

# FACILITY ASSESSMENT

## A district master plan will require a comprehensive facility assessment of all owned and leased properties

*Roger Price*

The impact of technology, environmental issues, changing demographics and societal expectations will shape what resources are available and how they will be deployed in our school districts. Adding the reality of already aging and in many cases outdated facilities, educational leaders are faced with how best to direct limited resources.

Schools are a community asset and the facilities provided are often the cultural center for the residents of those communities. An investment in facilities should be managed as

district's facilities is critical to establishing plans that are created through systematic, comprehensive and analytical processes. Communicating the priorities will maximize the ability of the district to assure maximum student achievement and excellence.

A district's obligation to its community is to conduct an objective assessment and analysis of WHAT YOU KNOW about your district. This includes the full understanding of educational trends, student performance data and the current state of the districts program structure, finances and facilities. The condition

The assessment should evaluate:

- building codes issues,
- access and potential safety/security issues,
- existing facilities plans,
- transportation and parking issues,
- future land uses including outlying properties,
- academic facilities and support facilities,
- sports and recreation facilities, athletic fields, open space, landscaping,

**Clearly understanding the current state** of the district's facilities is critical to establishing plans that are created through systematic, comprehensive and analytical processes.

any other part of the financial picture. The return on investment should be measured in terms of how they further the mission and vision of the school district.

Decisions cannot be made serendipitously or with unchecked influence of vendors or stakeholders. School boards are responsible for these decisions. Clearly understanding the current state of the

and planned use of facilities is a critical part of this self-evaluation.

### Facilities Assessment — Comprehensive

The process to fulfill this part of the assessment includes evaluation of both internal and external conditions, existing intergovernmental coordination, and the history of capital improvements.

- general infrastructure (water, sewer, surface water management),
- energy management, including utilities costs and efficiencies,
- intergovernmental coordination, and,
- capital improvements.

**The first step** is to ascertain the extent of deferred maintenance,

**The WASB Can Help!** Completing a facility assessment is an involved process with many moving parts. Consultants from the WASB's Organizational Consulting Services can help districts complete in-depth facility assessments along with a host of other services. For more information, visit [wasb.org](http://wasb.org) or contact Louis Birchbauer at 414-218-2805 or [lrbirchbauer@wasb.org](mailto:lrbirchbauer@wasb.org).

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remaining facility life, and renovations needed. It includes evaluation and documentation of:

■ **Site Conditions:** What is the condition of driveways, sidewalks and parking lots? Are there transportation and parking issues? Is there a plan for future land uses of sites including outlying properties? What is the status of storm water drainage systems, including the municipal plans and effects to and by your neighbors? What is the condition of landscaping and general site infrastructure? What is the status of signage?

■ **Building Exterior:** What is the construction history? What are the general conditions of exterior doors, cladding, and roofs? Has the brick, overhangs and flashings been inspected for needed maintenance? Is there a schedule of regular roof replacement and maintenance? Is exterior lighting adequate?

■ **Building Interior:** What is the history of updates and remodeling? What is the condition of the interior infrastructure: plumbing systems and fixtures, electrical systems, interior lights?

■ **Security Systems:** What is the status of existing systems for fire prevention and alarms, access control, and surveillance?

■ **Telecommunications Systems:** What is the status of communication systems including intercom and telephone? What is the status and capacity of data distribution systems, within facilities, between facilities, and with the outside world? Is there an integrated,

synchronized clock system in place? Is there an existing technology plan?

■ **Sports and recreation facilities, athletic fields, open space:** What is the status of these facilities related to the demands of the district and community programs?

■ **Energy, environmental, and utility management:** What is the status of existing systems including heating plant, air conditioning, emergency power, including utilities costs and efficiencies? At what level is the building functioning related to environmental guidelines?

■ **Code Compliance and Accessibility:** Are all buildings, installed systems and equipment in compliance with all applicable fire, safety, building codes and required standards appropriate for the building age?

■ **Support Spaces:** Are there adequate restroom spaces throughout the building? What space is available and dedicated to services such as housekeeping, recycling, receiving, and maintenance? What is the current state of space available and used for auxiliary services such as food service?

**The second step** of facility assessment is to understand the use of the facilities within the existing academic program. Evaluating the effectiveness of programs and departments use of current facilities is needed. This includes evaluation and documentation of:

■ **Capacity:** How many rooms are there? What is the scheduled and real use pattern? Is the use over or under specified capacity?

■ **Instructional Tools:** What is the

A photograph of a young woman with long, wavy brown hair, smiling warmly at the camera. She is wearing a green and white horizontally striped shirt. In the background, a computer keyboard is visible, suggesting she is in a classroom or office setting.

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The ACT logo, consisting of the letters "ACT" in a bold, sans-serif font, with a small red triangle above the letter "A".

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# FACILITY ASSESSMENT

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current capacity to support the educational process, including appropriate connectivity, teaching accessories, computers, and other equipment?

■ **Furniture and Fixtures:** What is the condition of existing furniture and fixtures? Is it ergonomically appropriate?

■ **Functional Adequacy:** How are the rooms configured as to size, flexibility, and safety?

■ **Room Finishes:** What is the condition of the floors, ceilings and walls? Are they easily cleaned and maintained in a neat and orderly manner? Are color schemes and finishing materials conducive to teaching and learning?

■ **Room Environment:** What are the existing conditions in the classroom related to acoustics and sound, climate, lighting, electrical capacity, and installed furniture and fixtures?

It would also be prudent to evaluate and document community spaces and/or spaces used outside of district's mission, whether or not they are dedicated or shared.

In addition to internal staff and/or a consultant to coordinate the assessment, it may be necessary for the district to engage additional expertise such as surveyor, geotechnical engineers, environmental consultant, traffic consultant, food service consultant, architects, mechanical/struc-

tural/electrical/HVAC consultants, roofing consultant, and others to complete the comprehensive assessment of facilities.

The citizens of the district need to be ensured of responsible stewardship and public accountability. This can be accomplished by providing careful assessment and inclusive planning to provide sustainability of its physical and fiscal resources for current and future generations. The end result will focus financial resources on projects that help attain the district's vision for its students. ■

*Roger Price is an organizational consultant with the WASB.*

## PLANNING with Strategic Thinking

**It's a district's obligation** to its school community to conduct an objective assessment and analysis of **what you know** about your district. This includes the full understanding of educational trends, student performance data and the current state of the district's program structure, finances, and facilities.

It's also imperative to have a clear understanding of **what you believe**, and most importantly, having a clear ear to what your community believes are their expectations.

Inclusive processes around listening, accumulating data/information and communicating lead to collaborative strategic thinking. This information then assists in forming a comprehensive master plan for the future. The results are long term — fiscally responsible planning for educational, operational, financial, and facilities in the future.

Only then can the district move forward together with shared goals and objectives that assure excellence in education and that all students achieve success. □

