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Creating a Successful Facility Master Plan

Two experts take you step by step down the facilities planning pathway.

by Dr. William DeJong, REFP and Carolyn Staskiewicz, REFP

A facility master plan is a district-wide plan for a school district's facilities. The plan should clearly state what buildings are going to be kept, which should be discontinued, which are going to be renovated and what new buildings are going to be built. The plan should be developed on a foundation of sound data and community input. It should be a road map for addressing the district's facility needs. The desired educational program should be the driving force. The plan should not be based only on facility conditions and demographics. A facility master plan, if developed appropriately, has the potential of having a significant effect on the quality of education in a school district.

As a road map, the facility master plan should specify the projects that have been identified, the timing and sequencing of the projects, and their estimated cost. A district-wide facility master plan is typically a 10-year plan. A facility master plan is important in determining and securing financing and providing the macro scope of projects. A facility master plan should be updated periodically to incorporate improvements that have been made, changes in demographics or other educational directions.

It is important to remember that the facility master plan is only the first phase in developing projects. Following the development

and approval of the plan, each project will require detailed educational specifications, design and construction.

Critical to a facility master plan is the process used to develop it. The plan should be the convergence of the condition of existing facilities, the desired educational program, the demography of the district and a vision of the future. There needs to be an opportunity for a community to come together to determine how educational facilities can be an impetus for change and improvement. It requires the collaboration of educators, administrators, policy makers, community members and facility experts.

Based on working with more than 300 school districts, I believe the following process has been extremely successful. Depending on the size of the district, there are many variations of the process that need to be considered.

The Steering Committee

The purpose of the Steering Committee is to guide the facility planning process. In order to form a successful Steering Committee, it is important that its members be representative of the community as a whole. The board of education or school superintendent should not hand pick the committee members. It is suggested that



organizations and groups in the community be asked to select their representatives. The final committee comprises a cross-section of school personnel, parents, students and community members.

It is suggested that the committee select its own leadership. It is also strongly suggested that the committee meetings and the entire process be facilitated by an outside consultant — typically an educational facility planner.

The Steering Committee should operate by consensus and may have two or more subcommittees. The first subcommittee typically takes the form of a Communications or Publicity Committee. The second committee develops the questionnaires to be used at the community dialogues and assists in the logistics of the community meetings.

The Database

The Database provides the Steering Committee and the community with “the state of the district,” including a community/school profile. This database should include the following:

- historical and projected enrollment,
- demographic profile of the community/school district,
- facility inventory,
- condition assessment of school facilities,
- educational adequacy assessment of facilities,
- capacity analysis,
- educational programs and academic achievement and
- financial and tax information.

Comprehensive databases will be required to develop a district facility master plan. Be ready to share and disseminate information widely.

Community Dialogue #1

There is a major difference between a community dialogue and a public hearing. A public hearing is usually to get a reaction to a plan. Community dialogues are held to identify specific educational priorities in the district. The first community dialogue focuses on programs and services.

The purpose of the first community dialogue is to gain community input to develop the educational framework of the plan. Agreement should be built around issues such as grade configuration and size of elementary, middle and high schools. Other issues include whether there is going to be preschool, the extent of community use of school facilities, etc. In order to develop a successful master plan, there is a need to build agreement on the macro framework of the educational program.

The community dialogue often works like this.

Upon entering the community dialogue, each person is given a nametag with a number on it and is asked to sit at the table with the corresponding number. This encourages people who come together not to sit together, and allows each table to be a mini-representation of the community — with staff, parents, students and community members dispersed among the tables.

At each table, there is an envelope that includes a registration form, individual questionnaires, and a group

questionnaire. Everyone is asked to fill out the registration form so that the results from the community dialogue can be sent directly to him or her. The district profile (summary of data) is then distributed so that everyone has the same information. Each participant receives data on issues such as the enrollment of the district, programs and services currently offered and condition of school buildings.

The individual questionnaire includes questions on everything from preferred class size to desired programs and services to technology needs. Everyone fills out the questionnaire individually, and then each table fills out a group questionnaire together. Here is where the real dialogue takes place.

Facility Options

Based on the results of the first Community Dialogue and the data collected, facility options are developed. These options represent future scenarios for the district regarding its buildings and include capital improvements — any renovations and new construction, technology upgrades, cost estimates and tax implications.

Based on the data collected and input from the first community dialogue, several possible options typically emerge. The Steering Committee then reviews/clarifies options, and adds or deletes options before the second community dialogue.

Community Dialogue #2

The second community dialogue format is very similar to the first. Everyone sits at round tables, and the options formulated by the Steering Committee are presented to them

through an “options packet.” Each person fills out an individual questionnaire that compares options and asks the participant to identify a preferred option. To conclude the second dialogue, each table fills out a group questionnaire, which is posted on wall charts to illustrate each option and the participants’ preferences.

Completion of the Facility Master Plan

The final step in the process is preparing the final facility plan to be presented to the board of education. The facility plan should include all the data collected to date as well as strategies for implementation for the projects, including timelines, costs and additional recommendations. It is suggested that representatives of the Steering Committee present the plan to the board of education. By this time, the plan is truly a plan for the district and the ownership rests with the district and its community.

Timeline

It is suggested the facility master planning process from start to finish be approximately five to six months. The process allows enough time for the data to be collected, but is short enough to ensure continued involvement by the Steering Committee members, as well as the community. By keeping the process moving, people will be able to remember what actually happened at community dialogue #1 by the time community dialogue #2 takes place.

Through the facility planning process, the school community is positioned and empowered to improve the quality of life by advancing education through research, planning and consensus-building strategies. School districts

need to make their futures happen in ways conducive to their individual needs. What we do today will affect what we do tomorrow — the future does not just happen. We need to make it happen. ▲

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