

An Overview of the Facilities Master Plan Process

The purpose of the Facilities Master Plan is to develop and communicate an efficient process to change the school facilities to better accommodate and support its current and future educational programs in a planned and coordinated manner. It will serve as a guide for assessing the need for facility improvements and capital investments to implement them, typically over a 5-10 year period.

This Facilities Master Plan will determine the scope of repairs, modernization, upgrades, and/or new construction needed to serve the current and future school facilities needs of the community. It will also assess the variety of funding sources and financing options available and provide a prudent view of the scope of projects that may reasonably be accomplished with available funds.

The Process

The planning process is facilitated and supported by the Facilities Master Plan Task Force (FMPTF). The Task Force normally consists of two or Board members (one of whom is appointed Chair), Head of School, Business Manager, a School Principal, and selected representatives of the faculty, staff, and parent body.

The Task Force is designed to coordinate the entire Facilities Master Planning process, more specifically to accomplish data gathering, data analysis, scenario development and prioritization and from that, develop a recommendation for board approval. As with any Board Committee or Task Force, explicit Terms of Reference should be established by the Board.

Sequence of Events

To begin the Facilities Master Plan process, a sequence of activities and decisions are made, typified by the following:

- The Board decide that a need to improve current school facilities and/or build new facilities exists.
- The FMPTF is appointed.
- The FMPTF begins by establishing a vision, mission, and goals for the Facilities Master Plan process, for approval by the Board. The vision, mission, and goals establish a framework for the plan and process.
- An architect is hired and joins the FMPTF

- The FMPTF determines the methodology and timeline for completing the Facilities Master Plan, including a communication plan to involve the school community in the process.
- The FMPTF conducts initial assessments of educational programs, facilities, and demographics.
    1. Defining Educational Program Needs

        The primary planning focus of the Facilities Master Plan is to identify the current and future educational programs that are being and will be delivered to the District's clients. This process identifies such elements as teaching methodologies, instructional programs, grade configurations and class size parameters, application of technology, etc. These factors form the basis for facility improvements, including equipment, and systems that are needed to support and enhance the education processes. It is important to analyze the full range of spaces and equipment needed to facility current and future educational programs.

    2. Condition of Facilities
        a. Assessment of Physical Condition

            A program of evaluation is undertaken to provide a summary list of improvements required, including accommodating

                i. school growth
                ii. program changes
                iii. modernization
                iv. repair and upgrades
                v. code compliance and health & safety
                vi. community use

    3. Future Market

        A study is developed describing the size, nature, and needs of the future "market" of the school, including scenarios of demographics, programmatic options, and school aspirations.
- The FMPTF drafts an Implementation Plan, including phasing options.
- After the FMPTF has defined the needs and direction of the facilities plan, the Board Finance Committee develops funding scenarios to meet the needs of the Facilities Master Plan.
- The Board formally approves the Facilities Master Plan

<u>Typical Facilities Master Plan Outline</u>

1. DESCRIPTION OF CURRENT SITUATION
2. FACILITIES VISION STATEMENT
3. EXISTING POLICIES/ASSUMPTIONS USED IN PLANNING PROCESS
    3.1. Board Policies in existence (i.e., size of school, grade configuration, location of school, etc.)
    3.2. Assumptions used in preparation of plan (i.e., expand existing school sites due to growth, future land use assumptions, political implications, etc.)

    3.3. Educational goals
4. COMMUNITY INPUT INTO PLAN
5. BOARD REVIEW AND ADOPTION PROCESS
6. ANALYSIS OF EXISTING FACILITIES
    6.1. Existing school facilities
    6.2. Listing of All Needs (Major) - Cost of implementation, funding source
    6.3. Recommendations - Priorities of need
7. FUTURE MARKET
8. FUTURE SCHOOL NEEDS
    8.1. Educational program accommodations (size, nature)
    8.2. Space
    8.3. Quality of facility
9. COORDINATION WITH OTHER AGENCIES
10. FINANCING PLAN
11. PHASING SCENARIOS

The approved Facilities Master Plan serves as the framework for all facilities development. The FMP is a living document, to be adjusted as conditions warrant. It should co-exist with the school's Strategic Plan and the Board's annual goals in the continued development of the school.

RMD/April, 2015
based on California Coalition for Adequate School Housing paper on Facilities Master Plan Process, https://www.cashnet.org/resource-center/resourcefiles/192.pdf