

This document is part of the Decarbonization Roadmap Guide for School Building Decision Makers toolbox, download the full document at: <https://newbuildings.org/resource/decarbonization-roadmap-guide-for-school-building-decision-makers/>



Documents to Inform the Stock Take

Before you get started on the roadmap development, take stock of current stakeholders and activities in the district as they pertain to sustainability, energy, and/or carbon emissions. This initial data dive is called a stock take. It is helpful to uncover relevant plans, goals, and policies as they currently exist in the district.

This document includes a list of common documents uncovered in a stock take that can inform the roadmap. Not all districts will have these documents, and some may have other relevant items to be added. The result of this process may uncover gaps that should be filled, which can become part of the roadmap planning effort.



Roadmap Planner Table 1

Stock Take List and Location of Documents to Inform Roadmap in the Roadmap Planner can be used as a place to track and organize documents.

Documents to Inform Roadmap Collected During the Stock Take

Goals: A list of documentation of any district goals regarding buildings, health, efficiency, or sustainability. Might be found in district resolutions formally or informally adopting sustainability goals, plans, or practices.

Technical specifications for district facilities: Technical design and construction specifications for building projects. Often found in Capital Planning or Facility department documents.

Procurement requirements: Policies or documentation outlining procurement practices. These might apply to equipment or buildings and may even apply down to food and paper products. Typically, these documents are found in Capital Planning or Facility department documents, but also may be centralized in the administrative team in smaller districts.

Technical specifications: “Tech specs” are detailed descriptions indicating all the requirements that cannot be represented or described clearly in construction drawings. In schools, these are often related to the educational specifications that articulate a district’s educational philosophy, approach, programs, and goals and translates them into facility requirements. The technical specifications then describe the technical requirements that achieve the facility requirements.

Owners Project Requirements (OPR): An OPR forms the basis from which all design, construction and acceptance decisions are made for construction projects. Often these can be found in the Capital Planning department if this is a document your construction teams utilize.

Energy or carbon report to school board: In districts that have begun public reporting of energy use or carbon emissions. This can be in the form of a simple graph, a website, or more comprehensive annual report. Check with your facilities or sustainability team to see if something like this exists for your district.

School district organizational chart: Chart of school district departments to help identify stakeholders and decision makers.

More technical stakeholders will be interested in:

Facilities, characteristics, and equipment lists:

Facilities departments may maintain lists of facilities and their characteristics such as square footage, building age, building equipment, etc.

Facility master plans and assessments: Capital Planning departments develop facility master plans, every 5-10 years. Technical experts may have conducted more detailed facility assessments, documenting current conditions of buildings. The most recent plans and assessments should be included in your stock take.

Benchmarking information: Benchmarking involves tracking of utility (i.e. electric, gas, and water) consumption and cost. Some districts have already benchmarked their facilities either using ENERGY STAR Portfolio Manager or another software.

Capital project plans, including bond planning documents:

Capital Planning departments may have plans for upcoming projects. Pull together any documentation about future projects. Some of these plans may be tied to school bond planning.

Operations and maintenance (O&M) requirements:

Check with the O&M department to obtain a copy of their building operations requirements. These requirements likely include information like building set points, lighting operational times, etc.

Fleet vehicle fuel use information: Many districts are transitioning to electric vehicles (EV) or buses. Where EVs have been integrated into the fleet, record how many and where charging stations are located.

City or State level energy codes: Codes define the minimum performance level of buildings at the time of construction. Obtain a copy of your city or state level energy codes. Check with your Building Department to ensure you know the current code that applies to District projects and when it might be updated next.



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