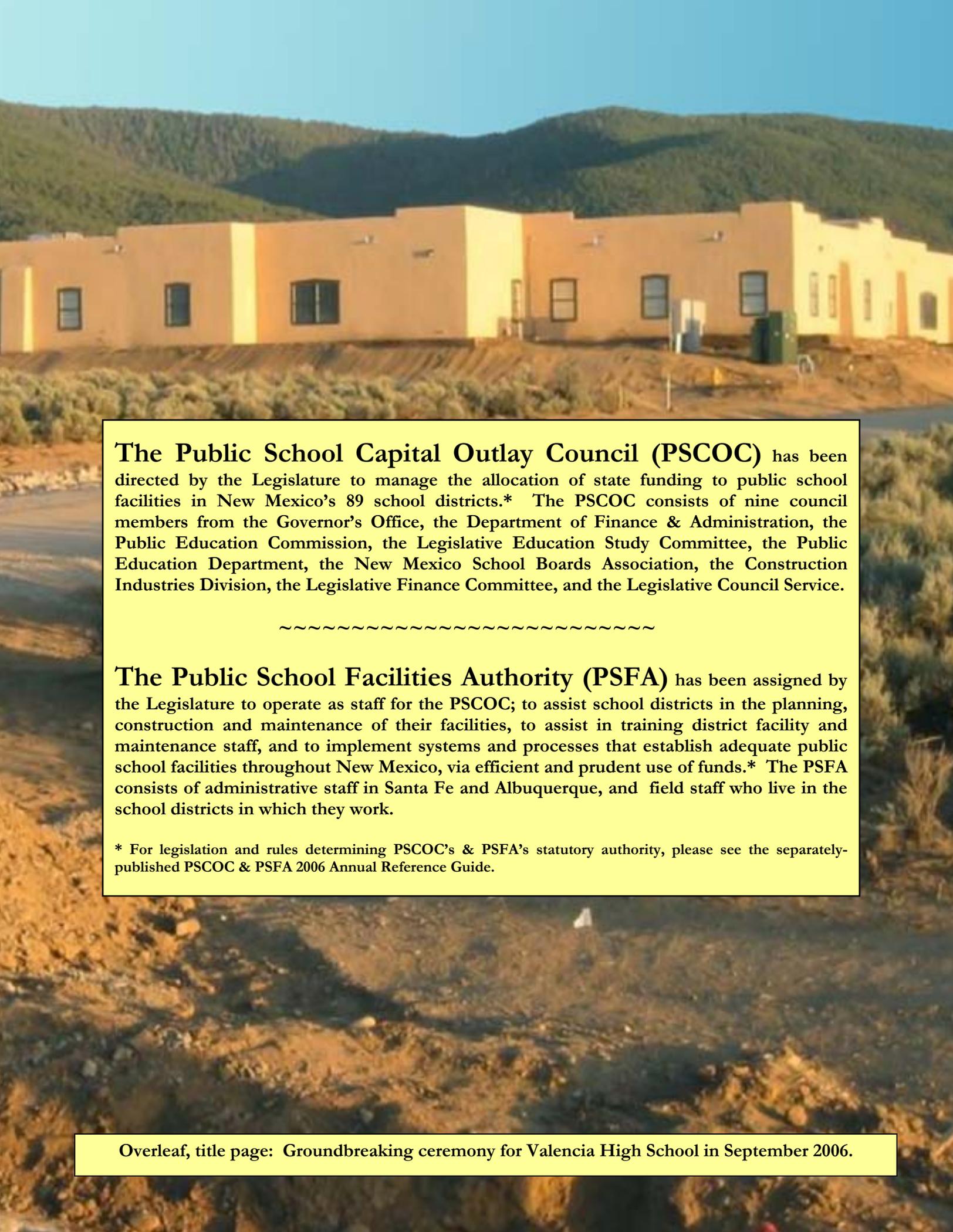
With highest regards,

Catherine M. Smith

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2006 ANNUAL REPORT**



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The Public School Capital Outlay Council (PSCOC) has been directed by the Legislature to manage the allocation of state funding to public school facilities in New Mexico's 89 school districts.* The PSCOC consists of nine council members from the Governor's Office, the Department of Finance & Administration, the Public Education Commission, the Legislative Education Study Committee, the Public Education Department, the New Mexico School Boards Association, the Construction Industries Division, the Legislative Finance Committee, and the Legislative Council Service.



The Public School Facilities Authority (PSFA) has been assigned by the Legislature to operate as staff for the PSCOC; to assist school districts in the planning, construction and maintenance of their facilities, to assist in training district facility and maintenance staff, and to implement systems and processes that establish adequate public school facilities throughout New Mexico, via efficient and prudent use of funds.* The PSFA consists of administrative staff in Santa Fe and Albuquerque, and field staff who live in the school districts in which they work.

* For legislation and rules determining PSCOC's & PSFA's statutory authority, please see the separately-published PSCOC & PSFA 2006 Annual Reference Guide.

PSCOC & PSFA 2006 Annual Report

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Public School Capital Outlay



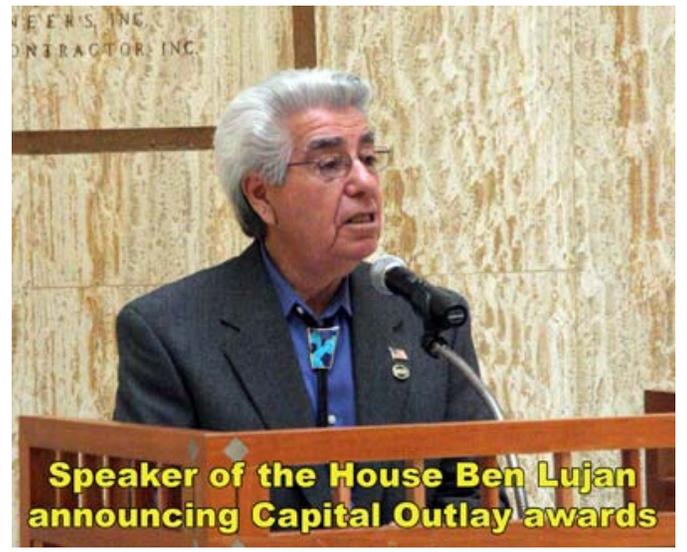
**Governor Bill Richardson
announcing Capital Outlay awards**



**Navajo Middle School
Groundbreaking**



**Sen. Michael Sanchez at the new
Central Elementary School, Belen**



**Speaker of the House Ben Lujan
announcing Capital Outlay awards**

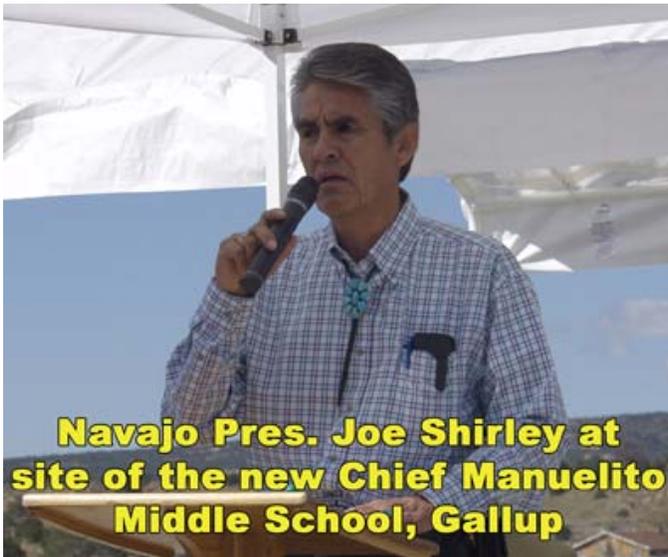


**Rep. Patricia Lundstrom at site
of the new Chief Manuelito
Middle School, Gallup**



**James H. Rodriguez Elementary
School Dedication, Espanola**

Key Events in 2006

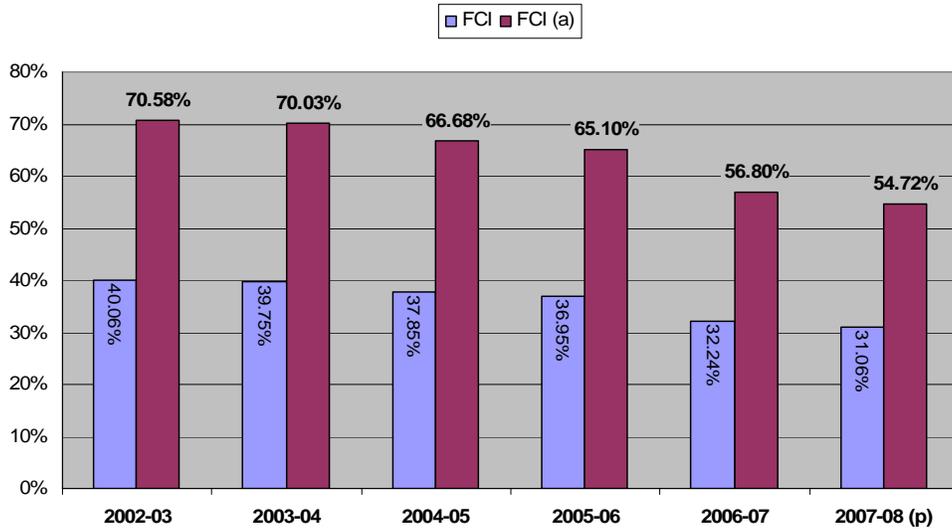


**Working closely with the
Governor and the
Legislature, the PSCOC
awarded \$259.2 million
during 2005-06 to 139
school facilities projects
throughout New Mexico.**



Facility Condition Trends & Grant Awards

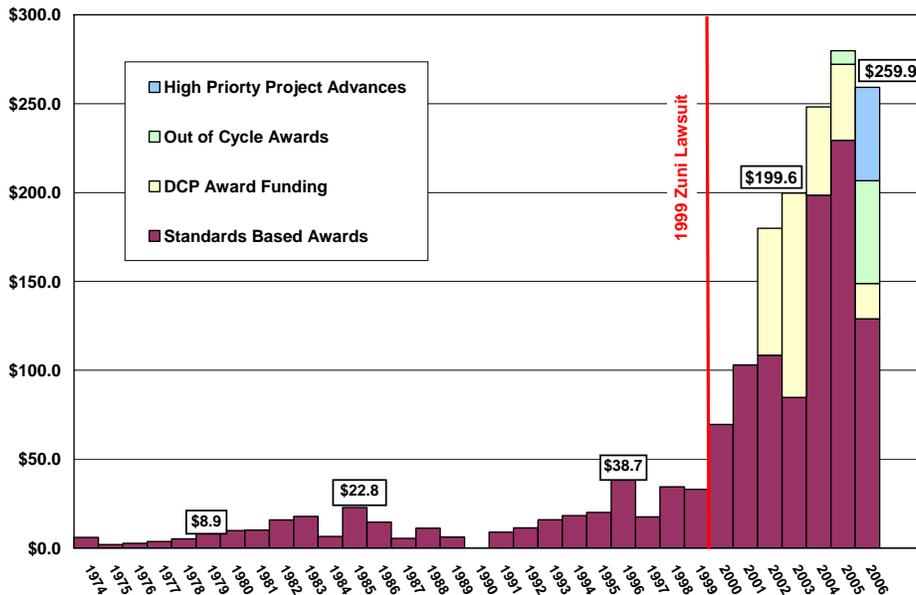
Facility Condition Index Trend Analysis



(a) – Adjusted; (p) – Preliminary Estimate

In 2006, the New Mexico Facility Condition Index (FCI) continued to decline. A declining FCI indicates improvement in the statewide condition of school district physical plant, net of the annual cost of maintaining facilities in their current state.” FCI as it has been reported in past years is indicated in BLUE. The adjusted FCI, indicated in PURPLE, more comprehensively reflects New Mexico school lifecycles and overall condition. The adjusted FCI will be used in forthcoming years. For historical comparability, the adjusted FCI was calculated for previous years.

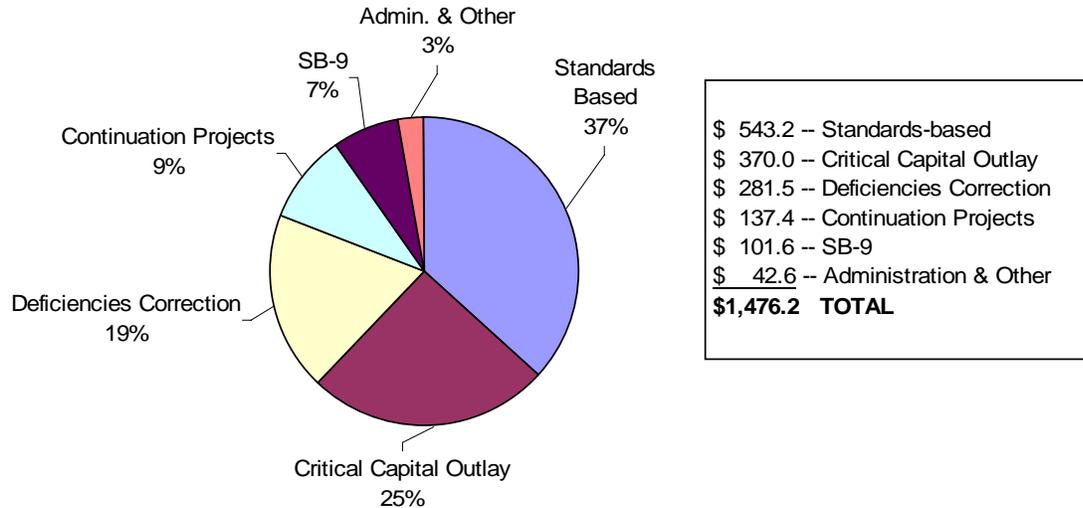
PSCOC Grant Award Allocations 1974 – 2006 (Millions)



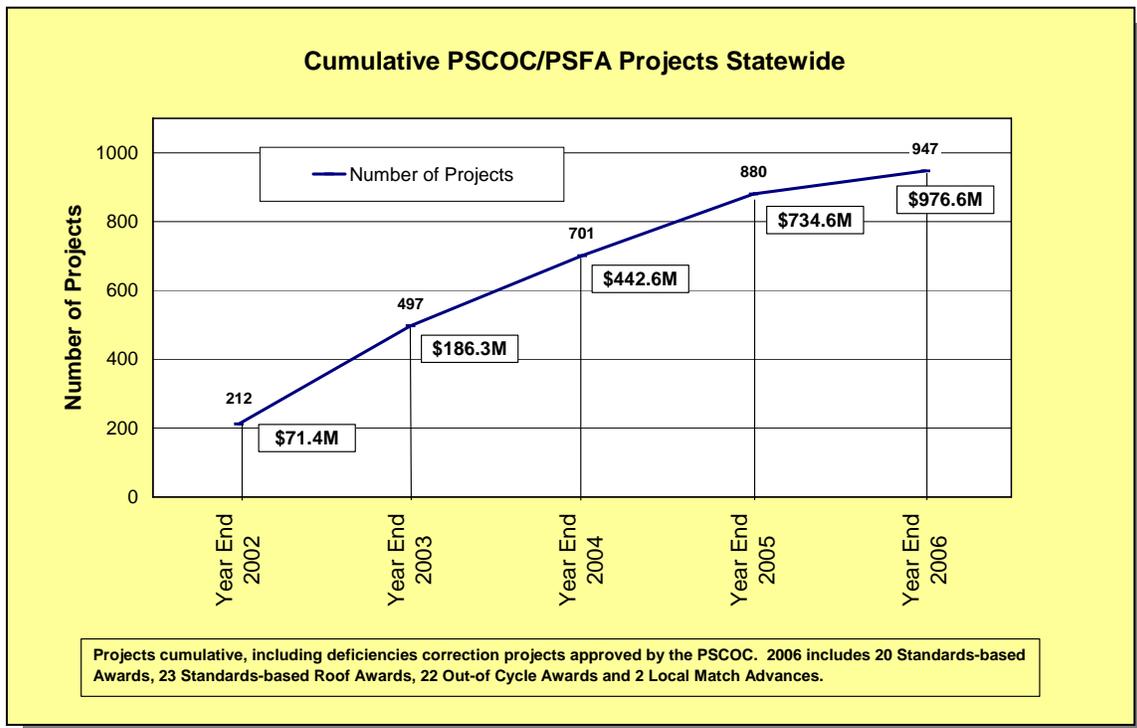
In 2006, state capital outlay for public school construction totaled \$259.2 million, the second highest annual award level ever. Funds allocated to projects from previous years – out of cycle awards relating to cost overruns and other cost increases – totaled \$57.9 million. The PSCOC and PSFA are working closely with districts to speed project delivery in order to minimize the portion of project budgets that is lost to construction inflation.

Uses of PSCOC Funds & Total Projects

**PSCOC Funding Uses 1999 - Present
(millions of dollars)**



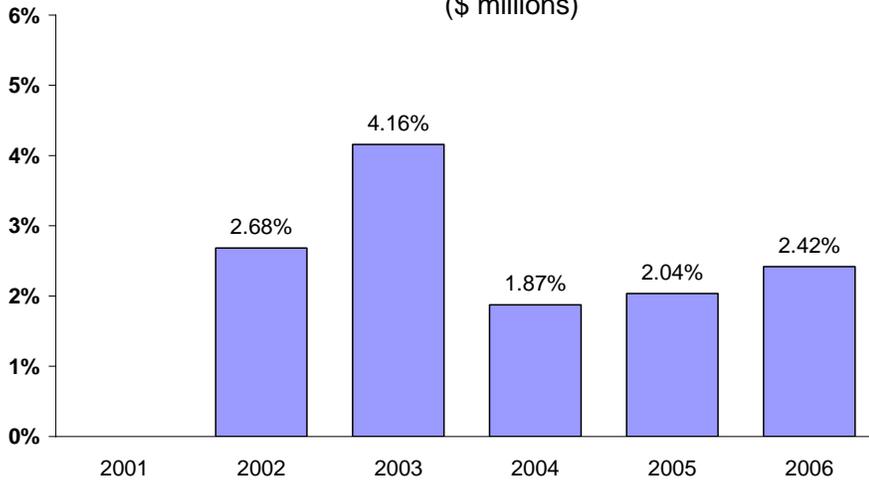
Since 1999, the state has allocated just under \$1.5 billion to a wide range of public school facilities funding programs.



The PSCOC & PSFA have provided project and funding assistance to 947 projects and facilities throughout New Mexico since the Deficiencies Correction Unit was established in late 2001. Corresponding total project value is \$976.6 million.

PSFA Operational Uses of Funds

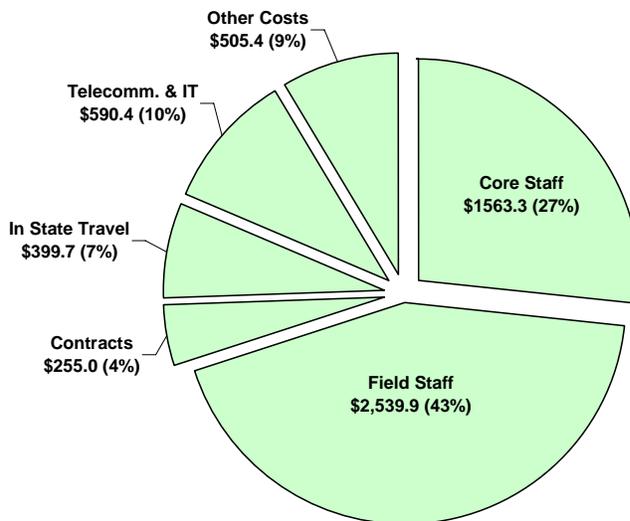
PSFA Operating Budget
as Percent of Annual Capital Outlay Awards
(\$ millions)



PSFA Operating Budget	\$1.9	\$4.8	\$4.7	\$5.7	\$5.9
PSCOC Annual Awards	\$71.4	\$114.9	\$248.1	\$279.7	\$242.0

The state endeavors to minimize oversight costs. Since program inception, oversight costs as a percent of total annual funding have averaged 2.63 percent, well below the levels of comparable states.

PSFA Operational Uses of Funds
(Dollars 000's)



PSFA's largest line item cost in managing construction oversight are the specialized staff who are based throughout the state in the school districts in which they serve, who assist in managing district construction projects, and who train district facilities staff.



Fogel & Co LLC

CONSULTANTS & CERTIFIED PUBLIC ACCOUNTANTS

January 16, 2007

State of New Mexico
Public School Facilities Authority

We have audited the financial statements of the Public School Facilities Authority (PSFA) as of and for the year ended June 30, 2006 and have issued our report thereon dated December 8, 2006. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States.

The results of our audit are summarized as follows:

1. The auditors' report expresses an unqualified opinion on the financial statements of the PSFA.
2. Two reportable conditions were disclosed during the audit. There were no material weaknesses disclosed. Reportable conditions are summarized as follows:
 - During our audit, Agency personnel utilizing a management by exception approach in the invoice approval process through which anomalies are investigated, noted that fuel charges for one automobile in its fleet were approximately twice the fuel charges of similar vehicles. We recommended that PSFA personnel use statistical methods on a regular basis to evaluate fuel usage and overall fleet performance. The Agency agrees with this recommendation.
 - During examination of the policies and procedures in place for use of automobiles and state credit cards, we noted that although the Agency had in place a blanket policy regarding use of state property, the agency did not require a positive affirmation that employee's had received the specific automobile, the associated fuel card and a copy of the law pertaining to their use. We recommended that an affirmation of receipt of the state owned automobile and associated fuel card be obtained as well as affirmation that the law governing their use had been read and was understood to ensure greater control over these specific assets. The Agency agrees with this recommendation.
3. No instances of noncompliance material to the financial statements of the PSFA were disclosed during the audit.

This letter is intended for the use of the Public School Facility Authority and its management, and is not intended to be and should not be used by anyone other than these specified parties.

Albuquerque, New Mexico
December 8, 2006

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The Public School Capital Outlay Council On

Public School Capital Outlay Council members Dr. Pauline Rindone and Dr. Kurt Steinhaus share their thoughts.

What's working well in this process?

Rindone: PSFA's statewide maintenance management system comes to mind immediately. The information that this system provides is invaluable, and most school districts are involved. It's been a success for both districts and the state.



Dr. Kurt Steinhaus

Steinhaus: Dr. Rindone is exactly right. Being proactive about maintenance is going to save New Mexico millions of dollars in the future. Also, the Governor and the Legislature are partnering to provide record levels of funding for school infrastructure in communities throughout New Mexico. PSFA and PSCOC are listening to the public, and I'm pleased PSFA is using a process of continuous improvement.

What are the key priorities over the next funding cycle?

Steinhaus: First, adequate funding for new schools and quality renovations. Second, continual refinement of facility adequacy standards to reflect the programmatic needs of schools for the future. And third, achieving equitable resource distributions for all districts while recognizing special needs for high growth districts and districts with declining enrollment.

Rindone: I would agree with Dr. Steinhaus specifically on the adequacy of funding. We need a larger, permanent revenue stream to better address the level of need. With resources as limited as they are, the Standards-Based funding process is compromised by new needs every year that push to the head of the line and further limit available funding. And of course we still face compliance under the Zuni lawsuit.

What other key challenges will Council address over the next few years?

Rindone: Facilities for charters, space utilization as it relates to schools for the future, and an ongoing range of recommendations from school districts.

Steinhaus: I'd add that the state has done a relatively good job at taking care of many schools with truly awful facilities. Now we're making funding decisions where facilities aren't quite as bad, and the differences are finer. So that requires better analysis and makes funding decisions more challenging. Finally, with the high prices of oil and gas, energy efficiency is going to be even more important as we design new schools.

You both mentioned "schools for the future." How will they differ from schools of today?

Rindone: In terms of the physical plant, more co-location, much greater integration between programs and facilities. Higher facility utilization, mixed use between communities and districts, much more alignment between capital and operational dollars and how the related funding efficiencies are measured. Overall, a better understanding of how large a role the facility plays in the learning process, while leveraging new partners and funding streams to meet growing needs.

"We need a larger, permanent revenue stream to better address the level of need for public school facilities."

– PSCOC Member Dr. Pauline Rindone

Steinhaus: Recently I was in Philadelphia at a new "school of the future" that was designed by facilities experts from all over the country. They built an 1,800 student high school for about \$63 million, so costs were on the low side for a school of that size. To give an example of their innovativeness, they didn't use carpet or tile on the floor. They used painted concrete in a way that was appealing, and they saved thousands of dollars. Additionally, the school had huge glass windows facing south with photovoltaic glass that helps save energy costs. All in all, they built an outstanding, flexible facility at a reasonable cost that offered an exceptional learning environment and low operating costs via new ways of thinking about facilities systems. These are best practices that we can utilize in New Mexico.

Also, as Dr. Rindone indicated, better synergy between community and school facilities is vital to efficient use of resources. I live in Santa Fe and within 200 yards of my house there are three libraries—one for the high school, one for the city and one for the junior high. We'd save a great deal of money and better meet the needs of users by possibly building one larger library for use by all three groups.

PSCOC funding levels dropped this year after two years of record increases. Is Council doing anything to reduce annual funding variance to make it easier for districts to do capital planning?

Rindone: Well, there is intrinsic variability in the funding stream since it's predicated on severance tax revenue for oil and gas, which in turn is driven by the prices for these commodities. Another factor are new programs which seem to be added every year, are funded out of the same revenue source and reduce funds available for Standards-Based projects—I touched on this earlier. The third factor is cost overruns on projects from previous funding cycles related to construction inflation, which represented about \$58 million in this funding-

Challenges & Priorities Over the Next Funding Cycle

cycle and also reduced total funds available for projects this year. PSFA is working with districts to cut the time it takes to build schools by 25 percent, which will reduce costs related to construction inflation, and allow more funds to flow to brick and mortar.

Steinhaus: It's important to point out that total funding this year was over \$250 million. It wasn't that long ago that total annual state funding for public school capital outlay averaged \$12 million. As far as funding variability, over the past few years, Council has tried to focus on the top 100 projects on the ranked list of school needs, so if you're a district with a school in the top 100, then you know you're in the running for state capital outlay funds, and that helps with districts' future facilities planning.

As Dr. Rindone indicated, schools that are built faster are less expensive without a corresponding reduction in building or material quality. What else is Council doing to get schools built faster?

Steinhaus: The Council is now making a concerted effort to evaluate funding requests based upon which districts are "ready to move" in two areas. First, that they've got their local match, and second, that they've got their facilities master plan in place. That way if the district does get an award from the Council, the money doesn't just sit around for a couple of years, meaning in turn, that the project gets built faster.

"The state has done a relatively good job at taking care of many schools with truly awful facilities. Now we're making funding decisions where ... the differences between facilities are finer."

– PSCOC Member Dr. Kurt Steinhaus

Critics have said that the current funding process rewards poor management by providing higher levels of funding to districts which don't practice good maintenance, and/or which don't bring projects in at or under budget. Is the PSCOC looking at ways to reward districts that do practice good facilities management?

Steinhaus: The short answer is yes. The Council is aware of that policy question and is committed to addressing that issue. Incentives are often more effective than mandates and usually make good public policy. The Public School Capital Outlay Oversight Task Force is considering incentive legislation.

Rindone: It's true that we need to find a means to recognize and reward districts that do good maintenance—right now they are getting penalized in terms of state funds. A real solution will need to come from the Legislature, and I believe that they recognize the problem.

What's the best way to fund charter school infrastructure?

Rindone: A school needs to be in a public building to get state dollars more easily. Until that happens with charters, I think we're going to continue having some difficulty funding these schools. The other tough issue is that although some charters may now be managed directly by the state, they still cannot generate tax dollars the way school districts can.



Dr. Pauline Rindone

Steinhaus: It's important to keep in mind that charters are public schools, and are designed to be incubators for innovation, not only in learning, but also in utilization of facilities. A good example of this in Santa Fe, the Academy for Technology and the Arts Charter School put their facility right next to the Genoveva Chavez Center, so they have access to the best PE facility in the entire city, and didn't have to build a single building.

Legislation is now in place that may allow developer-funded lease buyback in getting schools built faster in growing communities. Is this a viable model for New Mexico?

Rindone: For some districts, it may be a good model, possibly for some charters. The details of each specific project are important. For example, what happens if the student population doesn't materialize? Is the district obligated to buy the school? Who provides maintenance? How are the adequacy standards maintained when a facility is built privately? These issues will need to be addressed by the Public School Capital Outlay Oversight Task Force and the Legislature.

Anything to add?

Steinhaus: Just one additional point. The PSCOC is only effective with the active participation of our stakeholders from school districts. I want to thank everyone who has dedicated time to help make this process as helpful and efficient as possible for the children and parents of New Mexico.

Rindone: I'll echo that and add a special thanks to the PSFA as the support staff to the PSCOC.

Dr. Pauline Rindone is Director of the New Mexico Legislative Education Study Committee.

Dr. Kurt Steinhaus is Senior Education Policy Advisor for Governor Bill Richardson.

The PSFA on Stakeholder Focus, Challenges, Results, & New Directions

What were PSFA's main accomplishments in 2006?



PSFA Director Robert Gorrell

Gorrell: We list our performance measures elsewhere in the annual report, so I want to highlight PSFA's overriding goal of making public school capital outlay and facilities management easier for school districts, while working to make PSFA the benchmark in being customer-driven and customer focused. With support from the Governor, Legislature, PSCOC and most

of all our district partners, we've made real progress in 2006. Specialized advisory groups made up of school district staff are illuminating the way for all primary agency functions. We continue to simplify processes, clarify standards and implement better means of listening and learning from the people we serve.

Can you provide a few examples?

Berry: We've implemented three new advisory groups for project development, award applications, and adequacy. The planned 2007-08 PSCOC award application will be an order of magnitude more user-friendly than the already simplified application which was made available last year. It will allow electronic routing and notification that PSFA has reviewed the application submittal, and permit districts to review staff recommendations that will then be presented to the PSCOC. PSFA introduced a dramatically easier to use construction information management system this year—user feedback for this has been enthusiastically positive. PSFA embraced the exemption of small district projects from review and approval which we are hopeful will pass through the 2007 legislative process. We've redrafted state adequacy planning guidelines to eliminate ambiguities and confusion, and have spent a tremendous amount of time working with districts to revise and improve the state adequacy standard requirements. I want to highlight that these initiatives were all in response to school district requests. We value and need district feedback and will continue to be very actively responsive to it.

PSFA is now four years old. How would you characterize the agency's track record?

Gorrell: Well, I think we've made a good start in attacking the state's multi-billion dollar school facilities challenges. The Deficiencies Correction Program succeeded in eliminating some of the worst problems. The NMCI ranking and assessment model isn't perfect yet, but it's more fair than any alternative and is clearly the most sophisticated tool of its type—a number of other states have copied New Mexico on this. 100 percent of school districts now have current preventative maintenance plans—less than 10 percent had them when we began.

80 districts are currently able to track data relating to maintenance and materials expenditures via PSFA's maintenance facilities information management system, or FIMS. The majority of districts now have current master plans. All in all, we're moving forward. We still have much to do.

What is PSFA doing to eliminate NMCI ranking volatility from year to year?

Berry: This has been a problem that should largely be mitigated in 2007 and later ranking releases. When we began using the NMCI assessment tool, the underlying code wasn't sophisticated enough to process facility and systems lifecycles in ongoing depreciation increments. Neither was any other comparable system. The next systems release adds that



PSFA Deputy Director Tim Berry

capability. The other factor in ranking volatility is the integrity of the underlying data that districts provide on their facilities. I cannot emphasize enough that there must be joint PSFA and district involvement in order to keep the data current and accurate, and to minimize ranking volatility, which in turn makes district long term planning easier.

Moving forward, what major new areas of focus can we expect from PSFA?

Gorrell: A major focus will continue to be speeding project delivery in order to minimize losses due to construction inflation. Faster project development means a better school at a lower price, which benefits both local communities and the state. We'll be working closely with districts to shorten project pre-construction periods by implementing a range of best practices in project budgeting and other areas. Overall, PSFA adds value to district needs by helping to streamline unnecessary complexities across the state, while respecting that New Mexico is a large place and what works in one district may not work in another. For example, this year we'll explore guidelines to consistently align curriculum with facility master plans across each district. Which will simplify facilities challenges while respecting the unique needs of each district.

Berry: Legislators, the Governor, and the PSCOC are all looking closely at increasing the number and quality of school facilities via more efficient facilities utilization, along with new thinking in community partnerships and funding. I expect we'll see major progress in this area over the next year. Also, in early 2007, PSFA will launch its first comprehensive survey of district stakeholders, and will incorporate what we learn into the agency's strategic plan.

Do Better School Facilities Improve Learning?

A growing body of research demonstrates an explicit, measurable relationship between the physical characteristics of school buildings and effective (or ineffective) student learning. For example:

- Students learning in better building conditions earn 5-17 percent higher test scores than students in substandard buildings.¹
- Students' standardized achievement scores rose 10.9 percent in schools which improved building conditions from poor to excellent.²
- Students experience a significant reduction in analytical ability, reading speed, and reading comprehension when classroom temperatures exceed 73.4 degrees.³ In nine additional studies, the importance of a controlled thermal environment was stressed as necessary for satisfactory student performance.⁴
- Students in classrooms with the most exposure to daylight progressed 20 percent faster on math tests and 26 percent faster on reading tests than those in classrooms with the least exposure to daylight.⁵
- As the age of school buildings increase, the achievement scores of students tend to decrease.⁶



Natural light and soothing colors promote achievement at Cuba Middle School's new indoor commons area.

- Facilities conditions may have a stronger impact on a student's academic performance than the combined influences of family background, socioeconomic status, school attendance and behavior.⁷
- When class sizes are reduced below 20 students, related increases in student achievement move the average student from the 50th percentile up to somewhere above the 60th percentile, with even greater achievement results for disadvantaged and minority students.⁸
- Schools with better building conditions experience up to 14 percent lower suspension rates than those with unsatisfactory conditions.⁹
- Quality of learning environment has a 66 percent greater impact on teacher retention than salary.¹⁰

¹ Earthman, G. *"The Impact of School Building Condition and Student Achievement,"* Organization for Economic Coordination and Development Conference, Luxemburg, 1998; Moore, D., and Warner, E. *Where Children Learn: The Effect of Facilities on Student Achievement,* Council of Education Facility Planners International, 1998; Morgan, L. *Where Children Learn: Facilities, Conditions and Student Test Performance in Milwaukee Public Schools,* Council of Educational Facility Planners International, 2000.

² Edwards, M. *"Building Conditions, Parental Involvement and Student Achievement in the D.C. Public School System,"* masters thesis, Georgetown University, 1992.

³ Harner, David. *"Effects of Thermal Environment on Learning Skills,"* CEFP Journal, April 1974.

⁴ McGuffey (1982), Mayo (1955), Nolan (1960), Peccolo (1962), Stuart & Curtis (1964), McCardle (1966), Harner (1974), Lemasters (1977), and Chan (1980).

⁵ Heschong_Mahone study.

⁶ V.W. Ikpa, *"The Norfolk Decision: Norfolk City Schools,* 1992.

⁷ Morgan, L. 2000.

⁸ U.S. Dept. of Education. *"Reducing Class Size: What Do We Know?,"* 2-14-02 DOE.

⁹ Boese, S. *"New York State School Facilities and Student Health, Achievement, and Attendance,"* Healthy Schools Network, Inc., 2005.

¹⁰ Buckley, J. *"The Effects of School Facility Quality on Teacher Retention in Urban School Districts,"* Department of Educational Research, Measurement, and Evaluation, Boston College, 2004.

How Direct Legislative Appropriations Offset a School District's PSCOC Award Funding— A Simple Overview

The Public School Capital Outlay Offset for Direct Appropriations can be confusing. Here's a simple, practical explanation.

What It is

The law says that the PSCOC must “*reduce any grant amounts awarded to a school district by a percent of all direct non-operational legislative appropriations for schools in that district that have been accepted, including educational technology and re-authorizations of previous appropriations.*”¹

How It Works

The *percent reduction* mentioned in the law is each school district's local match percent for PSCOC award funding.

The offset applies to all PSCOC award allocations after January 2003, including funds appropriated through another government entity which pass directly to the school district.

The offset applies to the *district*, so if one school in a district receives a direct appropriation, other projects in the district that receive PSCOC award funding will be subject to an offset.

Offset amounts not used in the current year apply to future PSCOC grant amounts.

The law gives districts the right to reject a direct appropriation because of the effect of the offset. For example, a school district receives a direct legislative appropriation for a specific purpose. The effect of the offset would cause the district to accordingly receive reduced PSCOC award funding for what it considers a higher priority need, and it chooses to reject the appropriation.

An Example

Legislative appropriation to a school	\$1,000
PSCOC award to that school's district	\$2,000
That district's local match percent	40%
Offset reduction in district's PSCOC award allocation (\$1,000 x 40%)	(\$400)
District's net PSCOC award amount (\$2,000 - \$400)	\$1,600
Total funds received by district (\$1,000 + \$1,600)	\$2,600

Fiscal Effects

The most significant effect of the offset is not to reduce total funds that the district receives², but instead to potentially reduce funds available for higher priority needs, in the event that the direct appropriation was for a lower-priority project than projects for which the district had applied for PSCOC award funding. In this case, the higher priority projects would have funding levels reduced by the amount of the offset.

Why An Offset?

The Legislature enacted the offset as one of a number of initiatives it has taken recently to better equalize state funding of capital requests across all of New Mexico's school districts. The 2002 report of the Special Master appointed as a result of the Zuni lawsuit specifically highlighted “*the dis-equalizing effect of direct legislative appropriation to individual schools for capital outlay purposes.*” The offset was enacted to mitigate this concern.

¹ Section 22-24-5.B(6) NMSA 1978

² The post-offset net amount of a direct appropriation will always be revenue positive for the district, given current local match percentages.

The PSCOC Award Process: How Your District Can Best Make the Case for Getting Funded

The PSCOC's award application is becoming ever more streamlined and user-friendly; but here are a few tips which go beyond the application itself.

- First and foremost, work closely with your PSFA regional manager (RM) in applying for a PSCOC award. RMs are the best single point of contact for information about current standards and are here to help.
- Subject to annual funding levels, over the past few years the PSCOC has attempted to consider funding requests for the top 100 projects on the ranked New Mexico Facilities Assessment Database. The higher a need is ranked, the greater the probability an award application will be funded—subject, of course, to the district making the application.

“An ideal PSCOC Award application includes good design estimates that demonstrate that the project is consistent with standards, comprehensive data on the district’s financial contribution, and concrete evidence that the district has been expeditious in the use of PSCOC funds awarded in prior years.”

– David Abbey

PSCOC Awards Subcommittee Chair & Director of the Legislative Finance

- Provide evidence that your district has *current* facility master and maintenance plans in place. Both are required by statute. The project for which your district applies must be among the top priorities in your master plan.
- It's a plus if your district can provide evidence that it either has already raised any required local matching funds or will do so shortly, which will allow state funds to be used more expeditiously.
- It's also a plus if your district has completed the project's design phase and has created an accurate project cost estimate in advance of applying for PSCOC funding—again, to allow any state funds awarded to be used more expeditiously and to avoid cost overruns due to inflation.
- Present a numerical case for the need. Be prepared to quantify why this project is necessary.

“In its funding decisions, the PSCOC is now making a concerted effort to determine which projects are “ready to go,” such that funds awarded are used rapidly, which maximizes investment in brick and mortar, and minimizes losses to construction inflation for both state and local funds.”

– Dr. Kurt Steinhaus

PSCOC Cochairman & Senior Education Policy Advisor to Governor Bill Richardson

- During the application process, be prepared to discuss any prior PSCOC funded projects in terms of pre-construction and completion times, whether the project was finished within its cost estimate and related factors that make the case for your district's prudent use of funds.
- Also be prepared to discuss how the proposed project is consistent with state facility adequacy standards, and/or falls within state adequacy guidelines.
- Award site visits are part of the application process and very tightly scheduled. To maximize consideration of your district's needs: 1) before the site visit, gather together required documents, and 2) during the visit, make sure that your district's leadership team is available immediately upon request.
- During your district's application presentation before the Council, keep the presentation concise and focused, while taking time to best make the case for the need. Remember that the Council is considering multiple applications during what is usually a very long day. Given very limited time constraints and in order to make the best and most focused presentation possible, plan out a well prepared and coordinated effort of key staff and design professionals.
- Check and double check submittal deadlines and your application documents, such that all sections are completely filled out and all required attachments are included. Missing data may delay or exclude an award if it causes a critical deadline to be missed.

Preventative Maintenance: Low Cost Preservation of Facilities Investment

Effective maintenance is second only to effective planning in minimizing facilities costs over the long term.

PSFA estimates that half of the \$324 million (2002 data) in identified life-safety and other facilities deficiencies in New Mexico’s schools result from inadequate or deferred maintenance.¹

Primary Accomplishments in 2006

- All 89 school districts in New Mexico have now implemented Preventative Maintenance plans—up from 69 districts in 2005.
- Continued statewide implementation of Facility Information Maintenance Management System (FIMS) software, which assists school districts in the execution of maintenance programs. At publication, 80 districts had been trained on FIMS were using elements of the FIMS software.

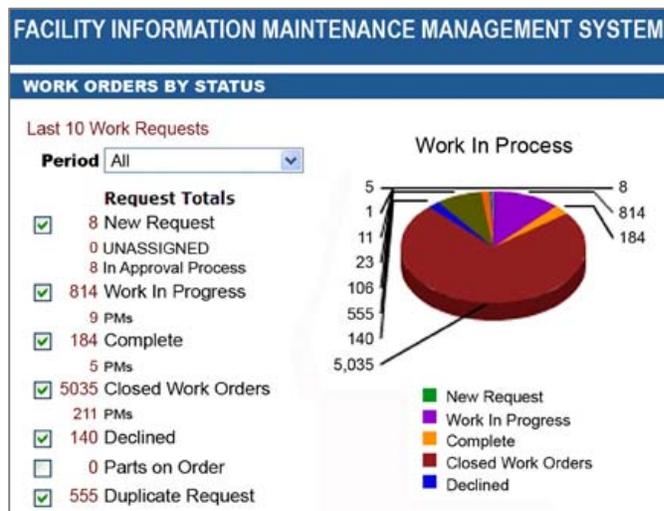
“The only way maintenance can prove its worth in the face of shrinking budgets is to have valid, reliable data to illustrate the scope of its work, its importance to the educational process, and its contribution to effective and efficient operations. FIMS has provided this data for our district.”

– David Flood

Facility Director, Alamogordo Public Schools

- Collected facility equipment inventory data at all school districts, which was then entered into FIMS database for automatic scheduling of preventive maintenance work. Inventories were completed or ongoing at 28 districts.
- Conducted on-site training for all 89 school districts, and participated in regional and state training seminars. Also conducted workshop

¹ Based on a comprehensive NM public school facilities assessment completed in 2002.



Example district homepage from FIMS, a PSFA web-hosted system that assists school districts in cost-effective maintenance management, and is provided to districts at no cost.

sessions at annual statewide Facility Managers’ Training Workshop. Provided over 900 hours of hands-on training to a multitude of district business office and maintenance workers.

- Under SB-455, analyzed and prioritized acute roof repair requirements at 28 school districts, which were addressed with \$24.2 million in state funding.
- Initiated programs to assist districts in reducing utilities expenditures. Progress to be measured utilizing the FIMS Utility Direct software.
- Initiated efforts to provide “maintenance friendly” designs on school construction projects, with the goal of providing high-performance “sustainable” facilities to maximize efficiency of available staff and minimize operating costs.

Operations & Staff

PSFA’s Maintenance Division is managed by Bob Bittner, and has a staff of 4.

Maintenance staff are based in PSFA’s Albuquerque office, and can be reached at 505-843-6272.

2006 Ben Lujan Maintenance Achievement Awards

Speaker of the House Ben Lujan and PSFA's Maintenance Division awarded Ben Lujan Maintenance Achievement Awards to individuals & school districts which have demonstrated commitment and success in school facility maintenance. In 2006 there were 29 recipients:

District Awards:

Alamogordo	Moriarty
Aztec	Peñasco
Farmington	Rio Rancho
Gadsden	Roswell
Los Alamos	Silver
Los Lunas	Texico
Lovington	

Individual Awards:

Juan Acuna, Gadsden Independent Schools
Bernadine Baca, Belen Consolidated Schools
Gary Barbe, Hagerman Municipal Schools
Gilbert Espinoza, Las Cruces Public Schools
Robert Fields, Clovis Municipal Schools
Mark Kear, Springer Municipal Schools
Oscar Lerma, House Municipal Schools
Michael Pumphrey, Capitan Municipal Schools
Danny Sanchez, Ruidoso Municipal Schools
Gary Spinks, Floyd Municipal Schools
Mike Thrasher, San Jon Municipal Schools
Marie Valencia, Espanola Public Schools
Charlie Varela, Pecos Independent Schools



Maintenance Supervisor Ryc Velasquez, Roswell Independent School District, accepts his district's Ben Lujan Maintenance Achievement Award from Speaker Lujan and PSFA Director Bob Gorrell.

Special Award:

Max Luft, Cooperative Educational Services

PSFA 2006 Quality Awards

PSFA Regional Managers awarded a limited number of PSFA Quality Awards to general contractors, subcontractors, and individual craftsmen who delivered truly exceptional workmanship that led to better school buildings for the children of New Mexico. In 2006 there were three recipients:



Glen Lewis of Gallup accepts a Quality Award from the PSFA's John Adams, School Board President Dr. Bruce Tempest, and Superintendent Karen White.

Recipient:	Glen Lewis
Category:	Individual / Subcontractor
Project:	Gallup Middle-School
District:	Gallup-McKinley County Schools
PSFA RM:	John Adams
Recipient:	Wayne Rutherford
Category:	Individual / Contractor
Project:	Taos Charter School
District:	Taos Municipal Schools
PSFA RM:	Karl Sitzberger
Recipient:	Hacienda Carpet & Tile
Category:	Subcontractor
Project:	Central Elementary School
District:	Belen Consolidated Schools
PSFA RM:	Jon Stoltzfus

Keys to Efficiency: IT Systems

Construction is labor and information-intensive. Process management systems that improve workflow among the many specialists involved in each major project help generate dramatic savings at relatively modest costs. Major cost savings, with no reduction in material or build quality, also accrue in standardizing IT systems throughout the state. A recent study indicated potential savings of up to 30 percent of total building cost by improving systems interoperability.¹

Accordingly, PSCOC and PSFA emphasize a systems approach in partnering with districts to value-engineer the many complexities in public school facilities construction and maintenance.

“The PSCOC’s new maintenance management program is as effective as it is user-friendly, and the PSFA staff has been courteous and knowledgeable in helping our district to implement it.”

– Gene Bieker
*Director of Maintenance,
Clovis Municipal Schools*

Primary Accomplishments in 2006

- Implemented an updated and more user-friendly PSFA Construction Information Management System, which offers improved capital project administration. This system has the potential to achieve 10 to 30 percent savings through improved project management efficiency and interoperability.
- Improved PSFA web-hosted PSCOC award application via a streamlined data entry process, increased ease of use, and decreased application completion time.
- Completed over 2,175 service and support calls to assist internal and external users with IT Systems and related processes, achieving a “First Call” support resolution of 96% and overall support resolution of 100%.

- Upgraded PSFA’s e-mail system to enhance agency-wide communication practices, eliminate unnecessary complexities in system usage, improve collaboration, and increase operational efficiency between central and regional headquarters.

- Maintained 99.9% critical systems and website uptime to provide consistent and stable access to PSFA documents and resources for internal and external users, including training registration forms.

- Received a Gold New Mexico Cumbre Award in effective government communications for PSFA’s 2006 website redesign.

Strategic Direction & Objectives

- To use information technology to reduce complexity and increase effectiveness for school districts in managing their facilities construction and processes.

- To significantly streamline the processes by which businesses work with the PSCOC and PSFA.

- To be innovative in developing simple, robust, low-cost IT solutions.

- To use information technology to make project communication easier and less expensive across the broad expanses of New Mexico, but without losing the effectiveness of in person meetings.

- To develop cost-effective, automated systems that provide the right data in the right form to policymakers, staff, and stakeholders to enable work at optimum effectiveness.

- Overall, to maximize productivity and minimize costs by deploying effective IT systems across PSFA’s areas of operation.

Operations & Staff

PSFA’s information technology operations are managed by Agency CIO Tom Bush and IT Support Technician Alfonso Urquidez.

IT staff are based in PSFA’s Albuquerque field office, and can be reached at 505-843-6272.

¹ “Cost Analysis of Inadequate Interoperability in the US Capital Facilities Industry,” National Institute of Standards and Technology, 2006.

Keys to Stakeholder Empowerment: Training

Training is a critical and cost effective part of PSFA's overall mission in providing school districts with assistance in the planning, construction, and maintenance of school facilities, while improving facilities processes throughout the state.

Primary Accomplishments in 2006

- Trained 860 users from school districts, general contractors, state agencies, and architectural & engineering firms in implementing the New Mexico Construction Information Management System (NMCIMS), BidNet, the PSCOC Awards Application process, the Adequacy Standards Worksheet, and the New Mexico Facilities Assessment Database.
- 405 out of 860 participants were trained during the Pilot and Phase I implementation stages of PSFA's new more user-friendly statewide construction management application.
- Conducted on-site facilities master planning workshops, and trained 47 school district representatives, architects, and FMP professionals, 22 of which passed the correlating exam and received facilities master planning certification.
- Conducted 14 procurement workshops attended by 326 users from 46 school districts, state agencies, and private sector firms.
- Conducted on-site training for all 89 school districts, and participated in regional and state training seminars. Also conducted workshop sessions at annual state-wide Facility Managers' Training Workshop. Provided over 900 hours of hands-on training to a multitude of district business office and maintenance workers.
- Conducted four training sessions with the Public Education Department for all school districts during PED's spring budget workshop.
- 56 percent of PSFA staff achieved certification in a broad range of project/facilities management specialties under BOMI and CSI.



PSFA Training Staff (L to R): Tanya DeLara, Julia Small, Selena Padilla

- More than 90 percent of Agency staff underwent professional development training.

Primary Objectives

- To raise productivity and establish standards which eliminate inefficiencies and related costs. To create sustainable optimized cost/benefit of public school construction statewide.
- To increase school districts' expertise in effective management of their own facilities planning, building, and maintenance.
- To establish objective certification standards in procurement, maintenance, and construction management for all career levels.
- To provide quality support services which enhance the benefit of training programs.

Operations & Staff

PSFA's three person, full-time training staff is managed by Julia Small, while the majority of PSFA staff members provide additional training related to their areas of expertise.

Training staff are based in PSFA's Albuquerque office, and can be reached at 505-843-6272, or by e-mail at training_support@nmpsfa.org.

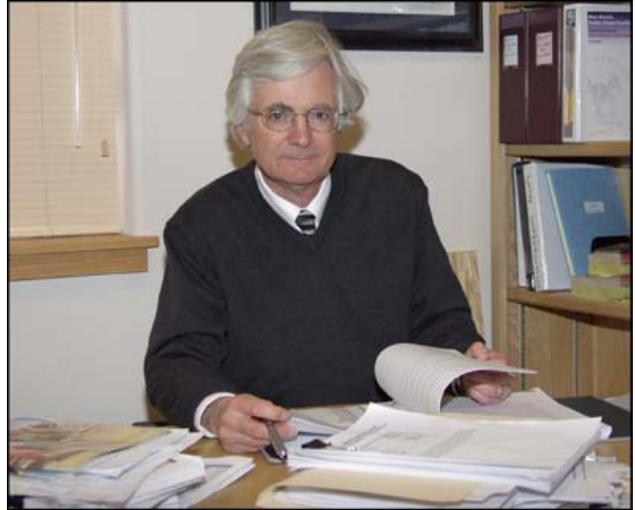
Cooperative Planning: Helping Districts to Meet Facilities Requirements

Of the many expenditures on a construction project, funds allocated to effective pre-planning have the greatest impact on assuring that projects meet current and future needs, achieve maximum build quality at minimum cost, and are affordable to maintain over the long term.

PSFA's planning and design group works to assist school districts in navigating through what can be a complicated regulatory process for facilities, with the ultimate goal of implementing building plans that maximize utility to educational programs while being cost effective and efficient to construct.

Primary Accomplishments in 2006

- Reviewed and approved 593 code and adequacy submittals for school construction projects at program statement, schematic, design development, and bid document phases.
- Assisted districts in creating their own facility master plans (FMPs) via statewide guidelines. 37 districts have approved FMPs as of December 2006.
- Drafted water scoping manual to simplify sizing requirements for sprinkler system tanks.
- Partnered with the State Fire Marshall and local fire jurisdictions to standardize interpretation of fire codes in order to simplify and reduce the cost of school building design compliance.
- Conducted on-site facilities master planning workshops, and trained 47 school district representatives, architects, and FMP professionals, 22 of which passed the correlating exam and received facilities master planning certification.
- Continued "one stop shop" plan review with the Construction Industries Division, the State Fire Marshall, and other regulatory agencies, offering 14-21 day turnaround on project plan approvals.



PSFA Building Standards Coordinator Andre Larroque.

- Took part in Governor Richardson's High Performance School Taskforce to develop statewide school facility adequacy standards.

Strategic Direction & Objectives

- To develop better methodologies for significantly improved long term forecasting of future public school facilities needs throughout New Mexico.
- To continue to assist districts in master plan implementation at state and district levels, and to expedite project delivery through an integrative, multi-tier systems approach.
- To maximize coordination across the numerous state agencies which must sign off on public school construction projects.
- To provide high-quality rapid plan approval to the numerous participants in public school construction projects, for which delays are costly.

Operations & Staff

PSFA's planning division is managed by Martica Santistevan. Planning staff are based in PSFA's Albuquerque and Santa Fe offices, and can be reached at 505-843-6272 and/or 505-988-5989.

PSFA Regional Management: Restructuring To Simplify District Facilities Challenges

By Pat McMurray & Gloria Martinez

At the onset of the Deficiencies Correction Program in 2002, PSFA field staff worked closely with districts to assess facilities needs, and to ensure that projects were completed within the correct specifications.

The Deficiencies Correction Program has transitioned into the Standards-Based Process. Accordingly, the role of PSFA field staff has broadened into comprehensive project development, including database management, facility master planning assistance, capital prioritization, design management, value engineering, and life-cycle analysis. To better reflect these expanded areas of focus—and its corresponding certifications and training—PSFA has changed the job title of its senior field staff from Construction Manager to Regional Manager.

Regional managers continue to serve as the primary point of contact between New Mexico's 89 school districts and PSFA management, and it is through this locally-based partnership that each community is better able to realize its individual educational and capital improvement goals.

Current Initiatives

- Construction is a labor and information-intensive process, and as costs continue to rise, it is ever more important that projects be completed in a timely and efficient manner. A recent study indicated potential savings of up to 30 percent of total building cost by improving systems interoperability.¹ **Speeding project delivery via working with districts to improve processes is one of our major areas of focus.**

PSFA regional managers enhance workflow by assisting districts throughout the construction process, and guide district personnel in PSCOC award application procedures, memorandums of understanding, project bids, change orders, progress meetings, design review, warranty and bonding issues, and building maintenance.

- To further improve oversight, regional managers provide comprehensive expertise, and are trained in

¹ *“Cost Analysis of Inadequate Interoperability in the US Capital Facilities Industry,”* National Institute of Standards and Technology, 2006.



PSFA Regional Manager Gloria Martinez, and PSFA Senior Facilities Manager Pat McMurray.

contemporary building practices. They maintain a wealth of knowledge relating to public policy, essentially acting as interpreters for districts, and serve as a gateway to PSFA's specialty staff.

- Effective planning creates the highest return on facilities investment, and regional managers partner with districts to navigate through what otherwise might be a burdensome and complicated process.
- The core benefit in basing PSFA regional managers throughout the state is that they learn about and become a part of the communities in which they serve. They come to see school district problems as their own problems, so they develop a vested interest in looking out for districts' best interests.
- Ultimately, by working to make it easier for districts to manage and overcome facilities challenges, PSFA regional managers help districts to provide safe, secure, and adequate facilities for every child via best practices in building and the prudent use of funds.

Operations & Staff

PSFA's regional division is managed by Pat McMurray, who can be reached at 505-843-6272.

PSCOC & PSFA Milestones in 2006

- Provided \$259.2 million in funding to school districts for standards-based capital outlay awards, deficiency correction projects, facilities leasing assistance, standards-based facility roof repairs, and cost increases for projects from previous award cycles. Funds were allocated to 139 projects and/or facilities throughout the state.
- Released a third generation, significantly more user-friendly web-hosted PSCOC standard-based award application that simplifies the application process for school districts.
- As of 2006, 100 percent of New Mexico school districts now have current preventative maintenance plans. 80 districts have begun using FIMS, a 33% increase over 2005.
- As of 2006, 37 school districts now have district facilities master plans, an 8% improvement over 2005. All future FMPs will follow improved guidelines for better consistency throughout the state.
- Awarded 29 Ben Lujan Maintenance Achievement Awards to school districts and district staff for exceptional maintenance practices, and 3 PSFA Quality Awards to school construction contractors for superlative work that improved the quality of the facility.
- Trained 860 users from school districts, general contractors, state agencies, and architectural and engineering firms in implementing the New Mexico Construction Information Management System (NMCIMS), BidNet, the PSCOC Awards Application process, the Adequacy Standards Worksheet, and the New Mexico Facilities Assessment Database. Conducted on-site facilities master planning workshops, and trained 47 users from school districts, architects, and FMP professionals. Conducted 14 procurement workshops across the state, which were attended by 326 participants from 46 school districts, state agencies, and private sector firms. Conducted over 850 hours of hands-on maintenance training for all 89 school districts.
- Reviewed and approved 593 submittals for school construction projects at program statement, schematic, design development, and bid document phases.
- Continued to provide “one stop shop” plan review with the regulatory agencies, offering 14-21 day turnaround on project plan approvals.
- Achieved 99.9% accuracy in processing accounts payable transactions.
- Maintained 99.9% critical systems and website uptime to provide consistent and stable access to PSFA documents and resources for internal and external users.
- Awarded three New Mexico State Cumbre Award in effective government communications for PSFA’s 2006 annual report (best public sector annual report in the state award), 2006 website redesign, and other communications initiatives.

Cuba Middle School: A Model Renovation Project

“We want our students to achieve adequate yearly progress,” said Pancho Guardiola, Superintendent of Cuba Independent Schools. *“So we need adequate facilities. When we first met with PSFA to discuss the middle school, we wanted a new facility. But they determined that the structure was sound and that a renovation would meet our needs.”*

PSFA staff worked with the district to develop a cost effective plan. *“We depended on the experience and wisdom of the PSFA throughout the project,”* Guardiola said. *“In rural New Mexico, we don’t have the expertise to analyze a facility and determine its condition. There were challenges, but the contractor and the architect, along with PSFA, helped everything go smoothly, which in my experience is very rare on a project of this type.”*

The district determined that classes would be disrupted by the renovation, so students were temporarily moved to Immaculate Conception School. *“We cut construction time by about six or seven months by moving the kids out,”* said Guardiola.

“There were a lot of improvements that needed to be made, and of course safety is always a huge consideration. Our public is very proud of the renovated facility.”

-- Pancho Guardiola

Superintendent, Cuba Independent Schools

Construction began in August 2005 and was completed in 12 months at a total cost of \$6 million. *“At the onset, we formed a project committee that included community members, and then held a forum where we asked for suggestions for the remodel,”* said Guardiola. *“The public had passed a bond issue to build a new gymnasium several years earlier, so that was included in the renovation project.”*

The new 9,000 square foot gymnasium features a maple floor and ample natural lighting, as well as an adjoining 3,000 square foot area for locker rooms, concessions, and a lobby. *“The gymnasium is the centerpiece of the entire project. I think they did a very good job,”* Guardiola said.

Additional improvements were made to the school entryway, cafeteria, sixth grade classrooms, bus loading zone, and patio. *“It flows well,”* added Principal Eddie Atencio, *“and the students have respect for the property.”*

The PSFA saw the project through to completion. *“I commend the patience and ingenuity of everyone involved,”* said Regional Manager Gilbert Ferran. *“The students, staff, and community have a beautiful building of which they can be proud.”*



The new 9,000 square foot gymnasium features a maple floor and ample natural lighting.

The facility sits on 15 acres of land and shares an aquatic recreation area, track, and football stadium with the neighboring elementary and high schools.

“Our expectation is that we need to maintain our facilities so that they are conducive to a learning environment. We need to keep them well-maintained and stay on top of things,” said Guardiola. *“We have a maintenance prevention plan in place, and I’m very confident that with the assistance of PSFA’s Maintenance Advisory Group, we’ll do a much better job with that than we had been doing in the past.”*

Cuba Middle School participates in Governor Richardson’s Laptop Initiative, which provides seventh and eighth grade students with computers. To augment the program, the school has been equipped with internet and wireless capabilities, as well as with a state of the art computer lab.

“I believe that we must have school facilities where kids will come to learn, but it’s important to address each student’s interest, and help them to become productive, law abiding citizens within the global society. The step this technology takes is phenomenal. I think the sky is the limit,” said Guardiola.

A reported 70 percent of the school’s 130 students are Native Americans, and some must travel up to 120 miles each day to attend. However, all are provided with full transportation, and special services and classes are offered to help break down the language barrier.

“Every community has its own challenges. But we’re hopeful that by having adequate facilities, and by exhibiting unity, our kids will also improve on the academic side,” said Guardiola.

“I believe that to create a place where kids really want to be, we must make sure that they feel welcome. Cuba Middle School must be safe and clean, and also a place that will provide a solid education. With the improvements we’ve made, our teachers can instruct kids in a very meaningful way.”

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¹ Don Moya, Deputy Cabinet Secretary, Public Education Department, is Dr. Garcia's PSCOC designee.

Legislative Leaders on New Thinking in Public Education Infrastructure

What are the main challenges this year in providing school districts with adequate facilities?

Nava: Adequacy of funding for the needs we face. And making sure that the standards by which we judge projects are truly adequate, while being responsive to the direction of education into the future.

Miera: I agree. We need to find sufficient resources for the new programmatic needs of 21st Century schools. A second major challenge are all the facilities issues related to charters.

Should the adequacy standards be expanded when funding hasn't been sufficient to meet the current standards?

Miera: Yes. We've made a commitment as a state that every child should attend school in an adequate facility. Educational adequacy is dynamic, so we need to be willing to refine the standards and adjust the funding to reflect current and future needs.

Nava: Yes, the standards should reflect the need, not the limits of funding, but it isn't just about spending more money, it's about building smarter. As we provide funds for new programmatic needs, there may be costs related to outdated thinking that we can eliminate.

Can you provide a few examples? How could public school facilities be built smarter?

Nava: One thing we can do is to co-locate community colleges and high schools, given career academy and career cluster overlaps. It's cost-effective for facilities with side-by-side programs to be shared, and it just makes sense to co-locate them.

Miera: To continue along the Senator's thinking, cities and counties could have a role in co-locating their facilities with schools as well, or possibly partner in combining schools with community centers or municipal libraries. The bottom line is that it makes more sense to use school buildings for more hours during the day than it does to build new schools when current facilities have excess capacity.

Is that a possible solution to charter school facilities needs—sharing existing school buildings and expanding the hours that schools are open?

Nava: Yes, because the two most difficult issues that charter face are facilities and finding qualified teachers. So if charters work with the local school district in providing education in off hours, that solves the facility problem, and helps attract teachers who want to work beyond the school



Representative Rick Miera and Senator Cynthia Nava co-chair the Public School Capital Outlay Oversight Task Force, and chair, respectively, the House and Senate Education Committees.

day. We also need to take a close look at charter lease payments, because I'm not convinced that going out and building a brand new facility for every charter school in the state is the way to go.

Do you foresee any major new legislative initiatives this Session for funding student population growth?

Miera: It may be premature to discuss, but we're considering a few new ideas. I'm sure Senator Nava would agree that on the question of growth, we need to look not just at growth districts, but at growth across New Mexico, and at how it pertains to the educational system overall.

So you support better forecasting systems that would capture student feeder patterns across districts?

Nava: Yes.

Miera: Definitely.

How is the state doing on the Zuni Lawsuit?

Nava: I think the state has made a heroic effort to meet the demands of the Zuni lawsuit. The underlying question that we're grappling with now is what happens to a district when it has no ability to go above whatever the adequacy standard is, and how to ensure that there really is equity among facilities for all students, regardless of whether they live in Zuni or Los Alamos.

Miera: Under the time constraints, and given the significant increases in funding that we've dedicated to this, we're doing as well as can be expected.



ABOVE: Dedication ceremony for the new James H. Rodriguez Elementary School, built by the community of Espanola and the Espanola Public School District, with project and funding assistance from the State of New Mexico.

ON THE COVER: Students enjoy the outdoor commons area of the newly renovated Cuba Middle School, built by the community of Cuba and by the Cuba Independent School District, with project and funding assistance from the State of New Mexico.