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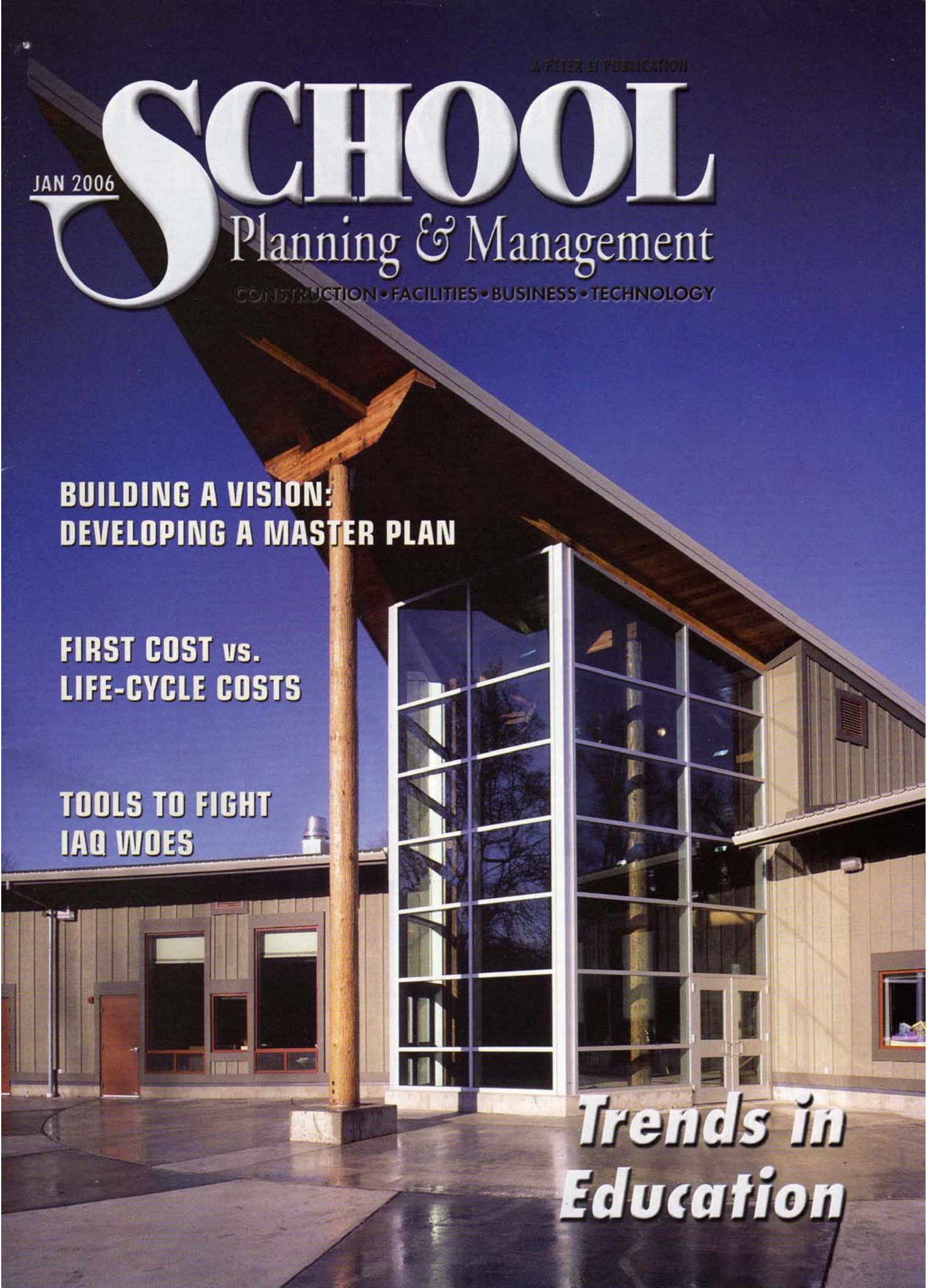

BUILDING A VISION: DEVELOPING A MASTER PLAN

FIRST COST vs. LIFE-CYCLE COSTS

TOOLS TO FIGHT IAQ WOES

Trends in Education

BUILDING A VISION

Developing an educational facility master plan can have a positive impact on the quality of education.

Nothing is more important to success than proper planning. In the case of school districts, this includes not only planning projects, but also developing districtwide facility master plans. If developed appropriately, a facility master plan can significantly impact the quality of education in a school district and build a better vision and future for the community. A master plan serves as a comprehensive road map, spanning five to 15 years, which a district uses to guide facility planning. It provides objective criteria for planning educational facilities that meet the changing needs of a community, as well as options in allocating facility resources to achieve the district's educational goals and objectives. While a plan is developed on a foundation of sound data and community input, the desired educational vision should be the driving force. Once a facility master plan is completed, it provides clear direction to administrators, policy makers and the community as to how the district should address facility needs. This is not a stagnant document. In fact, it should be updated periodically to incorporate building improvements, changes in community demographics or other educational directions. It is important to remember that the facility master plan is only the first phase in developing projects. Following approval of the plan, each project requires detailed specifications, including design (concept, schematic and development) and construction. Unless there is an agreed upon master plan, individual projects are less likely to be successful.

A facility master plan must be an inclusive process. It's an opportunity for a community to come together to determine how educational facilities can be an impetus for change and improvement for all parties. A master plan requires the collaboration of educators, administrators, policy makers, community members and facility experts.

The Process

After working with more than 300 school districts worldwide, this is the process that my colleagues and I have found to be extremely successful. Variations occur, of course, depending upon the size of the school district.

Step 1: Set-Up & Selection

Executive Committee

This internal committee comprised of school district staff directs the process and is involved in decision-making at critical steps. The committee also manages the entire master planning process and the district's consultants.
Depending on the size of the school district, it usually includes superintendent/CEO, assistant superintendents for curriculum and instruction, operations, finance, director of facilities, and public information officer.

Community Steering Committee

This external committee ensures that equity and fairness are maintained throughout the planning process and across planning areas. The committee reviews and confirms decisions at critical junctures and assists in resolving conflicting recommendations before the master plan is submitted for approval. It usually includes representatives from the community at large, parent teacher association, school board, city planning department, district planning office, city/county government, students [middle/high school], teachers' union, clergy and business community.

Step 2: Development of Data and Documents

The following is developed concurrently.

Enrollment Projections/GIS

The facility planning firm develops five-to 10-year enrollment projections per school and sets up a Geographic Information Systems (GIS) database to overlay: present school locations; student attributes, such as address, lunch code, ethnicity, special needs, attending school and overall graduation rate; land use data from local agencies to determine planned and approved housing developments; plans for road expansion; and community expansion.

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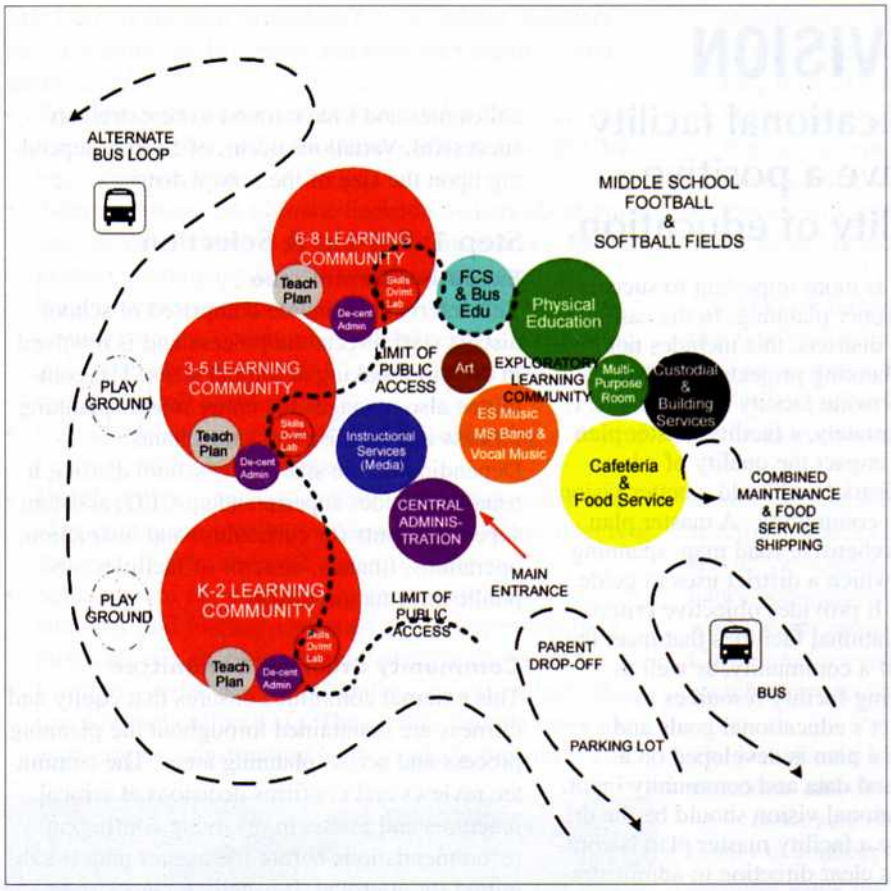

GIS is extremely valuable in facility planning. Before GIS, district administrators spent days locating available and affordable land for a new school. They also spent weeks determining the student population in the vicinity of the property. Thanks to technology, educational facility planners can now use GIS to show district administrators aerial photographs to determine suitable land for a new school, assess information about acreage and current appraised values of the land, and retrieve student population relative to the property — in a matter of seconds.

Educational Framework

This is developed with input from the school community. For each school level (elementary, middle and high), program requirements are compared to existing buildings to district desired "standards" for new school facilities. Issues included in the educational framework are school size, class size, grade configuration, universal pre-k, community uses of schools, magnet programs, year-round schools and renovation standards.

The educational framework is set by holding community dialogues in each planning area, to which the entire school district and community are invited to participate. Those who are unable to attend a meeting often fill out a Web-based questionnaire. After the dialogues, a work session is held to review all findings and merge the results into one.

Educational Specifications

Educational specifications address the delivery of educational programs in the facilities. They address the layout of the facility, and sizes of instruction and support areas, as well as plans for flexible spaces now and in the future. The educational specifications are often developed by a committee for each level: PK-5, 6-8, 9-12. The committee is made up mostly of teachers and staff but also includes students, parents, administrators and community members. The committee usually meets for two two-day lab sessions.

Lab #1 is an intensive, two-day work session examining future trends and determining program direction. Participants discuss programmatic and space needs and draft a report.

Lab #2 is another intensive, two-day work session to further edit and refine the draft report. This lab incorporates large group work, as well as smaller, breakout group work. Participants resolve space requirements and area descriptions with programming guidelines.

Facility Assessments

Information regarding the condition of each building is critical to the development of a master plan. Many building are in need of roofs, windows, HVAC and electrical upgrades, among many other systems. An evaluation of each school building needs to be conducted to determine the level of renovation needed or if the building should be replaced.

Educational adequacy and capacity studies should also be conducted. A facility planner must consider how each building fits a district's need for educational programs now and in the future. Therefore, planners look at not only a building's physical capacity and layout, but also at how many students it presently serves and how many students it can serve in five to 10 years.

Design/Construction Standards

These are overlaid on existing facilities to gauge adequacies and deficiencies. The standards also are used to guide new construction, including design and material selection.

Step 3: Development of Facility Options and Priorities

Options Work Sessions

Facility options are developed from the data collected and input gathered from

the facility condition review, educational framework work session, GIS, cost estimates and community dialogues. Appropriate costs associated with options are also developed and are based on cost estimates of the scope of work determined by the needs assessment. All options are developed by the facility planner, the district and the planning area committees before being presented to the community. These options identify the basic scope of the renovations, replacements, additions, new construction, and closures/consolidations, as well as macro costs.

Step 4: Community Input

Planning Area Committee

In smaller districts, the district Steering Committee and the Area Committees may be one in the same. In larger districts, it is recommended the district be divided into areas for planning purposes. Each Planning Area Committee includes representatives from each school within the area, as well as community representatives. Each committee is responsible for developing recommendations for an area plan, which serves as a basis for the facility master plan.

Community Dialogue

Community dialogues are structured to share information with the community and gain maximum input and consensus on future direction. Attendees are given a blank name tag with a number on it. The number corresponds to a table number, telling them where to sit. An attempt is made to split people who know each other, such as husband and wife or neighbors, because they are familiar with each other's educational views. After opening remarks and presentations, attendees respond to critical questions individually and in small groups. Small groups record their questionnaire responses on large wall charts. A quick overview of how small groups responded to questions is given as part of closing remarks. Everyone who attends the community dialogue and provides an accurate mailing address receives a copy of the results. To ensure that the entire community has an opportunity to provide input, an electronic version of the community dialogue questionnaire is posted on the district's Website so community members can fill out the online form. The responses are analyzed in the exact same manner as questionnaires completed and collected at the community dialogue.

Step 5: Development of Implementation Plan

Once the team has assessed existing data, developed cost estimates, identified new construction projects, identified discontinued facilities, identified replacement construction projects, prioritized modernization and rehabilitation projects, and conferred with the Community Advisory Committee, all information is organized into possible phases of implementation. Each phase lists schools and shows action to be taken (new construction, renovation, addition, etc.), suggested enrollment/capacity, cost estimate and time-line for completion.

The implementation plan also includes scope of projects, cash flow, budgets and priorities.

Step 6: Board Presentation

The final facility master plan contains assessment data, including systems' conditions and a detailed needs analysis for each site; future building needs; present and future building capacities; operation and maintenance costs; availability of funding and alternative funding options; and a list of proposed projects in priority order for the next 10 years, such as new schools, renovations/additions, replacements and deferred maintenance.

Step 7: Board Approval

Charts, graphics and electronic presentation media are only some of the tools used to present the facility master plan in a simple, yet sophisticated, manner.

Following board approval, the district considers various funding measures.

The most common funding measures are through tax levies or the sale of bonds. For more information on how to get a school bond passed in your district, go to <www.peterli.com/spm/betterschools/index.shtm> to download or order a pamphlet called *"How Better Schools Build Better Communities."*

Deborah Moore, who authored the pamphlet, summed up the funding issue perfectly: "Without adequate investment in education, students will suffer, communities will stagnate, businesses will leave and property values will drop." It truly is all about planning. Nothing can impact the quality of education in a district, as well as build a better vision and future for a community, than a facility master plan. SPM