

# Planning Process for Facilities Improvement

**Presented by:**

Tahir Ahad, President

Dennis Dunston, Architect, Director

David Azcarraga, Consultant

Bryan DeBlonk, Legislative Director, CSBA

**Facilitated by:** Keith Bray, General Counsel, Director, CSBA



July 15, 2016

# Introductions

# Facilities Master Plan

A Facilities Master Plan is the component of the District's long-term strategic plan that deals with facilities.

- Acquisition/Disposition of property
- Building of new schools
- Purposing/Repurposing facilities
- Asset Management
- Putting Facilities in the best service of students and teachers
- Providing facilities that allow staff to adequately deliver the educational program

# What Does/Should the Board Manage?

The following three components require direct Board involvement:

- SCOPE – Work/projects to be accomplished
- SCHEDULE – Time frame for work/projects to be accomplished
- BUDGET – Sources and uses of funds

# Establishing Scope

To establish scope that will derive budget and schedule, it is necessary to:

- Project enrollment
- Determine educational program and school needs
- Analyze current schools utilization and capacity
- Assess facilities needs – new and modernization

# Establishing Scope (cont.)

- Finalize a list of facilities related improvements including desired new construction
- Determine modernization issues

# Establishing Scope (cont.)

One of the most important things to remember in the development of a Facilities Master Plan is:

- The master planning process is intended to plan *for* schools, not planning *of* schools.
- Don't get into architectural details prematurely
- Be strategic about the allocation of resources
- Two phase planning

# Different Enrollment Scenarios

- Growth
  - Select and acquire site
  - Plan and provide new housing
  - Manage the design and construction process
  - Maintain existing facilities
- Non-Growth
  - Maintain existing facilities
  - Remodel existing facilities to educational trends
  - Repurpose facilities
- Declining Enrollment
  - Plan for the maintenance, use or disposal of facilities
  - School Closure
  - Boundary Adjustment



# District Facilities Master Plan Elements

- Educational program
- Demographics/Enrollment projections
- Facilities assessment
- Capacity study
- Educational specifications
- Equity analysis
- Asset management
- Funding analysis

# Educational Program

- What is taught
- Teaching methodologies/modalities
- Organization
  - Traditional vs. Restructured
  - Small learning communities
  - Integrated curriculum/Team teaching
  - Themed learning
- Class size standards
  - Number of students
  - Physical size

# Demographics/Enrollment Projections

- Demographic study
  - Locations of students
  - Number of students
  - Anticipated new development – generation rate
- State cohort survival method
  - CalPADS
  - 5 year projection
- Projected facility needs

# Facilities Assessment

- What do you have?
- Inventory of school sites
  - Size and capacity of teaching stations
  - Organization
  - Support facilities
- Assessment of conditions
  - Need for maintenance/modernization
- How do the existing facilities meet the educational needs
  - Need for reorganization

# Facilities Assessment

- Building envelope
- HVAC systems
- Electrical/lighting
- Plumbing
- Technology/Communications
- Restrooms
- Utilities

# Facilities Assessment

- Outdoor Elements
  - Sidewalks
  - Hardcourts
  - Parking
  - Playfields
  - Playground equipment
  - Drainage

# Capacity Study

- Spaces to include
  - All teaching stations
  - All spaces designed or intended to be TS
- Spaces to exclude
  - Special education spaces
  - Spaces for pull-out programs
  - Physical education spaces
  - Other spaces for district sponsored programs

# Educational Specifications

- Response to the educational program
- Building program
  - Spaces required
  - Area required
  - Relationships of spaces
  - Site requirements
  - Site relationships



# Equity Analysis

- Student population
- Physical size of site
- Number of classrooms
- Size of classrooms
- Size and type of support spaces
  - Administration
  - Multipurpose
  - Library
  - Gymnasium

# Asset Management

- Declining enrollment
- Unused sites
- Determine best use
- Sale vs. lease
- Naylor Act
- Joint use projects
- Land swap

# Solar Projects

- Evaluate need
  - Analysis of past usage
- Location
  - Rooftop
  - Ground installation
  - Parking shade structure
  - Evaluate need
- Selection of provider
- PPA's vs. purchase

# Determining Budget

- Budget is a product of scope, and available and projected resources
- More often than not, budget is driven by a community's ability to provide funding
- The work previously listed helps clarify the demand side of the financing equation
- Available resources and school community's ability and willingness to pay determines the supply side.

# Funding Analysis

- Funding analysis
  - Local sources
    - G.O. bonds
    - Proposition 39 bonds
    - Mello-Roos bonds
    - Developer fees
    - Redevelopment districts

# State Funding

- Lease Purchase Program (LPP)
  - Unhoused students/Teaching station
  - Building area/Student
  - \$ / Square foot of building area

# State Funding

- School Facilities Program (SFP)
  - Leroy F. Greene School Facilities Act of 1998 SB 50 – 1998
  - “Simplified system”
  - Grant program
  - \$ / Student
  - 50/50 State/Local
  - Hardship provisions

# State Funding

- School Facilities Program (SFP)
  - New Construction
    - 50/50
  - Modernization
    - 60/40
    - 50 year old buildings
  - Joint use
  - Overcrowded Relief Grant (currently unfunded)
  - Charter schools
  - High performance schools grant
  - Career Technical Education Facilities Program
  - Seismic upgrade program



# State Funding

- Proposition 39 Energy
  - Clean energy job creating fund
  - 2013/2104 – 2017/2018
  - Amount based on ADA and FRPM eligibility
  - Energy efficiency projects
  - Alternative energy projects
  - Improvements and repairs to reduce operating costs
  - Improved health and safety conditions

# Schedule

The factors that impact a facilities program schedule include:

- Implementation Plan including schedule and project sequencing based on available resources
- Imminent Educational program needs
- Urgency of growth impact
- Availability of funds
- Legal mandates

# Schedule (cont.)

- Condition of existing facilities
- Outside influences/politics
- Minimization of disruption to students' learning process
- Design and approval timelines

# Spotlight on Student Success and Facilities:

The Planning Process Undertaken for Facilities Improvements  
and Preparing to Win a Local Bond Campaign

**Bryan DeBlonk**, Legislative Director, CSBA



# GO Bond District Pre-Campaign

Research bond capacity for District

Identify District facility needs *and* needs at each school site

- Form facilities needs committee
- Create buy-in from every community in the District

# Pre-Campaign (continued)

Voter opinion research survey:

- Level of voter support for bond
- What needs the voters support most
- Voter opinion on the job schools are doing

*Use results to inform decision to proceed*

Develop team (consultants & District staff)

# Pre-Campaign Communication

Communicate your District's facilities needs:

- Community-wide mailings
- Community meeting presentations
- Local media

# Critical Steps

Work in conjunction with bond counsel and be aware of deadlines to:

- Submit maps & boundaries
- Submit board resolution:
  - Ballot language (75 words)
  - Facilities project list (Prop 39)
- Submit arguments in favor



# After Board Resolution

- School site literature and signs
- Citizens Oversight Committee application
- Community meeting presentations
- Local media

*District support of campaign during off hours*

# DOs and DON'Ts for District and Employees on a bond campaign

# What **CAN'T** Districts Do

*The law is very clear...*

**The District cannot use *any* resources to support or oppose *anything* on the ballot!**

- Money
- Staff Time
- Equipment
- Supplies
- Facilities

# What Can District Staff Do at Work:

## Before Bond is on Ballot:

- Advise on:
  - Is bond is a good idea?
  - Priority projects?
  - Likelihood it will pass?
  - Amount of bond?

## After Bond is on Ballot:

- Inform (*not persuade*) public about what is in the bond and its value
  - *“If this bond passes, our schools receive...”*

# What Can District Staff Do On Their Own Time

On your own time, you can and should say  
“**Vote yes**” as often as you can!

**Reality vs. Perception:**  
*Stay clean on both!*

# The Bond Campaign at District Functions and Facilities

- Treat the bond campaign like **any other community group** under school or District rules
  - If other groups can't do it, the bond can't do it
  - No special treatment
  - No special discrimination



Contact us at: 707-422-6393

[info@totalschoolsolutions.net](mailto:info@totalschoolsolutions.net)

[www.totalschoolsolutions.net](http://www.totalschoolsolutions.net)