



Site Selection and Land Acquisition

There are many steps involved in the selection and acquisition of a site for a new school campus. The process of identifying, conducting a review of, getting approval for, and acquiring a site will typically take more than a year of effort. Before embarking on a search for potential sites, it is critical to have a comprehensive, thorough, and up-to-date Facilities Master Plan (see the CSBA Construction Management Task Force Policy Brief on Facilities Master Plans). Additionally, before the process of site selection begins, a process for determining who will be a part of the site selection team that will make the recommendation of a site to the board should be clearly defined.

Key Resources and Decision Points in Site Selection

In order to make the site selection process as efficient as possible, the district should have in place a Facilities Master Plan. With a Facilities Master Plan already adopted by the board, the necessary criteria that will be used to judge potential school sites is defined and understood, such as the amount of square footage per student needed, educational program requirements, whether specialized spaces will be built on the site (kitchens, science labs, etc), and whether there are identified partners for the possibility of building joint-use facilities. Other considerations include whether to partner with a developer to build a school, and whether eminent domain or a land trade are tools that should be employed to potentially acquire a piece of property. With the important criteria that will determine which site are logistically feasible, the district will have a clear basis for evaluation of potential sites.

For the purposes of site selection, it is also critical to have the following pieces of current information available in order to conduct a review of potential locations:

- Demographic statistics
- Enrollment projections and potential growth rates
- Attendance area maps
- Capacities at existing school sites
- Zoning plans

- Mitigation agreements with developers (current and proposed)
- Local community plans
- Jurisdictional boundaries for counties, cities, water districts, utilities districts, law enforcement and fire districts

Another important factor will be the district budget for construction and land acquisition. In order to identify potential parcels of land, the district must have an estimate of how much funding is available for real estate and construction. The process for the purchase of land will likely require consultation with the district's counsel and real estate brokers.

The Role of the Board in School Site Selection

The five responsibilities areas of school board members are to set direction, establish structure, provide support, ensure accountability and act as community leaders. The board will have numerous responsibilities in the planning and oversight of the school construction process. The site selection part of the construction process has specific consideration the board may need to address, including:

Setting direction

- Is there a Facilities Master Plan already adopted? Is it comprehensive and reflective of both the current reality and future needs?
- Is there an opportunity to bank land for the future, based upon the projected needs identified in the Facilities Master Plan?
- Has the board given consideration to everything included in Appendix A?
- Is there benefit to forming an architectural subcommittee of the board?
- Have clear budgets been defined and communicated so that all parties have a shared expectation about the available funding for land and construction?



Establishing Structure

- Is there a committee established to make a recommendation to the board on the best options for potential school sites? Are the appropriate stakeholders and staff involved?
- Is there a policy in place to prevent investors or speculators with knowledge of district site selection discussions (including consultants and family members) from purchasing property identified as a potential school site?

Providing Support

- Has the board provided adequate resources, professional development, staff capacity, and budget to allow for the appropriate level of information to be presented to the board for consideration?
- Do the actions of the board reinforce the concepts from the adopted Facilities Master Plan?

Ensuring Accountability

- Is there a clearly defined process for staff and consultants to report to the board on the process of site review?
- Have expectations and budgets been made clear so that board monitoring and oversight of the process can occur?

Acting as Community Leaders

- Have working relationships been established with city, county, and local communities before an actual project is under review?
- Is there a process in place to communicate with other local elected officials and planning departments of other local agencies?
- Has the board engaged local planning committees, homeowners associations, and neighborhood groups?
- Has an effective committee been established to provide input from appropriate stakeholders, including the community?
- Have partners for the potential joint-use of facilities been considered as part of the site selection process?
- Is there an opportunity for regular reports, discussion, public comment, and other communication about the site selection and land acquisition process during board meetings?

Forming a Selection Team

The district must decide who will be responsible for the process of site selection process and determine what criteria will be considered in selecting the site. It is recommended that districts form a selection team recommend a site or sites

to the board. This team should be composed of a variety of stakeholders, district staff, and can also include outside consultants. The committee makeup should include the following kinds of representatives:

- Stakeholders
 - Parents
 - Community Members
 - Teachers
 - Administrators
 - Staff members
 - Homeowners Associations representatives
 - Local planning committees
 - Neighborhood groups
- Consultants or District Staff
 - Facilities/construction manager
 - Chief Business Officer
 - Real property negotiator
 - Real estate appraiser
 - Civil engineer
 - Environmental consultants
 - Legal counsel
 - Architect
 - Traffic engineer

Hiring a facilitator to guide the work of the group may also be an avenue that a district would wish to pursue, in order to expedite the site selection process.

Characteristics of a Potential School Site

There are a many factors that go into the selection of a site as the potential location of a school campus. The factors include the location, size, and shape of a parcel of land, cost, as well as health and safety concerns. The recommendations of a particular site will have to be based not only on the current situations and requirements, but also on predicted needs in the future. It is also important to consider the history of the title of the property when evaluating a potential school site. A detailed, comprehensive list of characteristics appears in Appendix A.

Communications about Site Selection

Keeping others informed about the school site selection process is an important responsibility for the board and district staff. Holding community meetings to engage members of the public in the process can be a key way to gather input and to provide information. Not only should there be a plan to inform the community at large and specific stakeholders, but the district should also have a specific plan to keep in touch with other governmental agencies, municipalities, and

districts that could be affected by a new school site. Some cities and counties may have designated future school sites on general plan land use maps and school site selection teams should take that information into account as part of their evaluation process. Having an open, transparent process will help to identify potential concerns and generate understanding about decisions being made.

While the California Department of Education approves school site selection plans, it is beneficial for districts to keep cities and counties informed of their decisions, so that land use plans are kept updated. Board members and district staff should keep open lines of communications with cities, counties, and local communities since future school sites will have an impact on each of their budgets and the communities they serve. As community leaders, school board members should ensure that they are communicating with their counterparts in other local agencies and keeping lines of communication between district staff and city/county planners open.

Regulatory Process

While much of the work in the acquisition of land for a school site will be conducted by district staff or by consultants, it is important for board members to know how detailed and time-consuming the process will be. The regulatory process for state approval of a district school site selection is complicated and multi-phased. Once a district narrows down its choices and the board selects a single site to be reviewed by the state, a project manager (either district staff or an outside consultant) must oversee numerous tasks required by the state of California. This complex process, which must be completed before the close of escrow on a property, has at least five different steps that must be completed as part of the school site acquisition regulatory process. These requirements include:

- Ordinary due diligence investigation,
- California Department of Education approval,
- Department of Toxic Substances Control approval,
- Compliance with the California Environmental Quality Act, and
- Notice and coordination with other local agencies such as cities and counties.

As part of the approval process, the school district will have to provide the state with specific information on a variety of particular characteristics of the land. These characteristics may include:

- Safety
- Public acceptance
- Location
- Environment
- Soil

- Topography
- Size and shape of the parcel of land
- Accessibility
- Public Services
- Utilities
- Cost
- Availability

Each of these pieces of information must be thoroughly researched by district staff and/or expert consultants as the process of identifying and selecting a parcel for a school site moves forward.

Safety

With a goal of safety being the paramount concern, the site selection process can get into highly technical detail in order to ensure that nothing is overlooked. As an example, the criteria used to evaluate the safety of a site include fourteen specific points, including:

- Proximity to airports;
- Proximity to high-voltage power transmission lines;
- Presence of toxic and hazardous substances;
- Hazardous air emissions and facilities within a quarter mile;
- Other health hazards;
- Proximity to railroads;
- Proximity to high-pressure natural gas lines, gasoline lines, pressurized sewer lines, or high-pressure water pipelines;
- Proximity to propane tanks; noise; proximity to major roads and freeways;
- Results of geological studies and soils analyses (including seismic and fault hazards, liquefaction subsidence or expansive potential, dam or flood inundation and street flooding, and slope stability);
- Condition of traffic and school bus safety; safe routes to school; and
- Safety issues for joint-use projects.

In addition to the demographic information and regulatory requirements, there are other considerations when looking at potential school sites, including:

- The environmental and climate impact of the building.
- Is there an opportunity to use eco-friendly materials in construction?
- Could sources of natural light or carbon-neutral sources of power be incorporated into the plan?
- Renovation vs. New Construction. Is there an opportunity to remodel an existing building to adapt it to use as a school? Traditionally, California's acreage requirements and funding formulas for school sites favored new construction in outlying areas. But in some situations, adaptive reuse of existing space for a school site could be pursued as better option than starting with an empty parcel of land. This option may surface when there is an immediate need to provide more school space, the lead times for construction are long and the state-mandated minimum site sizes were not available, and non-educational buildings existed within the district that could be transformed affordably.
- The relationship between the school site location and how students get to school. The location of a school site can impact the surrounding community in terms of pedestrian and automobile traffic, the quantity and quality of open space in the neighborhood, and proximity to other social and civic sites as a community gathering place. The site and design selected for a school can have an impact on whether students walk, bike, take buses, get dropped off in cars, or drive themselves to campus. The method of transportation can have implications on air quality, traffic, and school transportation budgets. Does a potential school site offer proximity to public transportation and shopping areas, medical centers, and recreational facilities?

Resources

California Department of Education School Site Selection and Approval Guide Prepared by the School Facilities Planning Division 5/20/2007

<http://www.cde.ca.gov/ls/fa/sf/schoolsiteguide.asp>

Fast Tracking School Site Acquisition. Jerry Behrens, Lozano Smith

California Coalition for Adequate School Housing January 2001

www.cashnet.org/resource-center/SectionI/I-4-I6.html

Creating Schools and Strengthening Communities through Adaptive Reuse. August 2003. Stephen Spector. National Clearinghouse for Educational Facilities.

www.edfacilities.com/pubs/adaptiveuse.pdf

School Site Selection – California Department of General Services JoAnn Koplin, Jim Bush, Fred Yeager

http://www.excellence.dgs.ca.gov/PlanningTeamwork/S3_3-3.htm

The Division of the State Architect Sustainable Schools Website

<http://www.sustainableschools.dgs.ca.gov/Sustainable-Schools/index.html>

Guide to School Site Analysis and Development (2000) California Department of Education School Facilities Planning Division

The Guide for Planning Educational Facilities (2004) Council of Education Facility Planners International



Appendix A

Educational Specifications

Besides cost, location, and required environmental hazard evaluations, another critical piece in the evaluation of a potential school site is whether or not it meets the educational specifications established in the district's Facilities Master Plan.

A comprehensive set of specifications will identify both physical and educational program requirements, and take into account the resulting space and equipment needs. The following list touches upon many of the considerations that a site selection committee will have to think about when evaluating potential sites:

- Number of students to be served / desired enrollment
- Grade configuration of school (K-5, K-6, K-8, 6-8, 7-8, 9-12, 10-12)
- History of property title
- Specific program requirements
 - Multitrack or year-round schedules
 - Single- or double-session kindergarten
 - Class size
- Joint use/community use of facilities
 - Adult classes
 - Recreation
 - Library and media center
- Design
 - Americans with Disabilities (ADA) requirements
 - Single-story versus multistory buildings
 - Campus style (single-building or clustered, open or closed)
 - Activity areas
 - Size and height
 - Setbacks
 - Relationship with outdoor environment
 - On-campus Healthy Start or preschool or day care
 - Room for growth of relocatable/portable classrooms
- Technology
 - Cable
 - Wireless
 - Network
 - Telephones
 - Internet
 - Intercom/Public Address
- Bell and clock system
- Utilities & Environment
 - Sewer/septic system
 - Electricity
 - Lighting
 - Daylight requirements
 - Acoustic requirements
 - Air quality
 - Energy efficiency
 - Equipment storage
 - Energy systems
 - Climate control
 - Mechanical systems
 - Heating
 - Air conditioning
 - Ventilation
 - Restroom/stall requirements
- Security and safety
 - Alarm systems
 - Fencing
 - Visibility of all school entrances from the main office
 - Proximity of school to dangerous roads and freeways
 - Overall visibility of the site
 - Specific location of Pre-K and Kindergarten
- Classrooms and learning spaces
 - Size and number
 - Adjacency requirements
 - Flexible furniture
- Food service
 - Type
 - Provision
 - Kitchens
 - Food Storage
 - Cafeterias and lunch shelters
 - Food pick-up
- Maintenance
- Transportation
 - Parking
 - Student pick-up and drop-off
 - Traffic flow
 - Delivery and shipping areas
 - County requirements on speed limits

- Teacher work areas
 - Offices
 - Workrooms
 - Lounges
- Administrative areas
 - Offices
 - Reception
 - Nurse
 - Office support
 - Record storage
 - Supply storage
 - Conference room's
 - Administration's relationship to academic space
- Specialty spaces
 - Music
 - Art
 - Science
 - Drama
 - Dance
- Storage
 - Supplies
 - Bulk
 - Textbooks
- Teaching support
 - Teaching wall
 - Equipment
 - Storage
- Hallways
 - Lockers
- Library
 - Conference rooms
 - Study carrels
 - Copy equipment
 - Check-out system
- Multi-purpose and auditorium spaces
 - Seat number and type
 - Stage
 - Technology needs
 - Storage
 - Fly
 - Lobby

The California School Boards Association's Construction Management Task Force provides districts with policy briefs and fact sheets on construction related issues. District staff and Governing Boards should use this information as a resource when making local decisions. These documents are provided for informational purposes only and are not a substitute for legal advice from school districts legal counsel. Districts should obtain independent legal advice and review when necessary.

If you have any questions, please contact CSBA Policy Services at (800) 266-3382 or via e-mail policy@csba.org

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