

**2018 APS Presentation to the
NM Legislative Education Study Committee**



**APS Capital Master Plan
Facility Strategy & Update for
Charter Schools 2018**



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Capital Investment in APS

Area Charter Schools: 2007-2022

APS Investments in Permanent Charter Facilities in Addition to Per-Membership Distributions (2007-2016)	
School	Investment
Native American Community	\$ 14,700,000.00
South Valley Academy	\$ 10,074,378.00
Digital Arts & Technology Acade-	\$ 6,890,168.00
Public Academy for the Perfor-	\$ 9,025,000.00
maing Arts	
Robert F. Kennedy Middle	\$ 822,226.00
Robert F. Kennedy High	\$ 6,725,601.00
Montessori of the Rio Grande	\$ 9,628,798.00
Total	\$ 57,866,171.00

Total Per-Membership Distributions Granted Directly to Charter Schools in APS District Boundaries (2010, 2013 & 2016) Authorizations	
Election Year/Type	Revenue
2010 HB33	\$ 33,000,000.00
2013 SB9	\$ 20,190,000.00
2016 HB33	\$ 58,000,000.00
Total	\$ 111,190,000.00

- Albuquerque citizens have invested \$100,961,171 total in charter school facilities from SB9 and HB33 to date.
- \$53 million was distributed directly to charter schools through per-membership distribution from the 2010 and 2013 authorizations.
- \$57 million was invested from the APS capital master plan in addition to the per-membership distributions to secure permanent facilities for charter schools that participated in the facilities pilot.
- An additional \$58 million will be distributed to charter schools through per-membership distributions 2016—2022



APS Capital Master Plan 2008 Charter Facility Pilot Program

- In 2008 APS Capital Master Plan in conjunction with the Coalition of Charter schools formulated criteria for the orderly provision of facilities to Charter Schools via a 'Pilot Program'
- Participation in the program was voluntary and the terms were mutually agreeable to both APS and participating charter school
- Pilot Program has legally binding Memorandums of Understanding (MOUs) between APS and participating charter schools with regards to roles, responsibilities, location, and capital outlay requirements. The following schools have signed MOU's with APS;
 1. Native American Charter Academy (NACA)
 2. Robert F Kennedy Charter School
 3. Montessori on the Rio Grande Charter School
 4. South Valley Charter Academy Charter School (SVA)
 5. Public Academy for Performing Arts (PAPA)
 6. 21st Century Academy
 7. DATA
- All the schools above have a public facility or are in the process of moving/building/purchasing one
- Since 2010, the APS Board of Education and APS Tax Payers have invested over \$57,866,171 in the Construction, renovation and acquisition of charter school Facilities



APS CMP 2008 Charter Facility Pilot Program Prioritization Criteria

Prioritization Criteria Summary

1. Status with the District
2. Fiscal Responsibility
 - *Financial viability*
 - *Clean audits*
3. Stable Leadership
 - *Consistency at governing board, staff, and administration*
4. Constant School Improvement
 - *Track record of attaining set academic achievement/results*
5. Match or “Good Fit” with Available Public Property
 - *Geographical location vis-à-vis student body*
 - *Academic/curriculum needs translated into available physical space*
6. Both the District and charter school governing council will enter into a binding mutually agreeable voluntary Memorandum of Understanding (MOU) voluntarily. Both parties agree in writing on their respective roles and responsibilities in maintaining the public facility
7. Charter school retains all instructional, programmatic, human resource, and operational financial responsibility/authority unless otherwise pre-agreed on, i.e. professional autonomy



Some Strategies to Locate Charter Schools in Adequate Public Facilities

- Construct new facilities
- Purchase available facilities
- Relocate in existing repurposed public school buildings
- Cluster multiple, compatible charter schools such that they can share facilities like gyms, science labs, computer labs etc. in order to accrue economies of scale
- Co-locate with existing schools where there is space and compatibility
- Use existing APS real estate and portable classroom buildings to house charters
- Investigate potential lease-purchase options
- Implement some combination of the above options



Montessori of the Rio Grande



Address: 1650 Gabaldon Drive NW, Albuquerque, NM 87104

Location Number: 723

Grade Levels: K-5

Year Opened: 2004

Finance Method:

- i. **APS CMP Via Charter Pilot Program 2010 School Bond Election: \$3,606,798**
- ii. **Land Acquisition APS Real estate Fund: \$1,522,000**
- iii. **APS CMP 2016 School Bond Election: \$4,500,000**

Total Investment to Date: \$9,628,798

Detailed Capital Update:

1. **Project Scope:** 4 classroom block instructional and Enrichment Center
 1. **Completion Date:** July 2013
 2. **Budget:** \$3,581,798
 3. **Architect:** G. Don Dudley
 4. **General Contractor:** Famco, Inc.
2. **Project Scope:** Master Plan & Phasing Strategy
 1. **Project Status:** Complete
 2. **Budget:** \$25,000
 3. **Architect:** Suina Mead Architects
3. **Current Funded Project:** Design & Construction of 2 additional instructional pods consisting of 8 classrooms and 2 enrichment centers and administration
 1. **Budget:** \$3,581,798
 2. **Project Status:** Complete
 3. **Completion Date:** January 2016
 4. **Architect:** G. Don Dudley
 5. **General Contractor:** Thompson Construction, Inc.

G. DONALD DUDLEY ARCHITECT LTD.
ARCHITECTS





RFK Charter High School



Address: 4300 Blake Rd SW, Albuquerque, NM 87106

Grade Levels: 6th-12th

Year Opened: 2001

Finance Method: APS CMP Via Pilot Program 2010 School Bond Election: \$6,725,601

Total Investment to Date: \$6,725,601

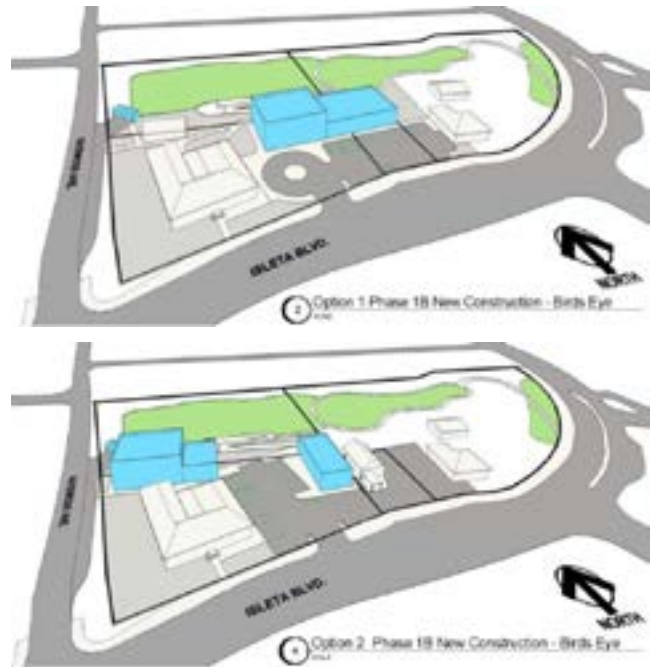
Detailed Capital Update:

1. **Project Scope:** Modular Campus with Infrastructure
 - Project Status: Complete 2009
 - Budget: \$2,500,000
 - Architect: APS On Call
 - General Contractor: APS On Call
2. **Project Scope:** Master Plan & Phasing Strategy
 - Project Status: Complete
 - Budget: \$25,000
 - Architect: DWL Architects
3. **Project Scope:** Auto Body/Paint Shop
 - Completion Date: November 2014
 - Budget: \$762,218
 - Architect: DWL Architects
 - General Contractor: Anchor Built
4. **Project Scope:** Pedestrian Bridge
 - Completion Date: April 2016
 - Budget: \$166,300
 - Architect: Wilson & Company
 - General Contractor: APS On Call
5. **Project Scope:** Photovoltaics & Shade Canopy
 - Completion Date: April 2016
 - Budget: \$27,988
 - Architect: APS On Call
 - General Contractor: APS On Call
6. **Project Scope:** Assembly, PE Support Space, & Media Center
 - Completion Date: April 2015
 - Budget: \$5,744,095
 - Architect: DWL Architects
 - General Contractor: Anchor Built





RFK Charter Middle School



Address: 1021 Isleta Blvd. SW 87105

Grade Levels: 6th-8th

Year Opened: 2001

Finance Method:

- i. APS CMP 2016 School Bond Election: \$250,000
- ii. APS CMP & PSFA matching funds: \$131,187
- iii. APS CMP : \$441,039

Detailed Capital Update:

1. **Project Scope: Existing main Building Re-roof**
 - Completion Date: April 2015
 - Budget: \$131,187
 - Architect: Cherry See Reames
 - General Contractor: Anchor Built
2. **Project Scope: Infrastructure & existing main Building Improvements**
 - Completion Date: March 2015
 - Budget: \$416,039
 - Architect: Baker Architecture & Design
 - General Contractor: Rio Conchas
3. **Project Scope: Master Plan to address existing building renovations and future phasing that would include a multipurpose room, restrooms, bookroom and multipurpose Media/Computer Lab**
 - Project Status: Complete
 - Budget: \$25,000
 - Architect: Suina & Mead Architects
4. **Upcoming Funded Project: Renovation of existing main building to include Windows, ADA, vehicular Circulation/parking, doors, remediation, restroom**
 - Budget: \$250,000
 - Architect: TBD
 - General Contractor: TBD



South Valley Academy



Address: 3426 Blake Rd. SW, Albuquerque, NM 87105

Grade Levels: 9th-12th

Year Opened: 2000

Finance Method:

- i. APS CMP Via Pilot Program 2010 School Bond Election: \$7,774,378
- ii. Land Acquisition APS Real estate Fund: \$2,300,000

Total Investment to Date: \$10,074,378

Detailed Capital Update:

1. **Project Scope: Phase 1A:** Core instructional Classrooms, Library, Administration, Special Programs, and Food Services Spaces
 - **Project Scope: 33,377 sq. ft. project total**
 - 10 general education classrooms
 - 3 science labs
 - Greenhouse
 - Digital library/community space
 - Computer and multimedia classroom
 - Advisory and multipurpose areas
 - Site development and teaching/instructional courtyard spaces.
 - Completion Date: January 2014
 - Budget: \$8,184,400
 - Architect: Studio Southwest
 - General Contractor: Shumate Construction Inc.
2. **Project Scope:** Master Plan & Phasing Strategy
 - Project Status: Complete
 - Budget: \$25,000
 - Architect: Suina & Mead Architects





Public Academy of Performing Arts (P.A.P.A.)



Address: 3000 Adams Street NE, Albuquerque, NM 87110

Location Number: 747

Grade Levels: 6-12

Year Opened: 2001

Finance Method:

- i. APS CMP Via Pilot Program 2010 school Bond Elections \$1,825,000
- ii. APS CMP 2016 School Bond Election: \$9,000,000

Total Investment to Date: \$10,825,000

Detailed Capital Update:

1. **Project Scope:** Modular Campus with infrastructure
 1. Project Status: Complete 2010
 2. Budget: \$1,800,000
 3. Architect: APS On Call
 4. General Contractor: APS On Call
2. **Project Scope:** Master Plan & Phasing Strategy
 1. Project Status: Complete
 2. Budget: \$25,000
 3. Architect: Dekker Perich Sabatini
3. **Project Description:** This project is the design and construction of the first phase (of a two-phase project) which will include instructional areas for dance, music, general education, and science curriculum, as well as improvements to the “old” Acoma facility.
 - 38,534 sq. ft. project total
 - 3 dance studios with storage and changing rooms.
 - 1 band/orchestra ensemble with storage and individual practice rooms
 - 1 choir ensemble with storage and individual practice rooms.
 - 1 guitar classroom
 - 1 piano classroom
 - 4 general education classrooms
 - 4 science classrooms
 - 2 science prep rooms
 - 2 educator home bases (shared office and collaboration space)
 1. Budget: \$11,838,472
 2. Project Status: In design
 3. Completion Date: TBD
 4. Architect: Studio SW
 5. General Contractor: TBD





Native American Community Academy (NACA)



Address: 525 Buena Vista Drive SE, Albuquerque, NM 87106

Location Number: 762 & 591

Grade Levels: 9 – 12

Year Opened: 2013

Finance Method:

- i. APS CMP Via Pilot Program 2010 School Bond Election: \$11,700,000
- ii. APS CMP Via Pilot Program : \$3,000,000

Total Investment to Date: \$14,700,000

Detailed Capital Update:

1. Project Scope: Modular Campus with Infrastructure
 - Project Status: Complete 2007-2009
 - Budget: \$3,000,000
 - Architecture: APS On Call
 - General Contractor: APS On Call
2. Project Scope: Master Plan for (3) Schools: CCHS, CNM, and NACA & Phasing Strategy
 - Project Status: Complete
 - Budget: \$40,000
 - Architect: Design Plus
3. Funded Project: Design & Construction of New 47,137 s.f. multi-story, joint use facility between Central New Mexico Community College and APS on the southern portion of the upper Student Services Center lot on the CNM Main Campus and that will accommodate two APS High Schools: College and Career HS, an APS magnet high school; and, NACA, an APS charter high school, along with CNM Teacher Education and Early Childhood Multicultural Education Program
 - Budget CCHS: \$3,300,000
 - Budget NACA: \$11,700,000
 - Total APS budget: \$15,000,000
 - Architect: Jon Anderson
 - General Contractor: Bradbury Stamm
 - Design Start: August 2016
 - Construction Start: Spring 2018
 - Estimated Completion: Spring 2019



Digital Arts & Technology Academy (DATA)



Address: 1011 Lambertson Place NE, Albuquerque, NM 87107

Location Number: 743

Grade Levels: 9-12

Year Opened: 2006

Finance Method:

- i. APS Lease-Purchase via New Mexico Finance Authority underwritten by APS Board: \$3,450,000
- ii. APS CMP 2016 School Bond Election: \$3,440,168

Total Investment to Date: \$6,890,168

Detailed Capital Update:

1. **Project Scope:** Master Plan & Phasing Strategy
 - Project Status: Complete
 - Budget: \$26,136
 - Architect: Edward Fitzgerald Architects
2. **Project Description:** Renovation and remodel includes design and construction of interior spaces and roof replacement.
 - 172,487 sq. ft. project total
 - Roof replacement
 - Reconfiguration of interior spaces
 - Vehicular circulation project
 - HVAC and electrical upgrades
 - Budget: \$3,300,000
 - Project Status: In design
 - Estimated Completion Date: TBD
 - Architect: FBT Architects



- General Contractor: TBD



Preventative/Reoccurring Maintenance of Charter School Public Facilities

- 1. Once a charter school in an APS-owned facility, the district acts as the landlord for the school**
- 2. Schools once again receive their per-membership distributions directly from the County Treasurer and spend those funds with APS approval on improvements to the facility**
- 3. Lease assistance revenue is paid to APS so APS may maintain the facility in accordance with the preventative maintenance agreement**



Preventative/Recurring Maintenance of Charter School Public Facilities

APS Maintenance and Operations Department as of 2017 provides the following services as part of a charter's lease utilizing state lease reimbursement to help offset reoccurring maintenance costs.

Electrical Services	Lamp Replacement (Same Type)
	Ballast Replacement
	Fire Marshall Repairs Typical
	<i>(Please Note: Charter schools must schedule and pay for Fire Marshall Inspections, if new equipment is required by the Fire Marshall for any reason then HB-33 funds will be used including replacement equipment.)</i>
	General Power Troubleshooting and repairs (no lights, no power, or brown outs etc.)
	Fire Alarm Calls for Troubleshooting (Lightning strikes, electronic boards not included)
	Fire Alarm Yearly Inspections
	Fire Extinguishers Service and Replacements (Stolen Fire Extinguisher Price Outs)
	Intercom Work Orders
	Minor paving Repairs (crack filling and patching)
	Graffiti Removal on Buildings
Building Services Grounds	Irrigation System Repairs
	Minor Tree Cutting and Trimming
	Weed Spraying (2-Times Per Year)
	Custodial Equipment Repair If Possible
	Carpet Cleaning (1-Time Per Year)
	Monthly Pest Control
	Turf Fields Mowing and Fertilizing (ornamental lawns not included)
	Quarterly Fire Sprinkler Inspections
	Quarterly HVAC Filter Changes
	Kitchen Hood Fire Suppression Inspections (2-Times Per Year)
Heating, Ventilation & Air Conditioning (HVAC)	Air Conditioner Startup
	Air Conditioner Shut Down
	Heating Startup
	Boiler Startup
	Boiler Annual Preventive Maintenance
	Weekly Boiler Inspections
	Boiler Water Treatment (Monthly)
	Air Compressor Preventive Maintenance
	Chiller Preventive Maintenance
	Service Calls for All Air Conditioner and Heating Work Orders
	Basic Parts for Typical Service Calls Included (*Major Parts for Replacement for Systems would be HB-33)
Plumbing Services	Backflow Inspections and Re-Certifications (Yearly)
	Backflow Device Repairs and Re-Builds
	Natural Gas Runs (Once Every Four Years)
	Plumbing Service Calls Work Orders
	Typical Parts Needed for Plumbing Calls Included (*Major Replacement Plumbing and Fixtures/parts would be HB-33)
Environmental Services	Environmental Inspections for Asbestos, Indoor Air Quality (IAQ), and Water
	Asbestos Management Plan Development (Yearly)
	Oversite and Management of Asbestos Abatement Projects (*Asbestos Abatement and Mold Mitigation Projects would use HB-33)
	Mold Inspections etc.
Structural Department Support	Roofing Preventive Maintenance including Patching and Inspections (Yearly)
	Parking Lot Striping As Needed
	Preventive Maintenance on Fencing and Gates
	Floor Tile Repair Work Orders (Floor Tile Replacement Projects would use HB-33 Funds)
	Spot and Wall Touch Up Painting (Painting Projects Not Included and would use HB-33 Funds)
	Carpenter Repairs and Doors
	Door Hardware Repairs and Preventive Maintenance
	Bleacher Preventive Maintenance and Repairs
	Glazing Repairs
	Weather Strip Maintenance
	Ceiling Tile Repair Work Orders
	Lock Repairs
	Welding Repair Work Orders



The Way Forward

Possible Funding Sources for Charters in Albuquerque

Goal: Charter schools in adequate public buildings by partnering with school districts and the state.

- Between 2016 and 2022, approximately \$58 million will be distributed to charter schools in the APS district boundaries through per-membership distributions.
- Current Situation:
 - 53 charter schools are located within the APS district boundaries
 - Only 12 of the 53 charter schools reside in a publicly-owned building
 - Most charters lease facilities and must supplement their lease payments with general operating funds
 - PSFA lease payment assistance may not be sufficient to finance lease purchase facilities
 - Charters lack financial strength necessary to acquire the best financing rates
 - Mill levy revenues are restricted in their use:
 - SB9 can only be used for maintenance, HB33 can only be used for construction
 - The revenue cannot be used to make improvements to non-public facilities
 - Per-membership distributions are generally too small for a charter to leverage funds for significant capital investments



The Way Forward

Possible Funding Sources for Charters in Albuquerque

- 1. Continue Facility Acquisition on an individual voluntary basis**
- 2. Codify the APS Charter Pilot through local board of education actions**
- 3. Work with charters that meet eligibility and prioritization requirements to be funded through the APS Capital Master Plan**



The Way Forward

Possible Funding Sources for Charters in Albuquerque

Per-Membership Distribution Pool

- Charter schools in APS district boundaries pool mill levy per-membership distributions (\$58 million over next 6 years)
- APS manages planning and implementing process to prioritize building/acquisition of facilities
- Policy Considerations:
 - a. Changes in statute to effectively end Per-membership distributions so money may be directed to a separate charter facility pool
 - b. Voluntary v. mandatory participation
 - c. Larger districts v. smaller districts
 - d. Ownership of the facility to the local district
 - e. Prioritization based on qualifying factors:
 - Reauthorized at least once
 - Health Life and Safety considerations
 - Program specific facility needs



The Way Forward

Possible Funding Sources for Charters in Albuquerque

Locally-Authorized v. State-Authorized Charter Schools

Clearly articulate facility responsibilities that locally authorized charter schools “belong” to the local district and that state-authorized charter schools “belong” to the state

Locally-Authorized Charter Schools

1. Local prioritization in local capital master plan like any other traditional school
2. Local districts maintain current mills and prioritize funding away from traditional schools for several years to fund charter school facilities
3. Local districts increase the mill levy within their own capacity to create separate funding stream and prioritization for locally authorized charter schools
4. Statute changes to allow a new, additional mill levy to fund charter school facilities within a local district

** facilities would be district owned*

State-Authorized Charter Schools

1. Prioritize all state-authorized charter schools in a state facility master plan through PSFA
2. Statute change to implement a new, statewide bond that would fund the charter school facility plan—similar to School for the Deaf & School for the Blind
3. Statute changes to permit counties to pass a bond/mill levy that would fund state authorized charter schools within that particular county

** facilities would be state-owned or county-owned*



The Way Forward

Possible Funding Sources for Charters in Albuquerque

Public School Capital Outlay Council Awards

- **Minimum awards granted by PSCOC to charter schools based on state-wide average percentage of students enrolled in charters over a certain time period**

Example: if an average 3% of students in NM are enrolled in charters over the past 3 years, the PSCOC would grant 3% of the total amount of all awards to charter schools for the next 3 years

- **Funding sources outlined previously could be used as local match for PSCOC or PSCOC could create a waiver process for the local match for charter schools**
- **Lease assistance awards have been critical in facility solutions**