

# Memorandum



CITY OF DALLAS

DATE May 6, 2016

TO Honorable Members of the Quality of Life & Environment Committee: Sandy Greyson (Chair),  
Tiffinni A. Young (Vice Chair), Rickey D. Callahan, Mark Clayton, Philip T. Kingston, B. Adam McGough

SUBJECT Facility Projects Bond Program Technical Criteria and Policy for Prioritizing

On Monday, May 9, 2016, the Quality of Life & Environment Committee will be briefed on the Facility Projects Bond Program Technical Criteria and Policy for Prioritizing proposed for the 2017 Bond Program. The briefing materials are attached for your review.

Please feel free to contact me if you have questions or need additional information.

A handwritten signature in black ink, appearing to read 'Jill Jordan'.

Jill A. Jordan P.E.,  
Assistant City Manager

## Attachment

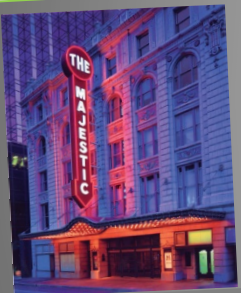
c: Honorable Mayor and Members of the City Council  
A.C. Gonzalez, City Manager  
Christopher D. Bowers, Interim City Attorney  
Craig D. Kinton, City Auditor  
Rosa A. Rios, City Secretary  
Daniel F. Solis, Administrative Judge  
Ryan S. Evans, First Assistant City Manager

Eric D. Campbell, Assistant City Manager  
Mark McDaniel, Assistant City Manager  
Joey Zapata, Assistant City Manager  
Jeanne Chipperfield, Chief Financial Officer  
Sana Syed, Public Information Officer  
Elsa Cantu, Assistant to the City Manager – Mayor & Council



# FACILITY PROJECTS

**BOND PROGRAM *TECHNICAL CRITERIA AND POLICY FOR PRIORITIZING***  
QUALITY OF LIFE AND ENVIRONMENT COMMITTEE – MAY 9, 2016



# PURPOSE

- PROVIDE INFORMATION ON THE PROPOSED **TECHNICAL CRITERIA AND POLICY FOR PRIORITIZING FACILITY PROJECTS** FOR THE 2017 BOND PROGRAM
- THE SAME TECHNICAL CRITERIA WILL BE UTILIZED FOR ALL CAPITAL PROJECTS BY:
  - PUBLIC WORKS
  - EQUIPMENT AND BUILDING SERVICES
  - PARK AND RECREATION



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# TECHNICAL CRITERIA AND POLICY

The technical criteria serve as a tool to assist in evaluating the priority for:

- Performing Major Maintenance and Repairs
- Renovating or replacing existing facilities
- Constructing New Facilities

The prioritization process is **a two-step process and includes** the operating department, Public Works or Park and Recreation, and Equipment and Building Services



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# TECHNICAL CRITERIA AND POLICY

## Two-step process:

1. Identify potential projects with help of operating departments through reviews of:
  - Existing Master Plan
  - Current operational needs to deliver services
  - Maintenance work orders
2. Rank projects using proposed Technical Criteria and input from the operating department



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# GENERAL POLICY BY CATEGORY

## “MAJOR MAINTENANCE AND REPAIR”

Capital expenditures needed beyond the **regular, normal building upkeep operating expenses of a building to ensure a facility operates as intended including:**

- Repairs or replacements of failed or failing building systems
- Improvements to comply with regulations, codes, and standards (such as accessibility)
- Projects to address health, safety, and environment-related issues



Photo #47: Water damaged finishes at theatre concourse



Photo #48: Water damaged finishes in theatre



Photo #36: Clean and re-point exterior brick veneer mortar and paint tube steel structure



Photo #27: Curtain Wall sealant damage



# FACILITY & SYSTEMS CONDITION GRADING

- Facility and systems deficiencies are categorized in one of five priorities:
  - Priority 1 -Currently Critical (Immediate)
  - Priority 2- Potentially Critical (Year 1)
  - Priority 3- Necessary/Not Yet Critical (Years 2-5)
  - Priority 4 - Recommended (Years 6-10)
  - Priority 5- Long Term Requirement (Beyond 10 years)
- Only projects in Priorities 1-3 are ranked and included in Needs Inventory



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# GRADING PRIORITIES POLICY

- **Priority 1:** Building System failure/currently critical
  - The facility is closed or facing imminent closure, and closure impacts service delivery
  - Repairs needed to address cited life safety concerns/code issues
- **Priority 2 :** High risk of Building System failure/Opportunities for Reducing O+M Expenses
  - Probable failures, obsolete system, or requires extreme O+M expenses to keep system functional
  - Code violation/update required with potential life safety concerns
  - Energy efficiency retrofits or other measures to reduce O+M costs
- **Priority 3:** Moderate risk of Building System failure
  - Approaching end of useful life with 2 – 5 years



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# GENERAL POLICY BY CATEGORY

- Renovation or replacement involves:
  - Renovation-
    - Major remodeling of a building involving replacement of multiple systems
    - Extends useful life by 20 years
  - Replacement-
    - Complete new building to replace an existing one
    - Renovation cost exceeds 75% of replacement cost (not applicable to historic structures)
- New Construction involves:
  - New programs or services
  - New service boundary
  - Relocation from existing lease space



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# TECHNICAL CRITERIA

#	Criteria summary- not all criteria apply to all facilities	Major Maintenance	Renovation/ Replacement	New Construction	Max. Points
1	Priority level (1=100 pts, 2=50 pts or 3=25 pts)	X	X		100
2	Improves/reduce O+M costs	X	X		50
3	Design Status	X	X	X	25
4	Impact on Facility Condition Index (FCI)	X	X		50
5	Functionality of Facility		X		50
6	Location Characteristics		X		25
7	Current Master Plan		X	X	25
8	Leverage Funds / Funding Match		X	X	25
9	Economic Stimulant / Neighborhood Plus		X	X	25
10	Site Acquisition Status		X	X	25
11	Service Demand		X	X	25
12	Prior Phase Complete			X	25
	<b>Total Maximum Points</b>	<b>225</b>	<b>425</b>	<b>175</b>	



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# CRITERIA DESCRIPTION- CONT.

## 2. Improves O+M

- Such as energy or water efficiency updates

## 3. Design Status:

- Project consultant selected, project in design, or project is ready for bids

## 4. Impact on FCI

- **Facility Condition Index (FCI)** is compiled for each building and represents a ratio of the cumulative costs of identified deficiencies to the replacement cost of the building



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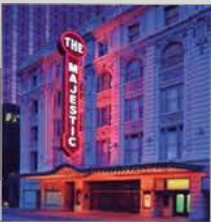
# CRITERIA DESCRIPTION- CONT.

## 5. Functionality of Facility:

- Meets Service delivery criteria (i.e. adequate layout, technology)
- Can be modified to meet service delivery needs
- Has adequate capacity

## 6. Location Characteristics:

- Centrally located for services delivery
- Compatible land use
- Adequate site for expansion/parking
- Co-location opportunities (ex. Library/Cultural facility, Library/DISD School)



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# CRITERIA DESCRIPTION- CONT.

## 7. Facilities Master Plans:

- Provide a comprehensive evaluation of the existing facilities and identify future needs
- Require annual review to reaffirm needs and priorities:
  - Citizen priorities
  - Change in physical condition of facilities
  - Shifts in demographics or service demand boundaries
  - Need to maintain current cost estimates
  - Policy or program changes
  - Funding opportunities
  - Technological or operational changes
  - Major maintenance priorities
- **New permanent facilities are planned to meet program needs for a projected 30-40 years, or longer**



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# CRITERIA DESCRIPTION- CONT.

## 8. Leverage Funds / Funding Match:

- Project leverages other funds such as grants
- Project has matching funds (i.e. Friends of the Library matching funds for Central Library)

## 9. Economic Stimulant / Neighborhood Plus:

- Project will promote economic growth
- Project fills a service gap

## 10. Site Acquisition Status:

- Site identified, in negotiation or acquired

## 11. Service Demand:

- Shifts in demographics or service demand boundaries
- Customer input

## 12. Prior Phase Complete



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# NEXT STEPS

- Obtain approval of Technical Criteria
- Prioritize and rank capital needs
- Receive first round of public comment in October 2016



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