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## Goals / Process

*This section discusses the goals for the desired future state of the district's educational programs, community involvement and facilities.*

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### 1.1 GOALS

The last of the eight priorities set out in the district's Strategic Plan addresses facilities and activities that impact facilities.

*The district will have mission-driven, empowering infrastructure. The district will ensure that utilization and allocation of resources (people, budget, facilities, technology, etc.) are in alignment with the mission and goals of our school system, and that they enable our staff, parents/families, and partners to contribute to the accomplishment of the district's student achievement and organizational objectives.*

The overall facilities asset goal is: we (the district) deliver essential maintenance, operational, and planning services that sustain and improve the physical learning environment. The objectives to support this goal are to:

- Provide on-going and preventive maintenance designed to maximize benefits at the lowest cost and to ensure maximum life of a facility or piece of equipment with a minimum amount of repairs, replacement or loss of use
- Provide and maintain safe, efficient and clean learning environments for students and staff
- Provide transportation services for approximately 6,700 students every day on over 168 routes
- Work with parents and communities to provide facilities, playgrounds and athletic fields that everyone can use and enjoy
- Implement the capital projects program in a timely manner, meet Bond Oversight Committee tasks, and supplement bond funding with funds from other sources where possible
- Continue planning efforts relating to tracking progress of improvements, updating facility needs, and tracking demographic influences

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### 1.2 PROCESS

*This section identifies the process for district capital planning and decision making.*

#### 1.2.1 How Information Was Gathered

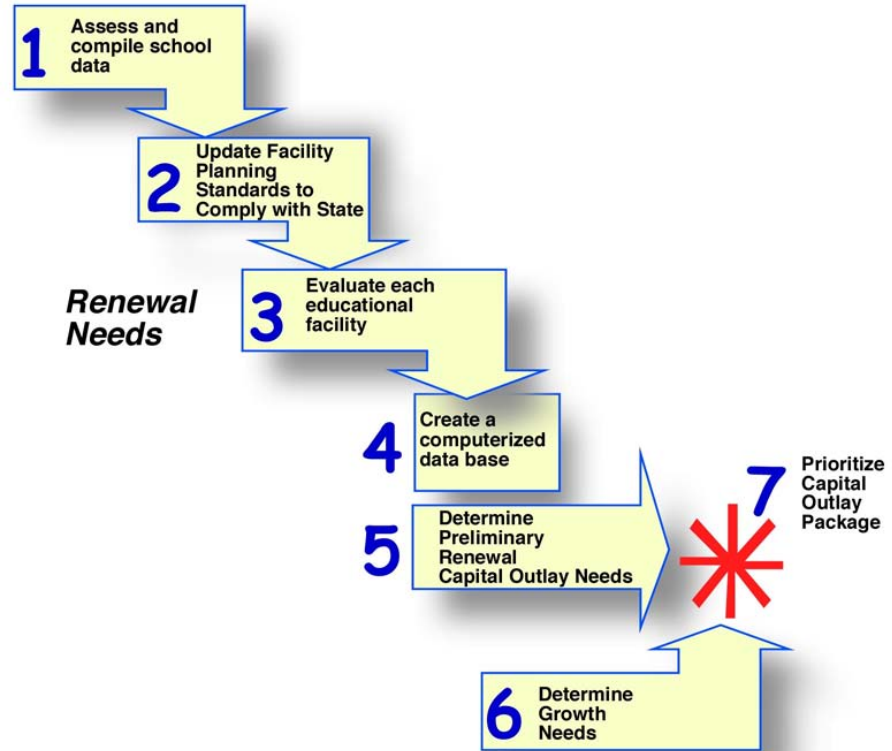
Project planning meetings for the FMP field evaluation began in November 2004. Field evaluations began in January 2005 and continued into September 2005. Evaluators visited 98 sites and compiled reports with details about the results. Exhibit 1-1 presents

the flow diagram of how information was gathered, validated, and used during work with the district to prioritize capital projects.

Steps 1 and 2: The project planning phase involved the following process steps.

**Exhibit 1-1**

*The Facility Master Plan (FMP) is based on a school assessment planning process.*



- Coordinated the 2001 Concordia prototype space criteria for new schools with Hawkins and Lilley *Guide for School Facilities Appraisal* (referenced in the 1991-2001 plan) to create base evaluation standards for the 2005 evaluation — there are no officially adopted facility standards in the district.
- Tested the evaluation tools on Maple ES, Sutter MS, and Hiram Johnson HS in November and December of 2004 to understand space use and facility condition issues at SCUSD
- Sent introductory e-mails to all facilities, explaining the process and purpose of the FMP work — this introduction was coordinated by the district operations group. An overall schedule of evaluations was developed to avoid visiting sites on testing and other special days.

Step 3: The procedure for gathering facility data included these activities:

- Distributed the site manager’s questionnaire (in both electronic form via the Web and paper copy via FedEx) and interviewed each

- principal while on site
- Evaluated each site in a day-long process of inspecting all spaces, exterior improvements, site areas, and the roof(s). Evaluators visited schools while classes were in session to determine how rooms were used, allow teachers to ask questions, and understand density, comfort, noise, and traffic problems. The evaluators (all architects) spent one day at elementary schools, two days at middle schools, four to five days at high schools, and 0.5 to one day at each alternative/adult school site, as well as administrative sites.
  - Scored facilities based on evaluation documents
  - Wrote a brief summary of needs for each school
  - Created capital improvement projects (CIPs) for facilities and their sites — all projects were entered into a Web-based database.
  - Met with local estimators to understand the dynamic of the bid climate in the area and updated the same information every six months to refine the cost database for SCUSD
  - Interviewed district staff and maintenance supervisors about major systems, recurring problems, and constraints in meeting the maintenance mission, as well as expected length of renewal cycles for HVAC, roofing and painting. Problems specific to a site were added as recommended capital improvements for that site. Districtwide needs were identified as general fund projects and entered into the database under the “District” category.

Steps 4 and 5: These steps were followed to validate facility data and the capital improvements indicated by the data:

- Returned all work for review, comments and additions by the schools and district functions that were evaluated. The schools were asked to prioritize needs (whether identified by ARC or added by the school on the comments form) on a scale from 1 to 8; 51 schools responded.
- Met with district “content area” supervisors in special education, nursing, early childhood, library / media centers, and food service, as well as with cabinet staff about districtwide physical education / athletic concerns. A “content area” directly impacts how a facility should respond; e.g., if the district hopes to expand library services into a media center model, then the schools must respond with a space change.
- Developed three site development master plans (at Elder Creek ES, Will C. Wood MS, and Luther Burbank HS) to determine if the basic FMP recommendations could be improved through a longer structured, site-based process. This process examines a site’s potential through the ideas and issues developed by a school design guidance committee and a local architectural firm. The

resulting plan's recommendations are then compared to the FMP recommendations to determine if changes are needed in the FMP's identified capital improvement project descriptions.

Step 6: These steps were followed to gather data about district student populations, growth projections and space utilization:

- Conducted interviews with Sacramento Area Council of Governments (SACOG) regional planners and demographers, city planning groups, housing specialists, developers, and district consultants handling housing and economic development, and land use information.
- Provided an electronic, Web-based questionnaire for school principals, posted in October, 2005. The questionnaire asked for information about socioeconomic conditions and school programs resulting from historic enrollment and transfer trends; 19 responses were received. This information varied in detail, but generally broadened our understanding of changes in attendance area demographics and new home construction, school population and school programs.
- Collected space use data from all schools and entered it into utilization and capacity modeling programs

Step 7 (Preparation): After data was collected and results were determined, these steps were followed:

- Presented information to staff and cabinet for feed-back
- Evaluated all schools that were modernized after September 2005, revising scores, summaries and capital projects as warranted to reflect completed work.
- Met with maintenance and content area supervisors to discuss FMP projects to address the facility problems which they identified. Part of this step establishes the impact of the "deferred maintenance" program on the overall capital program and whether cyclical work such as roofing, carpet, painting, stucco/masonry renewal, paving upgrade, and grass field improvements should be funded by the district rather than as specific site projects.
- Completed the three site development master plans; discussed "lessons learned" with district staff and whether changes to other schools' recommendations can be interpolated from the three studies
- Revised the data set for projects and finalized the estimating base to reflect possible costs in 2008 (the probable first year of a new funding cycle)
- Made preliminary recommendations

After Step 7 (refer to Exhibit 1-1 on page xi. The Section 3 of the FMP Process: How do we get there?)

- Conduct strategy workshops with the district for reaching decisions about which identified needs will remain as CIPs and whether any new needs should be added. These decisions will establish a validated set of results to serve as the basis for planning a capital program.
- Prioritize the list of capital project needs in the validated CIP database
- Determine the time span for making improvements, the order of work and the implementation process guidelines
- Establish monitoring procedures to monitor progress and control authorizing funds, scheduling projects and budgets
- Fulfill promises made to the community

### **1.2.2 Authority and How Decisions are Made**

During the stages of field work and information gathering, most decisions were made by Operations and Maintenance directors, the Assistant Superintendent for Operations, and the Deputy Superintendent / CFO. Questions of policy, education modeling, program applicability, and review of summary data were submitted to the Superintendent and the Associate Superintendents for comments. The School Board sets overall decision-making guidelines about issues, needs, and program changes, and establishes the content of the capital program. The FMP is meant as a means to assist the district in setting decision-making guidelines and applying them until an agreement is reached about a viable capital implementation plan.

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