

Educational Facility Planning Improves Schools and Saves Money

PK-12 Public Educational Facilities Master Plan Evaluation Guide

About this Assessment

An Educational Facilities Master Plan is a written document that describes the school district's real estate and capital improvement requirements and its strategy and school specific plans for meeting these requirements over a 6-10 year period. On the real estate side, educational facility master plan elements will address the space needs for schools, administration and logistics, including proposed site selection, school closings and consolidations, attendance boundary changes, leasing, joint use and co-locations. On the capital improvement side, educational facility master plan elements will include: the justification, scope, schedule and estimated cost for major repairs, modernization and new construction.

Proper planning of school facilities is critical for all school districts no matter how large or small. When school districts properly plan for their school facilities they have better schools, more public use and higher value for public spending. This evaluation guide was designed for superintendents and school boards that are called on to sign off on plans presented by facility professionals and consultants, but who generally do not have experience with educational facility planning. It can also be used by community members to advocate for high quality educational facility planning.

To complete the assessment, read the standard for each section and rate your district based on the indicators listed. Write comments in the spaces provided. Contact us at info@21csf.org with questions.

PK-12 EDUCATIONAL FACILITIES MASTER PLAN EVALUATION CHECKLIST

	Standard	Rating
1	The planning was INQUIRY BASED and engaged the PUBLIC .	
2	The VISION in the Facilities Master Plan inspires the school district, its community and its children, families and neighborhoods.	
3	The Facility Master Plan advances and supports HIGH QUALITY PUBLIC SCHOOLS , not just school buildings.	
4	The Facilities Master Plan will make a major contribution to securing VIBRANT AND SAFE NEIGHBORHOODS .	
5	The Facility Master Plan is a COMPLETE AND COMPREHENSIVE plan for all of the community's public schools.	
6	The Facility Master Plan is based on data that is ACCURATE and the information is clear and readily accessible to the public.	
7	The Facility Master Plan is COORDINATED with the plans and initiatives of other community agencies, as well as with initiatives within its own system.	
8	The Facility Master Plan proposes a FAIR AND EQUITABLE distribution of space and capital funds and sets priorities that treat those schools and neighborhoods with the greatest needs.	
9	The Facility Master Plan is MANAGEABLE by the school district and FEASIBLE within the time, cost and scope of objectives described.	
	Total Points	

PK-12 EDUCATIONAL FACILITIES MASTER PLAN EVALUATION CHECKLIST

1.0 The planning was **INQUIRY BASED** and engaged the **PUBLIC**. _____ **POINTS**

***The Standard:** Planning for the future of the community and its many neighborhoods needs intense involvement of residents, experts, public and private interests and, most importantly, local school staff, teachers, parents and students—the people who use the public schools daily. The visioning, assessment, and planning should engage a broad community of stakeholders in an open, inquiry based process in order to develop a plan that the public owns and supports.*

Consider the following indicators and assess your district on the above standard using a scale of 1-5 (1 is poor, and 5 is excellent, 0 is not at all)

- The school district involved residents in developing the proposed plan.
- Local school staff, teachers, parents and/or students were engaged in developing the proposed plans for their schools.
- Representatives from magnet, special education, alternative schools, charter schools or other non-traditional schools were included in the educational facility master planning.
- There was communication between school facility professionals and the public in setting criteria or conducting assessments of school buildings or of public or local school needs for facility improvements.
- There is a public schedule for presentation of a proposed educational facility master plan.
- There are public hearings on the proposed facility master plan.
- A public process for revision of the plans once they have been adopted by the authorized entity.

Comments:

PK-12 EDUCATIONAL FACILITIES MASTER PLAN EVALUATION CHECKLIST

2.0 The **VISION** in the Facilities Master Plan inspires the school district, its community and its children, families and neighborhoods. _____ **POINTS**

***The Standard:** The plan should provide a clear, inspiring vision for the community's public facilities that will be broadly acceptable to its citizens. The plan must build confidence in the school district's ability to overhaul its inventory of facilities efficiently and thoroughly. This must be an inclusive plan that can be embraced by the entire community, providing a serviceable template for the next decade.*

Consider the following indicators and assess your district on the above standard using a scale of 1-5 (1 is poor, and 5 is excellent, 0 is not at all)

The EMFP presents a vision for the system that is generally accepted by the community's citizens.

- The vision supports a system of public schools where there is high expectation for participation of parents and families throughout the community.
- The vision is inclusive of the community as a whole.
- The vision is inspiring.
- The vision explicitly ties facility improvement to educational improvement.
- The vision explicitly ties facility improvement to community vitality, including environmental sustainability and regional equity.
- The plan includes a vision and plans for outdoor recreation and play space as well as environmental education.
- With the understanding that the plan is to be updated every 3 years, this is a plan that can provide a blueprint for the next decade.

Comments:

PK-12 EDUCATIONAL FACILITIES MASTER PLAN EVALUATION CHECKLIST

3.0 The Facilities Master Plan advances and supports **HIGH QUALITY PUBLIC SCHOOLS**, not just school buildings. _____ **POINTS**

***The Standard:** Foremost, the plan must provide the best support for educational improvement. It must accurately reflect reforms that are in the education plan for the district and state and lay the foundation for a high quality system of public schools in the community.*

Consider the following indicators and assess your district on the above standard using a scale of 1-5 (1 is poor, and 5 is excellent, 0 is not at all)

- The facility master plan is intentionally aligned to school district plans for educational improvement, programs, and initiatives.
- The plan gives priority to programs with special space requirements, such as career and technical education; vocational training; early childhood education; special education for children with intensive physical and developmental needs.
- The plan creates a compelling educational environment for teachers.
- The plan looks at attendance boundaries and school utilization to reduce economic, racial and cultural isolation in schools.
- The plan supports school district and state content standards and curriculum.
- The plan adequately provides for support spaces for nurses, counselors, social workers and psychologists and community provided school based social services..
- The space provided is adequate to support existing gyms, auditoriums, and other common spaces for school and joint use.

Comments:

PK-12 EDUCATIONAL FACILITIES MASTER PLAN EVALUATION CHECKLIST

4.0 The Facilities Master Plan will make a major contribution to securing **VIBRANT AND SAFE NEIGHBORHOODS**. _____ **POINTS**

***The Standard:** Improved school facilities in neighborhoods can become a major factor in attracting and keeping families in the community. They contribute to improving the quality of life for all residents, particularly if the facility is part of community based improvement initiatives. It must be clear that by implementing the EMFP, the school district can strengthen neighborhoods for students, staff, and residents by increasing public access and connections with public school facilities and grounds. High quality design and construction of public school facilities must be supported by the EMFP.*

Consider the following indicators and assess your district on the above standard using a scale of 1-5 (1 is poor, and 5 is excellent, 0 is not at all)

- The plan supports projects that contribute to the overall attractiveness of the neighborhood.
- The plan contributes to a greener and more environmentally responsible community.
- The plan allows sufficiently for community use of schools.
- The plan supports schools that are located so students can walk, bike or take public transportation to school.
- The plan allows for the schools that are large enough to be fiscally viable but small enough, to support personalized educational experiences for students and families.
- The plan provides for schools that are small enough to be safe and self-policing.
- This plan incorporates the improvement of civic spaces in schools, such as fixed seat auditoriums, stadiums, gymnasiums, swimming pools, libraries, multi-purpose rooms.
- The plan is conducive to increased reliance on public transportation for staff and students.
- The plan envisions schools as emergency shelters.
- The plan modernizes our old and historic schools.

Comments:

PK-12 EDUCATIONAL FACILITIES MASTER PLAN EVALUATION CHECKLIST

5.0 The Facilities Master Plan is a **COMPLETE AND COMPREHENSIVE** plan for all of the community's public schools. _____ **POINTS**

***The Standard:** The plan has to be complete and comprehensive, planning for all neighborhoods and for all public schools and administrative and operational space. The plans for each public school should be clearly stated, with what will happen, when and at what cost. The plans should be explicitly justified and give parents, students, staff and neighbors cause to evaluate their support or concerns for the future of the school. Consideration of all relevant factors associated with the locations, condition, utilization and design affecting the school district's buildings and grounds must be demonstrated. The plan should reflect community demographic change, initiatives and programs underway that will affect population, housing, transportation, neighborhoods and communities.*

Consider the following indicators and assess your district on the above standard using a scale of 1-5 (1 is poor, and 5 is excellent, 0 is not at all)

- __ There is a short term and long term plan for each school.
- __ There is a schedule for the short term and long term improvements needed for each school.
- __ There is a budget estimate for the short term and the long term improvements planned for each school.
- __ The schoolyards, playgrounds, athletic fields, recreational assets and green space at each school are an integral part of the planning for each school.
- __ The staff and community parking are considered as part of planning for each school.
- __ Access to public transportation is valued in preserving school sites.
- __ There is enough consideration for future growth.
- __ The needs of special education students are sufficiently considered.
- __ The plan offers a realistic, studied proposal for the school district's administrative needs.

Comments:

PK-12 EDUCATIONAL FACILITIES MASTER PLAN EVALUATION CHECKLIST

6.0 The Facilities Master Plan is based on data **that is ACCURATE** and the information is clear and readily accessible to the public. _____ **POINTS**

***The Standard:** Reports from local schools, parents, teachers, principals and students should indicate that assumptions are valid and data is accurate. Spot checks of data must show that it is current. Information should be accessible in a clear, transparent and comprehensible format and in a timely way.*

Consider the following indicators and assess your district on the above standard using a scale of 1-5 (1 is poor, and 5 is excellent, 0 is not at all)

- Enrollment projections are based on valid assumptions that are explicitly stated and justified.
- The enrollment estimates incorporate explicit and research based assumptions about future residential change and enrollment change.
- Project estimates are realistic and cost assumptions are valid and explicitly stated with escalation defined and factored into cost estimates.
- Condition and adequacy assessments reflect the experience of the school users.
- Condition, adequacy, and capacity assessments have been checked by local school principals, parents, teachers, custodians and building engineers.
- Information is presented in a comprehensible format for public understanding.
- The data is clearly tied into the criteria for making decisions on school consolidations and building improvements.

Comments:

PK-12 EDUCATIONAL FACILITIES MASTER PLAN EVALUATION CHECKLIST

7.0 The Facilities Master Plan is **COORDINATED** with the plans and initiatives of other community agencies, as well as with initiatives within its own system. _____ **POINTS**

***The Standard:** There should be evidence of planning in coordination with other jurisdictions agencies including libraries, parks and recreation, public transportation, health services, housing, and public safety. The EMFP should reflect increased accommodation for community use of schools during non-school hours.*

Consider the following indicators and assess your district on the above standard using a scale of 1-5 (1 is poor, and 5 is excellent, 0 is not at all)

- Priorities for school improvements aligned to educational priorities.
- The plan simplifies feeder school patterns so that neighborhood students can remain together from elementary school, to middle school and through a comprehensive, neighborhood high school.
- The plan advances the community's green initiatives for increased tree cover and permeable surfaces that retain storm water.
- The plan is coordinated with initiatives for energy conservation.

Comments:

PK-12 EDUCATIONAL FACILITIES MASTER PLAN EVALUATION CHECKLIST

8.0 The Facilities Master Plan proposes a **FAIR AND EQUITABLE** distribution of space and capital funds and priority, first treating those schools and neighborhoods with the greatest needs.

_____ **POINTS**

The Standard: *The plan should represent fair and equitable priorities for distribution of limited school modernization funds and school district management attention. The priorities for projects should be driven by need and be mindful of the importance of public school construction investment in all communities. The criteria for setting project priorities should be explicitly stated and developed with public input.*

Consider the following indicators and assess your district on the above standard using a scale of 1-5 (1 is poor, and 5 is excellent, 0 is not at all)

- The plan provides an equity analysis of proposed space allocation and capital investment which demonstrates by student and by square foot estimates of how much money is proposed to be spent at each school.
- The amount of space allocated to schools, administration and operations is adequate and fairly distributed based on age of students, program supported and the design of the building.
- The building and grounds conditions are being addressed in priority to meet the greatest problems first, for the children with the greatest needs.
- The plan distributes resources to schools fast enough to get them all up to reasonable standards within the next several years (carpet, paint, lighting, bathrooms, etc.).
- The criteria for setting priorities are well defined and clearly and consistently applied.
- The plan provides for improved maintenance and repair simultaneously with modernizations.

Comments:

PK-12 EDUCATIONAL FACILITIES MASTER PLAN EVALUATION CHECKLIST

9.0 The Facilities Master Plan is **MANAGEABLE** by the school district and **FEASIBLE** within the time, cost and scope of objectives described. _____ **POINTS**

The Standard: The EMFP must reflect the urgent need for improved facilities, but the implementation of the plan must be cost effective, efficient and of sound quality.

Consider the following indicators and assess your district on the above standard using a scale of 1-5 (1 is poor, and 5 is excellent, 0 is not at all)

- There is a project schedule for implementation of each project.
- There are cost estimates for all proposed capital projects, described at the school level.
- There are educational and facility justifications for the scope of work proposed at each school.
- There is an annual schedule of projects with estimated costs that the school district is prepared to manage and oversee.
- Internal controls and external oversight of the implementation of the educational facility master plan is articulated and ready for implementation.
- Sufficient swing space is provided in each planning area.
- There is a maintenance and operations budget that aligns to the capital investment and real estate requirements in the proposed educational facility master plan.

Comments: