Elements of the Planning Process

The Educational Plan
Nancy Myers

The Master Plan
Steve Looper

Educational Specifications
Dennis L. Dunston

Quality Facilities and Quality Education
Dennis L. Dunston

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The Educational Plan:
Framework for Planning & Design
Nancy Myers
Change Models

✧ Accelerated Schools
  • K-8
  • Principal Goal: Provide all students with enriched instruction based on entire school community’s vision of learning.

✧ America’s Choice
  • K-12
  • Principal Goal: Enabling all students to reach internationally benchmarked standards.

✧ ATLAS Communities
  • Pre K-12
  • Principal Goal: Align the efforts of a school district, K-12 feeder patterns of schools, individual faculties, and parents to promote student success.

Change Models

✧ Center for Effective Schools
  • K-12
  • Principal Goal: To improve the academic achievement of all students.

✧ Child Development Project
  • K-6
  • Principal Goal: To help schools become caring communities of learners that promote students’ intellectual, social, and ethical development.

✧ Community for Learning
  • K-12
  • Principal Goal: To achieve social and academic success for students by linking schools with community institutions.
Change Models

- **Co-nect**
  - K-12
  - Principal Goal: Improved achievement in core subjects.

- **Core Knowledge**
  - K-8
  - Principal Goal: To help students establish a strong foundation of vocabulary and skills to build knowledge and understanding.

- **Different Ways of Knowing**
  - Pre K-8
  - Principal Goal: Raise students’ academic achievement and improve their attitudes toward school.

Change Models

- **Direct Instruction Model**
  - K-8
  - Principal Goal: Significantly improve academic performance over current performance levels.

- **Expeditionary Learning Outward Bound**
  - K-12
  - Principal Goal: High achievement for all students.

- **High Schools That Work**
  - 9-12
  - Principal Goal: To increase the achievement of all students with special emphasis on career-bound students by blending the content of traditional college prep studies with quality vocational and technical studies.
Change Models

- **High/Scope Primary Grades Approach to Education**
  - K-3
  - Principal Goal: To provide children with effective, developmentally sound learning experiences in all curriculum areas and to be sensitive to their backgrounds, strengths, and interests.

- **Integrated Thematic Instruction**
  - K-12
  - Principal Goal: Apply current brain research to teaching strategies and curriculum to develop responsible citizens.

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Change Models

- **MicroSociety**
  - K-8
  - Principal Goal: Preparing students to become active, caring, responsible citizens by multiplying opportunities for success.

- **Modern Red Schoolhouse**
  - K-12
  - Principal Goal: High achievement for all students through development of a coherent instructional program aligned with state standards and implementation of school governance practices that support school improvement.
Change Models

✧ Onward to Excellence
  - K-12
  - Principal Goal: Help schools build capacity through shared leadership for continuous improvement.

✧ QuEST
  - K-12
  - Principal Goal: To increase student achievement through quality process improvements.

✧ School Development Program
  - K-12
  - Principal Goal: Mobilize entire community of adult caretakers to support students’ holistic development to bring about academic success.

Change Models

✧ Success for All/Roots & Wings
  - Pre K-6
  - Principal Goal: To ensure that all children learn to read, acquire basic skills in other subject areas, and build problem solving and critical thinking skills.

✧ Talent Development High School with Career Academies
  - 9-12
  - Principal Goal: Improve achievement and other outcomes for at-risk students in large high schools.
Change Models

❖ Talent Development Middle School
  • 4-9
  • Principal Goal: To create high-performing schools by providing all teachers with training, support, and materials and all students with standards-based learning opportunities and supportive learning environments.

❖ The Learning Network
  • K-8
  • Principal Goal: To support school wide changes in teachers’ theory and practice that lead to improved learning outcomes for children.

Change Models

❖ Turning Points
  • 6-8
  • Principal Goal: Improve teaching, learning, and achievement for all students in middle schools, including those with special needs.

❖ Urban Learning Centers
  • Pre K-12
  • Principal Goal: To build learning environments where high-quality instruction is supported by a well organized school that is strongly connected to its community.

❖ Ventures Initiative and Focus System
  • K-12
  • Principal Goal: To raise students' academic performance.
Establishing a Master Plan
Steve Looper

What is a Facilities Master Plan?

- Road map to good planning
- Assessment of existing facilities
- Needs assessment
- Educational specifications
- Project identification and budgeting
- Analysis of funding sources
- Establishes timelines
Elements of a Good Master Plan

- Assumptions and parameters
- Enrollment projections
  - Methodologies
- Existing capacity
  - Actual vs. State Allocation Board
  - School by school analysis

Enrollment Projections - Comparison

Elements of the Planning Process – Establishing a Master Plan
Community Standards

- Parity among schools
- Expectations
New Construction Needs

- New schools
- Additions to existing schools
- Portable additions
- Joint-use facilities

Modernization Needs

- Maintenance and upgrades
- Reorganization of spaces
Other Facilities Needs

- Support facilities’ needs
- Other needs
  - Technology
  - Furniture and equipment

Timelines

- Project timelines
- Project funding/cash flow
Financing

- State program
- Local bonds
- Developer fees
- CFD’s
- Redevelopment agencies

The Process

- Consultant
- Committee
- District staff
The Committee – Key Members

- Principals
- Information systems
- M & O
- Planning
- Fiscal services
- Community
- Superintendents/Assistant Superintendents
- School Board Members, ex-officio

Use of the Master Plan

- Updating information
- A “living document”
- Preparation for bond measures
References

- Guide for the Development of a Long-Range Facilities Plan,
  1986, California Department of Education.

Elements of the Planning Process – Establishing a Master Plan

Writing
Educational Specifications
Dennis L. Dunston
Purpose

✧ Design criteria for designers
✧ A means to verify the design during the process
✧ Operator’s manual for occupants
✧ A means to evaluate existing facilities
✧ Evaluating equity

As an Element of the Master Plan

✧ Can be done for a specific site or as a grade configuration component for all schools
✧ Educational Plan should precede this document
Key Components

- Introduction
- Educational program
- Building program
- Site requirements
- Detailed requirements
- Budget

Introduction

- Process used
- Participants
- Community needs and standards
- Background of the district
- Architectural qualities desired
Educational Program

- Summary of program
- Educational goals
- Teaching methodologies to be used

Building Program

- Spaces required
- Relationships of spaces (bubble diagrams)
- Building area required for each space
- Detailed requirements for each space
Site Requirements

- Access
- Parking
- Hardcourt
- Playfields
- Security
Site Diagram

Detailed Requirements

- Cabinetry
- Plumbing
- Electrical
- Data
- HVAC
- Lighting
- Acoustical
- Color
Sustainability & Energy Conservation

- CHPS
- LEED

The Participants

- Educators
- Administrators
- Students
- Parents
- Community members
- Local government officials
- Architect
- Maintenance staff
The Process

- Traditional
- Charrette
- Post occupancy as a final verification of the Ed Specs and a prequel to the next design

References

- *Educational Specifications, Linking Design of School Facilities to Educational Program*, School Facilities Planning Division, California Department of Education.

- *The Form of Reform, School Facility Implications for California Educational Reform*, School Facilities Planning Division, California Department of Education.

Quality Facilities & Quality Education
Dennis L. Dunston

The Parent Connection

- San Diego Department of Education study
- National Center for Family and Community Connections
- Design impacts
  - Places for parent meetings at school
  - Parking for parent volunteers
  - Room for parent coordination
  - Teaching spaces designed with volunteers in mind
Small

- Small schools
- Gates Foundation
- School restructuring
- Schools within a school
- Class size reduction

Color

“Rice (1953) found that paint color in schools especially carefully planned color schemes positively affect academic achievement of elementary students and especially students of kindergarten age. Papadatos (1973) suggested that the proper use of color in schools can convert an atmosphere that is depressing and monotonous into one that is pleasing, exciting and stimulating.”

Creating Connections
Design

- Daylight
- Acoustics
- CHPS
  - Student and teacher health
  - Student performance
  - Impact on operating costs
  - Impact on initial costs
  - Impact on the environment

CHPS

- Daylighting
- Indoor air quality
- Control systems
- HVAC systems
- Materials
- Acoustics
- Water usage
- Site characteristics
- Constructions practices
Academy of Neuroscience for Architecture

- AIA
- Neurosciences Institute, UC San Diego

Assembling the Team
Dennis L. Dunston
Selection of Architect

- The RFQ
- Requirements for the School Facilities Program
- Qualifications based selection
- The format
- The screening process

Assembling the Team

Selection of Architect

- The interview
- Selection committee
- Preparation and briefing of the committee
- Typical questions
- Maintaining objective criteria

Assembling the Team
Considerations in the Selection

- Relationships
- Expectations
- Communication
- Architect’s project team
- Selecting one architect or multiple architects

Selection of Architect

- Contract negotiations

- Contract and fee should be specific to the districts' needs and the scope for the project
DSA Inspector

- Selection process
- Options
  - District employee
  - Contract to firm
  - Contract to individual
- Resources
- DSA
- Other districts
- Association of construction inspectors

Assembling the Team

DSA Inspector

- Interview
  - Match of inspector to type of project
  - Match of inspector to rest of project team
- References
Construction / Project Manager

- Selection process
- The RFP
- The interview
  - Match of firm with type of project
  - Qualifications of individuals to be assigned to projects
- Types of services
  - Project Management
  - CM General Contract
  - CM Multiple Prime
  - CM at Risk

School District Point Person

- Consistency