

LONG-RANGE FACILITIES PLANNING OVERVIEW

WHAT IS A LONG-RANGE FACILITIES PLAN?

Having a well-developed Long-Range Facilities Plan is a critical support for the sustained vitality of a School District. A Long-Range Facility Plan incorporates a district's strategic plan, including desired enhancements to programmatic and service offerings, and the current state of repair of the buildings and grounds. With this data and information, work is then undertaken with the District to create options to maintain and/or improve the buildings and grounds, depending on the needs and strategic goals of the District with enrollment projections also considered, to achieve them. The end result, the Long-Range Facilities Plan, provides a roadmap for the community to maximize fiscal responsibility, mitigating the impact of aged buildings and systems and delivering learning environments that support student growth.

ON WHAT BASIS IS THE LONG-RANGE FACILITIES PLAN TO BE FORMED?

Our experience has shown that it is extremely helpful for districts to have recently completed, or be in the process of completing, Strategic Planning. While considering facility needs is a major component of good financial and operational planning by districts, having a compelling and agreed-upon rationale for future facilities usage is a large part of the formation of stakeholder support for the final Long-Range Facilities Plan.

THE PLAN AS A LIVING, BREATHING DOCUMENT

A Long-Range Facilities Plan is not a detailed architectural design. It is a **guiding document** that serves as a foundation for planning capital investments well into the future. The Plan lays out, usually in **10-30 year estimated timeframes**, foreseeable maintenance, renovations and/or new buildings, and possibly the desired acquisition or sale of property. The School Board, administration and community work together once the Long-Range Plan has been approved to implement **phases** that meet the most pressing needs of the District. Funding for these investments can come from the District budget or other **funding sources** and/or the passage of a referendum. Some Districts are able to leverage both of these funding options along with private donations and grants to fully realize the Long-Range Facilities Plan.

The Plan should be viewed as a **living document** that is reviewed at the completion of each phase and revisited to ensure that student enrollment and community development data, building maintenance needs, and programmatic function remain the same and adjusted if needed. These responsive changes could impact the overall Plan, or just the ordering of phases. Many Wisconsin Districts also utilize this Plan to fulfill Fund 46 requirements.

LONG-RANGE FACILITIES PLAN DEVELOPMENT PROCESS



← **STAKEHOLDER ENGAGEMENT** →

STEP	END RESULT OF STEP	CONSULTANT/DISTRICT PARTICIPATION	STAKEHOLDER ENGAGEMENT
1	The State of the Current Buildings/Grounds and Life Expectancy for Components. At the conclusion, the District will have a detailed, prioritized maintenance list with conceptual cost estimates.	PRA, as architects, coupled with engineers contracted with PRA, walk the grounds and each building in the District and review relevant building plans to create the Facilities Condition Assessment.	District leadership and school level staff as District determines. Often Heads of Maintenance, Facilities and Custodial Leads are a part of building walkthroughs.
2	The State of the Current Buildings/Grounds with respect to educational space adequacy are described based on capacity, any space deficiency and vision for the spaces.	PRA, as architects and educational space planners, walk the grounds and each building in the District, as well as meeting with District staff to obtain student enrollment data and anticipated future enrollment, District class size policy, and discussion of programmatic offerings currently and desired.	District leadership and school level staff as District determines. Sometimes this step also includes student, parent and community engagement if visioning for the future curriculum and programmatic offerings is added to the scope of the project and/or the District does not have a current Strategic Plan.
3	A draft Long-Range Facilities Plan ready for broader community feedback.	PRA works with the District to take the information from Steps 1 + 2 and craft concepts that address the near and long-term needs and goals for the District. Any Board parameters for concepts, projected student enrollment and area development and programmatic vision should be established at the first meeting in this step along with desired level of Community Engagement in shaping concepts. From several concepts, eventually 1-2 Options with suggested phases will emerge as the best Long-Range Facilities Plan. Budget estimates for each are then determined in preparation for Step 4.	<p>This is also when Districts weigh what kind of community input in concept development and vetting, in addition to District staff, they feel is best.</p> <p>Examples range from District staff and Board members vetting concepts without broader community input to District staff and Board members vetting concepts and then bringing forward several for community focus group response, all the way to forming a Facility Advisory Committee (FAC) that is tasked with making recommendations to the Board following intensive consideration of information from Steps 1 + 2 as well as the District's Strategic Plan, demographic data and expected area development and other community-guided priorities and considerations.</p> <p>In the example of an FAC, the District's Board crafts a charter to clarify the role, expectations, parameters, and timeframe for drafting a Long-Range Facilities Plan. Once this charter is approved, members who fit into different stakeholder representation groups (parents of current elementary, middle, high school students, alumni, residents without students in the school system, etc.) are solicited. It should be noted that some Boards and Districts tap potential community participants who fit into identified stakeholder groups as well as advertising for membership. Regardless, it is recommended to determine the method of selection to meet ideal group size in advance of soliciting members.</p> <p>If the Board charters a committee (FAC), the District should work with legal counsel to ensure all Open Meetings Law requirements are met for the FAC. FAC agendas are usually forecasted out in advance of the meetings and background materials provided to members to ensure well-run meetings maximizing in-person meeting time. Most FACs include the following:</p> <ul style="list-style-type: none"> - Tours of all District Buildings - Use of Consultants to Detail Known Maintenance Needs and Costs, Future Student Enrollment/Demographic Data for the Community, the Appraisal of the Educational Space Adequacy, and any other reports germane to concept development and prioritization. - The recommendation to the Board at the conclusion of this Step typically is used to then gain broader community input in Step 4.
4	A Long-Range Facilities Plan with information about potential phasing over time and tax threshold when monies beyond the District's budget are needed.	<p>District officials often utilize internal staff and student focus groups at the onset of this Step to gain preliminary responses from the primary users of District facilities on the Options and phasing recommended from Step 3.</p> <p>The District also typically contracts with a consultant specializing in Community Surveys to assist with the Community Engagement on a broader scale than what the District is able to do by itself.</p> <p>Following a survey and/or other District-led community engagement events, a final Long-Range Facilities Plan is ready for use in Step 5.</p>	Community engagement can range from Focus Groups of invited community members to react to the options and phasing developed in Step 3, to open houses and tours. Often, community-wide surveys are also utilized that can be used to analyze voter response by those with and without students in the district currently, tax threshold, and breakdowns of other elements of the phasing.
5	<p>Formal affirmation and funding of the Long Range Facilities Plan with a Yes vote on a referendum ballot when additional funding is needed beyond the District's budget.</p> <p>When implementation of the Long Range Facilities Plan, or a phase thereof, requires additional funding via a referendum, this step is particularly crucial.</p>	<p>Educating staff on the legal parameters for advocacy versus getting the facts about the referendum campaign out and urging people to vote generally (not a yes or no vote) are critical at the onset of this phase.</p> <p>Consultants assist Districts at this step in creating communications materials to support the activities listed within the Community Engagement section and, when asked, may join District officials at said events.</p>	<p>Districts and Boards engage the community in the following ways during a referendum campaign:</p> <ul style="list-style-type: none"> - Host Open Houses in Schools - Attend and Speak at Local Civic Organization Meetings - Provide Fact Sheets to Local Businesses - Send In-Home Mailers with Long-Range Plan determination process, survey data, and how referendum dollars will be spent - Discuss the referendum on the radio, with local news media, and publish this same information on District communications channels such as social media, the website, school and district newsletters and via email/text with links to more detailed information - Additional ways that meet local needs <p>If a capital campaign to fundraise in addition to, or in place of, a referendum is needed, considerations for this may include:</p> <ul style="list-style-type: none"> - Many of the above referendum approaches - Determination of thresholds and any criteria for naming rights and/or advertising - The process to vet potential donors to ensure no reputational harm to district for taking money and naming rights