

CREATING A FACILITIES MASTER PLAN PART II

Critical Elements of a Facilities Needs Assessment for Existing Facilities

INTRODUCTION AND BACKGROUND

Creating a facilities master plan is essential for a district to be prepared for the future and to continue to serve the needs of its changing student population. This fact sheet is the second in a series that will provide essential information for board members about the main components of a facilities master plan, and important considerations for governance teams as they review and approve such plans. While district and county office staff develop these components, board members have the critical role of ensuring that the plans are in place and that they contain the information needed for making critical decisions about facilities.

The preparation of a Facilities Master Plan includes many key components. This brief addresses the facilities needs assessment. A needs assessment informs the district of the current physical conditions of existing facilities, including what sort of upgrades or replacements are necessary to bring these facilities up to a standard that will provide an effective learning environment for 21st century students.

NEEDS ASSESSMENT

The Needs Assessment process typically begins with an inspection of facilities to obtain visual determinations of their current physical condition. In addition, meetings with maintenance and facilities staff are conducted to assess needs based on a building's history, as well as records of system and equipment repairs or replacements that were done over the years are reviewed, and an overview of the facilities inventories, equipment data, plans and drawings. The Needs Assessment process also includes meeting with the school administration to discuss end-user concerns with the condition and adequacy of existing facilities to meet current and planned future educational programs, which could necessitate additions and/or modifications to the existing facilities.

There are some important considerations for governance teams to consider as their districts conduct the needs assessment:

Participants in the Process. Broad participation and input from the following groups will greatly enhance the coverage and completeness of the Needs Assessment. In general, the assessment process should include:

- » District administration
- » Teachers
- » Maintenance/operations and facilities staff
- » Other school staff

Coverage of the Needs Assessment. The assessment should cover a wide array of district needs, including:

- » Grounds and site work
- » Outdoor facilities
- » Utilities
- » Centralized equipment systems
- » Building envelope
- » Interior finishes
- » Furnishings and fixtures

Factors that determine needs. The need for modernization, upgrades or replacements to existing facilities, equipment and systems are driven by a number of factors including:

- » New code requirements
- » Economic service life
- » Exposure to weather
- » Wear and tear

- » Obsolescence
- » CDE standards

Sources of information. A comprehensive needs assessment also derives information from sources such as:

- » Facilities equipment data
- » The demographic studies and enrollment projections mentioned previously
- » Site visits and inspections
- » Staff interviews

OTHER USE OF A NEEDS ASSESSMENTS

While the Needs Assessment is a critical component of a Facility Master Plan, governance teams should also ensure that their district has an updated Needs Assessment when making a decision to levy a Developers Fee for residential and commercial/industrial construction or to go to local voters with a Bond Measure to fund facilities modernization and new construction projects. The needs assessment is required for both of these endeavors. In the case of a bond measure, prior to an election the board, should prepare a list of projects for the voters, drawing on findings about existing facilities based on information included in the Needs Assessment.

QUESTIONS FOR BOARD MEMBERS TO ASK

- » Have we conducted a facilities Needs Assessment? How recently: Is it up to date?
- » Who has the information from the Needs Assessment? Do the right district staff have access to the results of the Needs Assessment?

- » What does the Needs Assessment indicate about current and ongoing facilities needs? What does this mean for current and future district investments?

Resources for Board Members

- » Link to more detailed information on demographic studies and enrollment projections, www.totalschoolsolutions.net/fac_demoEPs
- » Link to more detailed information on needs assessment, www.totalschoolsolutions.net/fac_needsAssessment.php
- » Link to CSBA GAMUT Policies, gamutonline.net

CONCLUSION

Planning for a school district's future is never easy. Knowing the current physical conditions of existing facilities including what sort of upgrades or replacements are necessary to bring existing facilities up to a standard that will provide an effective learning environment for 21st century students is an essential part of understanding that future. Boards can play an important role in using the most up to date and accurate information in making these important decisions for their district.

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