

PK-12 Public Educational Facilities Master Plan Guide

Why is educational facilities master planning essential?

Proper planning of school facilities is critical for all school districts no matter how large or small, whether major construction is in the works or the district is managing enrollment change. When school districts properly plan for their school facilities, they have better schools, more equitable facilities, and higher value for public spending.

What is an educational facilities master plan?

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 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, demolition, modernization, site selection, and new construction.

How to use this plan guide

This PK-12 Educational Facilities Master Plan Guide provides a standard for each element of a Master Plan and criteria to help determine whether the standard has been met. This guide was designed for superintendents and school board members who are called on to approve educational facilities plans, but who may not have experience with educational facility planning. It can also help community members more effectively participate in educational facility planning.



Community meeting for District of Columbia Public Schools Educational Facilities Master Plan 2008, Savoy ES

Districts and communities can ensure they have a responsible plan process using this guide, but they can also rate their educational facilities master plan using these standards and criteria.

The guide was first developed by the 21st Century School Fund for the District of Columbia School Board in 2008 and has been revised. It can be found at www.21CSF.org on the publications page. Contact us at info@21csf.org with questions or suggestions.

#	Standards	Rating
1.0	The facilities planning was INQUIRY BASED and engaged the PUBLIC .	
2.0	The VISION in the Facilities Master Plan INSPIRES the school district, its community and its children, families and neighborhoods.	
3.0	The Facility Master Plan advances and supports HIGH QUALITY PUBLIC SCHOOLS , not just school buildings.	
4.0	The Facilities Master Plan will contribute to securing VIBRANT AND SAFE NEIGHBORHOODS .	
5.0	The Facility Master Plan is a COMPLETE AND COMPREHENSIVE plan for all the community's public schools.	
6.0	The Facility Master Plan is based on ACCURATE DATA and the information used for planning is clear and readily ACCESSIBLE TO THE PUBLIC .	
7.0	The Facility Master Plan is COORDINATED with the plans and initiatives of other community agencies, as well as with initiatives within its own system.	
8.0	The Facility Master Plan proposes a FAIR AND EQUITABLE distribution of space and capital funds and sets priorities for schools and neighborhoods with the greatest needs.	
9.0	The scope and schedule of the Facility Master Plan can be FUNDED OR FINANCED .	
10.0	The Facility Master Plan is MANAGEABLE by the school district and FEASIBLE within the time, cost and scope of objectives described.	
	Total Points	

For each planning standard, consider the indicators and rate each of the indicators using a scale of 1-5 (1 is poor, and 5 is excellent, 0 is not at all) and total the ratings to create an evaluation of your district's master plan.

1.0 The planning was INQUIRY BASED and engaged the PUBLIC.

The Standard: Planning for the future of the community’s public schools 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.

	Indicators of Community & District Values and Priorities	Rating (1-5)
1.1.	The school district involved residents in developing the proposed plan.	
1.2.	Local school staff, teachers, parents and/or students were engaged in developing the proposed plans for their schools.	
1.3.	Representatives from magnet, special education, alternative schools, charter schools or other non-traditional schools were included in the educational facility master planning.	
1.4.	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.	
1.5.	There is a public schedule for presentation of a proposed educational facility master plan.	
1.6.	There are public hearings on the proposed facility master plan.	
1.7.	A public process for revision of the plans once they have been adopted by the authorized entity.	
	TOTAL	

COMMENTS:

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

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.

	Indicators of Community & District Values and Priorities	Rating (1-5)
2.1.	The facilities master plan presents a vision for the system that is generally accepted by the community’s citizens.	
2.2.	The vision supports a system of public schools where there is high expectation for equity and healthy, safe, educationally inspiring teaching and learning places.	
2.3.	The vision is inclusive of the community as a whole.	
2.4.	The vision is not just a reaction to historic trends, but a .	
2.5.	The vision explicitly ties facility improvement to educational improvement.	
2.6.	The vision explicitly ties facility improvement to community vitality, including environmental sustainability and regional equity.	
2.7.	The plan includes a vision and plans for outdoor recreation and play space as well as environmental education.	
2.8.	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.	
	TOTAL	

COMMENTS:

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

The Standard: The plan provides explicit support for educational improvement. It accurately reflects reforms that are in the education plan for the district and state and lays the foundation for a high-quality system of public schools in the community.

	Indicators of Community & District Values and Priorities	Rating
3.1.	The facility master plan is intentionally aligned to school district plans for educational improvement, programs, and initiatives.	
3.2.	The facility master plan includes a plan for the relationship and appropriate scale for neighborhood schools and feeder patterns, application schools, charter schools and lottery access to DCPS.	
3.3.	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.	
3.4.	The plan creates a compelling educational environment for teachers.	
3.5.	The plan looks at attendance boundaries and school utilization to increase economic, racial and cultural integration in schools.	
3.6.	The plan supports school district and state content standards and curriculum.	
3.7.	The plan adequately provides for support spaces for nurses, counselors, social workers and psychologists and community and also provides space for other school based social services.	
3.8.	The space provided is adequate to support existing gyms, auditoriums, and other common spaces for school and joint use.	
	TOTAL	

COMMENTS:

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

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 facilities master plan, 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 facilities master plan.

	Indicators of Community & District Values and Priorities	Rating
4.1	The plan supports projects that contribute to the overall attractiveness of the neighborhood.	
4.2	The plan contributes to a greener and more environmentally responsible community.	
4.3	The plan allows sufficiently for community use of schools.	
4.4	The plan supports schools that are located so students can walk, bike or take public transportation to school.	
4.5	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.	
4.6	The plan provides for schools that are small enough to be safe and self-policing.	
4.7	This plan incorporates the improvement of civic spaces in schools, such as fixed seat auditoriums, stadiums, gymnasiums, swimming pools, libraries, multi-purpose rooms.	
4.8	The plan is conducive to increased reliance on public transportation for staff and students.	
4.9	The plan envisions schools as emergency shelters.	
4.10	The plan modernizes our old and historic schools.	
	TOTAL	

COMMENTS:

5.0 The Facilities Master Plan is a COMPLETE AND COMPREHENSIVE plan for all the community’s public schools.

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.

	Indicators of Community & District Values and Priorities	Rating
5.1.	There is a short term and long-term plan for each school.	
5.2.	There is a schedule for the short term and long-term improvements needed for each school.	
5.3.	There is a budget estimate for the short term and the long-term improvements planned for each school.	
5.4.	The schoolyards, playgrounds, athletic fields, recreational assets and green space at each school are an integral part of the planning for each school.	
5.5.	The staff and community parking are considered as part of planning for each school.	
5.6.	Access to public transportation is valued in preserving school sites.	
5.7.	There is enough consideration for future growth.	
5.8.	The needs of special education students are sufficiently considered.	
5.9.	The plan offers a realistic, studied proposal for the school district’s administrative and operational needs.	
	TOTAL	

COMMENTS:

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

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.

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

COMMENTS:

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.

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 facilities master plan should reflect increased accommodation for community use of schools during non-school hours.

	Indicators of Community & District Values and Priorities	Rating
7.1.	Priorities for school improvements aligned to educational priorities.	
7.2.	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.	
7.3.	The plan advances the community’s green initiatives for increased tree cover and permeable surfaces that retain storm water.	
7.4.	The plan is coordinated with initiatives for energy conservation.	
7.5.	The plan addresses climate related concerns for resiliency.	
7.6.	The plan is coordinated with the most recent land use plan or comprehensive plan for the city.	
7.7.	The plan is informed by planned housing development.	
7.8.	The plan is coordinated with charter school sector to ensure maximum benefit to students and communities.	
7.9.	The plan provides for joint and shared uses for public school buildings and grounds.	
	TOTAL	

COMMENTS:

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.

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.

	Indicators of Community & District Values and Priorities	Rating
8.1.	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.	
8.2.	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.	
8.3.	The building and grounds conditions are being addressed in priority to meet the greatest problems first, for the children with the greatest needs.	
8.4.	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.).	
8.5.	The criteria for setting priorities are well defined and clearly and consistently applied.	
8.6.	The plan provides for improved maintenance and repair simultaneously with modernizations.	
	TOTAL	

COMMENTS:

9.0 The scope and schedule of the Facility Master Plan can be FUNDED OR FINANCED.

The Standard: The educational facilities master plan needs to have realistic cost estimates for projects and policy reforms, and include recommendations on how projects and reforms are financed and funded, and how implementation of the plan will impact the capital budget of the city, including its debt ceiling, bond rating, and the facilities operations and maintenance expenditures in the operating budget of the city and school districts.

	Indicators of Community & District Values and Priorities	Rating
9.1	Is there a school specific cost estimate for every proposed capital project in the master plan?	
9.2	Is there a school specific cost estimate for annual cost of operating and maintaining the school buildings and grounds?	
9.3	Is there an energy management plan to reduce energy costs of the school?	
9.4	Is there an estimated cost with escalation incorporated into it, and a schedule for capital renewals within the master plan time frame?	
9.5	Is there a multi-year capital financing plan associated with the capital priorities of the master plan?	
9.6	Does the plan identify a dedicated source of revenue with which to repay school construction financing?	
9.7	Does the plan identify any alternative ways to finance facilities improvements, e.g. development partnerships; energy performance contracting; or joint use fees or leasing income?	
9.8	Does the plan consider the impact of the public schools capital program on other capital needs of the city?	
	TOTAL	

COMMENTS:

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

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

	Indicators of Community & District Values and Priorities	Rating
10.1	There is a project schedule for implementation of each project.	
10.2	There are cost estimates for all proposed capital projects, described at the school level.	
10.3	There are educational and facility justifications for the scope of work proposed at each school.	
10.4	There is an annual schedule of projects with estimated costs that the school district is prepared to manage and oversee.	
10.5	Internal controls and external oversight of the implementation of the educational facility master plan is articulated and ready for implementation.	
10.6	Sufficient swing space is provided in each planning area.	
10.7	There is a maintenance and operations budget that aligns to the capital investment and real estate requirements in the proposed educational facility master plan.	
10.8	There is a source of financing for the capital projects which is affordable and accessible through bonds or other financing opportunities.	
	TOTAL	

COMMENTS: