

High Performance Requires Long-Range Facility Planning

Maintaining and improving educational facilities requires vision, assessment, and critical decision-making.

By Kayla Peck and Damien Schlitt, AIA, LEED AP

We ask a lot of our schools as institutions of learning, but we also make demands on the buildings themselves.

Each year, new students arrive expecting to be welcomed into a learning environment where they can thrive both academically and socially. Meeting that expectation year after year takes long-range facility planning to ensure that buildings continue to perform above grade level.

Maintaining and improving educational facilities requires vision, assessment, and decision-making. This process anticipates and responds to changes in enrollment, learning preferences, and maintenance requirements. That is an intricate exercise; however, leaders can develop a long-range facility plan that is effective, flexible, and actionable. Here's how.

Developing a Long-Range Facility Plan

The first step in developing a long-range facility plan is to define a school's strategic objectives. To meet those objectives, goals identified in a master plan will align with the current physical structure's required resource allocation.

It is also important to reevaluate current plans for improvements and expansions to ensure that they are still practical, particularly in light of more in-depth information that will be gathered during the facility planning process. In addition to an individual school's



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objectives, the plan considers the broader vision put forth by the district and community.

It's said that a building is only as strong as its foundation; the same can be said of strategic facility planning, which begins with a survey of current conditions. An assessment of the facility will include room dimensions, capacity limits, furnishings, equipment, mechanical systems, and current usage.

Each component will be evaluated for condition, maintenance needs, and life-cycle projections. After an exhaustive inventory of physical assets, research on current and forecasted demographic and societal factors will determine future demand. That research will include community growth, enrollment fluctuations, staffing outlook, and fiscal standing. These data will be instrumental



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in making informed decisions concerning both short-term and long-term solutions for maintaining the facility's viability.

Presenting a united front will give everyone confidence that the chosen solution has been meticulously vetted and represents the best value.

With a thorough understanding of the facility's current condition and its relation to established objectives, the facility strategic planning team can define a vision for the school's facilities. This step of the process will require transparency, collaboration, and exploration.

Since every decision going forward will be based on the vision as established here, it is critical that every voice is heard, every alternative considered, and no stone is left unturned. Using surveys, interviews,

workshops, and public meetings, leaders collaborating with experienced project team members can achieve maximum value.

This is the stage in the planning process when everyone should be encouraged to think big and be guided by the desire to provide an optimal learning environment for the students enrolled today and the generations that will follow.

The following key questions should be asked in developing the vision:

- Can current facilities be renovated to adequately meet these needs?
- Is expansion an economical alternative for providing additional capacity?
- Can the current building provide the greatest return on investment or will that come from new construction?

Many variables must be considered, but with a thorough understanding of objectives and a clear picture of current conditions, leaders can be confident that their decisions will be based on the best information available.

With a well-defined vision of the ultimate destination, planners can begin the strategic work of developing solutions. At this stage, wishes begin to take physical shape. The design team will begin to conceptualize



Maintaining and improving existing educational facilities requires a process built around vision, assessment, and critical decision-making.

improvement or new construction projects. Everyone can view renderings and 3D models showing the alternatives in graphic detail; modifications can be made based on feedback and preferences. Cost estimates for each alternative will allow the planning team to evaluate the feasibility with regard to budget realities.

During the solution development phase of facility planning, a handful of alternatives will surface. At that point, those solutions are fine-tuned before being evaluated by a larger group of stakeholders and decision-makers. A planning project team member will lead the group through exercises that will allow them to (1) identify and evaluate strengths and weaknesses, (2) assess how each solution addresses the established goals, and (3) measure cost-benefit metrics.

The final step of the planning process is to decide the best path forward. Although opinions and priorities will almost certainly differ, a strong team leader can help opposing sides see the bigger picture and work toward compromise if needed.

Because education is a critical component of a community and because improvements to facilities represent a significant investment of resources, reaching consensus on the final plan is important. Presenting a united front gives everyone confidence that the chosen solution has been meticulously vetted and represents the best value.

Leveraging Data

Long-range facility planning leverages the real-world expertise, experience, and commitment of educators, administrators, and community members. This

invaluable human resource is optimized even further with QLEO, a master plan modeling and analysis software that allows users to input data on long-range facility planning scenarios for cost-benefit analysis.

Although many focus exclusively on construction costs, the software provides the true life-cycle costs of an improvement project that includes such factors as energy usage, short- and long-term maintenance costs for structures and components, and operational costs. Since most school-related projects require the issuance of municipal bonds, it is important to evaluate the investment in relation to the term of the bond, which is often for 30 years or longer.

The software allows the team to compare the functional performance of current facilities with what can be expected after improvements are made and then measure the difference with regard to fiscal investment.

However, QLEO goes beyond the power of life-cycle costs to the dimension of purpose-driven functional performance. This metric tells the client project team stakeholders not only how long a building will last but also how well it will fulfill the objectives defined during the planning process, allowing them to make smarter investment decisions and ensure future success.

A school district in central Illinois provides a case study of the software's effectiveness. The district's schools receive high marks for performance, a point of pride for the community. Still, school leaders knew they would need to present a strong case for replacing the middle school building despite its being in desperate need of improvements.



Because education is such a critical component of a community and any improvements to facilities will represent a significant investment of resources, it is important that a consensus is reached on the final plan.

Working with a steering committee, a planning process was undertaken over a nine-month period that covered a wide range of concepts and locations. Perhaps most important to winning the required community support was the development of several funding options to provide data that would justify the spending.

This approach was successful in countering opposition to the new school construction, and a \$33 million referendum was passed. A new state-of-the-art facility is now underway that will allow the district to maintain its level of excellence in educating students for decades to come.

Winning Community Support

Community engagement is critical in getting projects approved, and winning public support should begin early in the planning process. As with all persuasion campaigns, it starts with information.

A campaign can educate people on how outdated and inadequate facilities negatively affect both academic performance and teacher satisfaction and retention. Allowing citizens to tour the schools and see the deficiencies firsthand presents the need in unmistakable terms. Q-and-A sessions will make the planning team aware of specific objections that must be overcome before a funding referendum is put up for a vote.

On the positive side, these personal encounters also identify champions for the improvement

projects—people who can be brought into the planning process and serve as strong advocates among their peers and friends.

Any community engagement effort should begin with the assumption that *good people with good information make good decisions*. Maintaining a positive attitude and keeping the focus on what is best for students, families, and the community greatly increase the odds of success.

A successful long-range facility planning effort is recognized when the desired improvement projects are approved and fully funded; a successful facility planning project team is recognized by its track record in helping school districts achieve that type of success. A winning approach encourages community members to take ownership of the process, removing a significant burden from district and school leaders.

Long-range facility planning has been described here as a process, but it is much more than that. For educational organizations that wish to improve their school facilities in a time when budgets are tight and construction costs high, this type of planning is a strategic imperative. At times, it can be an uphill climb, but when it comes to our children's education, it is always a journey worth taking.

Kayla Peck is an architectural designer with BLDD Architects. Email: kayla.peck@bldd.com

Damien Schlitt is the director for K-12 and a principal with BLDD Architects. Email: damien.schlitt@bldd.com