Simi Valley Unified School District

Facilities Master Planning Process

Detailed Methodology

This is the long form of the Process page on the public site. It is written for District staff and Board members who want to see the calculations rather than take them on trust. Section 15 collects every planning assumption in one table, and throughout the document we state which figures come from District source records and which are illustrative.

Status: draft for District review. The assumptions marked as planning factors get adopted or replaced during the weighting workshop and the escalation-index decision, and we reissue the document when that happens.

Prepared by K12 Consulting Group LLC for RFQ/P #B26RM469, September 2026

Contents

1. Verified data and illustrative data

Two kinds of figures appear in the plan and we keep them separate.

Verified figures come from District source documents, mainly the 2016 Facility Needs Assessment and Addendum 2 to the RFQ. We transcribe them line by line and reconcile each campus against the total stated in its own source report.

Illustrative figures are generated sample data. They show what the platform will report once the field assessment is complete. They are a demonstration of capability and should not be read as findings about any Simi Valley campus.

Three rules

- Every page, tile and download says which kind of data it is using before it says anything else.
- No total ever mixes a verified cost with an illustrative one.
- Where the source has a gap, we report the gap. We do not fill it with an estimate.

What is verified today

Twenty-nine facilities appear in the 2016 assessment and twenty-four of them carry cost records. The remaining five are shown as pending. All five receive a full field assessment under this engagement.

Facility	Why no verified cost data
Simi Valley High School	The available source is a tBP Architecture master plan deck. It contains narrative project lists and square footages but no cost table, so we added zero cost rows rather than model them. The building inventory and square footages we do hold for this campus are used.
Big Springs Elementary	No DSK or PBWS assessment document for this campus was included in the published materials.
Hollow Hills Elementary	No assessment document was included.
Simi Elementary	No assessment document was included. The campus now houses Maintenance and Operations.
Township Elementary	No assessment document was included.

What is illustrative today

Condition ratings, Facility Condition Index values, the project register, work order history, budget figures and capacity figures on the platform's sample pages are generated data covering all thirty facilities. They are labeled on every page and get replaced by field-verified records as each campus is assessed.

2. The data model and stable identifiers

The plan is built as a database and reported as a document. The same records serve the Board, the Maintenance and Operations department and the public, filtered and summarized differently for each. That only works if every record carries an identifier that does not change.

Table	One row is	Key	Feeds
Sites	A facility	SiteID	Every page; coordinates for the map
Buildings	A building on a site	BuildingID, SiteID	Inventory, condition matrix, Prop 2 components 2 and 3
Condition assessment	One system on one building	BuildingID, SystemID	Condition ratings, FCI
Deferred maintenance	A costed project	ProjectID, SiteID, BuildingID, SystemID, FundingID	DM plan, prioritization, Prop 2 pipeline, live update
Work orders	A Unity work order	WorkOrderID, SiteID, BuildingID	Work order page, renewal flags
Budget	One site, one fiscal year, one fund	SiteID, FiscalYear, FundingID	Budget and schedule
Pupil capacity	One site, one grade level	SiteID, GradeLevel	Utilization, Prop 2 component 3
Enrollment projection	One site, one school year	SiteID, SchoolYear	Utilization, Prop 2 component 4
Outreach	One coded input	SiteID, topic, sentiment	Prioritization inputs, outreach dashboard

The project register lives in a SharePoint list inside the District's Microsoft 365 tenant, and Power BI reads from it. The dashboards are read-only windows onto that list. Section 14 covers which fields staff edit and which the system computes.

Keeping the two families apart

Verified tables carry a Real suffix in the model and illustrative tables do not. The two share no relationships, and site identifiers are assigned independently in each family, so a SiteID is never compared across them. Where a campus name differs between the 2016 documents and current usage, Vista Fundamental School and Vista Elementary for example, each family keeps its own name and the public site uses the current one.

3. Converting the 2016 Facilities Master Plan

Every finding, project and cost line in the 2016 plan is transcribed into the new structure. The District starts the engagement with a defensible picture of what has been done, what remains open, and where the 2016 grading needs updating.

Transcription rules

- Each cost line is transcribed as written, together with its source campus report, cost category and description.
- Per-campus reconciliation is a hard gate. A campus's transcribed total must equal the total stated in its source report before we commit the data.
- Cost categories stay in the vocabulary of the firm that wrote each report. The 2016 assessment was assembled by several architecture practices: Rachlin Partners at Santa Susana High, Sinaloa and Valley View; tBP at Hillside; Little Diversified at Royal; PBWS at Mountain View and White Oak; DSK at the remaining campuses. So Modernization, Building Modernization and Master Plan Summary are three source vocabularies rather than three scopes. Normalizing them is part of the engagement.
- Line items priced at zero because the District was handling them as separate projects are kept, with a separate-project flag. There are forty-four such lines across seventeen campuses. Dropping them would lose the scope; pricing them would invent a cost.

Cost basis

The 2016 figures are construction hard costs. Four campus reports also state a program grand total that adds general conditions at 10 percent, fee, overhead and profit at 10 percent, bond and insurance at 1 percent, and design contingency at 10 percent. Three of those yield a factor of 1.310 and Royal High's master plan applies roughly 1.40. The platform displays hard cost and says so on the page. Soft costs are applied separately at program level, when a project moves from planning into budgeting.

Restatement to current dollars

2017 hard costs are shown alongside a value restated to 2026 dollars using a single multiplier of 1.6191, which is roughly 62 percent cumulative or 5.5 percent a year. This is a labeled planning factor. We have not derived it from a published construction cost index and we do not represent it as actual market movement. During the engagement it is replaced by a documented index agreed with the District and refreshed annually under the support agreement. The same factor restates the replacement-value basis in Section 4, so the two move together.

Result

Measure	Value	Note
Cost lines transcribed	502	Plus 44 zero-value separate-project lines
Campuses reconciled	24 of 29	Five pending, see Section 1
Buildings inventoried	105	Ten campuses have building-level records in Addendum 2
Total, 2017 hard cost	$415,105,695	Reconciles to stated campus totals
Total, restated to 2026	$672,097,631	At the 1.6191 planning factor

4. Condition assessment and the Facility Condition Index

Every campus is walked. Each building is assessed system by system, following ASTM E2018 for the property condition assessment and Attachment A of the RFQ for the inventory elements the District requires.

What gets recorded

- By campus: land area, fire alarm, lighting controls, bell, clock and intercom, intrusion, mechanical, portables, play structures and surfaces, backflow preventers, hydrants, onsite and street parking, drop-off and circulation.
- By building: age, roof type, square footage, fire sprinklers, floor surface, stories, year last modernized, portable and instructional flags.
- By system, sixteen per building: roofing; building envelope and exterior; windows and doors; HVAC and mechanical; electrical; plumbing; fire and life safety; fire alarm; security and intrusion; interior finishes; flooring; site hardscape and paving; play structures and surfacing; technology and low voltage; lighting controls; ADA and accessibility.
- For each system record: a condition rating, remaining useful life, deficiency cost, replacement value, photographs and a recommended action year.

Condition rating

A five-point scale, 1 for good through 5 for poor. Ratings count systems, so a failing fire panel and a failing structural envelope each count once. This differs from the FCI, which weights by dollars, and the difference is deliberate.

The Facility Condition Index

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FCI = deficiency cost / current replacement value
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Deficiency cost is the sum of identified repair and renewal needs. Replacement value is what it would cost to replace the building or campus new. We compute the index for each building, each campus and the District, and it recalculates on every refresh. It is one planning tool among several and does not by itself decide whether a building is repaired, modernized or replaced.

Band	FCI	What it generally means
Good	Under 5%	Routine maintenance
Fair	5% to 10%	Planned renewal of individual systems
Poor	10% to 30%	Significant renewal, modernization candidate
Critical	Above 30%	Replacement starts to compete with repair

Replacement value basis

Replacement value is stated per square foot by building type. The illustrative data uses a basis of about $709 per square foot, restated from a source basis of about $438 by the same 1.6191 factor described in Section 3. We restated it because $438 is not a credible 2026 California K-12 replacement figure. It is a named measure in the model. During the engagement the basis is set from RSMeans data calibrated to recent California K-12 bid results, and to the District's own recent bids where those are available.

FCI and FCI (Current)

FCI is the assessed baseline. FCI (Current) subtracts the estimated cost of projects marked Complete from the deficiency numerator, so the index improves as work closes out. Both measure something real and they are labeled separately wherever they appear.

5. Cost estimating

Master plan estimates are planning-level decision tools. Their job is to be consistent, transparent and comparable across every District site, so projects can be prioritized and positioned for funding on the same yardstick. They are opinions of probable construction cost at the time prepared, not bid forecasts.

- Unit costs are built from published RSMeans data in CSI format, calibrated to recent California K-12 bid results and prevailing-wage conditions.
- Quantities come from the verified space inventory described in Section 4, with a documented source for each quantity.
- Markups for general conditions, fee, bond and insurance, and design contingency are stated separately from hard cost and never blended into a unit rate. That keeps new estimates consistent with the hard-cost basis in Section 3.
- Escalation uses a ten-year table built on a documented index agreed with the District and refreshed annually. Section 6 covers how it is applied.
- Every estimate is a row in the project register, so rollups by campus, system, year or funding source are computed rather than compiled by hand.

6. The fifteen-year deferred maintenance plan

The plan sequences renewals year by year from 2026 through 2040, built from remaining useful life on every major building system and site improvement. The draft is delivered in the first quarter of 2027.

Escalation to planned year

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EscalatedCost = EstimatedCost x (1 + r) ^ max(0, PlannedYear - 2026),
where r = 4.5% per year
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EstimatedCost is in current dollars. The escalated value is computed at refresh rather than stored, so a newly entered deficiency escalates to its planned year automatically and a project moved to a later year re-escalates without anyone updating a column. The 4.5 percent rate is a planning factor and gets replaced by the agreed index. It is a separate thing from the 1.6191 restatement in Section 3, which converts known 2017 costs to today. The two do different jobs and we do not reconcile them to one another.

The two bands

After prioritization, the ranked list is run against the District's actual annual maintenance and deferred maintenance budget as a hard constraint.

- Band 1 is the achievable plan: high-scoring, maintenance-scale projects sequenced so each year's total fits inside existing funding. This is what the District can execute without a bond.
- Band 2 is the exceedance list: projects beyond annual capacity, packaged with cost, escalation and funding-leverage data as the case for bond or state funding.

Status vocabulary

Project status is one of Planned, Deferred, In Progress or Complete. Work orders use a different vocabulary, Open, In Progress, Completed and Closed, because they are a different table describing a different thing. The two are never mixed in one field.

What the illustrative register shows

The sample register carries 1,107 projects at $244,778,315 estimated and $340,595,476 escalated, a difference of $95,817,161. That difference is not additional work. It is the same work done later, and it is the figure the Board sees as the cost of the schedule itself.

7. Work order history and the Unity connection

The District maintains its facilities through Unity by FacilityONE and staff use it daily. The master plan does not replace it. Unity is where the work happens; the plan holds the fifteen-year capital picture and reads from Unity.

Why the plan needs work orders

The same roof leak logged four times in two years is not really four repairs, it is evidence that the roof is a replacement candidate. That pattern stays invisible if the two systems never share data. Work order volume and cost by campus and system, shown next to condition ratings, either corroborate or challenge the assessment and flag recurring-failure assets as renewal candidates.

Shared identifiers

The plan and Unity have to describe the same buildings using the same identifiers. Every site, building and major asset in the plan carries a stable ID mapped to its Unity record. The asset registry rather than the vendor is the system of record, so the approach survives a change of work order platform.

Two stages

	What it is	When
Stage 1	A scheduled export from Unity's work order module on a cadence the District sets, typically every two to four weeks. Standard report, CSV or API extract, loaded on refresh. No change to the District's Unity configuration and no work required from FacilityONE.	Delivered during the engagement. Demonstrated now on labeled sample data structured to the export format.
Stage 2	A live loop through Unity's open API. Completion in Unity updates the plan, and a scheduled renewal in the plan can open a preventive maintenance work order in Unity.	Optional, built during the engagement at the District's election and dependent on API access. It does not gate any other deliverable.

Renewal flag

A work order is flagged as a renewal candidate when the same building and system accumulates repeat corrective tickets within a rolling window, or when its cumulative repair cost approaches a set share of the system's replacement value. Thresholds are set with Maintenance and Operations staff and recorded in Section 15. Flagged items carry into the project register as candidates for the ranked list. They are not automatically funded.

8. Campus utilization

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Utilization = current enrollment / loading-standard capacity
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Capacity is established by applying State loading standards to the verified classroom inventory from Section 4, by grade level and including special day class seats, then summed by campus. Enrollment is the District's current count. The result tells leadership whether a campus has room to grow, room to consolidate, or neither, and it informs recommendations on additions, administrative placement and future use of sites.

9. Enrollment projections

The District's existing Enrollment Projections and Facility Capacity report is an input to this work, not something we produce. It is loaded into the platform so that capacity, utilization and project sequencing all read from the same figures, and it is displayed by campus and school year with the change from the base year. The projection itself, its demographic basis and its adoption remain the District's.

10. Equity-based planning

Equity is one of the scored criteria in the prioritization model. Each campus carries an equity score reflecting historic investment relative to its peers, so that no community's campus is chronically last in line. Small improvement projects that correct imbalances get explicit attention during option development. The weight the Board assigns to the equity criterion in Section 11 is the number that makes the Local Control and Accountability Plan commitment operational, and it is reported in Component 9 of the Proposition 2 plan.

11. Prioritization: inputs, weights and the ranked list

Every project in the register is scored on four criteria, weighted into a single number, and ranked. The weights are decided with the District in a weighting workshop. We run the arithmetic.

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Priority = (wC x Condition + wA x Adequacy + wE x Equity + wF x
FundingMatch)
           / (wC + wA + wE + wF)
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Criterion	What it measures	Illustrative weight
Condition and risk	FCI contribution, remaining useful life, consequence of failure. Life-safety and code items rise automatically.	0.40
Educational adequacy	Whether the space supports instruction and student wellness: libraries, playgrounds and shade, practice fields, hardscape. A building can be in perfect condition and still educationally inadequate.	0.25
Equity across campuses	Historic under-investment relative to peers, see Section 10.	0.20
Funding leverage	Eligibility for Proposition 2 and SFP match, energy incentives, grants. Scored 0, 25, 50, 75 or 100.	0.15

Dividing by the sum of the weights normalizes the score, so a single weight can be moved without rebalancing the others and the score stays on a 0 to 100 scale.

Thresholds

High priority is a score of 70 or above and low priority is below 40. Thresholds are calibrated to whatever weights the Board adopts. If the Board shifts weight materially toward a criterion whose scores run lower across the District, the thresholds move with it, and that recalibration is part of the workshop. Under the illustrative defaults, 59 of the 1,107 sample projects score high.

Gates before scoring

Health, safety, security and accessibility deficiencies are flagged before scoring and do not have to win a weighting argument to get funded. Urgency works as a gate rather than a competing weight.

How the six public inputs relate to the four weights

The public site describes six inputs to prioritization: facility condition, work order history, facility and system age, urgency, community and District input, and state funding eligibility. The four weights above are the scored criteria the Board moves; the six inputs are the evidence feeding them. Work order history and system age feed the condition score. Urgency is the gate described above. Community and District input from outreach and the survey, coded by campus and topic, feeds the adequacy and equity scores. If the District would rather see any of those inputs as its own weighted criterion, the model accepts as many criteria as the Board designates.

12. Options and costs

From the ranked list, option development produces recommendations on possible school additions, placement of District administrative staff and potential future use of existing schools. It also produces alternative packaging of projects by campus, by system and by funding source, and scenario views in the platform. Every option is reviewed with District leadership before anything is labeled a recommendation.

13. Funding and the Proposition 2 Five-Year Plan

Every project carries both a funding source and a funding match score. Funding source records the fund a project is programmed against. The match score records how strongly it qualifies for state match under School Facility Program rules, which turn on building age, modernization history and project type. They measure different things and can legitimately diverge.

Since November 2024 a district must have a board-approved Five-Year School Facilities Master Plan to participate in the School Facility Program. The plan has nine required components under Title 2 CCR Section 1859.18(d), documented on Form SAB 50-MP under Education Code 17070.54.

No.	Component	Produced by
1	Eligibility estimate for State bond funding	Office of Public School Construction
2	Inventory of existing facilities, sites and property	This platform, Sections 2 to 4
3	Existing classroom capacity	This platform, Section 8
4	Projected enrollment change over five years	District records, Section 9
5	Capital planning budget of significant projects	This platform, Sections 5 and 6
6	Financing and funding sources	This platform, this section
7	Verification of current assessed value	County Assessor
8	Deferred maintenance plan	This platform, Section 6
9	LCAP alignment narrative	District records, Section 10

Because the Five-Year Plan is drawn from the same register as the master plan, the two reconcile by construction. Cost records carry OPSC-aligned categorization from the start, so future applications inherit clean tracking. State share percentages are set by OPSC and are not stated in this document.

14. Keeping the plan current

Whether a plan stays alive or becomes shelfware comes down to who can change it and how quickly.

Staff may edit	The system computes, and nobody edits
Project status, completion date, actual cost	Facility Condition Index and FCI (Current)
Condition grade after a repair	Priority score and rank
New deficiencies, with photographs	Escalated cost
Building attributes: roof type, HVAC unit, portable added or removed	Backlog totals, retired percentage, project counts
Documents attached to the Vault	Prop 2 remaining and pipeline views

Edits go through a permission-controlled form into the SharePoint list, and a typical update takes under two minutes. Role-based permissions let Maintenance and Operations staff edit condition and work data while financial fields stay controlled. Every change is versioned with who, when and the prior value. A correction enters as a new record and a restore is itself logged, so nothing is silently overwritten, including by us.

Refresh and hosting

Dashboards refresh on a schedule against the updated list. The platform runs in the District's Microsoft 365 tenant on licenses the District already holds, under the District's identity provider, conditional access and retention policy. There is no separate hosting, vendor platform or subscription. The District owns all data, files and platform configuration outright under Attachment A Section 1.4 and Article 13.F, and may transfer the plan to any future consultant.

Annual update

Each year of the support period includes a data-hygiene review, a refresh of the cost-estimate and escalation factors to industry standards, and a re-training session, so the dataset stays trustworthy and District staff grow more self-sufficient.

15. Assumptions register

Every planning factor used in the platform, collected here. Factors marked planning are provisional and get adopted or replaced with the District during the engagement. Factors marked standard are industry conventions the District may still choose to vary.

Factor	Value	Type	Where used	How it is set in production
2017 to 2026 restatement multiplier	1.6191	Planning	Sections 3 and 4; R1 and R2 pages	Replaced by a documented index agreed with the District, refreshed annually
Forward escalation rate	4.5% per year	Planning	Section 6; DM plan	Ten-year escalation table on the agreed index
Replacement value basis	About $709 per SF	Planning	Section 4; FCI denominator	RSMeans by building type, calibrated to CA K-12 bids and District bid history
Soft cost adder	31% to 40%	Observed in source	Section 3	Stated separately at program level, not applied to displayed hard cost
FCI bands	5 / 10 / 30 percent	Standard	Section 4; condition maps	Retained unless the District adopts different bands
Condition rating scale	1 good to 5 poor	Standard	Section 4	Retained
Prioritization weights	0.40 / 0.25 / 0.20 / 0.15	Planning	Section 11	Set by the Board in the weighting workshop
Priority thresholds	High at 70, low below 40	Planning	Section 11	Recalibrated with the adopted weights
Funding match scale	0, 25, 50, 75, 100	Standard	Section 11	Retained
Work order export cadence	Every 2 to 4 weeks	Planning	Section 7	Set by the District
Renewal flag thresholds	Repeat-ticket count and repair-cost share	Planning	Section 7	Set with Maintenance and Operations staff
Significant project threshold	Not yet set	Planning	Section 13, Component 5	Set by the District
Loading standards	State standards by grade	Standard	Section 8	Retained

What we have not assumed

No State share percentage for School Facility Program match is assumed anywhere in the platform or in this document; OPSC sets that figure. No construction cost index is cited as the source of the 1.6191 multiplier. No change order or bid result is used as evidence of escalation.

16. Quality control

- Reconciliation gate. No campus's 2016 data is committed until its transcribed total equals the stated source total.
- Independent QC. The Senior Project Manager reviews every campus assessment dataset before database commit.
- M&O validation. District maintenance staff review preliminary findings, delivered no less than monthly. Their knowledge of chronic issues is loaded into the protocol as items to verify at each campus.
- Five-campus checkpoint. After the first five campuses we confirm the database structure with District IT and Facilities before mass data entry continues.
- Sum checks. Priority bands must sum to the project count, campus totals must sum to the District total, and status counts must sum to the register. These run at every refresh.
- Labeling. Every page states its data kind, and every planning factor is a named measure rather than a constant buried inside a formula.
- Versioning. All edits to the governed register are logged with actor, timestamp and prior value.

Appendix A. Schedule

Phase	Period	Milestones
1. Initiation and data intake	Oct 2026	Kickoff; revised schedule within ten business days; document intake; 2016 conversion begins; database design meeting; assessment protocol approved; Unity export access confirmed
2. Outreach wave 1	Oct to Dec 2026	Facilities, M&O and Technology staff session; Board workshop 1; survey drafted, approved and posted; campus staff sessions begin
3. Field assessment	Nov 2026 to Mar 2027	Campuses in batches of four to six per month; five-campus checkpoint; monthly preliminary findings; 60 percent assessed by February, 100 percent by March
4. Draft deferred maintenance plan	By Mar 31, 2027	Draft fifteen-year plan delivered in two bands; District review window
5. Cost, prioritization and options	Mar to Apr 2027	CSI estimates complete; escalation table adopted; weighting workshop; matrix applied; option development; Board and community workshop 2
6. Platform completion	Apr to May 2027	All campuses live; GIS layers complete; write-back front end delivered; Unity Stage 1 feed live; work order integration demonstrated; database installed on District environment and accepted
7. Final plan and Prop 2	May to Jun 2027	Final plan submitted, electronic and three hard copies; Five-Year Plan finalized and submitted with three hard copies; Board presentation at District discretion
8. Training and support	Jun to Jul 2027, then five years	Staff training; 96 hours technical support in year one; quarterly sessions in years two to five; annual software and cost-factor update for five years

Appendix B. Glossary

Term	Meaning
ASTM E2018	Standard guide for property condition assessments, followed for the facility condition assessment
Band 1, Band 2	The achievable plan within existing budget, and the exceedance list beyond it
FCI (Current)	FCI with the cost of completed projects removed from the numerator
Form SAB 50-MP	State Allocation Board form documenting the Five-Year School Facilities Master Plan

Hard cost	Construction cost excluding general conditions, fee, bond, insurance and design contingency
LCAP	Local Control and Accountability Plan
OPSC	Office of Public School Construction
Planning factor	A provisional assumption named in Section 15 and replaced during the engagement
Renewal candidate	An asset whose work order history indicates replacement rather than continued repair
Restatement	Conversion of 2017 hard costs to 2026 dollars by a single multiplier
SFP	School Facility Program, the State's K-12 facilities funding program under Proposition 2
Stage 1, Stage 2	Scheduled export from Unity, and the optional live API loop
Unity	FacilityONE's facilities management suite, the District's work order system
Vault	The plan's document library: site plans, as-builts, warranties, photographs, source assessments