

Role of Facilities in the Overall Education Plan of a District

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Introductions

Intended Outcomes

- Relationship of facilities planning with the educational goals and objectives
- Role of the Board members in pre-planning activities
- Know about certain issues that result in disjointed and sometimes cross-purposed efforts
- Decisions needing attention of the Board members
- Determination of funding needs
- Potential sources of funding for capital improvement

Common Practices in Education Planning

- Even today, most districts do not have a strategic master plan to address current and projected educational needs
- Most districts develop and implement programs in response to federal and state mandates, community demands or compliance issues
- Program development is usually spearheaded by the Educational Services leadership that is generally not very aware of facilities issues and their impact on the programs
- When facilities issues are considered, they are considered for a specific program and not for the educational plan as a whole

Common Practices in Facilities Planning

- Often, facilities planning and implementation of capital improvement plans are a responsibility of Business and Operations
- Most of the professionals intimately involved including demographers, planners and architects are not educators
- Opportunities of incorporating the education plan are minimal and seldom very meaningful
- School communities get more interested in physical improvements instead of program compatibility since it is easier to grasp
- The result: Instead of program driving the facilities, facilities dictate the program to be housed

The Outcome: A Disconnect

- It is almost never intentional but a disconnect exists that results in a facilities plan and program that is disjointed and not correlated with the overall educational goals and objectives of the district and the Board
- The facilities master plan should be a part of the overall Strategic Master Plan of the district
- The facilities master plan should serve to support the district-wide Educational Plan of the district and toward the academic and co-curricular goals and objectives adopted of the Board

Understanding the Impact of the Educational Program

- Consider all factors that will impact the facilities.
 - What is taught today?
 - What will be taught 10-15 years from now?
 - What changes in instructional methodologies/modalities are on the horizon?
 - How you wish the educational programs to be delivered?
 - What options and learning opportunities will be offered within a subject area?
 - How your schools will be organized across the district?
 - Grade level configuration
 - Size and capacity of teaching stations
 - Curricular/Co-curricular activities
 - Common areas/Offices

Understanding the Impact of the Educational Program

- How program delivery is organized within a school:
 - School schedule/calendar
 - Traditional vs. Structured
 - Small learning communities
 - Team teaching
 - Level of infusion of technology
 - Themed learning
 - Local class size standards
 - Maintaining flexibility
 - Cross campus instruction

Understanding the Impact of the Educational Program

- What is/will be taught?
 - District curricula – present and projected
 - Specialized programs, Special Education, GATE etc.
 - Magnet or pull-out programs
- How is it (best) taught?
 - Instructional methods and delivery options
 - Level of use of laboratories, media centers and learning centers
 - Progression of technology

Class Size and Standards

- State standards vs. local standards
- What is adequate?
- Is adequate good enough or is it the best?
- Will that be adequate 10-15 years from now?
- Has your district adopted the local standards?
- Have you recently modified these standards?
- How frequently are standards reviewed and revised?
- Standards cover both quantitative and qualitative issues

Educational Specifications

- Educational specifications can be misleading
- Could have different meaning for different people
- Could have the board falsely think that educational programs have been adequately discussed
- An architect's definition is to define the facilities that will allow the users to adequately deliver the current or future educational programs
- In many cases, a deeper understanding of the program is lacking

Educational Specifications

- Educational Specifications from an educator's point of view mean that the facilities designed and built/modernized based on these specifications would be best suited and conducive to delivery of instruction to the current and future students. That if an anticipated program change occurs, either in the contents of instruction or their delivery, the designed space would be able to accommodate such changes smoothly without additional capital improvement commitment

Understanding the Role and Responsibility of a Board Member

- Pre-planning Stage:
 - Determine the educational program of the district
 - Understand how the facilities master plan supports the educational program
 - Develop and establish standards
- Planning Stage:
 - Be mindful if the planning process is responsive to the educational needs, inclusive and transparent
- Post Planning Stage:
 - Remain diligent regarding oversight and monitoring
 - Stay appropriately involved
 - Insist on reporting

How to Stay “Appropriately Involved”?

- Distinguish between micro-management and appropriate involvement
- Delegation is fine but the responsibility remains with you
- Require and read monthly progress reports
- Be aware of important decision points
- Be watchful of changes/change orders
- Simply put....if a decision impacts one of three elements (Scope, Budget and Schedule), that decision needs to be made by the board, either directly or **accountable** delegation

Determining the Need

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

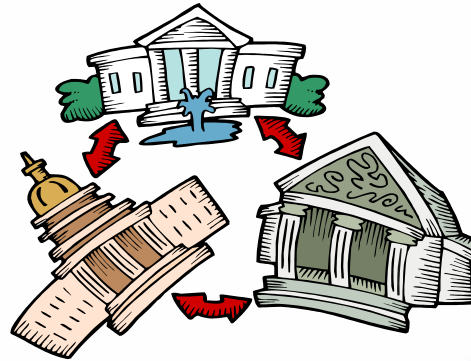
Quantifying Needs

- Use realistic data
- Utilize data driven decision-making
- Make reasonable allowances for contingency
- Cost out all facets of construction
- Include adequate oversight

Prioritizing Needs

- Kids first
- Overcome interest groups
- Overlook personal agendas
- Futuristic programs
- Cost/Benefit analysis
- First thing first, (The main thing)

School Construction Dollars Come From a Mixture of State and Local Sources



Funding Sources

- State General Obligation Bonds
- Local property taxes, with voter approval
- Developer impact fees on new construction
- Redevelopment Agency Agreements (RDA)
- Certificates of Participation (COP)

Local Funding Sources are of Several Types

- General Obligation bonds must be approved by voters (2/3 or 55%- Prop 39)
- Mello-Roos Community Facility District (CFD) bonds must be voter approved (2/3 vote)
- Parcel Taxes must be voter approved (2/3 vote)

Preferred Sources of Funding

- **The availability of funding sources varies from district to district**

QUESTIONS



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