

Tailoring Board Presentations to Your Audience

WASBO Spring Conference 2024

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School District Of Jefferson



My Background

Master Electrician

HVAC Tech

School District Facility Maintenance Role

Director of Building & Grounds



Customers, Engineers or School Board

- ▶ Effectively Communicate the Issues & Needs

Part 1

Presenting Facility Reports to the School Board

Presentation Goals

- ▶ Community Support
- ▶ Credibility With Board
- ▶ Validate Budget Use
- ▶ Seeds For Future Needs
- ▶ Share Vision

Traditional Presentation

Grounds:

- Snow Removal Winter 2018/2019.
- Kubota 3990 Ford Replacement.

Buildings:

- Quarterly sprinkler testing H.S.
- East Elem. Roof repair.
- HVAC repairs.
- East Elem. New bathroom partitions second floor.
- H.S. boys and girls varsity locker room new ceiling tiles.

Custodial/Staffing:

- Custodial staff floor care training.

Energy/Utility

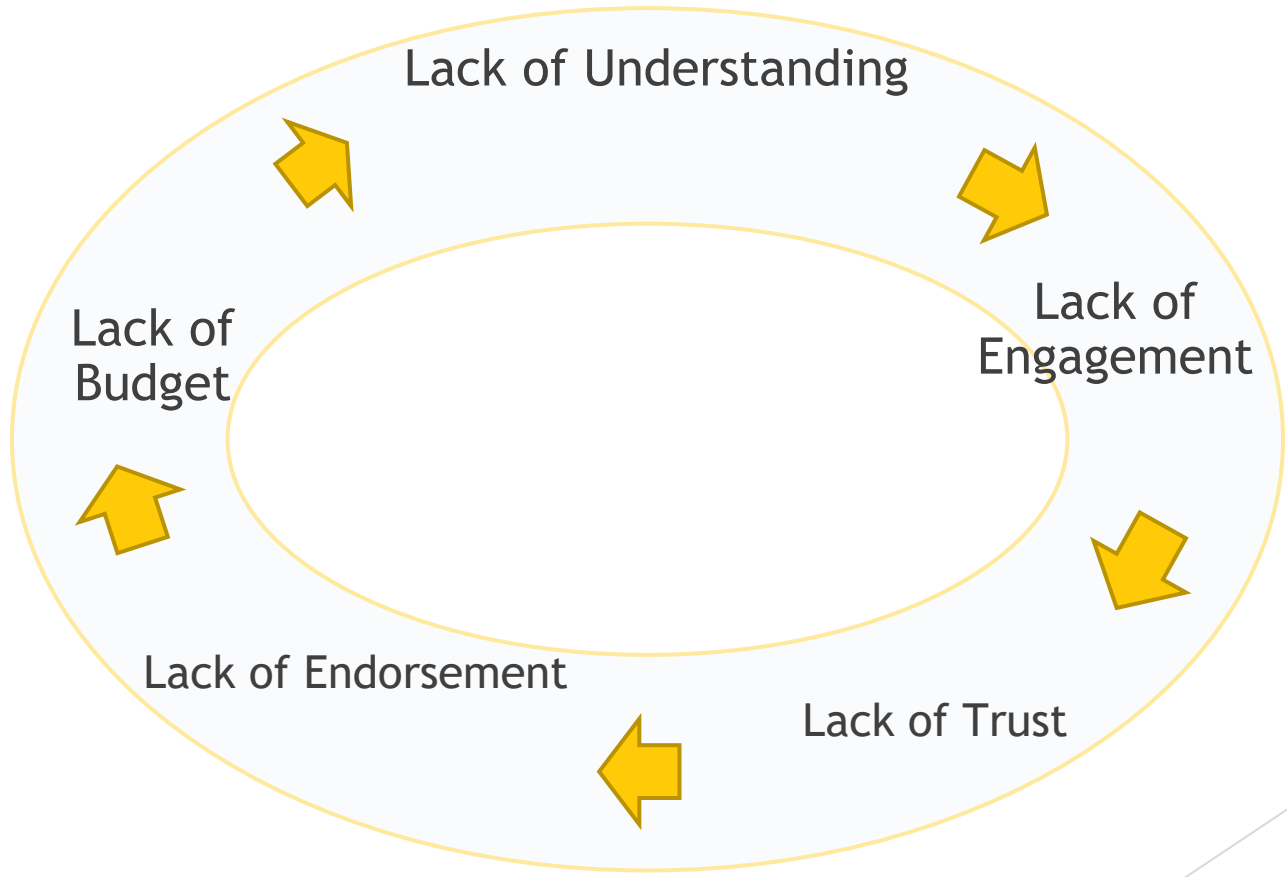
- LED lighting installation East Elementary.

Projects:

- New work order system implemented.
- East/West playground equipment received.
- Phase 2-safety grant film order in progress.
- Ag welding fume/exhaust system in progress.
- Sullivan window and door project in progress.
- Sullivan painting project in progress.
- Sullivan parking lot resurfacing in progress.
- Middle School north parking lot resurfacing in progress.
- West Pope path in progress.
- H.S. pool dolphin replacement.
- Middle, West Elem. East Elm. Sullivan Elem. fire alarm monitoring system in progress.

Usual Response





Lack of Understanding

Lack of Engagement

Lack of Trust

Lack of Endorsement

Lack of Budget

Considerations for Delivering Better Presentations

Time Limits

- ▶ Small part of the meeting
- ▶ Highlights only



Considerations for Delivering Better Presentations

Reporters

- ▶ Everything is reportable - *maybe not what you want!*
- ▶ Taken out of context
- ▶ Elaborate with care
- ▶ Controversial subjects



Tips For Better Presentations

#1: Convey Expertise

- ▶ First hand, transferred or a combination
- ▶ Present proof of need & results
- ▶ Predict likely outcomes of options



Parking Lot Lighting



HS Parking Lot Lighting

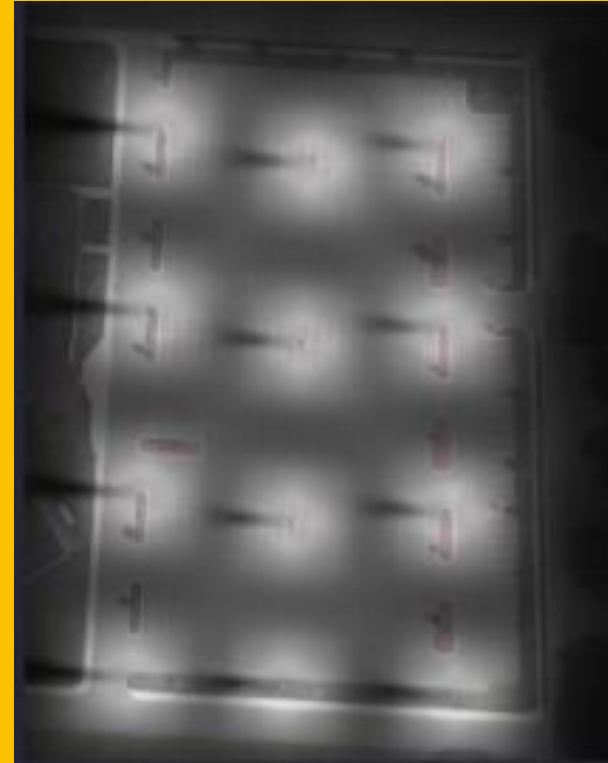
Remove Old Light
Heads

Upgrade to LED Heads

Results:

Reduced Dark Spots

Improved Safety





Parking Lot Drainage

Parking Lot

Resurface

Drain Installation

Results:

Reduce Slip Hazard



Tips For Better Presentations

#2: What Does Good Look Like

- ▶ Use photos to compare
- ▶ Educate & explain
- ▶ Make subject matter less intimidating
- ▶ Zoom in / Mark it up



Window Replacement



Replace Windows

Results:

- Energy Savings
- Improved Safety
- Prevent Water Infiltration

Tuck Pointing



Masonry Tuck-pointing & Caulking

Prevent Water
Infiltration



Lintels



Tuck Pointing
Suspected Problems

Inspection Confirmed
Lintel Damage

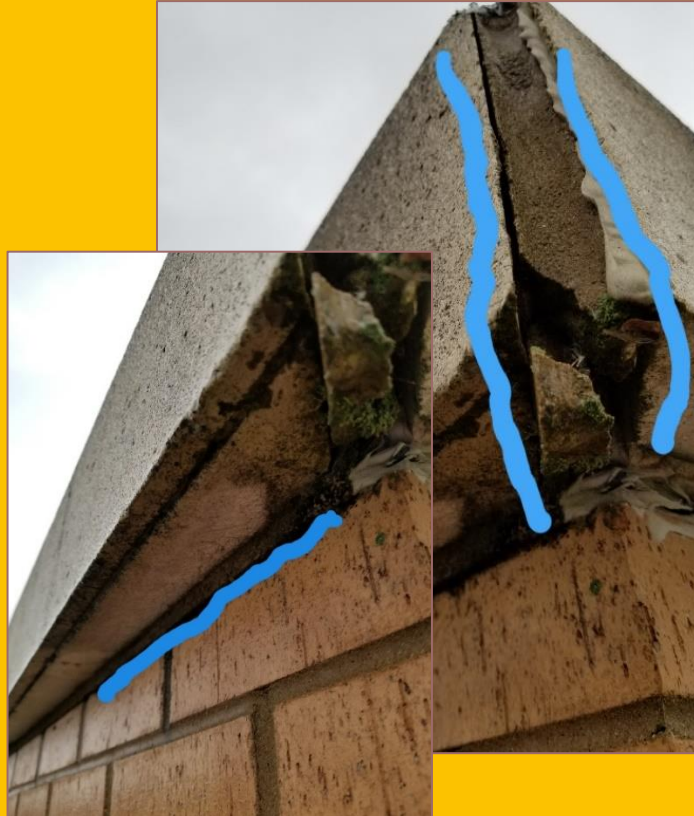




Middle School Building Envelope

Caulk Capstones,
Expansion Joints
and Windows

Results:
Reduced Water
Infiltration



Tuck Pointing & Brick Replacement



Brick Replacements



Completed Brick Replacement



Tips For Better Presentations

#3: Expose Unseen Areas

- ▶ Build credibility & attention to detail
- ▶ Show the inner workings - difficult to describe
- ▶ Convey the importance of doing the work in their terms

Pool Timers



Replace pool timers & wiring

Results:

Accurate Times

No ghost starts

S-Traps



Replace rusted pipes

Results:

No Leaks

Preserve historic fixtures



Canopy Supports



West Canopy

Remove Concrete

Inspect Poles

Replace Poles

Replace Concrete



Results:

Structural Safety

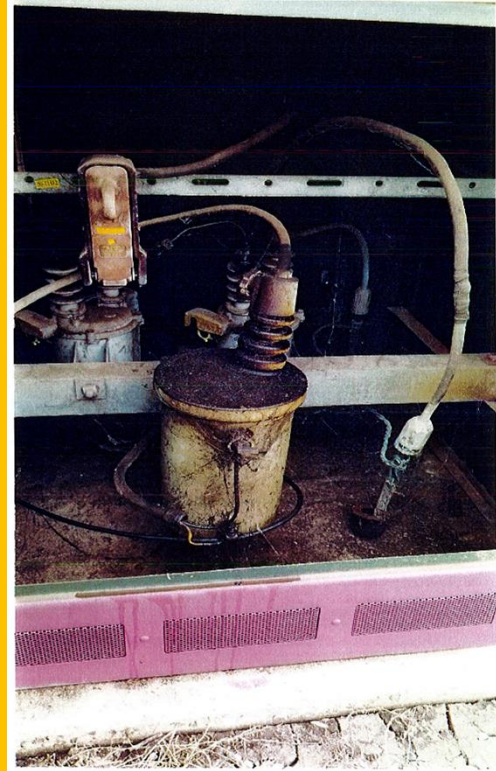
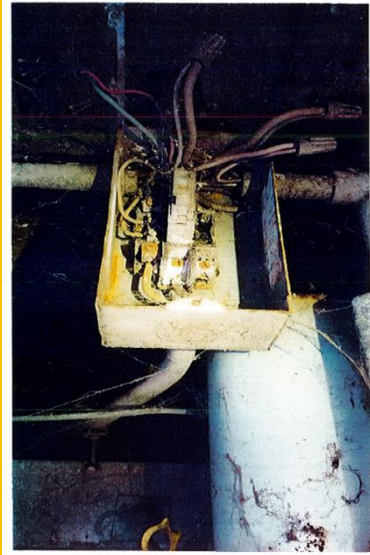
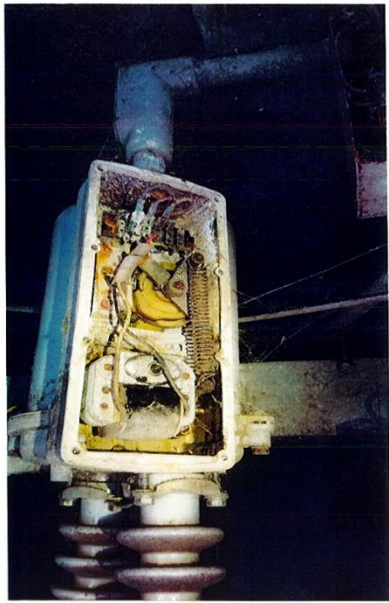


Tips For Better Presentations

#4: Convey Safety Priority

- ▶ Work to be done in areas that it would be unsafe for them to see in person
- ▶ Show the use of safety equipment
- ▶ Justify budget needed to work safely

Field Lights - Replacement



Outdated
Switchgear

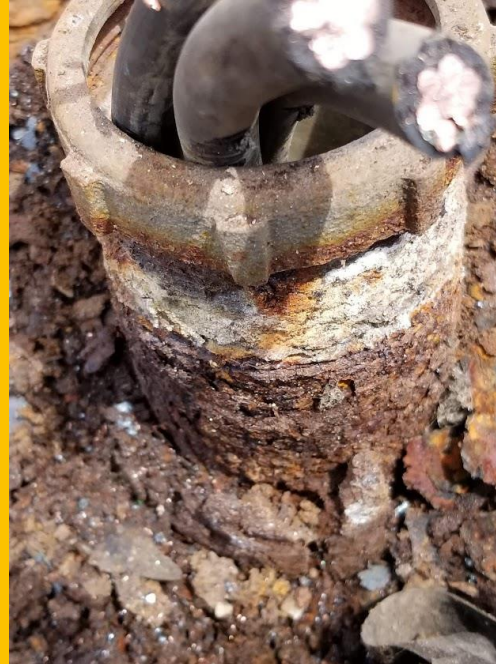
Results:

Safety

Replacement
Parts

Reliability

Field Lights - Replacement



Remove Old Poles

Field Lights - Replacement



Install New Poles

New Electrical
Infrastructure

Upgrade Lights

Results:

Structural Safety

Consistent Lighting

Tips For Better Presentations

#5: Show Behind The Scenes

- ▶ Show efforts made - staff value and endorsement
- ▶ Tools used - efficiencies



Preventative Maintenance / Indoor Air Quality



Uni-Vent Cleaning/
Bearing Repair

Uni-Vent
Disinfection/Cleaning

Preventative Maintenance / Indoor Air Quality



Uni-Vent Cleaning/
Bearing Repair



Uni-Vent
Disinfection/Cleaning

New Process & Equipment



Results:
Efficiency
Quality

Tips For Better Presentations

#6: Impact Evidence

- ▶ Show proof of impact - reporting
- ▶ Credibility
- ▶ Management & monitoring value

Energy Tracking

MyPortfolio | [Sharing](#) | [Reporting](#) | [Recognition](#)

JEF - East Elementary

120 S. Sanborn Ave., Jefferson, WI 53549 | [Map It](#)
Portfolio Manager Property ID: 6057652
Year Built: 1938
[Edit](#)

[Change Metric](#)

ENERGY STAR Score (1-100)

Current Score: 91

Baseline Score: 46

[Summary](#) | [Details](#) | **[Energy](#)** | [Water](#) | [Waste & Materials](#) | [Goals](#) | [Design](#)

[Refresh](#) to see **Source EUI Trend**
[Change Metric](#)

[Change Metrics](#)
[Change Time Periods](#)

Metric	Dec 2013 (Energy Baseline)	Aug 2019 (Energy Current)	Change
ENERGY STAR Score (1-100)	46	91	45.00 (97.80%)
Source EUI (kBtu/ft²)	122.3	66.0	-56.30 (-46.00%)
			-11.70

Tips For Better Presentations

#7: Vision & Future Needs

- ▶ Strategic direction for department
- ▶ Value to district

Future of SDOJ



Tips For Better Presentations

Budget & Future Planning

Project #	Building	2021-22 Projects Proposed (Year 0)	Budget	Expensed or Encumbered	Balance
1	High	Tuckpointing/caulkwork	\$ 116,890.00	\$ 116,889.05	\$ 0.95
2	Middle	New light fixtures	\$ 58,383.00	\$ -	\$ 58,383.00
3	Middle	CDS room renovation project	\$ 50,459.00	\$ -	\$ -
4	High	Auditorium lighting project	\$ 35,316.00	\$ 35,315.52	\$ 0.48
5	Sullivan	Add transformer enclosure	\$ 3,432.00	\$ 3,432.00	\$ -
6	E/W/S	Replace faucets with motion sensors	\$ 18,768.00	\$ 18,767.79	\$ 0.22
7	West	Vestibule addition	\$ 34,582.00	\$ -	\$ -
8	West	Replace all exterior lighting	\$ 72,400.00	\$ 5,487.02	\$ 66,912.98
9	West	Clean out and repair area wells	\$ 1,486.00	\$ -	\$ 1,486.00
10	West	Tuckpointing/caulkwork	\$ 38,197.00	\$ 38,197.00	\$ -
11	Middle	Add ceiling fans in tech ed space	\$ 1,700.00	\$ -	\$ 1,700.00
12	Middle	Replace all exterior lighting	\$ 10,000.00	\$ -	\$ 10,000.00
13	Middle	Retro commission uni vents controls	\$ 68,618.00	\$ -	\$ -
14	District	Vehicle replacement (replacing the Spark)	\$ 16,510.00	\$ 16,510.00	\$ -
15	District	Vehicle replacement (replacing the 2013 lift van)	\$ -	\$ -	\$ -
16	East	Elevator project	\$ 7,034.00	\$ 7,033.62	\$ 0.38
17	Sullivan	Tuckpointing/caulkwork	\$ 25,135.00	\$ 25,135.00	\$ -
18	Middle	Block sealing	\$ 5,750.00	\$ 5,750.00	\$ -
19	Sullivan	Garden fence project	\$ 3,005.00	\$ -	\$ -
20	Middle	Painting	\$ 1,509.00	\$ 1,509.00	\$ -
21	East	Hot water project	\$ 9,268.00	\$ -	\$ -
22	High	Wrestling room padding	\$ 13,250.00	\$ 13,250.00	\$ -
23	East	Waterproofing room L5	\$ 9,801.00	\$ 9,801.00	\$ -
24	Sullivan	Controls upgrade	\$ 44,975.00	\$ 44,975.00	\$ -
25	East/West	Retro commission uni vents controls	\$ 16,980.00	\$ 16,980.00	\$ -
26	Middle	Bathroom partitions	\$ 32,889.00	\$ 32,888.02	\$ 0.98
27	Sullivan	Duct cleaning	\$ -	\$ -	\$ -
28	West	Duct cleaning	\$ 3,000.00	\$ -	\$ -
29	Middle	Cafeteria floor infill	\$ 31,190.00	\$ 31,190.00	\$ -
30	East	Fence project with tree removal	\$ 21,830.00	\$ 21,830.00	\$ -
31	High	Parking lot maintenance	\$ 7,558.00	\$ 7,558.00	\$ -
32	High	JV Baseball field upgrade	\$ 5,200.00	\$ -	\$ -
33	E/W/S/M	Fire alarm monitoring	\$ 2,780.00	\$ 2,780.00	\$ -
34	East	Install roof netting for falling tiles	\$ 10,045.00	\$ 10,045.00	\$ -
35	High	Air monitoring and air flow testing	\$ 2,500.00	\$ 2,500.00	\$ -
36	Middle	Gym floor refinishing	\$ 15,600.00	\$ 15,600.00	\$ -
37	High	Science rooms eyewash stations and art room faucets	\$ 17,002.00	\$ 17,002.00	\$ -
38	High	Landscaping work	\$ 6,078.00	\$ 6,077.18	\$ 0.82
39	District	Zero turn mower	\$ 17,083.96	\$ 17,082.96	\$ 0.04
40	District	Purchase aerial scissors lift	\$ -	\$ 12,000.00	\$ (12,000.00)
		Total Budget	\$ 836,211.00	\$ 769,725.15	\$ 126,485.85
Project #	Building	2022-23 Projects (Year 1)	Estimate		
1	West	Replace air handler (1988 install)	\$ 25,000.00		
2	High	Repaint ceiling in metal shop	\$ 42,800.00		
3	High	Refinish gym #2 floor	\$ 28,000.00		
4	West	Replace pump pump	\$ 500.00		
5	Middle	Replace carpeting in computer labs	\$ 20,790.00		
6	Sullivan	Replace rooftop AHU 3 and 4	\$ 22,500.00		
7	West	Replace library air handling unit	\$ 45,000.00		
8	Middle	Replace exhaust fans	\$ 15,000.00		
9	High	Upgrade controls and upsized heating/cooling of auditorium unit	\$ 75,000.00		
10	District	Replace maintenance truck including plow package and lift gate	\$ 38,000.00		
11	District	Floor Maintenance	\$ 10,000.00		
12	East	Sealing coal chute	\$ 3,891.00		
13	District-Wide	Parking lot resurfacing	\$ 51,900.00		

5 Year Plan

14	Middle	Duct cleaning	\$ 37,862.00		
15	High	Tennis court crack filling	\$ 10,000.00		
16	District	4x4 for snow removal with salter (UTV)	\$ 32,000.00		
17	East	Replace Fischer Field backstop fence	\$ 25,000.00		
18	District	District vehicle replacement (mini van)	\$ 32,000.00		
19	District	District vehicle replacement (mini van)	\$ 32,000.00		
20	Middle	Replace lighting controls	\$ 50,000.00		
21	Middle	Fire alarm replacement	\$ 60,000.00		
22	High	Replace HVAC controllers	\$ 70,000.00		
		Total:	\$ 727,243.00		
		NOTE: 5-year waiting period for Fund 46 use is done on 3/15/2023			
Project #	Building	2023-24 Projects (Year 2)	Estimate		
1	High	Localize all lighting controls	\$ 380,411.00		
2	District	District vehicle replacement (mini van)	\$ 32,000.00		
3	West	Replace switch gear and electrical panels	\$ 120,000.00		
4	District	Floor maintenance	\$ 10,000.00		
5	Middle	Replace RTU2 - Middle School	\$ 125,000.00		
6	Sullivan	Replace electrical panels throughout building	\$ 75,000.00		
7	Sullivan	Replace fire alarm system	\$ 54,330.00		
8	High	Refinish gym #1 floor	\$ 40,000.00		
		Total:	\$ 836,741.00		
Project #	Building	2024-25 Projects (Year 3)	Estimate		
1	West	Lighting controls	\$ 150,000.00		
2	Sullivan	Air handler and chiller replacement	\$ 175,000.00		
3	Sullivan	Replace condensing unit	\$ 15,000.00		
4	Middle	Replace windows throughout building	\$ 246,000.00		
5	High	Re-caulking 2012 addition	\$ 70,000.00		
6	West	Replace section of roof (A)	\$ 75,000.00		
		Total:	\$ 731,000.00		
Project #	Building	2025-26 Projects (Year 4)	Estimate		
1	Sullivan	Install fire sprinklers throughout building	\$ 457,216.00	Potential referendum inclusion	
2	West	Address water infiltration of building by adding exterior drain tile	\$ 94,045.00		
3	West	Replace older cabinetry and counters throughout building classrooms	\$ 136,890.00		
4	West	Install fire sprinklers throughout building	\$ 600,504.00	Potential referendum inclusion	
5	West	Repitch exterior landscaping for drainage	\$ 25,920.00		
6	Middle	Replace fire alarm system	\$ 138,135.00	Potential referendum inclusion	
7	Middle	Repitch exterior landscaping for drainage	\$ 30,080.00		
8	Middle	Install fire sprinklers throughout building	\$ 1,162,176.00	Potential referendum inclusion	
9	West	Solar panels	\$ 188,000.00		
		Total:	\$ 2,833,866.00		
Project #	Building	2026-27 Projects (Year 5)	Budget		
1	District	Replace dump truck w/plow and salter	\$ 45,000.00		
2	Sullivan	Replace boilers	\$ 180,000.00		
3	High	HVAC repairs	\$ 100,000.00		
4	Middle	Replace RTU 4	\$ 190,000.00		
5	Middle	Replace RTU 5	\$ 60,000.00		
6	Middle	Replace RTU 1 with air conditioning	\$ 120,000.00		
7	East	Chiller replacement	\$ 220,000.00		
		Total:	\$ 915,000.00		

Part 2

School Board Walk Through



Old Approach to Walk Through

- ▶ Guided Tour
- ▶ Focus on Cleanliness
- ▶ Show New Installations
- ▶ Didn't Know What They Were Missing
- ▶ Low Engagement
- ▶ Few Understood
- ▶ Questions Remained

New Walk Through Goals

- ▶ Engagement
- ▶ Understanding
- ▶ Credibility
- ▶ Support



School Board Walk Through

#1: More Time - Use it

- ▶ Sole Purpose
- ▶ Elaborate on Big Items
- ▶ Include Smaller Items



School Board Walk Through

#2: Opportunity for 1:1

- ▶ Get to know each member
- ▶ Encourage questions - develop relationship
- ▶ More informal setting (*normally no reporters*)-
 - elaborate to the level needed
 - no hesitancy in asking questions

School Board Walk Through

#3: Opportunity to Educate

- ▶ Understand the facilities experience
- ▶ Supplement the tour with reference documentation
- ▶ Tailor to level of the audience

School Board Walk Through

#4: Drive It Home

- ▶ Share more details
- ▶ Tell the story
- ▶ Explain why
- ▶ Elaborate on the risks

School Board Walk Through

#5: Reference Material

- ▶ Organized Like Your Itinerary
- ▶ Photos
- ▶ Supplemental Reports
 - ▶ Engineering
 - ▶ Inspection

Thank you

Any Questions?

