

## **Guidelines for Interpreting and Scoring Benchmarks**

**12.1** *The school's facilities, equipment, and technology management plan includes objectives to support the delivery of the educational program of the school and accessibility for all students.*

### **I. What does this benchmark indicate for school performance?**

Benchmark 12.1 is about developing and maintaining the school's facilities, equipment and technology plan, which supports the educational mission of the school. One would find specific examples of this benchmark in plan documents, the school's mission and vision statements, current and future curriculum maps and plans, student accessibility needs assessments, school financial assessments and actual aid programs. When evaluating this benchmark, look for the degree to which the plan is integrated with all aspects of school planning.

### **II. As a review team member, what evidence do I look for?**

Here are some fundamental guiding questions which will help frame this item:

- Are facilities, equipment and technology plan documents available and used for planning?
- Is planning for future needs included and demonstrated in the document?
- Is the plan fully aligned with and integrated with the vision and mission of the school for the current priorities?
- Does the plan refer to the school's mission and vision statement?
- Does the plan include a variety of approaches to accessibility?
- How fully does the plan support the educational program's future needs?

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**12.1** *The school's facilities, equipment, and technology management plan includes objectives to support the delivery of the educational program of the school and accessibility for all students.*

### III. What are the key differences between the levels of the rubric?

#### At level **3-Fully Meets Benchmark**,

the facilities, equipment and technology plan is readily available and supports the delivery of the educational program. The plan consists of one, two or three interrelated documents. The objectives are aligned to the mission of the school. However, it does not include comprehensive and integrated planning for the future.

#### At level **4-Exceeds Benchmark**,

the school has a written plan that is fully comprehensive and integrated covering all aspects of the facilities, equipment and technology. The plan supports the current needs but also takes future needs into consideration. The plan relates to all areas of school's planning including: academic, physical, social and financial needs.

#### At level **2-Partially Meets Benchmark**,

the school has a plan but it is partial or incomplete. The plan relates to only one or two of the three areas: facilities, equipment and technology or the plan only partially is aligned to supporting the delivery of the programs.

#### At level **1-Does Not Meet Benchmark**,

there is no plan evident in writing or shared among the community. There may be a plan that exists only in the mind of one person. If there is a plan, it is vague and not clearly shared. It does not adequately and clearly provide for addressing the current and future needs in the following areas:

1. Facilities, equipment and technology management.
2. Alignment with the mission and goals associated with supporting the delivery of education program
3. Alignment of all physical facilities with good stewardship and being accessible to the needs of the students

NOTE: Look at the plan and how it relates to the current and future needs of the school.

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### **IV. What are some key suggestions for improvement?**

#### **To move from level 1 to level 2,**

- Form a leadership team to create or revisit the current plan.
- Look to other schools that have examples of exceptional plans to model.
- Begin aligning the plan to support the delivery of educational programs.

#### **To move from level 2 to level 3,**

- Revisit the original plan.
- Align the facilities, equipment and technology plan to better support the delivery of the school's educational mission.
- Evaluate and monitor what portions of the plan are working successfully and what needs to be revisited.
- Ensure that the objectives of the plan are tied to the mission of the school and are accessible for all students.

#### **To move from level 3 to 4,**

- Revisit the current working document or documents to create a more comprehensive and integrated plan that meets the current needs as well as future priorities.
- Ensure that the current plan is forward thinking and ensures accessibility to academic, physical, social and financial objectives.
- Work to create a plan that is integrated with all aspects of the school planning.
- Include more than one way to approach accessibility to academic, physical, social and financial objectives to reach a level 4.

### **V. What are key terms for common understanding? (Refer to the NCEA Glossary for the key terms listed below.)**

Needs Assessments  
Accessibility Plan

## **Guidelines for Interpreting and Scoring Benchmarks**

**12.2** *The school's budget supports facilities, equipment, and technology management with specific funds for capital improvements, depreciation, and replacements.*

### **I. What does this benchmark indicate for school performance?**

Benchmark 12.2 is about budget planning that is detailed and integrated, using generally accepted accounting principles (GAAP) and making sure it is developed to support the mission of the school. It takes into account appropriate use depreciation of equipment and accurately projects future costs. The budget gives all stakeholders an understanding of current and future costs associated with school assets and capital fund improvements. The budget enables long term planning to prevent sudden, unplanned expenses. This plan is compared to other similar schools to ensure best practices and comprehensiveness.

### **II. As a review team member, what evidence do I look for?**

Here are some fundamental guiding questions which will help frame this item:

- What does the budget look like? What did last year's budget look like?
- Are line items for the current and future budget clearly detailed?
- Has future planning been reflected in the budget?
- Does the budget match the educational mission of school?
- What other similar plans have been taken into account when making the budget?
- What are the current assessments for school assets?
- What capital improvements will need to take place in the near future?
- What improvements will the school face in the future? What has been budgeted?
- What is the state of the current technology at the school?

## Guidelines for Interpreting and Scoring Benchmarks

**12.2** *The school's budget supports facilities, equipment, and technology management with specific funds for capital improvements, depreciation, and replacements.*

- What are the budgeted lines for depreciation and replacement for technology and all facilities?
- Are the planning documents for facilities aligned with the plans for curriculum and instruction and all associated costs?

### III. What are the key differences between the levels of the rubric?

#### At level **3-Fully Meets Benchmark**,

the budget is clear and supports the facilities, equipment and technology. There are specific funds marked for capital improvement, depreciation and replacement. Line items are clearly marked and easy to read. It is not a level because 4 because the plans have not been compared to other schools to ensure best practices and completeness or they have not given all stakeholders a realistic and comprehensive understanding of costs that may occur in the future.

#### At level **4-Exceeds Benchmark**,

the budget is fully integrated and detailed. The budget has been designed following the principles of GAAP. School leaders have studied and reviewed other similar plans to ensure best practices. The budget allows all stakeholders to have a real understanding of the current and future values of the school's assets. The budget reflects depreciation and use of assets in addition to long term planning that will prevent sudden, unplanned expenses. Future capital expenditures are detailed and outlined in the budget. It is comprehensive and all stakeholders understand the realistic current and future values and costs associated with the school.

#### At level **2-Partially Meets Benchmark**,

the existing budget supports facilities, equipment and technology in a loosely tied manner. The budget may include something for unexpected costs but it is not aligned to specific capital improvements or related costs. The budget does allow for some unexpected costs but they have not been specifically identified. For example, a school may indicate facilities improvement in the budget but may not specify the exact need. An example of this is a school with an old heating system that has not been replaced in 50 years. The budget should reflect that at some point this will need to be fixed and is quite costly.

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**12.2** *The school's budget supports facilities, equipment, and technology management with specific funds for capital improvements, depreciation, and replacements.*

### At level **1-Does Not Meet Benchmark**,

the school does not have a budget. If the school has a budget it does not include line items to support facilities, equipment or technology nor does it include funds for future capital improvements or depreciation.

### IV. What are some key suggestions for improvement?

#### To move from level 1 to level 2,

- If there is no budget:
  - Begin developing a budget with school accounting experts immediately.
  - Seek out examples of similar school budgets.
- If the school has a budget:
  - Look at the line items to ensure that there is support for future capital expenditures that relate to the mission of the school.
  - Complete a school asset survey to determine which items will need replacing or repair.
  - Use the results of the asset survey to determine priorities for budget planning.

#### To move from level 2 to level 3,

- Align and identify funds to specific capital improvements, depreciation and replacements.
- Ensure that the budget reflects specific items.
- Review the current and future needs to clearly identify costs to support the articulation and implementation of the vision based on school's mission.
- Develop and include plans to avoid unnecessary and sudden costs.
- Ensure the expenditures in the budget reflect the educational priorities of the school. (For example, if a school states in the mission that they are going to provide the most up to date, integrative technology program, the budget should reflect clearly how this will be accomplished.)

#### To move from level 3 to 4,

- Incorporate best practices that ensure proper long term planning that prevents any sudden, unexpected expenses.
- Integrate and itemize the budget.

## **Guidelines for Interpreting and Scoring Benchmarks**

**12.2** *The school's budget supports facilities, equipment, and technology management with specific funds for capital improvements, depreciation, and replacements.*

- Offer and share with all stakeholders a realistic understanding of current and future costs associated with the school.
- Include in the budget appropriate use depreciation and equipment costs given accurate values of costs associated with the school's assets.
- Utilize the Asset Survey to clearly identify areas that will need improvement on the school grounds.
- Compare the plan with other schools' plans.
- Accurately budget for costs associated with school assets.

**V. What are key terms for common understanding? (Refer to Glossary for the key terms listed below.)**

GAAP – Generally Accepted Accounting Principles  
School Asset  
School Asset Assessment  
Depreciation Costs

## **Guidelines for Interpreting and Scoring Benchmarks**

**12.3** *The school's purchasing and physical and technological improvements are by design, done in alignment with the mission and the school's planning and curricular goals and consistent with environment stewardship.*

### **I. What does this benchmark indicate for school performance?**

Benchmark 12.3 is about physical and technological improvements in the school being consistent with mission of the school. It is also about being environmentally appropriate. Purchasing for improvements should be clearly calculated and planned with the school's mission in mind. Purchasing and planning should also reflect best practices of environmental stewardship. Schools can seek certification from an external, independent review called LEED certification to ensure their planning reflects best practices for an external source.

### **II. As a review team member, what evidence do I look for?**

Here are some fundamental guiding questions which will help frame this item:

- Does the purchasing plan for school improvements align with the mission and vision statements?
- Are there records of recent purchasing decisions?
- Is there an analysis describing environmental impact of these purchases?
- Do the records of planning meetings indicate an environmental impact analysis?
- Are there copies of energy audits? Are there records of energy savings initiatives?
- What types of analyses have been done in the past?
- Should any new impact analyses be performed to properly prepare future budgets?

## Guidelines for Interpreting and Scoring Benchmarks

**12.3** *The school's purchasing and physical and technological improvements are by design, done in alignment with the mission and the school's planning and curricular goals and consistent with environment stewardship.*

- How is environmental stewardess reflected in purchasing or improvements at the school?
- Is there an external audit available to verify current budgeting practices?

### III. What are the key differences between the levels of the rubric?

#### At level **3-Fully Meets Benchmark**,

the physical and technological improvements are planned and consistent with the mission of the school. Environmental stewardship is visible and consistent with the school's curricular goals. However, at this level, one may not see a larger integrated system or an independent review.

#### At level **4-Exceeds Benchmark**,

purchasing for physical/technological improvements is fully integrated in all areas of the school and driven by the school's mission and curricular goals. Environmental stewardship is reflected in all purchasing decisions. Additionally, environmental stewardship is also reflected in the mission and vision of the school. The school follows best practices and may seek an external and independent review such as a LEED certification.

#### At level **2-Partially Meets Benchmark**,

the school's purchasing and physical and technological improvements are sometimes aligned to the mission and curricular goals but not always. Decisions are made with some understanding of environmental stewardship but not full understanding or consistency.

#### At level **1-Does Not Meet Benchmark**,

purchases are not planned or are made in reactionary mode to crisis. There is little or no regard to the school's mission with purchasing or making improvements. Environmental stewardship is not taken into consideration when making decisions or purchasing. There is no evidence of improvement design aligned to the school's planning and curricular goals.

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### IV. What are some key suggestions for improvement?

#### To move from level 1 to level 2,

- Align improvements with the vision which articulates the mission.
- Align improvements with the school's curricular goals.
- Demonstrate a conscious understanding of the environmental impact of all purchasing decisions for improvements.

#### To move from level 2 to level 3,

- Carefully align the school's purchasing regarding physical and technological upgrades with the mission/vision of the school.
- Connect and describe all improvements as they directly support the curricular goals.
- Consider and include environmental stewardship when planning purchases.

#### To move from level 3 to 4,

- Design the school's improvements and purchasing to be a part of a larger and integrated system.
- Intentionally address the need for environmental decision-making not only when considering purchases but in other decisions as well.
- Revisit the mission and the vision on what the school does, to ensure that it is fully addressed at this level.
- Seek an external and independent review of purchasing decisions, especially those over a certain limit.

### V. What are key terms for common understanding? (Refer to Glossary for the key terms listed below.)

LEED Certification  
Environmental stewardship