

# PLANNING FOR PK-12 INFRASTRUCTURE

## Adequate Public School Facilities for All Children



### The Problem

America's PK-12 public school facilities have wide-reaching educational, health, economic, environmental, and community impact. **But far too many school districts do not have the capacity to deliver PK-12 school facilities that are healthy, safe, environmentally sustainable and conducive to teaching and learning.** As a result, many children and communities suffer from inadequate and inequitable school facilities.

### The Opportunities

A reformed PK-12 infrastructure sector will:

- help close achievement gaps
- improve child and community health
- sustain the environment
- revitalize neighborhoods and communities

**Now is the time to chart the nation's course for the reforms, innovations, and tools needed to create the conditions for adequate and equitable school facilities for all children.**



### The National Planning Process

- ① Leadership Team has organized and will facilitate six diverse, cross-sector Working Groups focused on:

Data & Information	Planning	Decision Making
Identification, definitions, collection, analysis, research, access, and technologies for facilities data and information management.	District, regional, and state educational facilities master, capital and site specific planning, cross sector and agency planning.	Capital and facilities governance, approvals and procurement.
Management	Funding	Accountability
Maintenance, operations, and capital management of facilities.	Federal, state, and local operating funding and capital financing of public school facilities.	Internal controls and external oversight of facilities operations, maintenance, and asset management.

Working Group leaders and innovators come from key sectors:



Civic



Governmental



Building Industry



Public Finance



Labor



University

- ② Working Group leaders and innovators who have heart, experience and creativity will work together to develop a menu of systemic reforms and innovations that are both game-changing and incremental solutions for the status quo problems of inadequate and inequitable school facilities.

- ③ The Working Groups will convene to discuss their proposals and identify priorities for research, policy reforms, advocacy, and public and private investment. Leaders in PK-12 infrastructure can use these proposals to inform their priorities for policy reform, investment, research, and advocacy.

### The Leadership Team



# Phase I Strategic Planning Schedule Fall 2016

Leadership Team invites sector leaders to participate in Working Groups.

June–July 2016

September 7–8

Kick off calls for Working Groups

September

- Leadership Team drafts and circulates Problem Statements for review and revision.
- Working Groups edit Problem Statement.
- Leadership Team revises and recirculates Problem Statement and adds the frameworks for solutions.

October

- Working Groups finalize Problem Statements and begin brainstorming a Menu of Solutions.
- Problem statement is finalized and circulated along with Draft 1 Menu of Solutions.
- Working Groups review and revise their Menu of Solutions.
- Menu of Solutions is finalized and circulated for comments.

November

- Final Draft Problem Statements and Menus of Solutions are prepared and circulated for final comments.
- Leadership team compiles all Problem Statements and Menus of Solutions into a Preliminary Planning for Equity Report.

November 28

Preliminary “Planning for Equity Report” is provided to all Working Group members and to state facilities officials.

December 5–6

State facilities directors review and provide input on the Preliminary “Planning for Equity Report” at the National Council on School Facilities Annual Meeting.

December 6–7

Planning for Equity Summit in Washington, DC provides input and priority to solutions for feasibility analysis in Phase II.

January – March 2017

Leadership Team prepares a Phase I strategic plan: *Mapping Adequacy and Equity into PK–12 Infrastructure*.

## Phase II: Feasibility Analysis

- Prepare a business plan for financing the feasibility analyses
- Finance business plan for feasibility studies
- Conduct policy, legal, finance, governance and constituency building studies on priority solutions

## Phase III: Apply Priority Interventions

- Develop financing plan for implementation
- Build networks to increase public will
- Strengthen public and private institutions to build public capacity
- Implement plans for priority solutions

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## Data and Information Working Group

### Overview and Calendar of Key Activities, Fall 2016

Addressing the structural and legacy inequities nationwide in PK-12 infrastructure requires that the American public and policymakers better understand the conditions in public schools and how these facilities impact student and teacher health and performance, the environment, the local economy, and overall community vitality. Up-to-date, comprehensive, accurate, and relevant data and information on facilities that is accessible to citizens and officials is a key element of a well managed capital improvement program. It supports the other key elements: sound planning, effective decision making, skilled management, adequate and equitable funding, and appropriate accountability.

The Data and Information Working Group will craft a Problem Statement that identifies the key causes for shortcomings in facilities data and information management and access in PK-12 public education and identify a Menu of Solutions to these problems.

### Working Group Participants

Jason Bocarro, Associate Professor, North Carolina State University, College of Natural Resources

Scott Brown, Director of Facilities, Maine Department of Education

Lee Prevost, Strategic VP, SchoolDude.com

Jim Whittaker, President, Facilities Engineering Associates, Inc.

W.T. "Dusty" Duncan, Facilities Director, Marion School District, Arkansas

Lettie Boggs, Chief Executive Officer, Colbi Technologies

Kelly McCarthy, Senior Manager of IRIS & Impact Measurement, Global Impact Investing Network

Dan Rademacher, Executive Director, GreenInfo Network

Jerry Roseman, Director of Environmental Science & Occupational Safety & Health for the Philadelphia Federation of Teachers Health & Welfare Fund & Union

### Working Group Facilitators

Mary Filardo, Executive Director, 21<sup>st</sup> Century School Fund (mfilardo@21csf.org)

Jeff Vincent, Deputy Director, Center for Cities + Schools at UC Berkeley (jvincent@berkeley.edu)

### Key Activities

Date	Eastern Time	Key Activity	Objective
Wednesday, Sept. 7	1:00-1:30 PM	Conference Call #1	Kickoff
Wednesday, Sept. 21	1:00-2:00 PM	Conference Call #2	Edit Problem Statement
Wednesday, Oct. 5	1:00-2:30PM	Conference Call #3	Brainstorm initial Menu of Solutions
Wednesday, Oct. 19	1:00-3:00 PM	Conference Call #4	Review and expand Menu of Solutions
Tuesday, Dec. 6	5:00-8:00 PM	National Summit Dinner, Washington, DC	Working Groups dinner
Wednesday, Dec 7	8:00 AM-5:00 PM	National Summit, Washington, DC	Review and prioritize proposed solutions

# PLANNING FOR PK-12 INFRASTRUCTURE

## Adequate Public School Facilities for All Children



## Educational Facilities Planning Working Group

### Overview and Calendar of Key Activities, Fall 2016

Addressing the structural and legacy inequities nationwide in PK-12 infrastructure requires sound PK-12 facilities planning. Educational facilities planning is essential to get the best value for facilities spending regularly budgeted; to ensure equitable facilities for all children; to transform inadequate school facilities into healthy, safe and educationally appropriate buildings and grounds; and to leverage the district investments so they contribute to broader health, environmental, neighborhood use, and economic development goals of communities. Sound planning is a key element of a well managed capital improvement program. It supports the other key elements: accurate information, effective decision making, skilled management, adequate and equitable funding, and appropriate accountability.

The Educational Facilities Planning Working Group will craft a Problem Statement that identifies the key causes for shortcomings in PK-12 educational facilities planning and identify a Menu of Solutions to these problems.

### Working Group Participants

Krisztina Tokes, Director of Planning, Los Angeles Unified School District  
Perry Taylor, Director of Facilities, Alabama Department of Education  
Melanie Drerup, Director of Planning, Ohio Facilities Commission  
Steven Bingler, CEO, Concordia, LLC  
Bill DeJong, Co-founder at Schools for the Children of the World, Senior Advisor DeJong-Richter  
Ariel Bierbaum, Assistant Professor, Department of City Planning, University of Maryland  
Jeanne Schultz, Executive Director, Hawaii Institute of Public Affairs  
Darryl Alexander, Director of Health, Safety and Well-being, American Federation of Teachers  
Jacqueline Leavy, Advisor to the Chicago Educational Facilities Master Planning Task Force  
Peggy Shepard, Executive Director, West Harlem Environmental Action  
David Knotts, Executive Director of Capital Programs, Fulton County Georgia Public Schools  
Shirl Buss, Y-PLAN Creative Director, Center for Cities + Schools, UC Berkeley  
Sharon Danks, CEO, Green Schoolyards America

### Working Group Facilitators

Mary Filardo, Executive Director, 21<sup>st</sup> Century School Fund ([mfilardo@21csf.org](mailto:mfilardo@21csf.org))  
Jeff Vincent, Deputy Director, Center for Cities + Schools at UC Berkeley ([jvincent@berkeley.edu](mailto:jvincent@berkeley.edu))

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Wednesday, Sept. 7	4:00-4:30 PM	Conference Call #1	Kickoff
Wednesday, Sept. 21	4:00-5:00 PM	Conference Call #2	Edit Problem Statement
Wednesday, Oct. 5	4:00-5:30 PM	Conference Call #3	Brainstorm initial Menu of Solutions
Wednesday, Oct. 19	4:00-6:00 PM	Conference Call #4	Review and expand Menu of Solutions
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## Adequate Public School Facilities for All Children



## Decision Making Working Group

### Overview and Calendar of Key Activities, Fall 2016

Addressing the structural and legacy inequities nationwide in PK-12 infrastructure requires clear processes for needs-based decision making. Decision making associated with PK-12 public school facilities is complex and is largely regulated in procurement, public finance, administrative, and governance policies and codes. Effective decision making is a key element of a well managed capital improvement program. It supports the other key elements: accurate information, sound planning, skilled management, adequate and equitable funding, and appropriate accountability.

The Decision Making Working Group will identify weaknesses in federal, state, and local policies and codes that contribute to inadequate, inequitable and inefficient school facilities management and delivery. The group will then identify a Menu of Solutions to these problems.

### Working Group Participants

Cecile Carroll, Director, Blocks Together (Chicago)  
Pam Attardo, Historic Preservation Officer, Lewis & Clark County (Montana)  
Violet W. Brown, Senior Educational Program Director, Office of Educational Facilities, Florida Department of Education  
Bernard E. Piaia, Jr., Director, Office of School Facilities, New Jersey Department of Education  
David Lever, Former Director, Interagency Committee on School Construction (Maryland)  
Scott Newell, Senior Director, Cooperative Strategies/Dolinka Group (Colorado)  
Lee Dulgeroff, Chief Facilities Planning and Construction Officer, San Diego Unified School District  
Kate Gordon, Chair, Citizen's Oversight Board, California Proposition 39  
Cynthia Uline, Professor Emeritus, Educational Leadership, San Diego State University

### Working Group Facilitators

Mary Filardo, Executive Director, 21<sup>st</sup> Century School Fund ([mfilardo@21csf.org](mailto:mfilardo@21csf.org))  
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### Key Activities

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Thursday, Sept. 8	1:00-1:30 PM	Conference Call #1	Kickoff
Thursday, Sept. 22	1:00-2:00 PM	Conference Call #2	Edit Problem Statement
Thursday, Oct. 6	1:00-2:30 PM	Conference Call #3	Brainstorm initial Menu of Solutions
Thursday, Oct. 20	1:00-3:00 PM	Conference Call #4	Review and expand Menu of Solutions
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## Adequate Public School Facilities for All Children



## Facilities Management Working Group

### Overview and Calendar of Key Activities, Fall 2016

Addressing the structural and legacy inequities nationwide in PK-12 infrastructure requires strong and effective management. The management of PK-12 public school facilities involves the supervisory, administrative and direct service responsibilities for all aspects of school facilities from the acquisition (capital planning, land purchase, design and construction) through operations and ongoing maintenance and renewals.

PK-12 facilities management is evolving as building systems become more complicated, codes change, educational programming evolves, and as the supervision, administration and direct services cross public and private sectors. Effective management supports the other elements of a well managed capital improvement program: accurate information, sound planning, effective decision making, adequate and equitable funding, and appropriate accountability. The Facilities Management Working Group will craft a Problem Statement on the key obstacles to effective, efficient, and equitable management of PK-12 infrastructure. The group will then identify a Menu of Solutions to these problems.

### Working Group Participants

Bob Gorrell, Director, New Mexico Public Schools Facilities Authority

Jim Wilson, CEO/President, JFW Inc, Project Management

Tom Rogér, Vice President Finger Lakes & Central NY, Gilbane Building Company

Don Ulrich, Assistant Superintendent, Facilities Services, Clovis Unified School District (CA)

Bill Savidge, Former Engineering Officer, West Contra Costa Unified School District & Former Chief Executive Office, California State Allocation Board

Frank Patinella, Education Advocate, American Civil Liberties Union of Maryland

Jerry Roseman, Director of Environmental Science & Occupational Safety & Health for the Philadelphia Federation of Teachers Health & Welfare Fund & Union

John Dale, Chair, Committee on Architecture for Education, AIA; Principal and Pre K-12 Studio Leader, HED

Martin Knott, President, Knott Mechanical and Wye River Technologies

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## Facilities Funding Working Group

### Calendar of Key Activities, Fall 2016

Addressing the structural and legacy inequities nationwide in PK-12 infrastructure requires adequate and equitable funding. Adequate annual capital investments are necessary to ensure good value from M&O spending and to ensure healthy, safe, and educationally appropriate conditions for all schools. Stable and sufficient funding is a key element of a well managed capital improvement program. It supports the other key elements: accurate information, sound planning, effective decision making, skilled management, and appropriate accountability.

The Facilities Funding Working Group will craft a Problem Statement that identifies the key causes for shortcomings in PK-12 infrastructure capital funding. The group will identify a Menu of Solutions to these problems. In particular, the group will focus on identifying new sources for capital funds required for new construction and ongoing capital investments required to eliminate the accumulation of deferred maintenance of existing facilities; responsible stewardship of recently built and existing facilities; and for alterations of school buildings and grounds to meet both educational and community program and service needs.

### Working Group Participants

Nancy Brune, Director, Kenny Guinn Center for Policy Priorities (Nevada)  
Marialena Rivera, Assistant Professor, Texas State University  
David Sciarra, Executive Director, New Jersey Education Law Center  
Rocky Query, CEO, Query Associates  
Rick Gross, CEO, BW Realty Advisors  
Mike Rowland, Facilities Services Director, Georgia Department of Education  
Vincent Hughes, Senator, State of Pennsylvania  
Lori Raineri, President, Government Financial Strategies Inc.  
William Volker, President, Efficiency Energy, LLC

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Friday, Sept. 9	1:00-1:30 PM	Conference Call #1	Kickoff
Friday Sept. 23	1:00-2:00 PM	Conference Call #2	Edit Problem Statement
Friday, Oct. 7	1:00-2:30 PM	Conference Call #3	Brainstorm initial Menu of Solutions
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## Facilities Accountability Working Group

### Overview and Calendar of Key Activities, Fall 2016

Addressing the structural and legacy inequities nationwide in PK-12 infrastructure requires public accountability for facilities related decisions, spending and investment. Appropriate accountability, in the form of effective oversight and monitoring, is a key element of a well-managed capital improvement program. It supports the other key elements: accurate information, sound planning, effective decision making, skilled management, and adequate and equitable funding.

The Facilities Accountability Working Group will craft a Problem Statement that identifies the key causes for shortcomings in PK-12 facilities accountability. The group will then identify a Menu of Solutions to these problems that focus on internal controls and external oversight.

### Working Group Participants

Claire Barnett, Director, Healthy Schools Network  
Toby Thatcher, CEO, Thatcher Associates (New York)  
Kathy Patterson, DC Auditor, District of Columbia  
Brooks Allen, Vice President, Policy & Legal Affairs, Common Sense (California)  
David Walrath, President/Legislative Advocate, Murdoch, Walrath, & Holmes (California)  
Sarah Hains, Research Facilitator, Chicago Teachers Union  
Mike Pickens, Director of Facilities, West Virginia Department of Education  
Juan Mireles, Director, School Facilities and Transportation Services Division California Department of Education  
Susan Sadlowski-Garza, Ward 10 Alderman, City of Chicago

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