



Mother's Club Family Learning Center in Pasadena, Calif., received a citation of excellence for green school building of the transformation of a 10,000-square-foot factory into a learning center.

# Mastering the Plan

To ensure facilities are maintained equally, you need to be systematic in your assessment

Hitesh Haria

**B**roken windows, peeling paint, and leaky roofs are all part of the never-ending maintenance cycle of school buildings. Yet, not until recently has the state of a building and its grounds been fully understood in terms of its impact on student learning.

Perhaps more than anything, the break-neck speed of technological advances has put the issue squarely under the microscope. The capacity to retrofit classrooms for Internet and networking connections, video, and data ports has challenged districts with how to prioritize basic repairs, remodels, expansions, and the ultimate decision to raze a building and replace it with a new one.

Sometimes it can feel like the decision-making process is random, with, forgive the pun, the squeakiest wheel often winning the competition for limited district dollars. But a squeaky-wheel approach to facilities re-

pair is an inadequate way of distributing limited funds. In Minnesota's Saint Paul Public Schools, we serve 40,549 students in 73 district-owned instructional and administrative campuses (7.3 million square feet). Our department receives about \$230 million of yearly upgrade and remodeling requests. Our budget is \$30 million.

To approach this ongoing disparity thoughtfully and responsibly, we decided it was time for a facilities master plan, which would forecast and establish capital improvements and deferred maintenance needs for several years. Because the district established a new strategic plan in 2007 and

was embarking on a large-scale systems change, the timing was perfect to marry our facilities conditions assessment with an educational adequacy assessment.

### FORECASTING EDUCATIONAL NEEDS

An educational adequacy assessment bridges the gap between a district's facilities and its educational standards and goals. This was the first time that we directly linked the degree to which a school's facilities could adequately support its instructional mission and methods. As an example, if we plan to expand a school's burgeoning music program to better serve students and families, then that school first must be assessed based on its capacity to integrate features such as soundproof practice studios or adequate rehearsal and performance facilities.

If the studies deem the building inade-

quate for remodeling and expansion, then the question will be whether another building should carry the music program or the current building should be rebuilt or reconfigured.

Obviously, these considerations carry serious financial, educational, and emotional weight. But the educational adequacy assessment asks the critical questions often overlooked by a facilities condition assessment: What needs to be done to bring a particular school to a standard of adequacy that meets educational and instructional needs? At what point does a school's inability to meet educational needs mean that it should be replaced?

To comprehensively assess educational effectiveness, you must first understand the components that affect the instructional program. These components are formulated into educational adequacy assessment guidelines that broadly fit into eight major categories:

- Capacity

- Support for programs
- Technology
- Supervision and security
- Instructional aids
- Physical characteristics
- Learning environment
- Relationship of spaces

The data from this standards-based assessment gives administrators a big picture that is objective and has been applied consistently across all district facilities. The data enable you to assign priorities district-wide to the facilities that are most likely to meet the educational needs of students and support the district's academic mission. (See sidebar for tips on undertaking facilities and educational adequacy assessments.)

#### INVESTING WISELY

Your community may be concerned about

the costs of conducting both a facilities conditions assessment and educational adequacy assessment. However, considering the amount of money districts spend on facilities upkeep and maintenance (in St. Paul, it's \$240 million over eight years), it would be a disservice to taxpayers to not undertake an in-depth assessment.

The cost of the study was less than a half a percent of the overall long-term investment to be made in our buildings, which is an inexpensive way to understand what you're really doing. For smaller districts, the cost would be less as the cost for an assessment is typically quoted in terms of square footage.

While districts can continue to do a facilities conditions assessment without the benefit of an educational adequacy assessment, keep in mind that you'll only be getting half the story. An account of the health of a building is important, but only so far as it is directly tied to that building's ability to support the delivery of the programs within the building. In other words, the facilities conditions assessment tells you what is broken, and the educational adequacy assessment tells you what is missing.

Remember that the deficiencies identified in these dual assessments can then be combined with district enrollment projections to provide an overall facilities master plan that can be the basis for a district-wide facilities improvement funding strategy. With this data-driven plan, it will be that much easier to justify borrowing money to repair, maintain, or build facilities.

By employing a comprehensive assessment of your facilities first, you are taking the time to ensure that repairs and expansions are wise investments for your community. Doing a million-dollar facelift to a school might oil the squeaky wheel, but it will be a poor investment if you later determine that the building falls short of its potential to be adapted to the growing needs of 21st century learners. ■

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## Tips on undertaking facilities and educational adequacy assessments

**It will cost you money if you don't take the time to preplan.** It's critical that district leaders know how they'll use the data: Will it inform a referendum, bonding authority, facility master plan, or prioritize projects for wise investments? Before embarking on a request for proposal (RFP) process, research what other districts have done.

**Be wary of firms that say they can do it all.** It will take partnerships among a few specialized firms to undertake a comprehensive facilities and educational assessment. In our case, there was a lead architectural firm that partnered with three national experts to get the job done.

**Be very specific about roles and responsibilities.** Clarify what resources you have and don't have and where you need the consultants to fill in the gaps. For instance, we already had a lot of CAD data and drawings that we didn't have to pay a consultant to do.

**Keep the data updated.** The assessment is a snapshot in time as the condition of facilities are always in flux, so it's essential to keep the database updated or else you'll have to repeat both the study and the initial investment.

**Get broad input on the educational adequacy guidelines.** Involve teachers, athletic directors, music directors, administrators, parents, and students to determine the educational adequacy guidelines so that the study will reflect your school community's direct "on the ground" experiences and educational vision.

**Be realistic about the timeline.** For a district our size, it took a year—eight to 10 months, including the pre-planning, and two more months for the school board to approve the winning contract. If your RFP is lacking in important details, the timeline will expand.