

## GETTING STARTED

There are many reasons a school district might choose to undertake a Facility Master Planning Study:

- Student enrollment is projected to increase
- Student enrollment is projected to decline
- Decisions need to be made about whether to renovate or replace aging facilities
- Attendance center reconfigurations are required based on changing demographics, grade level reorganization, or new programming needs

Whatever the reason a district might choose to perform such an analysis, there are key components of every Facility Master Planning Study that should be considered:

- A broad spectrum of district constituents are included
- Quality information is gathered so that reliable and informative analytics are produced
- A healthy and transparent feedback loop is provided so the results of the study are straightforward and unambiguous
- A clear majority of stakeholders endorse the findings
- There are distinct and apparent action items – a clear road map is produced



## Objectives of a Successful Plan

# MASTER PLANNING



While these objectives are key to a successful study, there is not a single, packaged Facility Master Planning process that can be applied to every school district. Each investigation needs to be tailored to the unique needs of the district. The consultant a district engages to undertake a Facility Master Planning Study should be prepared to shape their approach to meet the district's particular needs. Key questions to ask your consulting team:

- What are their methods to arrive at a deep understanding of the culture and history of the district and community?
- Are the tools being suggested for information gathering going to work with the district's constituency?
- How will the consulting team provide dedicated and thorough leadership throughout the process?
- Will the results of the study be engaging and readily understood by the stakeholders?

There is a framework for Facility Master Planning that can be easily tailored to a district's needs. The overarching questions always need to be:

***Where are we?***

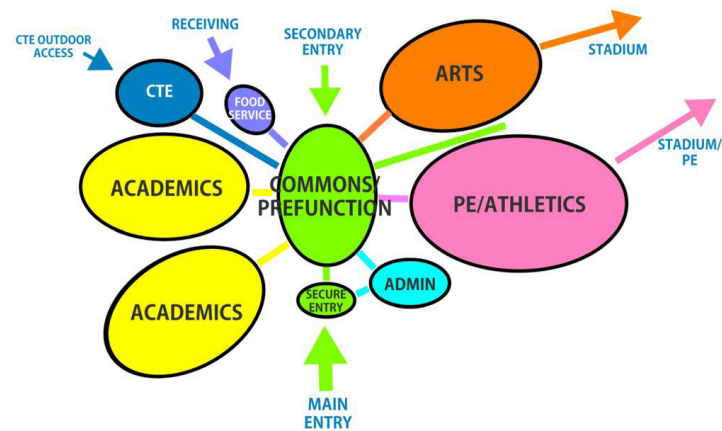
***Where are we going?***

***How do we get there?***

To answer these questions there is a linear process to follow. First, the consultant and the district need to identify and organize a team of individuals who will provide continuity throughout the study. Next, existing conditions, facilities and needs should be assessed. Once the lay of the land is established, the participants will undertake visioning exercises to establish goals and objectives. After a vision is put in place, it must be reviewed and refined to make sure it accurately reflects stakeholder input and assessed needs. Since this stage will result in establishing the road map for moving

forward, all participants must subscribe to the findings. Next, careful attention must be paid to the review and refinement stage of the Facility Master Plan. Finally, a strategy for implementation is put in place and the district activates the plan.

### BUILDING ORGANIZATION





## ORGANIZE - OBJECTIVES

- 1
  - Develop a clear understanding of the goals for facility planning
  - Engage district administration to define process
  - Determine timelines and decision making process
  - Identify participants and stakeholders
  - Establish communication lines

## ASSESS - EXISTING CONDITIONS

- 2
  - Review district demographics
  - Understand student population, both current and future
  - Study building capacities (maximum & operational)
  - Review structural integrity of facilities
  - Review mechanical and electrical systems
  - Look at fire, safety and energy codes
  - Consider sustainability and maintenance
  - Review educational spaces for optimal learning design
  - Review athletic facilities, media centers and auditoriums through the lens of the students' needs
  - Study site circulation and parking
  - Study student and staff accessibility
  - Look at district financial capacity and budget plans

## VISION - FUTURE GOALS

- 3
  - Involve the community in determining goals and priorities
  - Engage through interviews, forums, surveys and town hall meetings
  - Inclusive, hands-on visioning sessions to help find solutions
  - Define how district principles are applied to teaching and learning
  - An emphasis on energy efficient approaches, sustainable design strategies and Well Building priorities
  - Set a five-to-10-year vision for facility utilization



## REFINE – EVALUATE OPTIONS

4 Considering change that impacts the future of children is not only difficult, but will be emotional and challenging. It is imperative to be sensitive to this process and make sure the team leads the district through a process that informs, considers and helps find consensus through a vision that is right for the future of your facilities, your community and your children.

- Iterative and comparative review of solutions
- Identify strengths and weaknesses of options
- Feedback loop with stakeholders and community
- Cost impacts of proposals

## ACTIVATE – ACTION PLAN

- 5
  - Synthesize a recommendation that includes the perspectives of administration, committee and board members
  - Determine course of action for implementation with funding alternatives
  - Present final report
  - Strategize timeline for moving forward and establish a five-to-10-year overall schedule

## FINISHING STRONG

What does a district need in order to help make a Facility Master Planning Study productive?

- Identify district leadership dedicated to this project
- Establish clear lines of communication between the school district and firm engaged to conduct the Facility Master Plan
- Provide access to district facilities and any drawings or documentation for each building
- Help coordinate meetings with staff, administrators and the public
- Be enthusiastic participants in the process

### ***What defines a successful Facility Master Plan?***

- Students, parents and teachers are excited about the future of the district
- The road map is clear and concise
- The district is successful in passing a bond referendum
- The community supports the results



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