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CAPITAL PROJECTS PRIORITIZATION PROCESS

Key Issues:

1. The Jefferson Parish Public School System updates plans for its capital needs every year, when funding is available, with a major update when there is a plan for a capital bond issue. Jefferson Parish has over 5.6 million square feet of facilities with an average age 50 years. These facilities, even with constant maintenance, require regular capital investment in order to insure that they will meet the educational needs of our 45,954 students. The challenge of identifying, prioritizing, planning, designing and construction capital improvements is great and the challenge of funding these needed capital improvements is even greater.

Planning and management of capital improvement is comprised of four phases:

- Financial Planning
- Project Identification, Prioritization and Ranking
- Project Management
- Monitoring and Reporting

This report shall focus in on three areas: Identification, Prioritization and Ranking.

2. Capital Projects Identification Process

- Projects are nominated for the capital improvement program from various sources including but not limited to requests from Board Members, the Superintendent, Principals, Teachers and Parent Groups and through inspections by Maintenance and Facilities Departments, Technology Department, Transportation Department, Food Services Department and Fire Marshal code issues.
- Formerly identified projects are to be reviewed by Facilities Department for continued viability and need.
- All valid projects both formerly identified and all new projects are to be reviewed by the Facilities Department for consistency with the systems educational guidelines. Each project will be defined in terms of project type and project purpose.
- Initial estimates are developed by the Facilities Department for all projects and are refined as the project scope is better defined.

3. Capital Projects Prioritization Process

The following process has been developed from best practice examples from several public agencies and examples of processes presented by the Government Financial Review. This process prioritizes capital projects for limited capital improvement funds, and is intended for use with all specific capital fund and bond fund facilities, repairs, renovations, improvements, and new construction, etc., typically projects over \$20,000.

Not all facility improvement needs have the same level of importance. Therefore, a process is required to prioritize the relative importance of each facility improvement need. The following priority groups are recommended for prioritizing capital improvement projects.

Priority 1 – Critical Projects

Priority 2 – Necessary Projects

Priority 1 – Critical Projects

This level is for projects, which are considered to be of the utmost importance. These projects should be accomplished as soon as possible.

- Projects involving health, safety, and security
- Projects mandated by law/code compliance
- Projects necessary to avoid a building being temporarily closed. i.e., leaky boilers, cracked combustion chamber in a furnace.
- Projects that prevent other damage to a building or site. i.e., extensive roof leaks that cause interior damage.
- Projects that provide permanent additional classrooms or schools when an increase enrollment is projected.
- Projects as deemed necessary by the Superintendent and Board to promote the educational goals of the School System.

Priority 2 – Necessary Projects

This group includes projects that are essential to support the facilities mission and purpose. They are important but not critical and urgent as those projects in Group 1. These projects should be accomplished with five (5) years.

- Necessary preventative repairs and improvements to maintain the integrity of and keep in operating a building or facility. i.e., replacement of equipment and system that have served their useful life (boilers, electrical panels, roofs, floor replacement, paving overlays, site drainage).
- Projects that support existing instructional programs or expands the instructional program.
- Projects which provide operational efficiencies and economic, i.e., energy conservation.

4. Capital Projects Ranking Process

It is recognized that funding is limited and some projects will not be able to be funded immediately. Thus, following ranking system shall be utilized in order for the School System to maximum value of the capital dollars spent. Each project after prioritization will be graded from 1 to 5 in six weighted categories as outlined below. The ranking process is based on best practices in capital program management presented by the Government Financial Review.

Life Safety Issues	_____	X	10	=	_____
Risk of Property Loss	_____	X	8	=	_____
Legal/ Code Issues	_____	X	6	=	_____
Ed. Program Support	_____	X	4	=	_____
Recurring Cost Savings	_____	X	2	=	_____
Appearance/Convenience	_____	X	1	=	_____
Total Weighted Score					_____

All projects inside of a priority will be listed by ranking with the highest weighted score to be given top funding capacity and lowest weighted score to be given the remaining capacity. A report of all prioritization shall be made to the Board for comments and adoption.

Several surrounding parish school systems facilities departments were contacted to determine how their capital projects were prioritized. None of these systems had an approved system in place and relied on ranking projects by a committee.