Facilities
Network Meeting
LACOE
Facilities Master Planning

June 8, 2017
Eric J. Hall - President
Eric Hall & Associates

EH&A

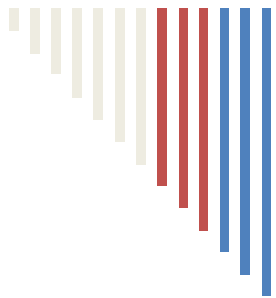HELPING SCHOOL DISTRICTS MEASURE UP

Agenda for Today

- ☐ Introduction
- ☐ Why a Master Plan?
- ☐ Master Plan Elements
- ☐ Demographics
- ☐ Classroom Inventory
- ☐ Condition Assessment
- ☐ Needs Analysis
- ☐ Cost Estimates
- ☐ Educational Specifications
- ☐ Funding Update
- ☐ Prioritization Process
- ☐ Summary

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Introduction

School Facilities Master Planning
A New Era of Construction

☐ One of two most important program areas for the business office in a district

☐ Facilities require a broad expertise in multiple disciplines and leadership

☐ Boards, superintendents and CBO's understand that facilities can be key to success and survival!

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School Facilities Master Planning
A New Era of Construction

☐ The teaching and learning environment is a major area of focus for instruction – the LCAP

☐ School facilities improvements can be the realization of a community's dreams and hopes for future generations of students

☐ Human resources and financial resources often dominate the district conversation

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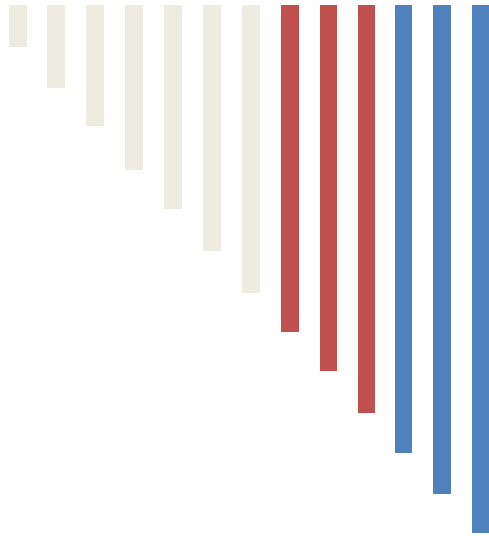
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School Facilities Master Planning
A New Era of Construction

☐ Limited funding and high costs results in a district's need to:

- Prioritize needs

- Develop criteria

- Be on the offense: aggressively pursue funding

- Be on the defense: efficiently manage costs

- Provide oversight

- Plan for the best, but have contingencies

- Staff up in the Facilities program

- Find a mentor!

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Why a Master Plan?

What is a Long Range School Facilities Master Plan?

- ☐ Road map to good planning
- ☐ Long-term blueprint
- ☐ Focus on changing Facilities needs
- ☐ Developed with school community input
- ☐ Projects and priorities for consideration
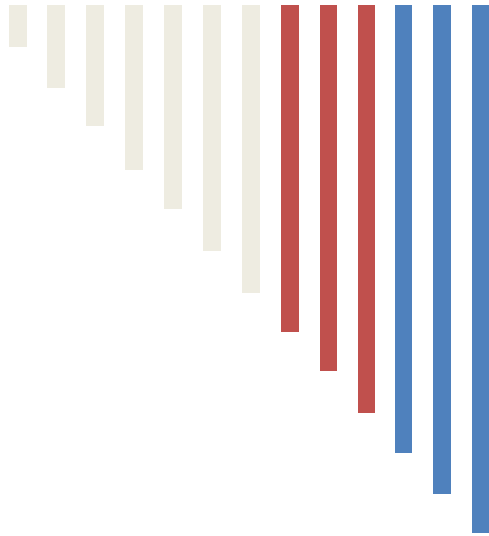- ☐ Funding sources identified

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LRFMP: Improving the teaching and learning environment

LACOE- EH&A School District Facilities Master Planning

Master Plan Elements

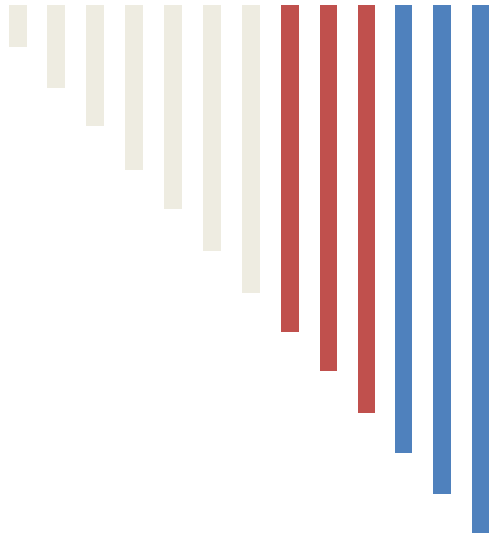# Master Plan Elements

- ☐ Enrollment projections
- ☐ District demographics information
- ☐ Classroom capacity analysis
- ☐ Educational specifications
- ☐ Facilities condition assessments
- ☐ Update cost estimates
- ☐ Summary of capital Facilities funds
- ☐ Prioritizing projects
- ☐ Funding and timing

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Demographics

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District Demographics Information

- ☐ Population analysis
- ☐ Age distribution
- ☐ Economic forecast
- ☐ Enrollment projections
  - ■ Current enrollment analysis
  - ■ Grade level advance
  - ■ Building permits
  - ■ Birth rates
- ☐ Charter enrollment
- ☐ 10-year enrollment History

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Updated Enrollment Projections

□ Enrollment Projections

- 1 to 7 years - build out assumptions
- Student generation rates

□ Projection Methods

- 3, 5, 7 and/or 10 year
- Average: all years equal weight
- Cohort: weighted average, recent year greater weight, previous years less weight

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District Age Distribution Example

National School District Age Distribution 2000 vs. 2010

LACOE- EH&A School District Facilities Master Planning
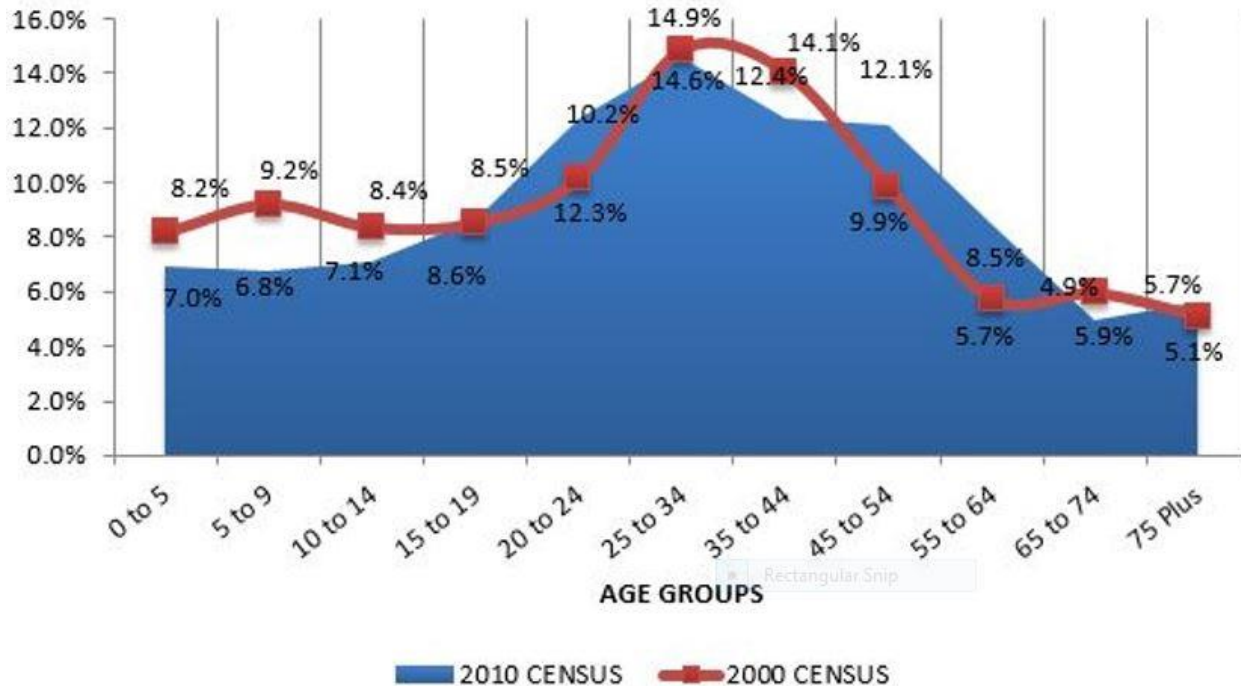
Enrollment History Example

Escondido Union School District
Enrollment History
2004-05 through 2013-14 (excl. Charters)

LACOE- EH&A School District Facilities Master Planning
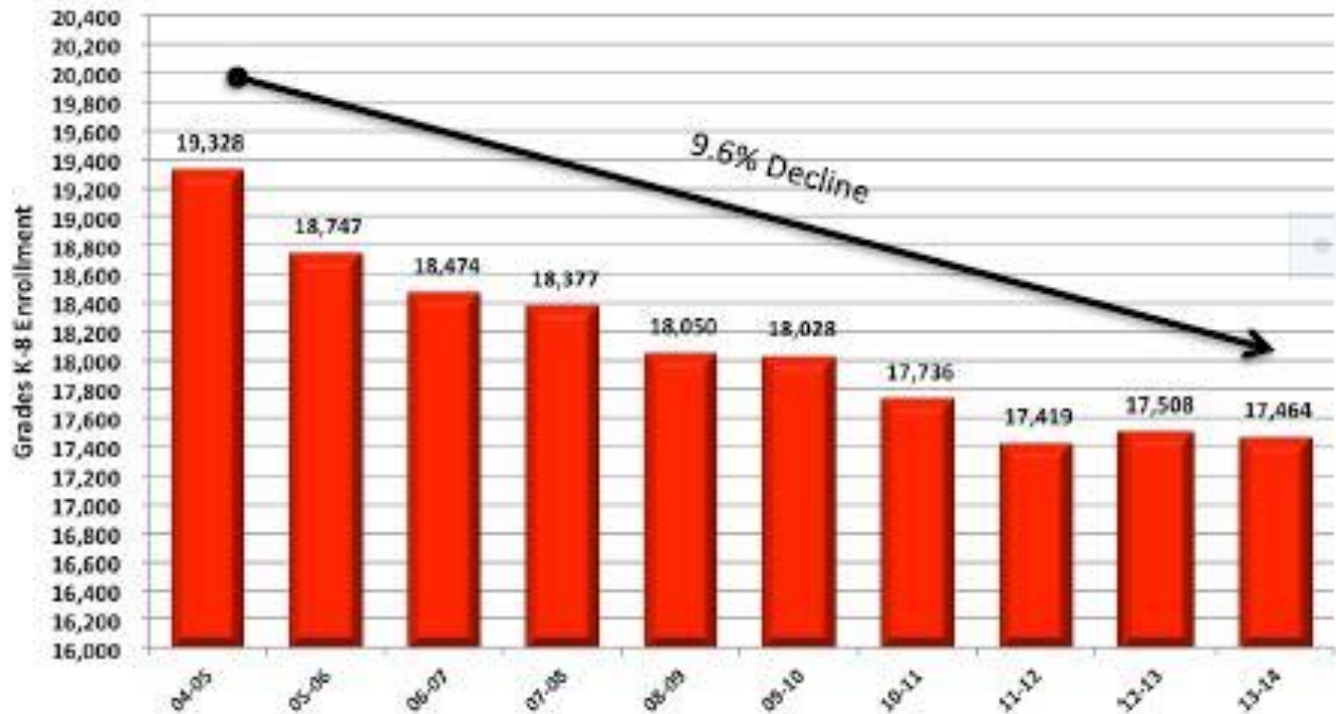
Enrollment Projection Example
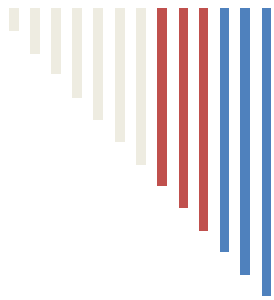
National School District Enrollment Projections
2013-14 through 2022-23

	13-14	14-15	15-16	16-17	17-18	18-19	19-20	20-21	21-22	22-23
■ 3-Year Simple	5,705	5,621	5,605	5,453	5,375	5,303	5,273	5,207	5,168	5,148
■ 3-Year Weighted	5,719	5,643	5,632	5,483	5,409	5,341	5,311	5,245	5,206	5,182
■ 5-Year Weighted	5,728	5,670	5,677	5,548	5,489	5,428	5,398	5,331	5,293	5,269
■ 5-Year Simple	5,738	5,695	5,717	5,605	5,557	5,506	5,476	5,409	5,371	5,347

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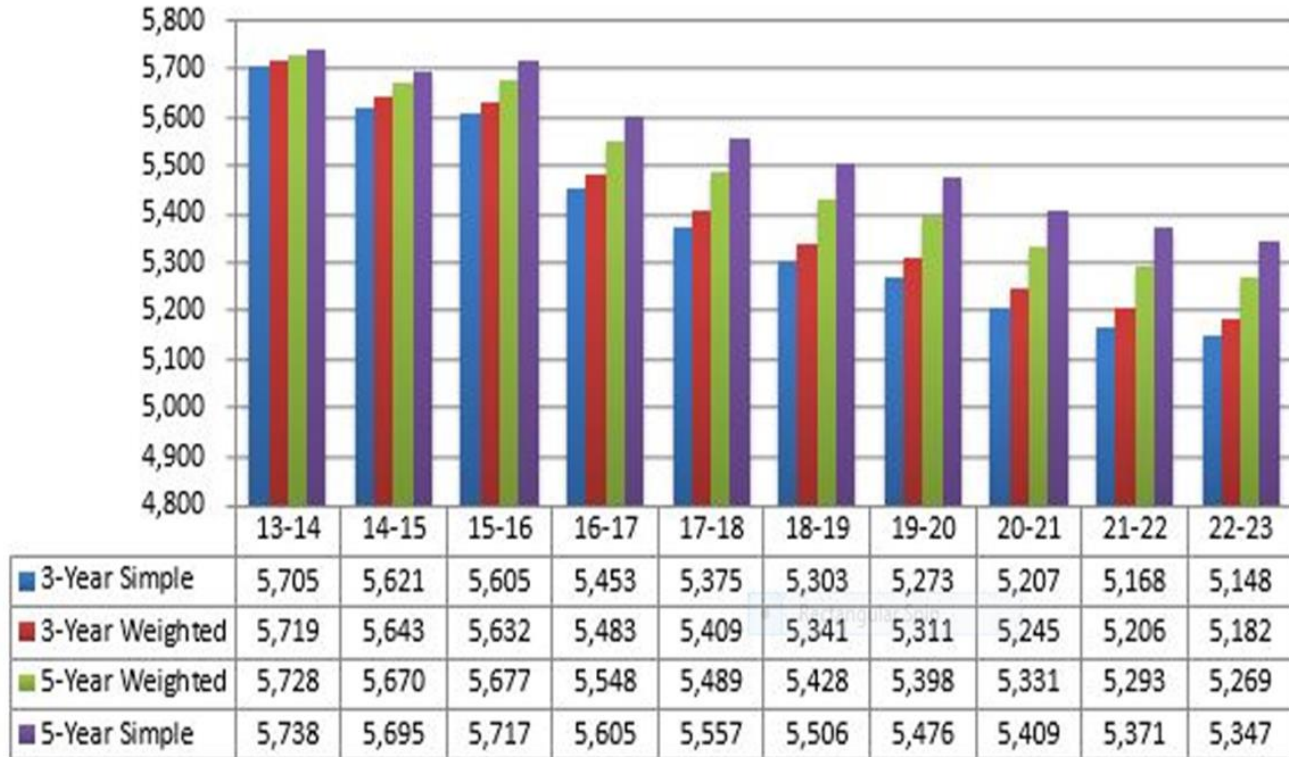
Classroom Inventory

Classroom Capacity Analysis

☐ A Guiding Tool for:

- ■ Student transfer policies
- ■ Class size adjustments to goals
- ■ Adequate school size determination
- ■ Attendance area decisions
- ■ Development of policies and regulations

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Updated Inventory of All Instructional Spaces

☐ Rooms

☐ Grade levels

☐ Programs

☐ Adequacy

☐ Special spaces

☐ Class size reduction goals

☐ District standards

☐ State standards

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Classroom Inventory Example

Room No.	District Capacity				State Capacity			Teacher and Grade	Total Sq. Ft.
	Room Type				Gross CR Inventory	Permanent	Portable		
	Pre-K, K-3	Grades 4-5	Special Ed						
			Severe	Non-Severe					
Edison Language Academy									
100	1				1	1		ELD	
101	1				1	1		Tejeda, 1st	
102	1				1	1		Mojica, 1st	
103	1				1	1		Cueva, 1st	
104	1				1	1		Melendez, 2nd	
105	1				1	1		Jimenez, 2nd	
106	1				1	1		Martinez, 2nd	
107	0				1	1		Ramirez, PS Arts	
108	0				1	1		Cerrato, Primary CREST	
109	0				1	1		Leo, Primary CREST	
110	0				1	1		Jessie, Pirmary CREST	
111	1				1	1		Meade, K	
112	1				1	1		Banks, K	
113	1				1	1		Fullerton, K	
200		1			1	1		Maldegul, 4th	
201		1			1	1		Brumer, 4th	
202		1			1	1		Salmaggi, 4th	
203		1			1	1		Murcia, 5th	
204		1			1	1		Morales, 5th	
205		1			1	1		Naranjo, 5th	
206	0				1	1		Upper CREST	
207	0				1	1		unassigned	
208	0				1	1		unassigned	
209	1				1	1		Alvarez, 3rd	
210	1				1	1		Boxer, 3rd	
211	1				1	1		Williams, 3rd	
314	0				1	1		Ellis, Spanish Reading	
315	0				1	1		Martinez, Computer Tech.	
316	0				1	1		Drosdick, Speech Pathologist	
317				1	1	1		SAI	
319	0				1	1		Marroquin, Family Serv.	
320	0				1	1		Martinez, School Psychologist	
321	0				1	1		Family Svcs. Intern, Psych. Intern	
407	1	0			0	0		Preschool CR.	
409	1	0			0	0		Preschool CR.	
Total	**15**	**6**	**0**	**1**	**33**	**33**	**0**		

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Classroom Capacity Example

Edison Language Academy

District Program Capacity Calculations

CR, K-3, w/out special ed	15
Students / Rm.	24
Subtotal	380
CR, 4-5, w/out special ed	6
Students / Rm.	27
Subtotal	162
Special Ed - Severe	0
Students / Rm.	9
Subtotal	0
Special Ed - Non-Severe	1
Students / Rm.	13
Subtotal	13

District Capacity 2013-2014

636

State Capacity Calculations

Gross CR, K-5, w/out special ed	32
Students / Rm.	25
Subtotal	800
Gross CR, Special Ed- severe	0
Students/Rm	9
Subtotal	0
Gross CR, Special Ed- non severe	1
Students/Rm	13
Subtotal	13

State Capacity 2013-2014

813

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Comparing Capacity to Projected Enrollment for Asset Management

	Number of Classrooms	Classroom Capacity - DISTRICT GOAL	Classroom Capacity - CURRENT LOADING		2016-17 Enrollment (Unofficial)	% UTILIZATION TO SITE'S GOAL CAPACITY VS. PROJECTION			
						vs. 2017-18 Enrollment Projection	vs. 2020-21 Enrollment Projection	vs. 2023-24 Enrollment Projection	vs. 2026-27 Enrollment Projection
School Name									
Del Rio ES	19	475	517		415	82.7%	77.0%	76.3%	76.5%
Foussat ES	28	686	742		684	96.1%	91.?	90.7%	90.9%
Garrison ES	23	509	537		391	77.5%	75.5%	74.5%	74.6%
Ivey Ranch ES	33	821	898		758	92.1%	87.9%	89.2%	89.3%
Laurel ES	24	554	596		445	78.6%	78.8%	79.0%	79.1%
Libby ES	27	661	710		561	81.9%	80.2%	80.2%	80.3%
McAuliffe ES	28	722	792		633	83.9%	76.7%	76.3%	76.4%
Mission ES	29	689	731		553	79.5%	76.9%	77.9%	78.1%
Nichols ES	31	727	776		688	95.9%	92.3%	91.8%	92.0%
North Terrace ES	35	839	930		787	92.1%	89.1%	86.8%	86.5%
Palmquist ES	27	671	734		662	95.8%	94.3%	94.3%	94.5%
Reynolds ES	28	680	722		627	93.6%	92.6%	92.6%	92.8%
San Luis Rey ES	18	451	493		344	72.4%	70.6%	70.1%	70.2%
Santa Margarita ES	31	744	821		678	86.6%	79.8%	77.0%	76.9%
South Oceanside ES	31	744	821		739	96.0%	95.6%	94.4%	94.5%
Stuart Mesa ES	28	613	655		524	83.4%	76.8%	74.0%	74.1%
Cesar Chavez MS	28	740	764		753	102.4%	90.3%	79.1%	77.8%
Jefferson MS	28	688	764		647	94.5%	81.9%	71.8%	70.6%
King MS	52	1364	1407		1466	106.8%	96.9%	85.0%	83.7%
Lincoln MS	33	909	939		836	91.4%	80.6%	70.9%	69.7%
El Camino HS	93	2409	3025		2957	120.5%	116.2%	104.9%	88.8%
Oceanside HS	89	2161	2673		2137	99.2%	98.1%	88.3%	74.8%
Ocean Shores HS	5	129	161		110	85.6%	85.6%	85.4%	85.4%
NPS	0	0	0		15				
Adult Transition	N/A	N/A	N/A		43				
Totals	768	18,986	21,208		18,453				

Red indicates where the current enrollment or the projection **exceeds** the stated "Classroom Capacity - Current Loading"

CBA is used for the AARC Center

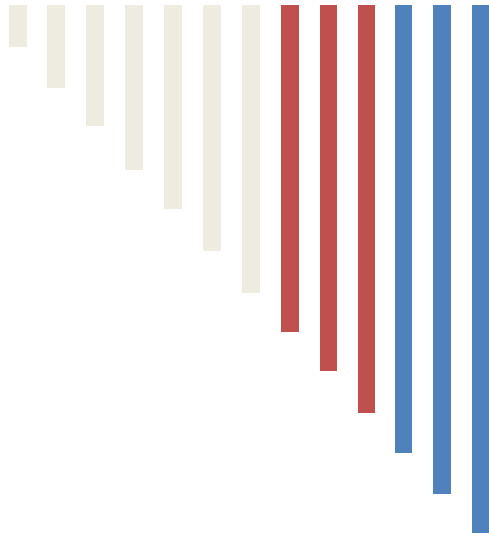Ditmar is used for the Adult Transition Program

Sources

2016-17 Enrollment: OUSD Capacity: OUSD & EH&A

Eric Hall & Associates 20117-18 Enrollment Projections

2016-17 Enrollment data does not include PreK SDC

GREEN	95% AND ABOVE UTILIZATION TO "GOAL" CAPACITY
YELLOW	85% TO 94% UTILIZATION TO "GOAL" CAPACITY
RED	BELOW 85% UTILIZATION TO "GOAL" CAPACITY

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Condition Assessment

Update Facilities Condition Assessment Updates

☐ Coordination with District Architect(s) and Engineer(s)

☐ Committee Process – Builds District Capacity

☐ Facilities Assessment Process

☐ Prioritize Facilities Improvement Projects

☐ Recommend and Rank Projects

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# Facilities Needs Assessments Committee Deliberations

LACOE- EH&A School District Facilities Master Planning

Dot Matrix Exercise

Campus	Total Projects	Total Dot Points	Number of Projects w/ Dots	Highest Number of Points to One Project	Project with Highest Number of Points
Central	84	7	3	4	HVAC/electric upgrades
Child Nutrition Services	77	15	4	5	Kitchen upgrades at John Otis
District Office	29	4	3	2	Larger parking lot
El Toyon	63	15	3	7	AC in all classrooms
Ira Harbison	48	11	4	5	Permanent library
John Otis	67	23	5	11	New two story building
Kimball	65	11	4	5	Secure pathway from office to classrooms
Las Palmas	70	9	4	3	Security cameras/upgraded exterior lighting
Lincoln Acres	57	21	5	7	Additional staff and student restrooms
M&O	18	9	4	5	Electrical Upgrades
Olivewood	45	6	4	2	Drop-off/safe and secure fencing
Palmer Way	93	9	4	5	Upgrade office/teacher workroom
Preschool	23	5	3	2	Sensory room/centralized preschool
Rancho de la Nacion	37	9	4	3	Upgrade parent drop-off/pick-up
Transportation	7	0	0	0	N/A
Warehouse	27	9	4	5	Centralized Kitchen
Total	810	163	58	71	

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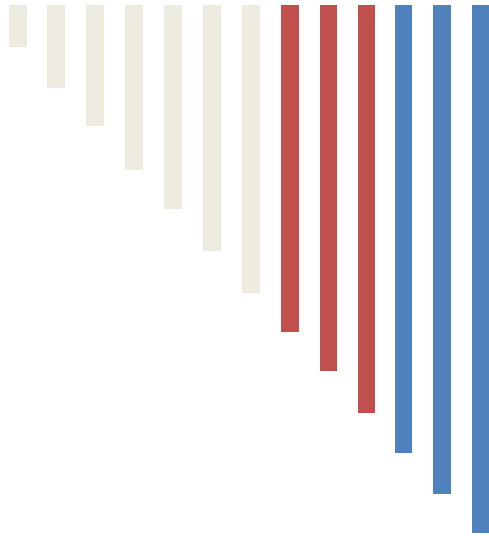HELPING SCHOOL DISTRICTS MEASURE UP
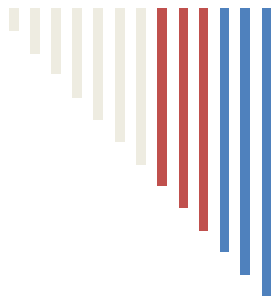
Summary
Facilities Assessment

Campus	Total Projects	Total Dot Points	Nr of Projects with dots	Highest Nr of Points to One Project	Project with Highest Nr of Points	Campus Ranking
District Office	3	0	0	n/a	n/a	n/a
IT– Districtwide	6	21 (including district wide mass notification system)	2	**20**	District wide mass notification system	n/a
Earlimart Elementary School	19	44	8	11	Security Fencing/access Control	1st
Alila School	5	25	4	11	Security Fencing/access Control	4th
Earlimart Middle School	21	43	9	12	Independently controlled HVAC units	1st
Grand Total	**54**		**23**			

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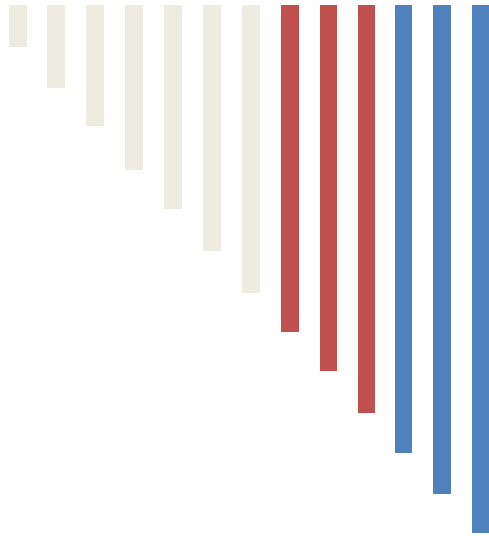
Needs Analysis

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Facilities Needs Analysis

- ☐ Engineering review
- ☐ Safety and security
- ☐ M&O input
- ☐ Facilities site assessments
- ☐ Work order history - tie in
- ☐ Visual inspections
- ☐ Site capacities
- ☐ Repair or replace?

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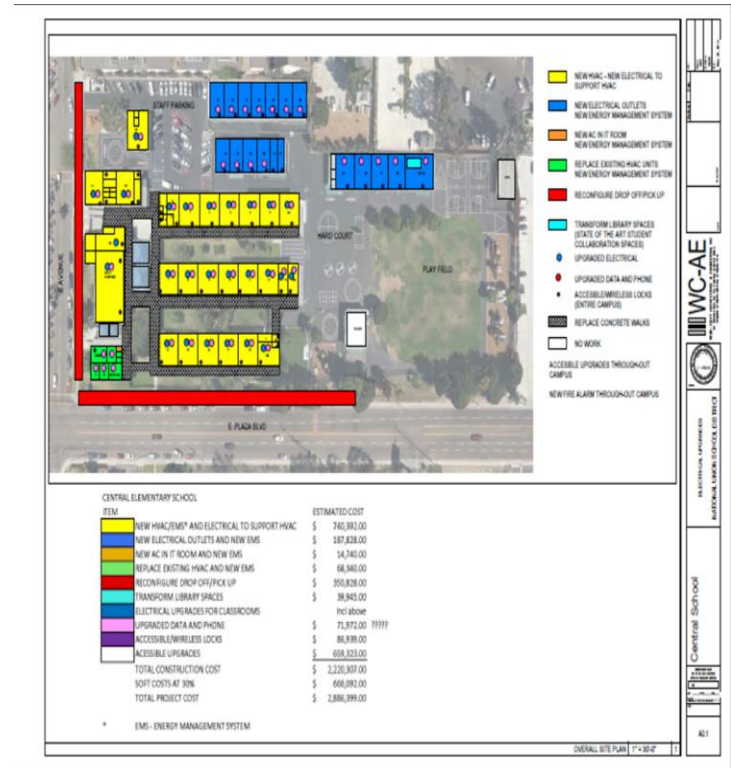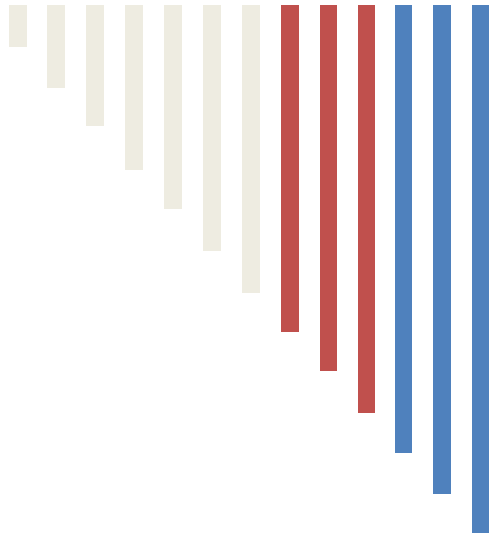
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Cost Estimates

Updated Cost Estimates

☐ Work with District Staff on scope and priorities

☐ District Architect(s) or estimating firm

☐ Develop hard and soft costs

☐ Refine with an inflation projection

☐ Include project contingencies (key!)

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Educational Specifications

Educational Specifications

- ☐ The teaching and learning environment
- ☐ Standards for design
- ☐ Specifications and area of rooms by function
- ☐ Equity and standardization
- ☐ Requirements by grade level and program
- ☐ 21st Century learners
- ☐ Saving operational funds
- ☐ What works & what doesn't

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Educational Specifications (cont.)

☐ Components:

- Trends in technology

- Language learning

- Common Core Standards

- Flexible spaces, furniture

- Broad band access district wide

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Example Educational Specification

Grade Span or Specific Area: Primary Elementary Classroom

Enrollment/Personnel: Up to 32 students, 1 teacher

Introduction: The primary elementary classroom should be large enough for various learning activities such as circle time, small and large group instruction, and age appropriate technology devices.

Curriculum to be Taught: Common Core State Standards aligned ELA and math, CA CCSS English Language Development Standards, Next Generation Science Standards based science, and social studies, as well as music, art, physical education. Technology and problem solving is taught throughout the subject areas.

Educational Outcomes: Mastery of all grade level standards preparing students for college and career readiness

Discernible Trends	Teaching, Learning, and Other Activities in Specific Areas	Facility Considerations	Special Requirements or Other
Technology: *Wireless technology, one to one devices suitable for young learners* **Language Learning:** *Language experiences, developmental grouping, language experiences, intentional academic vocabulary* **Common Core State Standards:** *Problem solving, citing evidence, reasoning, depth of knowledge and rigor* **STEAM:** *Experimenting, integration of tech, math and engineering concepts in thematic units*	English Language Arts • Shared reading • Guided Reading • Small motor skills • Writing process and workshop • Group/partner work • ELD- language experience, Realia, developmental grouping • Whole group and small group work with electronic devices	Large open floor space Durable rugs for sitting and student work space with squares for student places Low tables for visuals Space for writing center, library reading, small groups Wall space to display work Ceiling-mounted LCD projector and wireless streaming (airplay) device (e.g., Apple TV) Retractable screen communications system Space for age appropriate computers on desk tops, as well as hand held devices	Classroom walls should be able to open to provide ability to team teach, and combine students for grouping experiences Cabinets for student storage needs Storage room for volume of materials in primary classes Storage for student backpacks Sink with drinking fountain at appropriate height 4- 2 student tables with chairs for centers, for bookshelves, tables Kidney tables for small groups with 6 chairs Although in class bathrooms are not necessary, consideration to proximity of bathroom should be taken into account.

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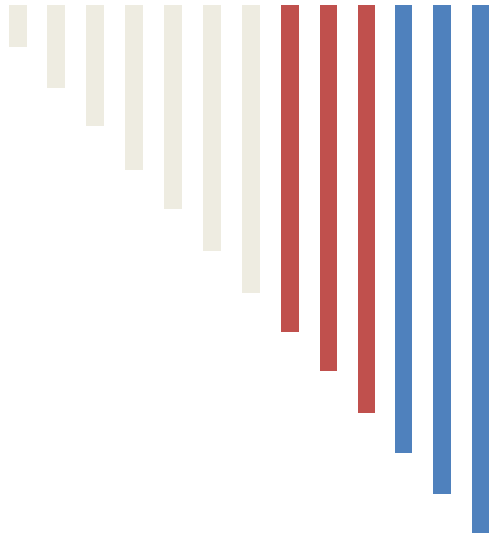
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Funding Update

Capital Facilities Funds Update

- ☐ Local Bonds
- ☐ Developer Fees
- ☐ State Funding
  - ◼ Prop 51
  - ◼ Current Eligibility
  - ◼ Future Eligibility
  - ◼ New Construction
  - ◼ Modernization
  - ◼ Charter School
- ☐ Prop 39 Clean Energy Funds
- ☐ General Fund: Deferred Maintenance

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Sample Funding Options Matrix

Potential State Modernization Funding at Eligible Sites

Site	Number of Eligible Pupil Grants	Base Grants	SDC Severe	SDC Non-Severe	Automatic Fire Detection/Alarm System	Automatic Fire Detection/Alarm System – SDC Severe	Automatic Fire Detection/Alarm System – SDC Non-Severe	Over 50 years	Over 50 years – SDC Severe	Over 50 years – SDC Non-Severe	Total Value of Eligible Grants
Alila Elementary (3-5)	TBD	$ 3,928	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
Earlimart Elementary (K-2)	TBD	$ 3,713	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
Earlimart Middle (6-8)	TBD	$ 5,141	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
Earlimart Community Day (4-8)	TBD	$ 3,713	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
										Total	$ -

Potential State New Construction Funding

Site	Number of Eligible Pupil Grants	Base Grants	SDC Severe	SDC Non-Severe		Total Value of Eligible Grants
Earlimart Districtwide	165 Elementary	$ 9,751	N/A	N/A		$ 1,608,915
Earlimart Districtwide	26 Middle	$ 10,312	N/A	N/A		$ 268,112
				Total Value of New Construction and Modernization Potential Funding		$ 1,877,027

Source: Office of Public School Construction Remaining Eligibility, Modernization and New Construction December 24, 2013
Notes:
1) Values are based on current Grant Amounts Adjusted January 23, 2013 by the State Allocation Board
2) Calculations are preliminary for planning purposes only
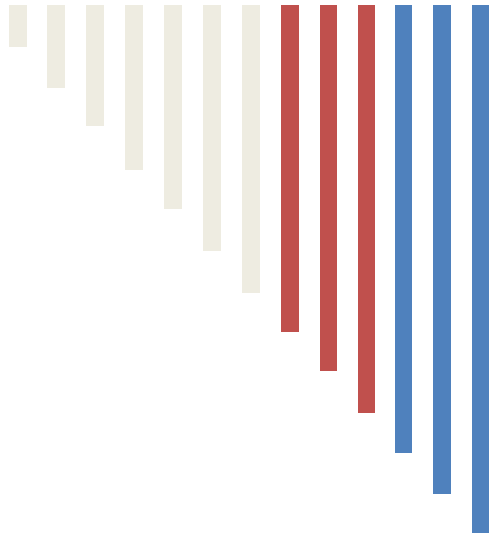3) EH&A will evaluate sites for potential additional eligibility and funding

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State School Facilities Program Funding Eligibility Matrix

Campus	Total Projects	Total Dot Points	Nr of Projects with dots	Highest Nr of Points to One Project	Project with Highest Nr of Points	Campus Ranking
District Office	3	0	0	n/a	n/a	n/a
IT– Districtwide	6	21 (including district wide mass notification system)	2	**20**	District wide mass notification system	n/a
Earlimart Elementary School	19	44	8	11	Security Fencing/access Control	1st
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Grand Total	**54**		**23**			

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Prioritization Process

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How do we Decide on Project Priorities?

Five major sources of inputs into Facilities needs

1. Advisory committee
2. Condition assessments
3. Instructional needs
4. District maintenance
5. Technology plan
6. (Board priorities)

Projects to be developed by site and program

Deciding on Priorities

☐ Establish Criteria for Priority Ranking

- Age of buildings

- Portable removal plan

- Matching money

- Instructional environment

- Regional equity

- Safety and security

- Schools not recently improved

- Enrollment

☐ Coordinate with executive team for board consideration

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Update of Project Priorities

- ☐ Facilitate the decision making process
- ☐ Work with district architect(s) and consultants
- ☐ Develop facilities master plan list of project priorities and phasing plans
- ☐ Work closely with facilities and M&O staff
- ☐ Coordinate with superintendent
- ☐ Facilitate with executive team
- ☐ Craft recommendations for Board consideration

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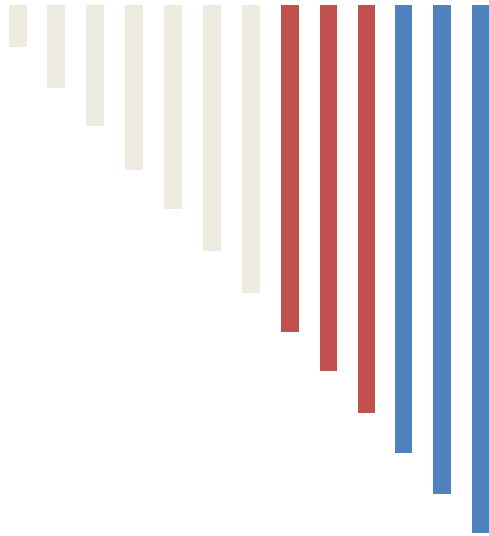HELPING SCHOOL DISTRICTS MEASURE UP

Deciding on Priorities

- ☐ Recommendations reviewed and discussed at executive cabinet level
- ☐ Who best understands the Board?
- ☐ Board review and approval
- ☐ Consider an outside facilitator
- ☐ Consider a master plan consultant

The consultant guides and the district decides!!

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Summary

LRFMP Summary

- ☐ Master Planning – What it is?
- ☐ Master Plan Elements
- ☐ Demographics and Enrollment Projections
- ☐ Master Plan Parts and Pieces
- ☐ Analysis of Capacity
- ☐ Assessment of Facilities
- ☐ Specifications
- ☐ Funds
- ☐ Cost Estimates
- ☐ Prioritization of Projects
- ☐ Capital Facilities Funds – Maximize/Timing

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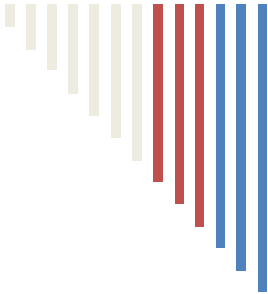
HELPING SCHOOL DISTRICTS MEASURE UP

Thank you for the opportunity to be of service to

LACOE and the LA County School Districts you serve

Thank You!!

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