


What's New in Facility Master Planning?



*March 16, 2018
CASBO Southern Section*

Eric Hall, EH&A President



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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



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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



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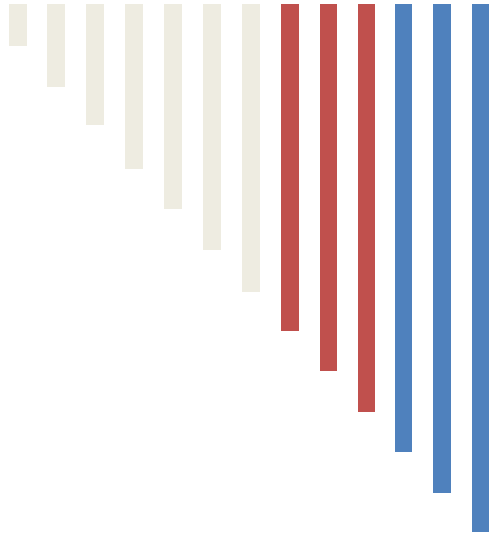
School Facilities Master Planning

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



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Why a Master Plan?



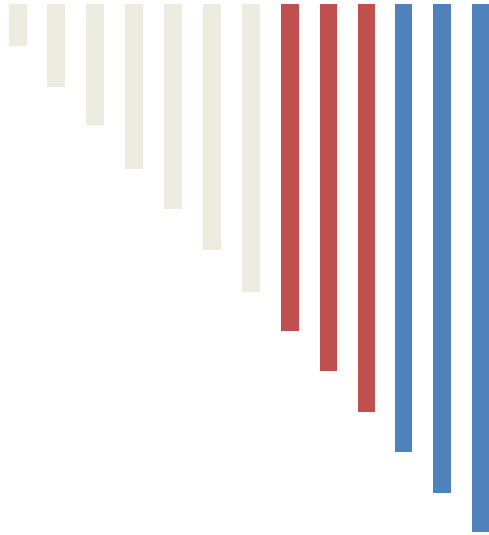
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What is a Long Range School Facilities Master Plan?

- ❑ Road map to good planning
- ❑ Long-term blueprint
- ❑ Focus on changing Facilities needs
- ❑ Developed with school community input
- ❑ Projects and priorities for consideration
- ❑ Limited Funding – All Sources Explored



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Master Plan Elements



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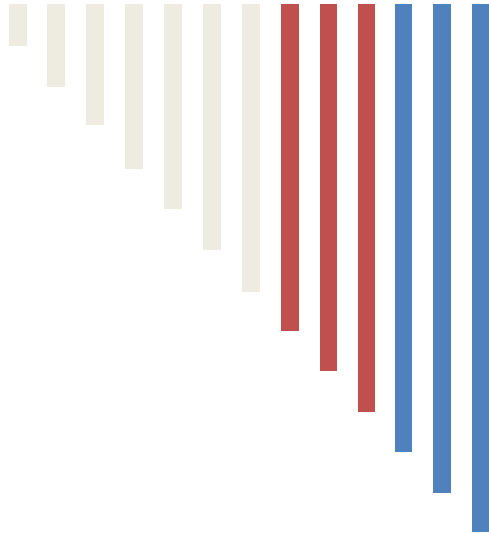


Master Plan Elements

- ☐ 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

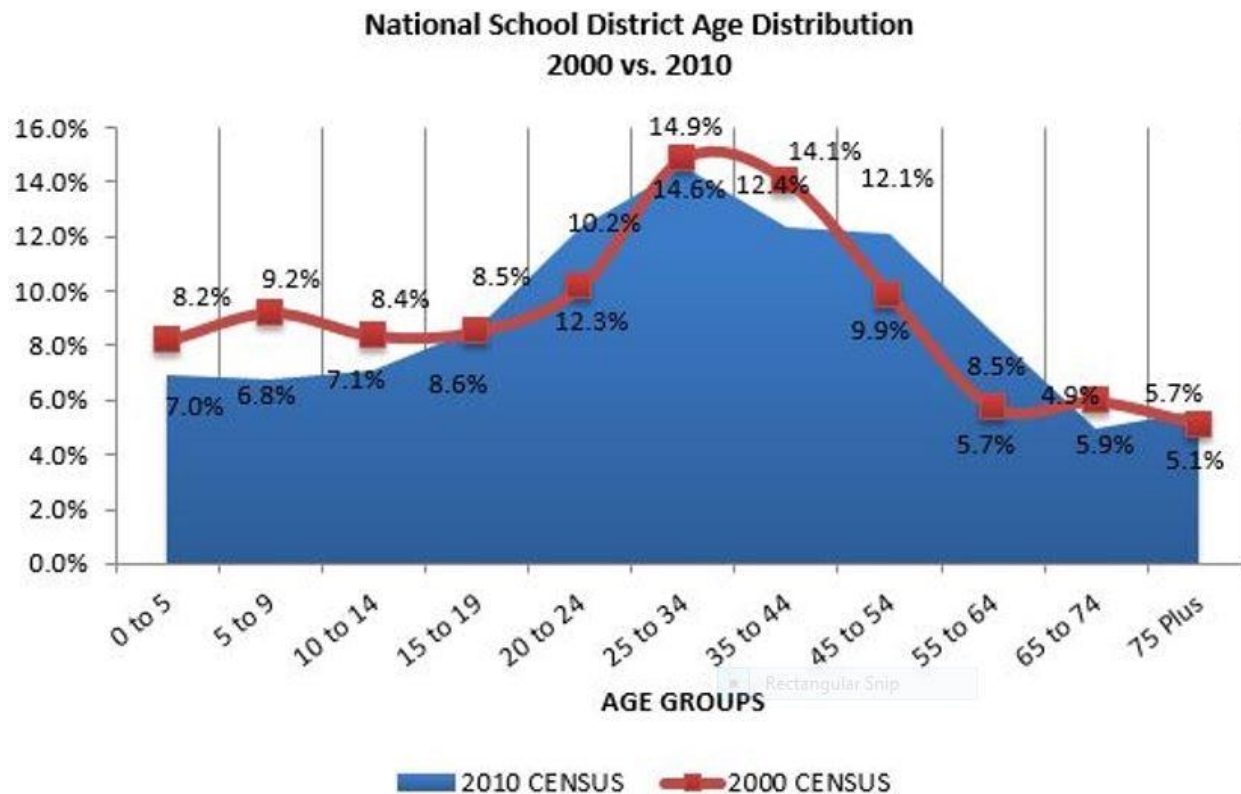
□ Projection Methods

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



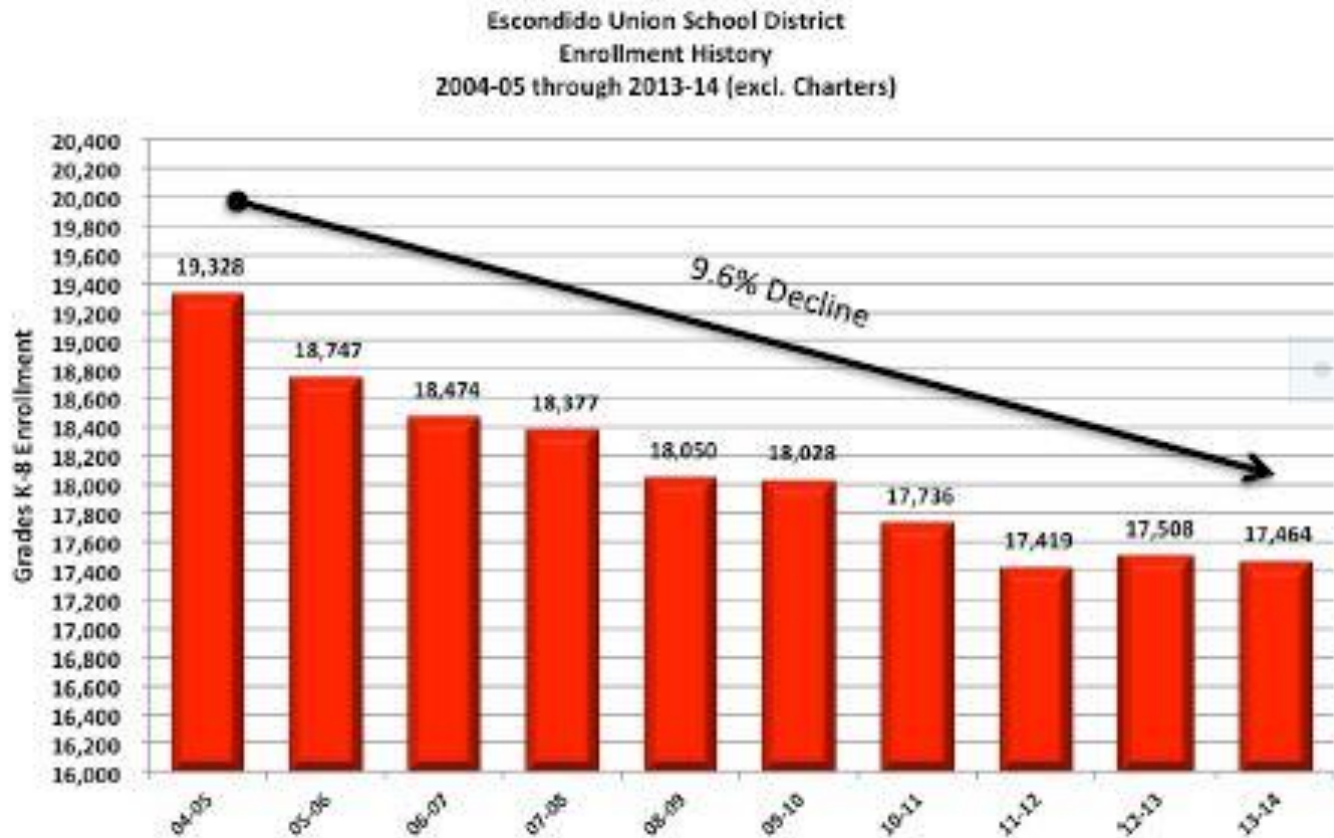
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District Age Distribution Example



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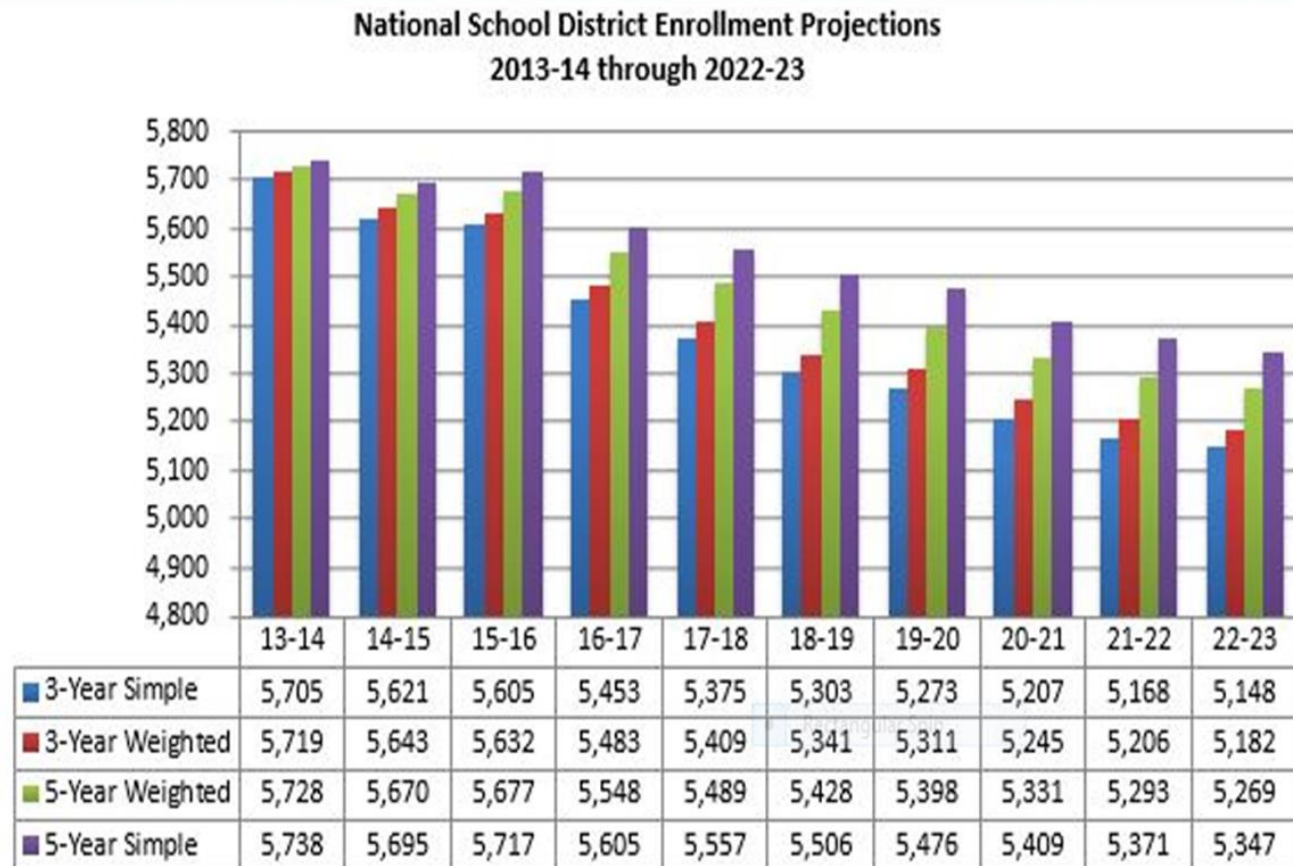
Enrollment History Example



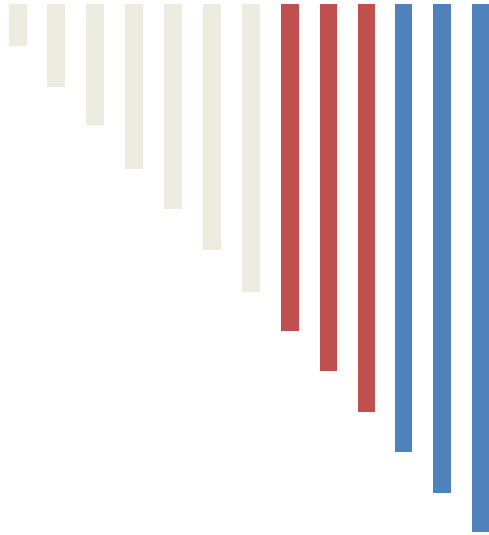
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Enrollment Projection Example



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Classroom Inventory



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Classroom Capacity Analysis

- A Guiding Tool for:
 - Baseline for State Funding
 - Developer Fee Justification & Negotiations
 - Student transfer policies
 - Class size adjustments to goals
 - Adequate school size determination
 - Attendance area decisions
 - Development of board 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		Tajeda, 1st	
102	1				1	1		Mojica, 1st	
103	1				1	1		Queva, 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, Primary 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		Bruener, 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		Avarez, 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		SAJ	
318	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	
408	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

360

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

535

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)
School Name				
Del Rio ES	19	475	517	415
Foussat ES	28	686	742	684
Garrison ES	23	509	537	391
Ivey Ranch ES	33	821	898	758
Laurel ES	24	554	596	445
Libby ES	27	661	710	561
McAuliffe ES	28	722	792	633
Mission ES	29	689	731	553
Nichols ES	31	727	776	688
North Terrace ES	35	839	930	787
Palmquist ES	27	671	734	662
Reynolds ES	28	680	722	627
San Luis Rey ES	18	451	493	344
Santa Margarita ES	31	744	821	678
South Oceanside ES	31	744	821	739
Stuart Mesa ES	28	613	655	524
Cesar Chavez MS	28	740	764	753
Jefferson MS	28	688	764	647
King MS	52	1364	1407	1466
Lincoln MS	33	909	939	836
El Camino HS	93	2409	3025	2957
Oceanside HS	89	2161	2673	2137
Ocean Shores HS	5	129	161	110
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 2011-18 Enrollment Projections

2016-17 Enrollment data does not include PreK SDC

% 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
82.7%	77.0%	76.3%	76.5%
96.1%	91.1%	90.7%	90.9%
77.5%	75.5%	74.5%	74.6%
92.1%	87.9%	89.2%	89.3%
78.6%	78.8%	79.0%	79.1%
81.9%	80.2%	80.2%	80.3%
83.9%	76.7%	76.3%	76.4%
79.5%	76.9%	77.9%	78.1%
95.9%	92.3%	91.8%	92.0%
92.1%	89.1%	86.8%	86.5%
95.8%	94.3%	94.3%	94.5%
93.6%	92.6%	92.6%	92.8%
72.4%	70.6%	70.1%	70.2%
86.6%	79.8%	77.0%	76.9%
96.0%	95.6%	94.4%	94.5%
83.4%	76.8%	74.0%	74.1%
102.4%	90.3%	79.1%	77.8%
94.5%	81.9%	71.8%	70.6%
106.8%	96.9%	85.0%	83.7%
91.4%	80.6%	70.9%	69.7%
120.5%	116.2%	104.9%	88.8%
99.2%	98.1%	88.3%	74.8%
85.6%	85.6%	85.4%	85.4%

GREEN

YELLOW

RED

95% AND ABOVE UTILIZATION TO "GOAL" CAPACITY

85% TO 94% UTILIZATION TO "GOAL" CAPACITY

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



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Spend Your Dot 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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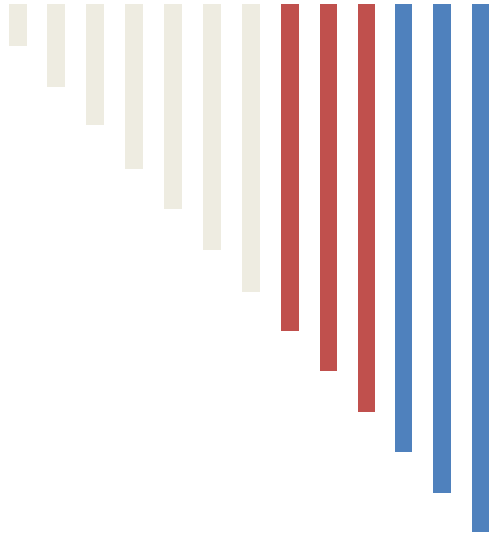


Summary Facilities Assessment

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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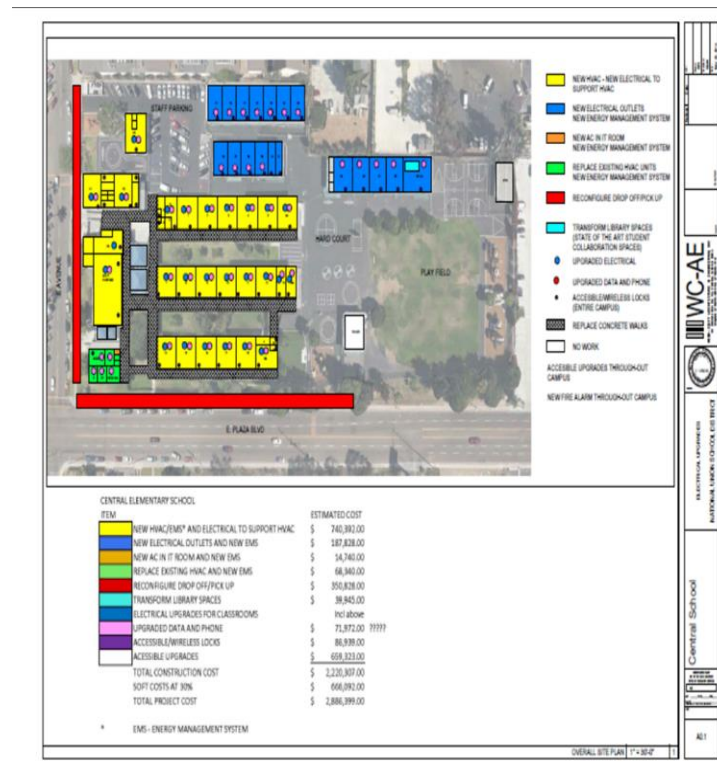
Needs Analysis



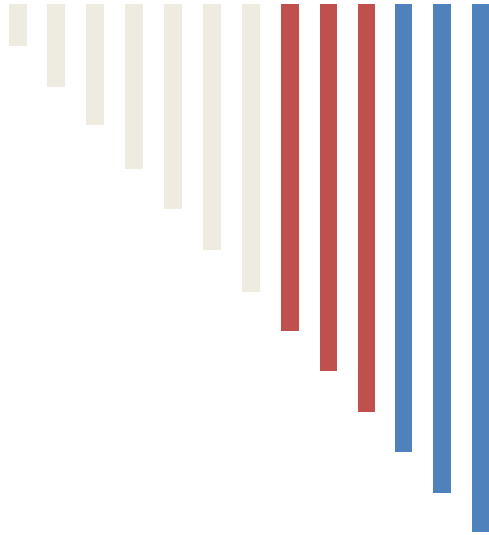
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Facilities Needs Use a Variety of Inputs

- 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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Cost Estimates



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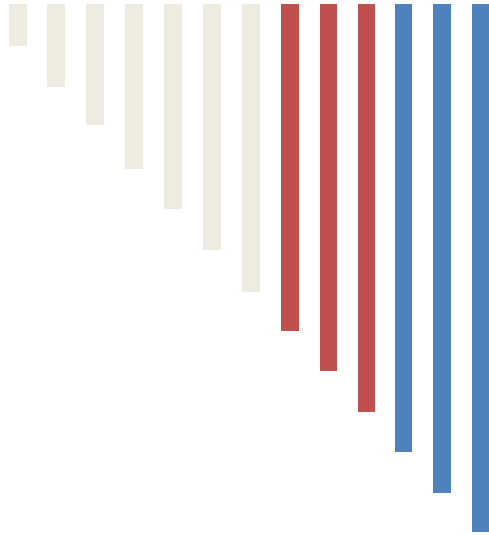


Updated Cost Estimates

- ☐ 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



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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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REASONS TO VOTE YES!

Increased state and federal funding for schools, which has increased the need for more classroom space.

TEACHER RETENTION
BUTTS

OUTDATED FACILITIES
Many schools have been built more than 50 years ago. The only way to attract top talent is to provide a safe, modern learning environment. Modern facilities and equipment are essential for the future of our students.

Older buildings are difficult to maintain. Heating, cooling, ventilation and all other systems are old and inefficient. Upgrading the HVAC system is essential for the future of our students.

MAINTENANCE

TECH CONTENT
The state of California is a leader in technology. Our students need to be equipped with the latest technology to be successful in the 21st century.

DATA MONITORING

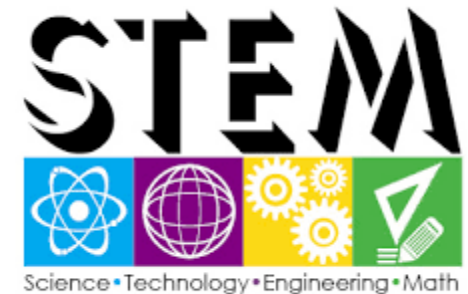
The state of California is a leader in technology. Our students need to be equipped with the latest technology to be successful in the 21st century.

HELP IMPROVE SCHOOL FACILITIES

Educational Specifications

□ Components:

- Trends in tech
- Language learning
- Common Core Standards
- Flexible spaces, furniture
- Broad band access district wide
- Science, Tech, Engineering, Math



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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
<p>Technology: Wireless technology, one to one devices suitable for young learners</p> <p>Language Learning: Language experiences, developmental grouping, language experiences, intentional academic vocabulary</p> <p>Common Core State Standards: Problem solving, citing evidence, reasoning, depth of knowledge and rigor</p> <p>STEAM: Experimenting, integration of tech, math and engineering concepts in thematic units</p>	<p>English Language Arts</p> <ul style="list-style-type: none"> Shared reading Guided Reading Small motor skills Writing process and workshop Group/partner work ELD- language experience, <u>Realia</u>, developmental grouping Whole group and small group work with electronic devices 	<p>Large open floor space</p> <p>Durable rugs for sitting and student work space with squares for student places</p> <p>Low tables for visuals Space for writing center, library reading, small groups</p> <p>Wall space to display work</p> <p>Ceiling-mounted LCD projector and wireless streaming (airplay) device (e.g., Apple TV)</p> <p>Retractable screen</p> <p>communications system</p> <p>Space for age appropriate computers on desk tops, as well as hand held devices</p>	<p>Classroom walls should be able to open to provide ability to team teach, and combine students for grouping experiences</p> <p>Cabinets for student storage needs Storage room for volume of materials in primary classes</p> <p>Storage for student backpacks</p> <p>Sink with drinking fountain at appropriate height</p> <p>4- 2 student tables with chairs for centers, for bookshelves, tables</p> <p>Kidney tables for small groups with 6 chairs</p> <p>Although in class bathrooms are not necessary, consideration to proximity of bathroom should be taken into account.</p>



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Funding Update



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What does aggressive mean to you?

Definition: very involved in activity

Synonyms: aggressive, agile, alert, alive, animated, assiduous, bold, brisk, bustling, busy, chipper, daring, dashing, determined, dexterous, diligent, dynamic, eager, energetic, engaged, enlivened, enterprising, enthusiastic, eventful, fireball, forceful, forcible, fresh, frisky, hard-working, high-spirited, hyper, industrious, intense, inventive, jumping, keen, lively, nimble, on the move, perky, persevering, purposeful, pushing, quick, rapid, ready, resolute, sharp, sprightly, spry, whiz*, zealous

Antonyms: disinterested, idle, indifferent, lazy, quiescent, quiet



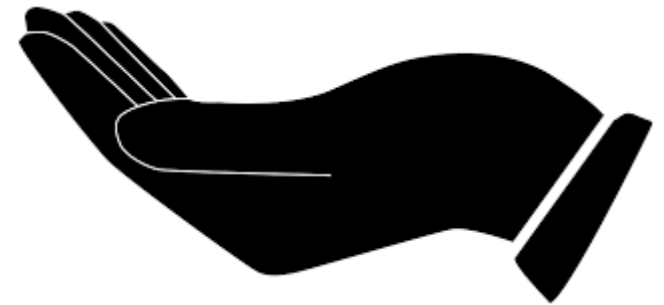
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No one hands you any funds for facilities!

A Robust Facility Program requires Aggressive pursuit of funds.

Standing idly by and waiting for someone to provide your District with facility funding will result in an empty hand.



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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/A larm System	Automatic Fire Detection/A larm System – SDC Severe	Automatic Fire Detection/A larm 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?

Inputs defining Your Districts Facilities Needs

1. Facility Advisory committee
2. Condition assessments
3. Instructional needs
4. District maintenance, tie in to work order history
5. Technology plan
6. Executive Team
7. Board priorities

Projects to be developed by site and program

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Deciding on Priorities

□ Priority Ranking

- Age of buildings
- Portable removal plan
- Matching money
- Instructional environment
- Regional equity
- Safety and security
- Schools not recently improved
- Enrollment

Establish criteria and evaluate against them.



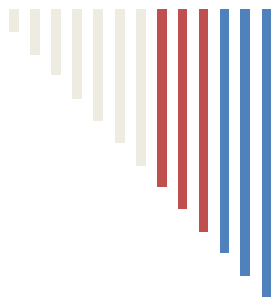


Update of Project Priorities

- ☐ 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
- ☐ Superintendents Cabinet Discussion
- ☐ Executive Team Recommendations
- ☐ Board consideration and approval



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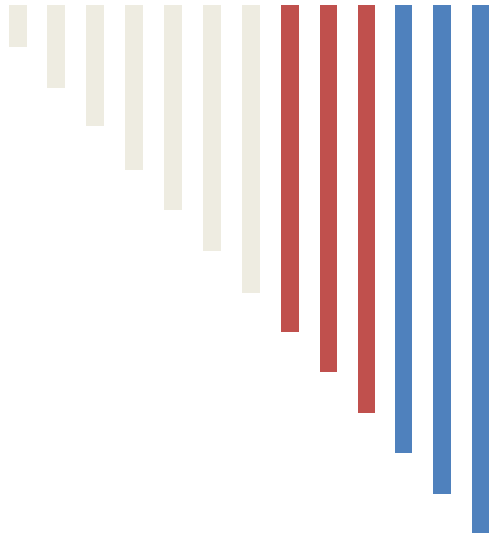
Deciding on Priorities

- ☐ Recommendations reviewed and discussed at executive cabinet level
- ☐ What are the Board's priorities?
- ☐ Board review and approval
- ☐ Consider an outside facilitator
- ☐ Consider a master plan consultant

The consultant guides and the district decides!!



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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

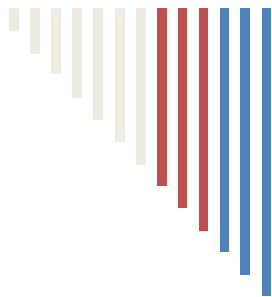
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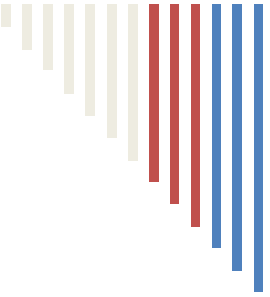
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