

**EFFECTS OF ENERGY NEEDS AND EXPENDITURES ON
U.S. PUBLIC SCHOOLS**

FAST RESPONSE SURVEY SYSTEM

This survey is authorized by law (P.L. 103-382). While participation in this survey is voluntary, your cooperation is critical to make the results of this survey comprehensive, accurate, and timely.

Please provide the following information:

Name of person completing form: _____ Telephone: _____

Title/position: _____ E-Mail: _____

This questionnaire asks about three fiscal years: FY 2000, FY 2001, and FY 2002. Most school districts define a fiscal year as the period of time spanning July 1 through June 30. Using this definition, the three fiscal years covered in this questionnaire are defined as:

FY 2000 = July 1, 1999, through June 30, 2000

FY 2001 = July 1, 2000, through June 30, 2001

FY 2002 = July 1, 2001, through June 30, 2002

What is the month and day of the start of your district's fiscal year? _____ / _____

What is the month and day of the end of your district's fiscal year? _____ / _____

Please use this time period as you complete this questionnaire.

AFFIX LABEL

If the above district information is incorrect, please update it directly on the label.

THANK YOU. PLEASE KEEP A COPY OF THIS SURVEY FOR YOUR RECORDS.

PLEASE RETURN COMPLETED FORM TO:

Tim Smith (716624)
WESTAT
1650 Research Boulevard
Rockville, Maryland 20850-3195

IF YOU HAVE ANY QUESTIONS, CONTACT:

Tim Smith at Westat
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FRSS Form No.81, 11/2001

DEFINITIONS FOR THIS SURVEY

District Facilities – A piece of land, a building site, a building, or part of a building owned by and/or used for activities of a local education agency (that is, a school district or equivalent organizational unit).

Energy – Includes all sources used to power or operate district facilities and equipment such as utilities (for example, natural gas, oil, and other sources of heating, cooling, and electrical power) and fuel (for example, gasoline, diesel, or other sources).

Total Overall Budget – Includes amounts for all programs and activities conducted by the district such as the general operating funds, physical plant and equipment repair, construction, capital outlay, student activities, cafeteria and food service, transportation, Federal programs such as Title I, and insurance/liability.

Information Copy - Do Not Complete

- **Budgets and Expenditures** – This section asks for information on your district’s original budgets and actual expenditures during FY 2000 through FY 2002.

- At the start of the fiscal year, what was your district’s original total overall budget for:
 - FY 2000 \$ _____ .00
 - FY 2001 \$ _____ .00
 - FY 2002 \$ _____ .00

- In **Column A**, please record the amount your district actually spent for the specified energy needs in FY 2000. In **Column B**, record how much was originally budgeted at the start of FY 2001 and how much was actually spent during FY 2001. In **Column C**, record how much was originally budgeted at the start of FY 2002.

Type of energy need	A. FY 2000	B. FY 2001		C. FY 2002
	Actual expenditures	Budgeted expenditures	Actual expenditures	Budgeted expenditures
a. Utilities for district facilities (heating, cooling, and electrical power)?.....	\$ _____ .00	\$ _____ .00	\$ _____ .00	\$ _____ .00
b. Gasoline, diesel, and other fuel to operate vehicles?.....	\$ _____ .00	\$ _____ .00	\$ _____ .00	\$ _____ .00
c. Other energy needs?.....	\$ _____ .00	\$ _____ .00	\$ _____ .00	\$ _____ .00
d. Total energy needs (sum of lines a-c)?	\$ _____ .00	\$ _____ .00	\$ _____ .00	\$ _____ .00

If your district’s original total energy budget at the start of FY 2001 was sufficient to cover your energy costs (that is, total actual expenditures on line d) does not exceed budgeted expenditures on line d) in column B), please check this box and skip to question 6. Otherwise, please continue with question 3.

- **Fiscal Year 2001 Experiences** – The next questions ask about FY 2001.
- What was the main reason your original total energy budget at the start of FY 2001 was not sufficient to cover your energy costs? (*Circle one.*)

- Increases in the per unit cost of energy (for example, increased price per gallon or price per kilowatt) 1
- Increases in the amount of energy needed due to construction of new schools..... 2
- Increases in the amount of energy needed as a result of adverse weather conditions 3
- Other (*specify*) _____ 4

4. How difficult was it for your district to respond to the increase in energy costs during FY 2001? (Circle one.)

- Very difficult..... 1
- Moderately difficult 2
- Slightly difficult..... 3 (Skip to question 6)
- Not difficult..... 4 (Skip to question 6)

5. Which of these statements describe why it was difficult for your district? (Circle one response on each line.)

	Yes	No
a. No new funds were available and money had to be reallocated from other programs (not surplus).....	1	2
b. No new funds were available and money had to be obtained through severe austerity measures	1	2
c. School taxes had to be raised to cover the shortfall	1	2
d. The school district had to borrow funds on a short-term basis.....	1	2
e. The increase was a large proportion of the non-personnel budget.....	1	2
f. The shortfall had to be rolled over into the next fiscal year.....	1	2
g. The source of approval (for example, the school board, county, or city) did not wish to approve an increase in funds (or did so reluctantly)	1	2
h. The unappropriated surplus had to be tapped to cover the shortfall.....	1	2
i. Other (specify) _____	1	2

• **Cost-Saving Measures** – The next questions ask about cost-saving measures that your district might have used at some time during this year or the past several years.

6. Please indicate if your district has used the following measures to decrease energy expenditures in each fiscal year. (Circle one response in each column on each line.)

Cost-saving measure	A. Used in FY 2000 or before		B. Used in FY 2001		C. Used in FY 2002	
	Yes	No	Yes	No	Yes	No
a. Participated in a consortium that negotiated prices with third-party energy vendors	1	2	1	2	1	2
b. Locked in rates with one or more energy vendors.....	1	2	1	2	1	2
c. Renovated or retrofitted existing facilities to improve energy efficiency.....	1	2	1	2	1	2
d. Closed schools or sent students home early on at least one regular school day	1	2	1	2	1	2
e. Instituted or increased fees charged to use school facilities	1	2	1	2	1	2
f. Instituted other district-wide conservation measures to cut back on energy use	1	2	1	2	1	2
g. Other measures (specify) _____	1	2	1	2	1	2

7. To what extent do you agree or disagree with the following statements about your district's energy expenditures? (Circle one response on each line.)

Statement	Strongly disagree	Disagree	Neither disagree nor agree	Agree	Strongly agree
a. Our district has successfully reduced energy usage.....	1	2	3	4	5
b. Our district has successfully reduced the cost per unit of energy	1	2	3	4	5
c. Our district has an immediate energy problem	1	2	3	4	5
d. Our district has a long-term energy problem	1	2	3	4	5
e. Future increases in energy costs pose a major threat to the allocation of district funds to essential areas such as student instruction.....	1	2	3	4	5

• **District Characteristics** – This section asks for some information on district characteristics.

8. Please record your district's enrollment as of October 1 (or the nearest date) for each of the following years.

- a. October 1, 2000 _____ students
- b. October 1, 2001 _____ students

9. What percent of the students in your district were eligible for free or reduced-price lunch as of:

- a. October 1, 2000 _____ percent of students
- b. October 1, 2001 _____ percent of students

10. Please record any additional comments regarding your district's experience with rising expenditures below.

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