

# Facilities master planning

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## Presentation overview

- The role of the board
- Why conduct a facility master plan?
- Where should the board start the process?
- Who should be involved in the process?
- What should be addressed in the plan?
- Steps for a comprehensive facility master plan

## Why conduct a facility master plan?

To ensure the final construction plans will be formulated to meet the long-term needs of:

- students
- teachers
- administrators
- parents
- the community

## **Where should the board start the process?**

- Decide to conduct a FMP
- Set goals and expectations for the plan
- Allocate resources and set direction for district/COE staff
- Assemble an advisory committee

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## The role of the board

- Strive to meet the expectations of the school community while working within limited funding constraints
- Ensure projects comply with state requirements
- Instruct staff to collect data
- Use results in planning and decision making process
- Build positive relationships with civic and community leaders

# Where should the board start the process?

## Assemble an advisory committee

- Outline the responsibilities of the committee
- Responsibilities may include:
  - Analysis of data
  - Providing recommendations to the board
- Require regularly scheduled reports to the board on the progress of the committee

## **Who should be involved in the process?**

District/COE staff will need to solicit the expectations of stakeholders and gather statistical information to provide the board with the most relevant data to make decisions regarding school facilities.

# Who should be involved in the process?

Potential stakeholders:

- Students
- Parents
- Community members
- Local government
- Parks and recreation
- School district/COE staff
- Business community
- Community-based organizations



## **What should be addressed in a facility master plan?**

Districts/COEs will need to collect data in order to:

- Assess the condition and adequacy of existing facilities
- Project future enrollments
- Align facilities with the district's/COE's vision for the instructional program

## What should be addressed in a facility master plan?

General background knowledge of the school facilities system in California:

- legal requirements, standards and court decisions affecting facilities
- funding options currently available to districts/COEs for new construction, modernization and deferred maintenance
- local planning processes as they relate to cities or counties general plan
- allowable uses of facilities
- a sense of current politics and legislative proposals
- educational specifications

# Steps for a comprehensive facility master plan

## Planning

- Collect projected enrollment data
- Use FMP data to identify concerns, define goals and desired outcomes of projects
- Work collaboratively with local and state agencies
- Understand historical and future developments of the community

# Steps for a comprehensive facility master plan

## Planning, cont.

- Establish parity across sites
  - set district/COE standards for technology, aesthetics, equipment, fixtures, etc.
- Prioritize funding and resources for individual projects
  - Communicate with staff and public why some facilities receive differentiated funding

# Steps for a comprehensive facility master plan

## Communication

- Create a communications plan
  - Be transparent with decisions
  - Convey realistic project timelines and goals
- Communicate the board's priority for a planning process to include stakeholder perspectives

## **Steps for a comprehensive facility master plan**

Communication, cont.

- Require regularly scheduled reports to the board on the progress of the plan
- Conduct forums, focus groups and surveys



## Construction Management Task Force

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