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SCHOOL HOUSINGSM

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Call to **ACTION**

Fighting for School Facilities Funding



CASH 31st Annual Conference

February 24, 2010

Introductions



- **Larry Ferchaw**
 - » Dolinka Group, LLC
- **Kathy Tanner**
 - » San Marcos Unified School District
- **Carri Matsumoto**
 - » Long Beach Unified School District
- **Jim Kisel**
 - » LPA, Inc.
- **Michael Regele**
 - » DecisionInsite

Audience Brainstorm



- **Areas to Consider**
 - » What role does your area play in the master planning process?
 - » What are the limitations of your area?
 - » How might your area conflict with the others?
 - » How could your area improve the others?
 - » What is the greatest strength of your area?

Demographics

**Programs and
Facilities**

Financial

Audience Presentation



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Audience Presentation Notes



Demographics

- Know Who is Out There
 - »Where, Now & Future
- Base of Programming
 - »Size, Location, Budget
- Accuracy/ Speed of Change
 - »Changing demographics
- Boundaries
 - »Balance Within
- District boundaries- Projected enrollment
 - »Geographic area
 - »Ethnic Balancing
- Grade Configuration
 - »e.g. K-5/K-6
- Changes in Enrollment
 - »Impact on Budget and Staffing
- Socio-Economic Realities
 - »Access (Transportation)
- Correlation
 - »Reality to Program
- School of Choice
 - »Impact – Normal factors
 - »Crossing Boundaries – Open Enrollment

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Audience Presentation Notes



Programs and Facilities

- Ed Specs
 - » Specific Requirements
 - » Functional Aspects
 - » Scope and Size
 - » What Facilities Needs to Accomplish Program

- Board and Community Priority

- What Does the Future Hold for School?
 - » Emerging technology
 - » What about kids who don't have home access?
 - » Satellites?
 - » To what degree do facilities fit the program?
 - » Technology training?
 - » Effect of internships on facilities needs?
 - » What does instructional delivery look like?
 - » What about the sustainability of the delivery model?

Audience Presentation Notes



Financial

- Provide Limitations/Constraints
- Opportunities/Identify Resources
- Leverage State \$/ Determine What's Available
- Could "Squash" Process (Reduce/Overwhelm)
 - » Strike Balance
 - » More Need than Resources
- Create Long-Range Estimates
 - » Cash Flow Analysis
 - » Funding the Master Plan
- Limitations
 - » Operational Savings/Maintenance
 - » Pre/Post Bond Master Planning
 - » Economic Factors
- Conflicts
 - » "Wet-Blanket" in the Room
 - » Convey Clear Understanding of Financial Restrictions
 - » Get More Money
 - » Value/Credibility

Best Practices. Facilities Master Plan



- The Goal :

“To Convey the Needs and Tell a Positive District Master Plan Story that is Compelling Enough to Move People to want to be a Part of the District Community, Support your Vision of School Facilities, and Invest in the District’s Future”

- To **Imagine** and then **Create** your future story...

- » Who will you serve?
- » What programs will you offer?
- » What facilities will be required?
- » How will you pay for them?

Best Practices. Facilities Master Plan



The
Future
History
Model

In The Future
THEN



Looking Back—
Describe How
You Got There

NOW

Best Practices: Demographics



- Student Enrollment Projections provide a baseline of anticipated seats needed
 - » *Student populations change over time as do their needs*
 - » *Imagine your future with these questions...*
 - How many students and at what school levels?
 - From where will you draw students?
 - Will that change from the current situation?
 - Will residential development impact the balance of your existing or new schools?
 - Will you need to open, close and/or rebalance schools?
- But do forecasts alone provide hints to program?

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Best Practices: Demographics



- Determining Market Potential has implications for program and facilities
 - » *Compare current number of students served to the estimated total number of students*

Market Potential Analysis Report

| Market Potential Analysis Report | Students Served by Distr | Est. Total School Age | Market Pen Rate % | Est Market Potential |
|--------------------------------------|--------------------------|-----------------------|-------------------|----------------------|
| Early Elementary: Age 5 to 9 | 178 | 230 | 77 | 52 |
| Late Elementary-Middle: Age 10 to 14 | 158 | 255 | 62 | 97 |
| High School: Age 15 to 18 | 149 | 208 | 72 | 59 |
| Totals: | 485 | 693 | 70 | 208 |

- » *Imagine your future with these questions...*
 - Are there opportunities to increase enrollment through directed marketing efforts?
 - Are there opportunities to better utilize some facilities if enrollment were increased by the directed marketing efforts?

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Best Practices: Demographics



- Tracking community-wide demographic changes supports imagining your future and strategic planning
 - » *You serve a community with certain demographic characteristics*
 - Income, education, racial/ethnicity etc.
 - Communities have values and beliefs
 - These change over time...as do needs and expectations
 - » *Imagine your future with these questions...*
 - What changes should you expect over 15 years?
 - What will the community expect from the district?
 - Will there be new communities and what will they need/expect?

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Best Practices: Programs & Facilities



- Planning Begins with Demographics
 - » *Know Your Students, Know Their Parents, Know Your Community*
- Develop Programs that Uniquely Address Specific Needs
 - » *Understand how they Complement the District's Guiding Principles*



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Best Practices. Programs & Facilities



- Get Buy-In from Students, Staff, Parents, and Community
 - » *Fully Examine the Teaching and Learning Processes*

- Take a Long Term View
 - » *A Holistic and Comprehensive Vision of Where the District Wants to Go*



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Best Practices. Programs & Facilities



- Program Philosophy & Needs Drive Facilities Solutions
 - » *Facilities Environment Should not Limit Learning Opportunities*

- Plan with Flexibility in Mind
 - » *Accommodation of Future Programs & Technology Evolutions*

- Master Plan the Total Needs of a School Site – A Larger Vision
 - » *Programs, Facilities, Site, Systems, Community*



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Best Practices: Financial



- **What Needs to be Funded and How**
 - » Identify the costs and evaluate **all** assets and potential revenue sources

- **Timing is Everything**
 - » Working around funding limitations to create a successful program

- **Building Support**
 - » What will Board and community support? Building on that base and understanding community dynamics

Best Practices: Financial

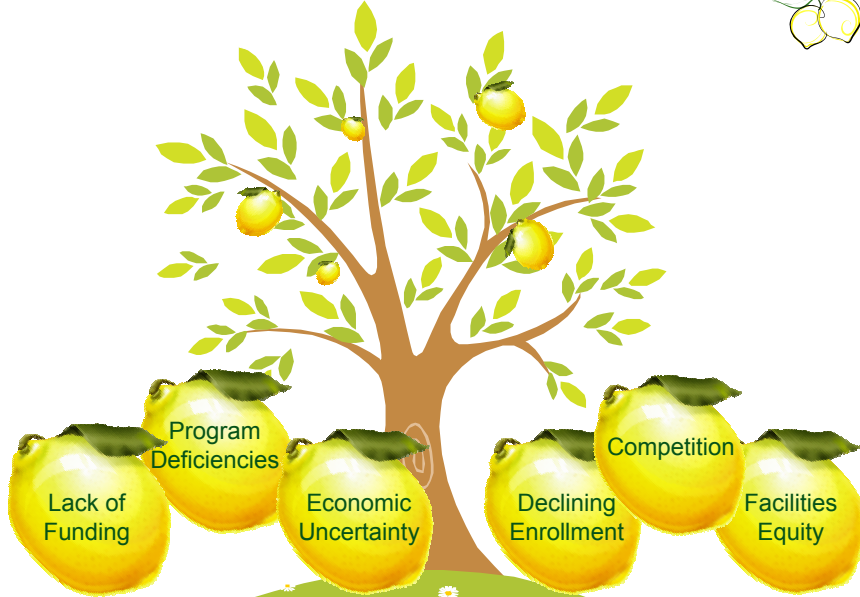


- **Keeping an Eye on the General Fund**
 - » Identify the facilities and programs a school district can support in the long-term

- **Mediating the Differences**
 - » Balance the needs of educational programs, facilities needs and financial obligations

- **Putting the Plan into Action**
 - » Bond campaign and crafting a strategy that moves the master plan from document to facilities

Today's Challenges



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San Marcos Unified School District



- Challenge – provide school facilities to support 21st Century Educational program across the District and prepare for a future school bond
 - » Develop facility equity between schools while maintaining educational program flexibility
 - » Replace aging portable classrooms with permanent new construction
 - » Correct instructional program facility deficiencies
 - » Upgrade technology for current and future instructional strategies

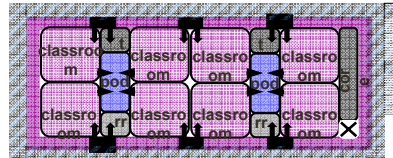


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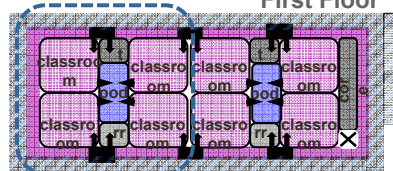
San Marcos Unified School District



- Challenge – provide school facilities to support 21st Century Educational program across the District and prepare for a future school bond (Continued)
 - » Improve school sites, building physical condition and curb appeal
 - » Incorporate sustainable building concepts to minimize future maintenance costs
 - » Plan for future student growth and flexible instructional program delivery



First Floor



Second Floor

Collaborative Cluster Concept

San Marcos Unified School District



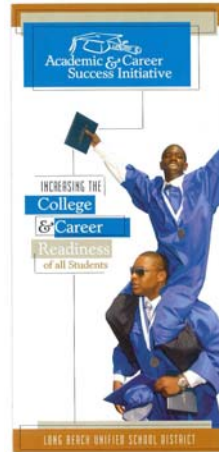
- Challenge – Through modernization and/or new construction provide a comprehensive 21st Century Educational program for San Marcos High School
 - » Design classroom spaces to facilitate the instructional program of 2030 while supporting the instructional program as it transitions to 2030 standards for all students
 - » Provide for a variety of student groupings for instruction & collaboration
 - » Use of facility spaces on ground floor vs. 2nd and 3rd floor
 - » Provide technology, power & security for an evolving educational program



Long Beach Unified School District



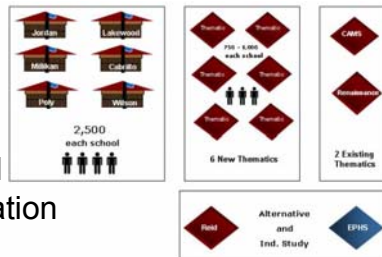
- Programs Shape Your Facilities and Attract Students
 - » Understand your student population (current and potential future)
 - » Use the data you have and build upon the information
- District Leadership
 - » Having a vision and objectives
- Existing Facilities and Infrastructure
 - » Knowing what you have to work with and what you don't



Long Beach Unified School District



- Programming for Changing Demographics
 - » Partnering, facilitation, conversation, development
- Implementation
 - » Developing proper educational specifications and its incorporation into design
 - » Sustainability for all purposes
- Curriculum Development and Leadership
 - » The importance of a master schedule of classes
 - » Programs, academies, special studies, special needs, etc.



Long Beach Unified School District

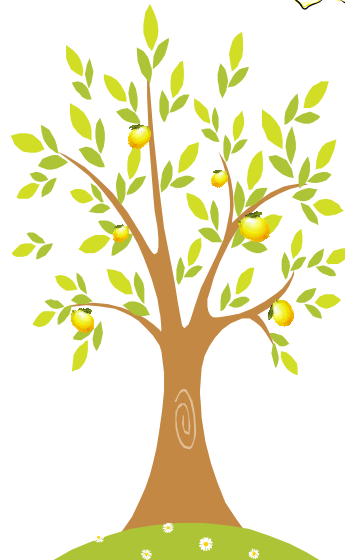


- Support
 - » Board, Executive Staff, Community, Teachers, Staff, Students

- Test Pilots
 - » If you can afford it, don't be afraid of it

- Examples
 - » Career and Technical Education, Academies
 - » Technology
 - » Pre-kinder

Questions and Discussion



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