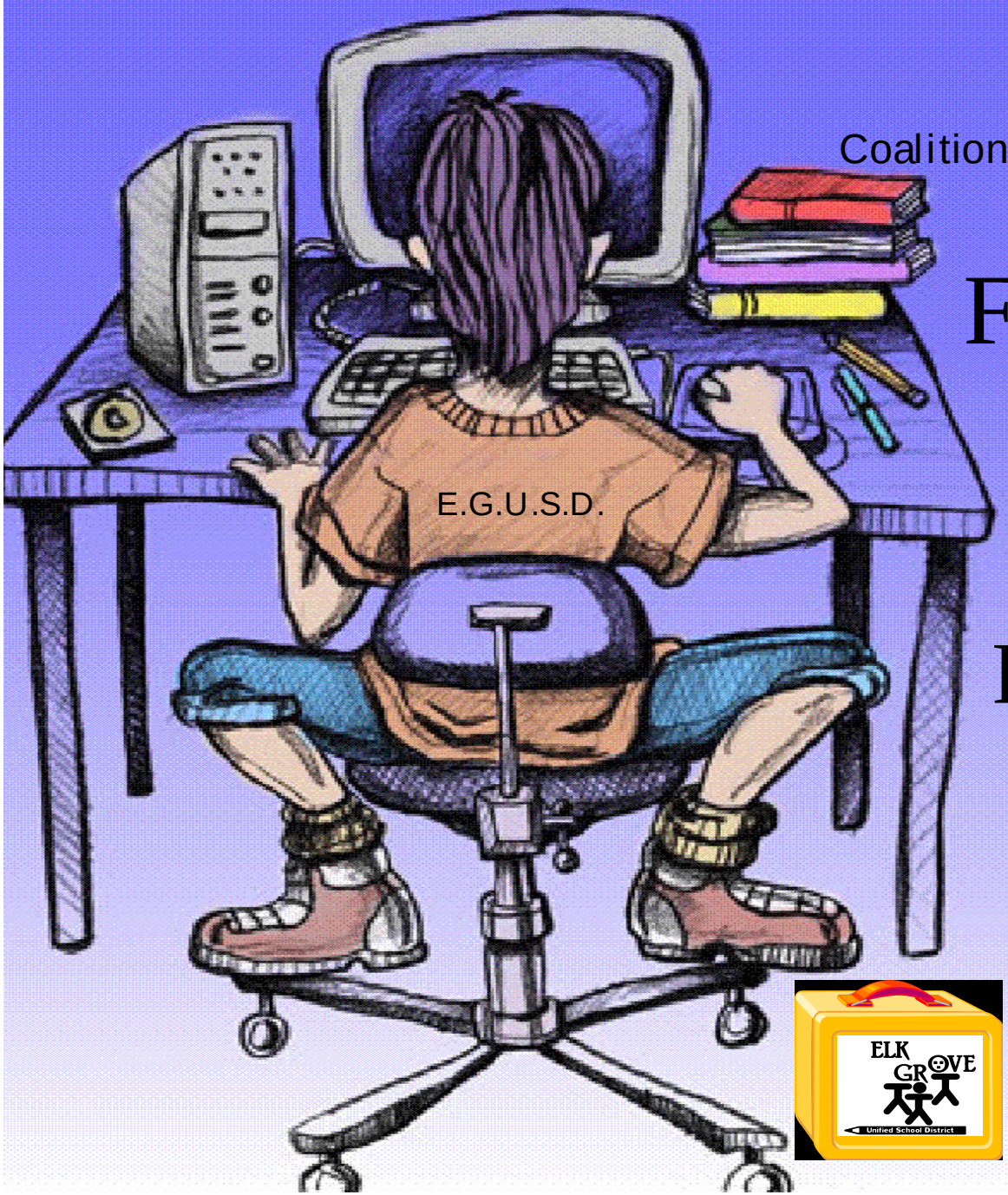


C. A. S. H.

Coalition For Adequate Student Housing

Funding Model 2000

Building Your Own

Furniture & Equipment Standards

Presented By:

Elk Grove Unified School District

Kathleen Moore Baratta

Cheryl Boschee

Steven Looper

Graphic Design & CD Created by: Shirley Bennett

Elk Grove Unified School District

Presentation Agenda

"Building Your Own Furniture and Equipment Standards"

C.A.S.H. Fall Conference -- October 12, 2000

I. Goals - Why Establish F & E Standards?

. To Establish An Allowance For The Project Budget

. To Set Minimum Standards

. To Ensure Equity

. To Track Inventory/Purchases

II. How EGUSD Established It's Standard

. Determined Funding Level

. Updated Standards

. Determined Minimum Basic Standards

. The Standards Format

III. Using the Standards as a Funding Model

. Creating A Formulated Spreadsheet

. Determining Dollar Values For Each Space

. Updating And Re-Using The Funding Model (Standards)

IV. How Can My District Build It's Own Standards

. Determining Your Allowance

. Building Your Standards (Funding Model)

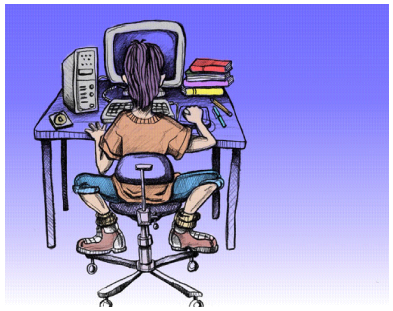
V. Questions and Answers

Elk Grove Unified School District

Funding Model 2000
Furniture and Equipment Standards

Goal --- Why Create Furniture & Equipment Standards?

- To determine Furniture & Equipment (F&E) Allowance under the new **SB/50** guidelines.
- To establish Furniture & Equipment Standards for new schools, additions, new portables, and modernization projects.
- To ensure equity between grade levels, departments, and sites and to set a minimum standard for basic classrooms/offices.
- To establish a Furniture & Equipment budget for each department to use as guideline.
- To provide a framework for easily tracking purchases to ensure compliance with the Standards.



Elk Grove Unified School District

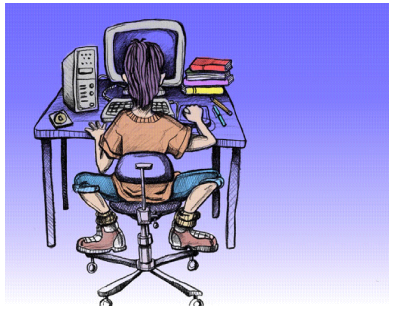
Funding Model 2000

Furniture and Equipment Standards

How Elk Grove Determined Funding Under SB/50

Using the pre **S/B 50** Furniture & Equipment allowance from a 1996 High School, and Middle School as a baseline, the following adjustments were made:

- A Construction Cost Index (CCI) of ***6%*** was added to both the OPSC allowance and Local Funds for the period 1996 to 2000.
- The Secondary Furniture & Equipment allowance from 1996 was cut ***8%*** over-all on the OPSC portion **only** due to funding ***changes*** reflected in SB/50.
- Though there was a cut on the OPSC funding portion, with the CCI applied to both the OPSC allowance **and** the EGUSD Local Funds portion, a slight over-all ***increase*** was noted.
- The Standards were then matched to the adjusted Furniture & Equipment allowance.



Elk Grove Unified School District

1996 Versus 2000 Funding Model

1996

OPSC	1,769,957	High School
OPSC	742,907	Middle School
	2,512,864	
Local Funds	918,000	High School
Local Funds	382,000	Middle School
	1,300,000	
Summary		
	2,687,957	High School Total
1996	1,124,907	Middle School Total
Total Secondary	3,812,864	
Allowance		

Based on : 86 Classroom High School
41 Classroom Middle School

2000

OPSC Secondary	2,512,864	
Construction Cost Index	150,772	6%
	2,663,636	
Local Funds	1,300,000	
Construction Cost Index	78,000	6%
	1,378,000	
OPSC		
	2,663,636	
Less 8% OPSC Secondary	(213,091)	8%
Add Middle Program Change	107,173	
	2,557,718	
OPSC	Summary	
Local Funds	2,557,718	
Total Secondary	1,378,000	
Funding	3,935,718	

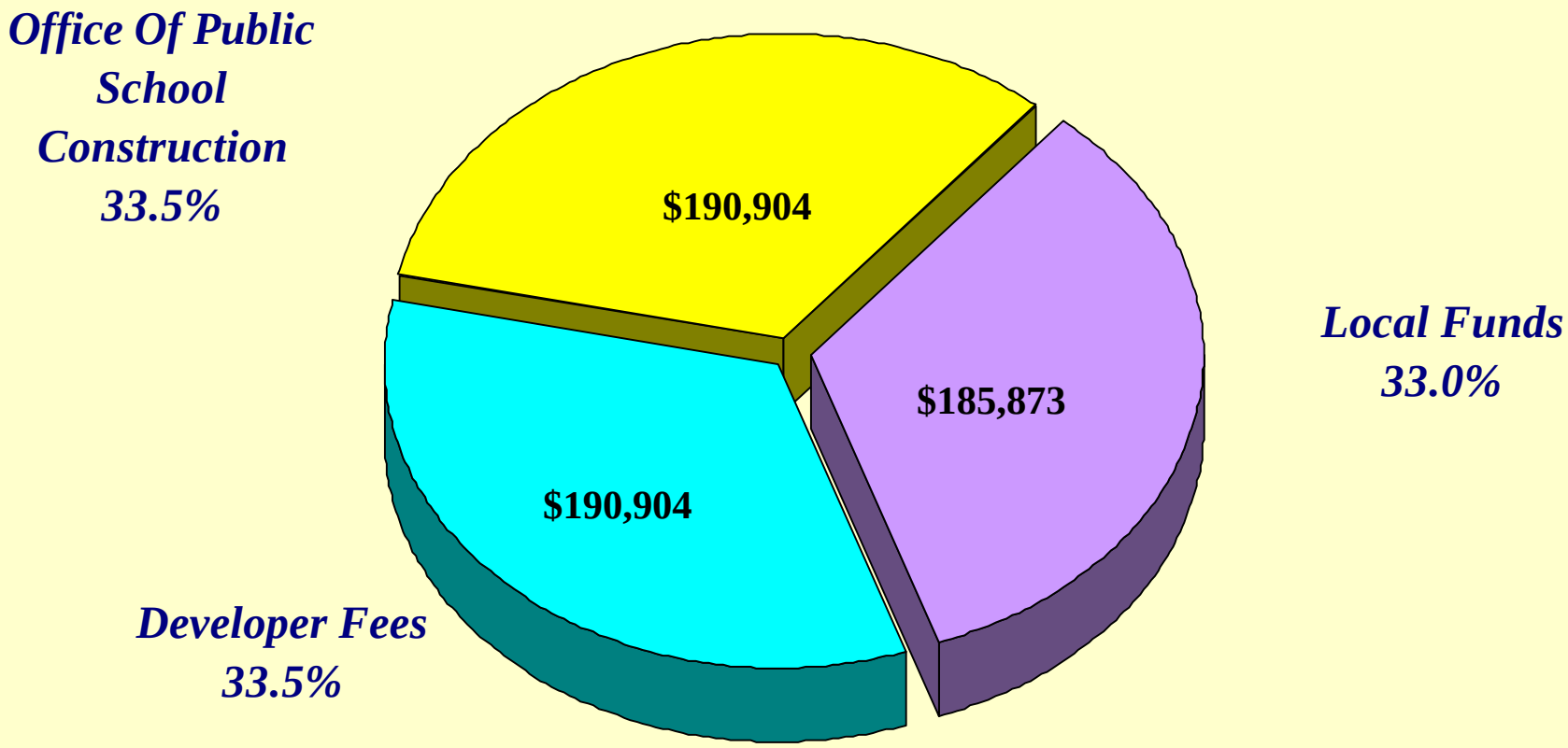
Elk Grove Unified School District

Elementary Furniture & Equipment Funding By Source

Based on a $567,681 Allowance

For a 40 Classroom Elementary School

(1,096 Maximum Capacity YRE)



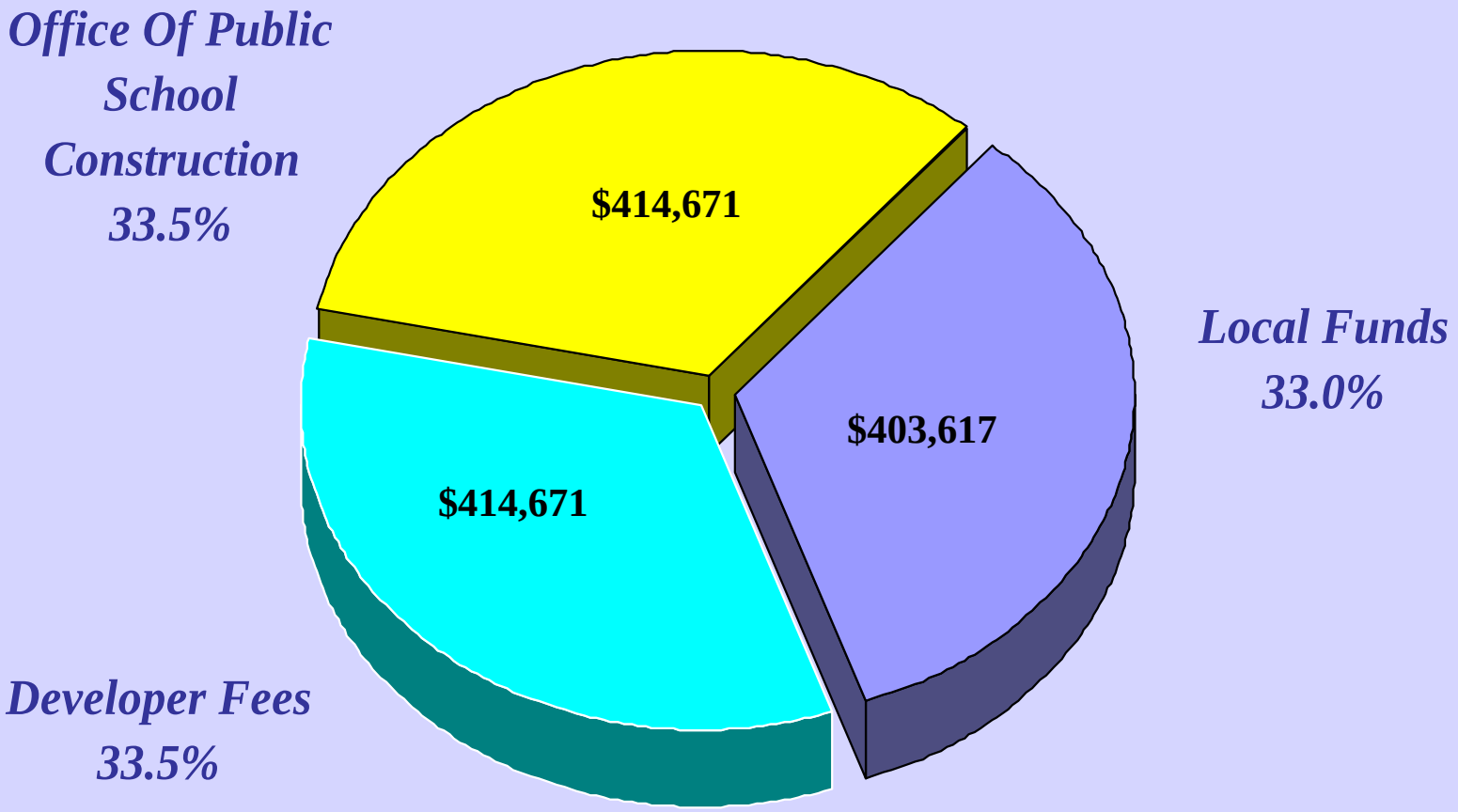
Elk Grove Unified School District

Middle School Furniture & Equipment Funding By Source

Based on a $1,232,960 Allowance

For a 41 Classroom Middle School

(1,637 Maximum Capacity YRE)



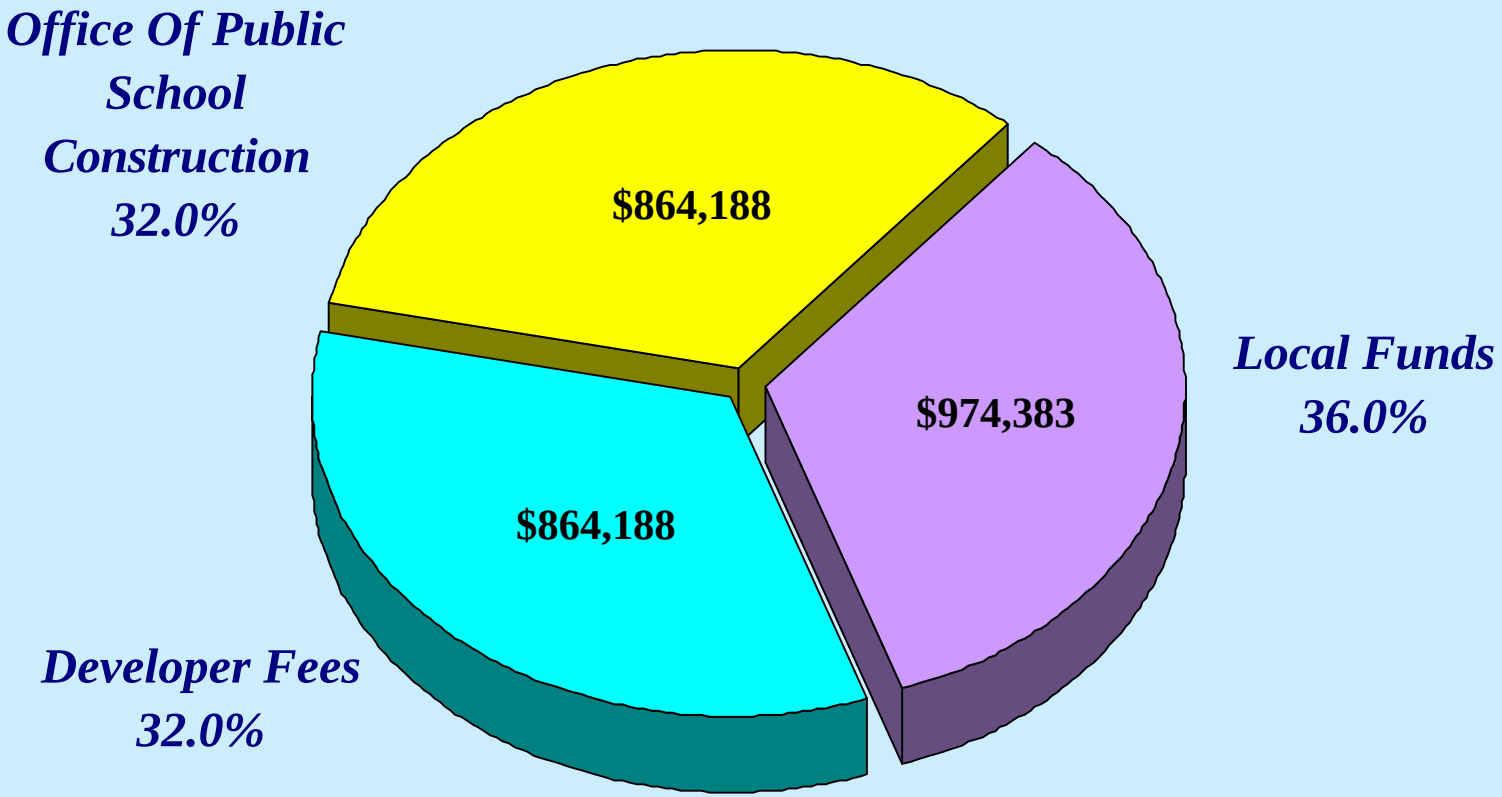
Elk Grove Unified School District

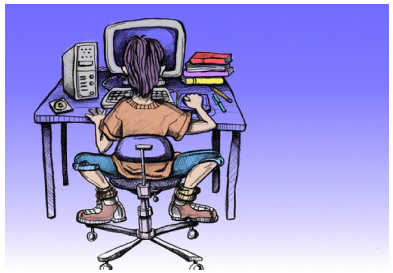
High School Furniture & Equipment Funding By Source

Based on a $2,702,759 Allowance

For a 86 Classroom High School

(2,654 Maximum Capacity)





Elk Grove Unified School District

Funding Model 2000

Furniture and Equipment Standards

How EGUSD's Standards Were Updated

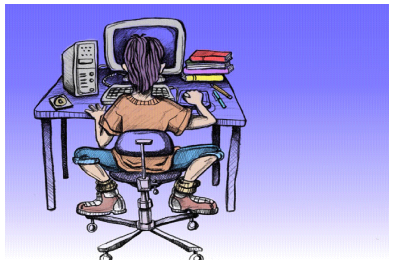
- Purchasing committee members made initial visits to meet with various Department Chairs for their input on what was needed or not needed on the existing ***1996*** standards.

- The committee compiled a list of adds/deletes based on the Department Chairs' recommendations. In the process the Standards were updated to reflect ***basic*** furniture and equipment for offices and classrooms.

- Obsolete equipment was targeted for deletion while additional or new items were noted as requested.

- Purchasing reviewed and updated prices which include shipping, installation and sales tax.

- The committee met with a team of three Site Administrators to review and approve changes to the Standards.



Elk Grove Unified School District

Funding Model 2000
Furniture and Equipment Standards

Basic Elementary School Classroom

Includes a minimum of :

20/34 Desks and Chairs
1 Teacher Desk and Chair
1 TV, VCR and Wall Mount
1 Map Set and Globe
1 Teacher Computer and Printer
1 Overhead Projector, Cart and Screen
1 File Cabinet
1 Work Table
1 CD/Cassette Player
1 Bookcase

Elk Grove Unified School District

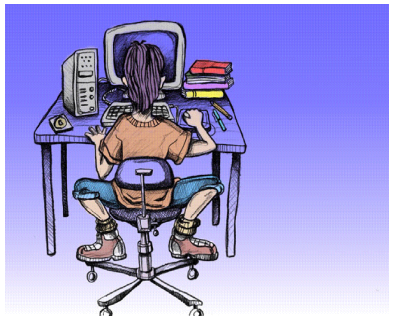
Funding Model 2000
Furniture and Equipment Standards

Basic Secondary School Classroom

Includes a minimum of :

34/36 Desks and Chairs

- *1 Teacher Desk and Chair*
- *1 TV, VCR and Wall Mount*
- *1 Teacher Computer and Printer*
- *1 Overhead Projector, Cart and Screen*
- *1 File Cabinet*
- *1 Work Table*
- *1 Bookcase*



Elk Grove Unified School District

Funding Model 2000

Furniture and Equipment Standards

Basic Secondary Department Office Equipment

Includes a minimum of :

1 Bookcase

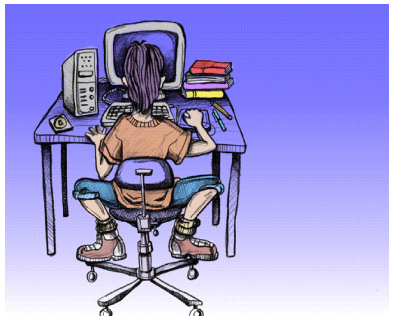
1 Teacher Desk

1 Teacher Chair

1 File Cabinet

1 Computer and Printer

1 Work Table



The Standards Format

- Each item in the Standards has a page and item number to assist with tracking and compliance of Priority 1 items. This information is also used to identify where the items are found on the Standards. These are noted on the Purchase Requisition next to each item and also used for maintaining the inventory for the project.
- Item description provides a brief explanation and should be consistent throughout the Standards.
- Note that there are **two** quantity columns, one for ***Priority 1*** and ***Priority 2.***
- Priority 1 items should be what your committee considers to be ***basic*** office, classroom and other Furniture & Equipment components that are necessary to open and operate your site.
- Priority 2 items are alternate or enhancement items that can be purchased if funds remain or if additional funding sources become available.

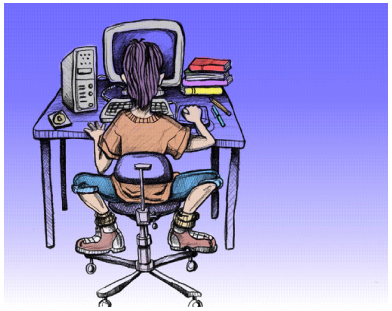
Elk Grove Unified School District

Funding Model 2000
Furniture and Equipment Standards

The Standards Format - Continued

- Every office and classroom type has a subtotal cost per room and a multiplier for a departmental total.

	MATH - CLASSROOM					ADDITIONAL	
PG	ITEM #	ITEM DESCRIPTION	PRI 1 QTY	EST. UNIT PRICE	PRIORITY 1	PRI 2 QTY	PRIORITY 2
63	1	Bookcase	1	125	125		
63	2	Cabinet, Storage Mobile	-	558		1	558
63	3	Cart, A-V or Wall Mount	1	191	191		
63	4	Cart, Overhead Projector	1	84	84		
63	5	Chair, Teacher	1	123	123		
63	6	Computer, Teacher Workstation	1	1,700	1,700		
63	7	Desk, Teacher	1	166	166		
63	8	Desk/Table/Chair Combo, Student	36	77	2,772		
63	9	File Cabinet, Vertical, 4 Drawer	1	193	193		
63	10	Overhead Projector	1	160	160		
63	11	Podium, Tabletop	1	80	80		
63	12	Printer, Teacher Workstation	1	245	245		
63	13	Screen, Projection	1	62	62		
63	14	Stool, Teacher	1	276	276		
63	15	Table, Work	1	68	68		
63	16	TV	1	469	469		
63	17	VCR	1	209	209		
				SUBTOTAL	6,923		558
			12	ROOMS	83,076		6,696



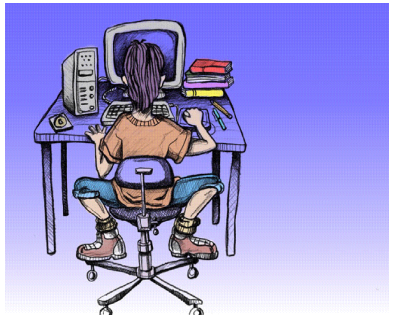
The Standards Format - Continued

Contractor Supplied/Built-In Items

- It is important to check the final plans for Contractor Supplied or Built-In items. These are usually classroom casework items such as storage cabinets, bookcases, paper cabinets and built-in workstations (shaded on the EGUSD standards).

- When the plans are checked and the items are ***not Contractor supplied,*** the items are unshaded and shifted to Priority1 (to be funded from Furniture & Equipment funds).

- If these items are included in the construction contract, you do ***not*** want to additionally fund them in the Furniture & Equipment Standards.



Elk Grove Unified School District

Funding Model 2000

Furniture and Equipment Standards

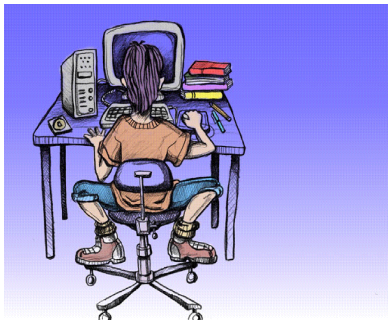
The Standards Format - Continued

- The last page of the Standards has a total for all departments (Grand Totals). This is the dollar amount needed to provide the site with its basic Furniture & Equipment.

	YEAR ROUND - GENERAL CLERICAL					ADDITIONAL	
PG	ITEM #	ITEM DESCRIPTION	PRI 1 QTY	EST. UNIT PRICE	PRIORITY 1	PRI 2 QTY	PRIORITY 2
27	8	Bookcase	1	125	125		
27	9	Calculator	1	90	90		
27	10	Chair, Office/Computer	1	319	319		
27	11	Chair, Side	1	77	77		
27	12	Desk, Office/Computer	1	700	700		
27	13	File Cabinet, Vertical, 4 Drawer	1	193	193		
27	14	Computer, Office Workstation	1	1,700	1,700		
				SUBTOTAL	3,204		0

	Pri. 1		Pri. 2
Total All Departments	567,681		181,706

Please note: Custodian, Grounds and SIS are included in the F & E Standards as an informational item only for the Site Administrator. Department Directors have sole discretion over those allocations.



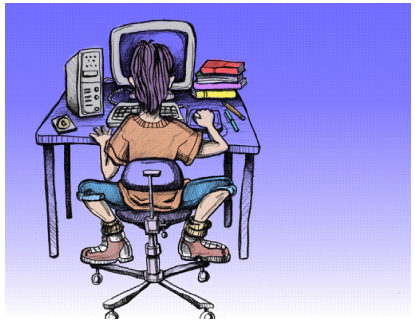
Elk Grove Unified School District

Funding Model 2000

Furniture and Equipment Standards

Using The Standards As A Funding Model:

- Using a formulated Microsoft Excel Spreadsheet your Standards can be turned into a Funding Model to customize each new project.
- A dollar value is set on each classroom/office. When changing the room count, quantity, or pricing the Funding Model (Standards) automatically calculates and gives you a revised grand total or allowance.
- To keep your Funding Model (Standards) current, a CCI should be applied annually. This can be applied by updating prices, adding more items to Priority 1 or a bottom line increase to the allowance.
- For future projects, the Standards can easily be reused by adjusting the classroom/office count to reflect the actual number of areas for the new site.



Elk Grove Unified School District

Funding Model 2000

Furniture and Equipment Standards

How Can My District Build A Standards/Funding Model ?

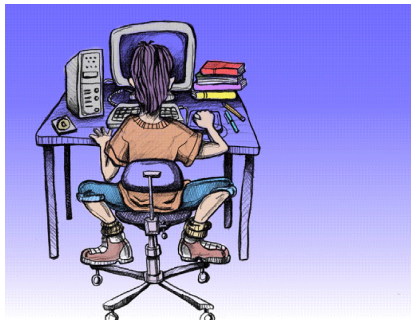
Determine Your Target Furniture & Equipment Allowance:

- In OPSC's Lease Purchase Program the Furniture & Equipment allowance was based on square footage and was a line item on the OPSC project budget. This would be the maximum amount that the State would participate in.

- In the new OPSC School Facility Program SB/50, OPSC is giving each District a lump sum Grant Amount based on capacity, leaving the entire budget up to the District to calculate.

Calculating your Furniture & Equipment Allowance for a new school can be done in several ways.

HERE ARE THREE EXAMPLES:



Elk Grove Unified School District

Funding Model 2000

Furniture and Equipment Standards

How Can My District Build A Standards/Funding Model ? - Continued

1. Use your Architect's estimated budget as a base.

2. Calculate a percentage of your estimated total project budget (grant amount). EGUSD allocates approximately the following percentage of the total project budgets (based on past project expenditures):

   Elementary School With Local Funds 5.16% ***(Without 3.47%)***

   Middle School With Local Funds 6.13% ***(Without 4.05%)***

   High School With Local Funds 6.27% ***(Without 4.13%)***

3. Build your funding model with everything in Priority 2. After adjusting the classroom counts, slide only the items your District considers essential into Priority 1. This will give a minimum amount needed to furnish and open the school.

Elk Grove Unified School District

Funding Model 2000

Furniture and Equipment Standards

How Can My District Build A Standards/Funding Model ?

Building Your Own Standards/Funding Model:

- Print out the Standards on the enclosed CD or use your District's current Standards as a base. Create a formulated Microsoft Excel Spreadsheet **(i.e.;quantity times price).**
- Have your Purchasing Staff check unit prices with your District's current bid prices.
- Select a team of Department heads and/or Site Administrators from Elementary or Secondary level. Have them review with their staff the items in their particular Department, looking for items to be added/deleted for a ***basic*** classroom/office.
- Facilities/Planning or the Architect should have the classroom/office count for your new site. Check the plans for Contractor Supplied or Contractor Built-In items.
- After the above has been completed, the final page total on the Standards should now be the calculated Furniture & Equipment Allowance. Compare this with your target budget--- the amount you want to set aside for Furniture & Equipment for this project.
- The Standards can now be increased/decreased as needed by sliding items between Priority 1/Priority 2 to match your Furniture and Equipment Allowance.