

**Guide
for the
Development
of a Long-Range
Facilities Plan**

1986 Edition

Prepared by
CALIFORNIA DEPARTMENT OF EDUCATION

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Introduction

Q. What is a long-range facilities plan for school districts?

A. It is a compilation of information, policies, and statistical data about a school district. It is organized to provide (1) a continuous basis for planning educational facilities that will meet the changing needs of a community; and (2) alternatives in allocating facility resources to achieve the district's goals and objectives. It is used for planning facilities needs for either pupil enrollment growth or decline.

Q. Why should a school district develop and maintain a long-range facilities plan?

A. By means of such a plan, a school district is enabled to:

1. Gather and organize factual information about a community from which present and future educational program needs can be determined.
2. Estimate pupil population as to numbers, ages, socioeconomic backgrounds, and ethnic composition so that facilities may be planned for and provided.
3. Make an objective appraisal of the quality and capacity of existing school facilities.
4. Make more effective decisions regarding the types, amounts, and quality of new and existing school facilities and the disposition of facilities during periods of declining enrollment.
5. Coordinate a program of total school and community planning.
6. Develop a system of educational program and facilities priorities as an integral part of the educational process.
7. Maintain a program of continuous comprehensive planning and financing of school facilities.

Q. How can a plan be developed?

A. A plan can be developed by:

1. Making a commitment in the form of a school district board resolution
2. Organizing a process that guarantees continuing analysis and evaluation of what is acceptable as

the district's educational and cultural goals and objectives

3. Expending a major effort through adequate staffing and financing
4. Involving the right people at the proper time and defining functions and responsibilities in terms of particular areas of competency
5. Providing leadership in problem-solving techniques through a system of communication and evaluation
6. Recognizing that educational program and facilities planning are one integral part of the total educational process
7. Anticipating community needs and maintaining contact with the ever-changing situations at the local level

Q. Who conducts the development of the plan?

A. When the school district governing board commits the district to initiate the plan, specific individuals should be designated to provide leadership and be responsible for its accomplishment and implementation. A planning committee should be named. Suggested representatives on the committee would be board members; community leaders; personnel from the chief administrator's office, instructional services, and business services; building principals; teachers; and classified personnel. District size would be a controlling factor in determining the pattern of organization. Individual responsibilities should be specified, as well as time and financial commitments needed to develop the plan.

The planning committee functions as a management group and ensures total staff and community involvement in the development of the plan. Professional resources should be called on in particular areas of competency. Suggested resources are the School Facilities Unit, State Department of Education; offices of county superintendents of schools; colleges and universities; and architectural and technical consultants. The decisions of the planning committee should be documented as directives and distributed throughout the district.

Part I

Educational Program

Part I of the long-range facilities plan involves preparing a statement of the educational programs and goals of the district in relation to its programs, both current and future.

A. History and Educational Transition

1. *Historical background.* Relate, in a narrative account, the history, regional setting, composition, and physical description of the district.
2. *Growth.* Illustrate the growth pattern of enrollments and schools in the district up to the present.
3. *Educational transition.* Trace the manner in which the educational program has progressed to the present.
4. *Changes in progress or contemplated.* Describe educational programs or needs now changing or being contemplated for change.

B. Community of the School District

1. *Community factors.* Identify factors in the community that affect the school system: the social, economic, racial, and ethnic makeup of the locale.
2. *Sociological policy.* State the district policy regarding actual or potential human problems.
3. *Relationships with other public agencies.* Define the district policy regarding cooperation and coordination with other public agencies (e.g., parks and recreation authorities, planning commissions, and health departments).
4. *Community involvement.* State the policy for community involvement to achieve total community development. Indicate organizational structure.

C. *Educational Goals and Policies.* Identify the universal and continuing purposes that are accepted and adopted by the governing board as the goals of education in the district.

D. *Educational System.* Describe the total district system as presently structured as well as future concepts. The system should be described in terms of goals, objectives, and policies.

1. *Grade level grouping.* State the organizational plan of the district for grade level grouping.
2. *Preschool program.* Describe the district's philosophy, policies, and operation of the preschool program.
3. *Elementary school program.* Describe the district's philosophy, policies, and operation of the elementary school program:
 - a. Organization and program
 - b. Site design criteria
 - c. Enrollment size policy
 - d. Program loading and staffing
 - e. Unique requirements
4. *Middle (intermediate, junior high) school program.* Describe the district's philosophy, policies, and operation of the middle school program, if applicable:
 - a. Organization and program
 - b. Site design criteria
 - c. Enrollment size policy
 - d. Program loading and staffing
 - e. Unique requirements
5. *High school program.* Describe the district's philosophy, policies, and operation of the high school program:
 - a. Organization and program
 - b. Site design criteria
 - c. Program loading and staffing
 - d. Unique requirements
6. *Special programs.* Describe the district's philosophy, policies, and operation of the special programs:
 - a. Special education
 - b. Gifted and talented education
 - c. Summer school
 - d. Continuation school
 - e. Adult education
 - f. Vocational education
 - g. Regional occupational centers/programs
 - h. Special classes and centers
 - i. Joint powers or cooperative programs
 - j. Other special programs

7. *Instructional support program.* Describe the district's philosophy, policies, and operation of the instructional support program:
 - a. District library
 - b. School libraries
 - c. Audiovisual materials
 - d. Textbooks
8. *Pupil services.* Describe the district's philosophy, policies, and operation of the pupil services programs:
 - a. Health
 - b. Guidance
 - c. Speech
9. *General support services.* Describe the district's philosophy, policies, and operation of the

general support services. Describe administrative services by illustrating the school district's organization and functions in chart form. Use correct personnel titles on the chart.

- a. Administrative services
- b. Facilities planning
- c. Transportation services
- d. Food services
- e. Building maintenance services
- f. Custodial services
- g. Site care services
- h. Community use services
- i. Joint use by parks and recreation departments
- j. District guidelines for implementing the California Environmental Quality Act

Part II

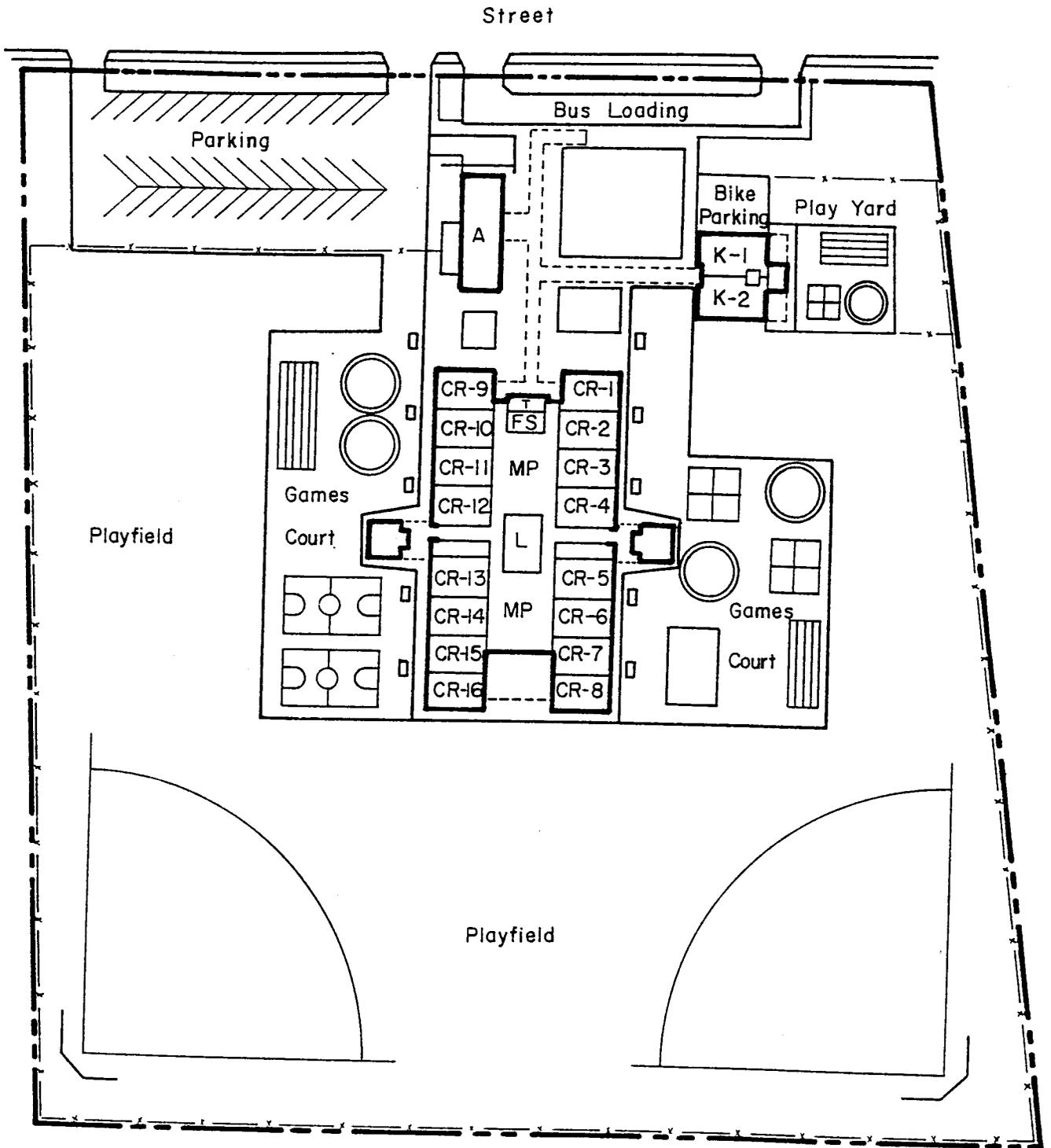
Educational Facilities

Part II of the long-range facilities plan involves preparing a comprehensive evaluation and report of the utilization and condition of the school facilities currently in the district.

- A. **Evaluation Procedure.** Describe the procedure for evaluating facilities. Preferably, the evaluation should be the result of a visit to each school by an evaluation team composed of members of the district educational division and business division along with consultants, such as the School Facilities Unit field representative and the district's architect. The team should be accompanied by the chief administrator of the school that is inspected and by community and staff representatives. A uniform checklist such as that found in the *Facilities Performance Profile* should be used as an evaluative tool. (Copies of the *Facilities Performance Profile* may be obtained from the School Facilities Unit.) If the maintenance supervisor accompanies the team, an opportunity will be available
- to plan long-range maintenance budget items. A plot plan of the facility should be checked and updated at the time of the inspection.
- B. **Summary of Facility Utilization, Capacity, and Evaluation.** Summarize the utilization, capacities, and evaluations of all district facilities on one form. (See Form 1.02a.)
- C. **Plot Plans.** Provide a current site utilization and plot plan with indoor and outdoor teaching stations for each school, central office facility, and site. (See Form 1.02b.)
- D. **Individual Facility Utilization and Capacity.** Report the present utilization and capacity for each facility. (See forms 1.02c and 1.02d.)
- E. **Individual Facility Evaluation.** Rate each facility as described above. (See Form 1.02e.) Include written statements of facility needs, corrections to be made, or other recommended improvements.

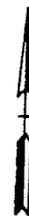
School or facility

Site acres (usable)



Elementary School

0 50 100





Spaces and Loading

School				Grades		Site acres	
Address						Date occupied	
Reported by						Date of report	
Type of teaching station	Number		Average class size	Gross capacity		Current enrollment	Comments on adequacy of space
	Permanent	Portable		Permanent	Portable		
Academic							
Regular							
Drama							
Journalism							
Language laboratory							
Art							
Art (crafts)							
Ceramics							
Photography							
Business							
Bookkeeping							
Business machines							
Computer							
Office practice							
Shorthand							
Typing							
Homemaking							
Clothing							
Foods							
Homemaking							
All-purpose							
Industrial Arts							
Agriculture							
Auto							
Drafting							
Electric							
Graphics							
Handicrafts							
Machine							
Metal							
Wood							
Music							
Choral music							
Instrumental music							
Science							
Biology							
Chemistry							
General science							
Physics							
Total							



School		Grades
Reported by		Date of report
Item	Adequate	Comments on existing conditions and needed improvements
Site		
Size		
Location		
Safety		
Contours		
Development		
Playfields		
Pool		
Parking		
Landscaping		
Other		
Space		
Administration		
Health		
Teachers		
Audiovisual		
Library		
Multipurpose		
Stage		
Kitchen		
Gymnasium		
Showers		
Toilets		
Lockers		
Storage		
Instructional space		
Size		
Flexibility		
Utilization		
Expandability		
Access for the handicapped		
Other		
Light		
Quantity		
Brightness		
Reflectances		
Windows		
Screening		
Audiovisual		
Energy factors		
Other		



Item	Adequate	Comments on existing conditions and needed improvements
Heat and Air		
Temperature comfort		
Insulation		
Air exchange		
Distribution		
Exhaust		
Conditions		
Energy factors		
Other		
Sound		
Floor absorption		
Wall absorption		
Ceiling absorption		
Ballast absorption		
Vent absorption		
Exterior absorption		
Interior absorption		
Isolation		
Aesthetics		
Appropriateness		
Naturalness		
Continuity		
Screening		
Other		
Equipment		
Quantity		
Mobility		
Flexibility		
Maintenance		
Instructional walls		
Other		
Maintenance		
Turfed areas		
Sprinklers		
Parking		
Hardcourt		
Sidewalks		
Exteriors		
Interiors		
Roofing		
Windows		
Fencing		
Mechanical equipment		
Hardware		
Plumbing fixtures		
Other		

Part III

Demographic Study

Part III of the long-range facilities plan involves a comprehensive demographic study of the district according to current and projected data.

A. Mapping. Some of the detailed mapping and study area census instructions contained in the following sections may not apply to districts with very small enrollments. Often, single zoning or no zoning at all is present in an entire district. A full census can be conducted in two or three days by parental volunteers, and a single map may suffice for the entire district.

1. *Base map*

- a. Obtain or prepare a complete map of the school district, with the scale large enough to include considerable detail, for use in making presentations to boards and community groups. (A recent aerial photograph, if available at reasonable cost, is also advantageous. A sample appears on page 16.)
- b. Ensure that the map is current with respect to all vehicular circulation: freeways, major streets, feeder streets, railroads, and waterways. Include any proposed streets as dotted lines on the map.
- c. Indicate, on the base map, all impediments to pedestrian traffic, such as industrial areas, drainage canals, rivers, ponds, power lines, and fenced areas.
- d. Show topographical features, such as canyons or cliffs that are a factor in development and access.
- e. Delineate and name each existing school and each existing school site owned by the district. Also, locate parks, cemeteries, golf courses, airports, and private and parochial schools.
- f. The district, in preparing this map as well as future maps, should work closely with all appropriate agencies, such as the State Department of Transportation, county road department, county flood control department, city/county parks and recreation departments, federal or local aviation agen-

cies, and the Bureau of the Census. It is also advisable to contact utility companies. Copies of master plans already completed by any of these agencies should be secured for their applicable information. Differences in planning goals should be resolved.

g. After all information has been entered on the base map, the map should be professionally prepared and printed. It should also be made in reproducible form, both full-sized and reduced, so that working copies can be made.

2. *Zoning map*. Use a copy of the base map or an overlay to indicate all existing zoning. Differentiate graphically the different kinds of zoning and describe the types by legend: residential (low, medium, and high density); commercial; industrial; and agricultural. Indicate, within each zone, minimum lot size or residences per acre. (See the sample on page 17.)

3. *Census map*. Although federal census information is not generally available in a form suitable for use by a school district because the tracts overlap the school district's boundaries, the census tracts should be included for future correlation. Delineate federal census tracts and numbers on a copy of the base map or a transparent overlay. (See the sample on page 18.)

4. *Study area map*

a. Use a copy of the base map or a transparent overlay to subdivide the district into logical statistical study areas. Once established, the boundaries of these areas are permanent and become the basis for collecting and composing all future demographic information about the district. Boundaries in partially or fully developed areas should never change, even though they may be further subdivided. Boundaries in undeveloped areas should change as the development of road patterns becomes evident. (A sample of a study area map appears on page 19.)

b. The following criteria are suggested for defining study area boundaries:

- (1) All major streets (existing or future) are boundaries.
- (2) All railroads are boundaries.
- (3) All drainage channels or waterways are boundaries.
- (4) Lines between developed and undeveloped portions of the community are boundaries.
- (5) Lines between different types of zoning are boundaries.
- (6) Federal census tracts are boundaries.
- (7) Unusual terrain features and impediments to pedestrian traffic are boundaries.
- (8) Present school attendance lines may be boundaries.
- (9) Municipal limit lines are boundaries.
- (10) Different types of housing, such as old versus new, apartment versus single family, trailer parks versus multiples, create boundaries.
- (11) Boundaries in large undeveloped areas should be tentatively drawn to include an estimated 200 pupils (kindergarten through grade six) when developed according to known zoning.

(12) Boundaries should be small enough so that study areas will have a minimum of variations in characteristics.

5. Study area evaluation

- a. After the criteria listed in the preceding paragraph are applied but before the boundaries are finalized, each study area should be physically surveyed and evaluated on the "Study Area Evaluation Report" (Form 1.02f, which appears on page 15.) The type, age, and value of the residences and the continuity and terrain characteristics of the existing development should be noted. The best available estimates of future developments should also be noted on the report. These reports are to be used as a basic tool for projecting future homes on vacant land.
- b. Once the demographic plan is in operation, study area reports must be maintained up-to-date by noting all changes or developments as soon as information is available. Analysis of changes and new developments and their implications to the plan should be made on a continuing basis.
- c. It is especially important to note zoning changes, redevelopment, or shifts in ethnic population.

(Text continues on page 20)

Study Area Evaluation Report
SFU Form 1.02f

District _____
Study area number _____

Existing Development _____ Name and Date of Entry _____

Type and number _____

Age _____

Value _____

Continuity _____

Terrain character _____

Other _____

Future Development (Estimated)

Type and number _____

Value _____

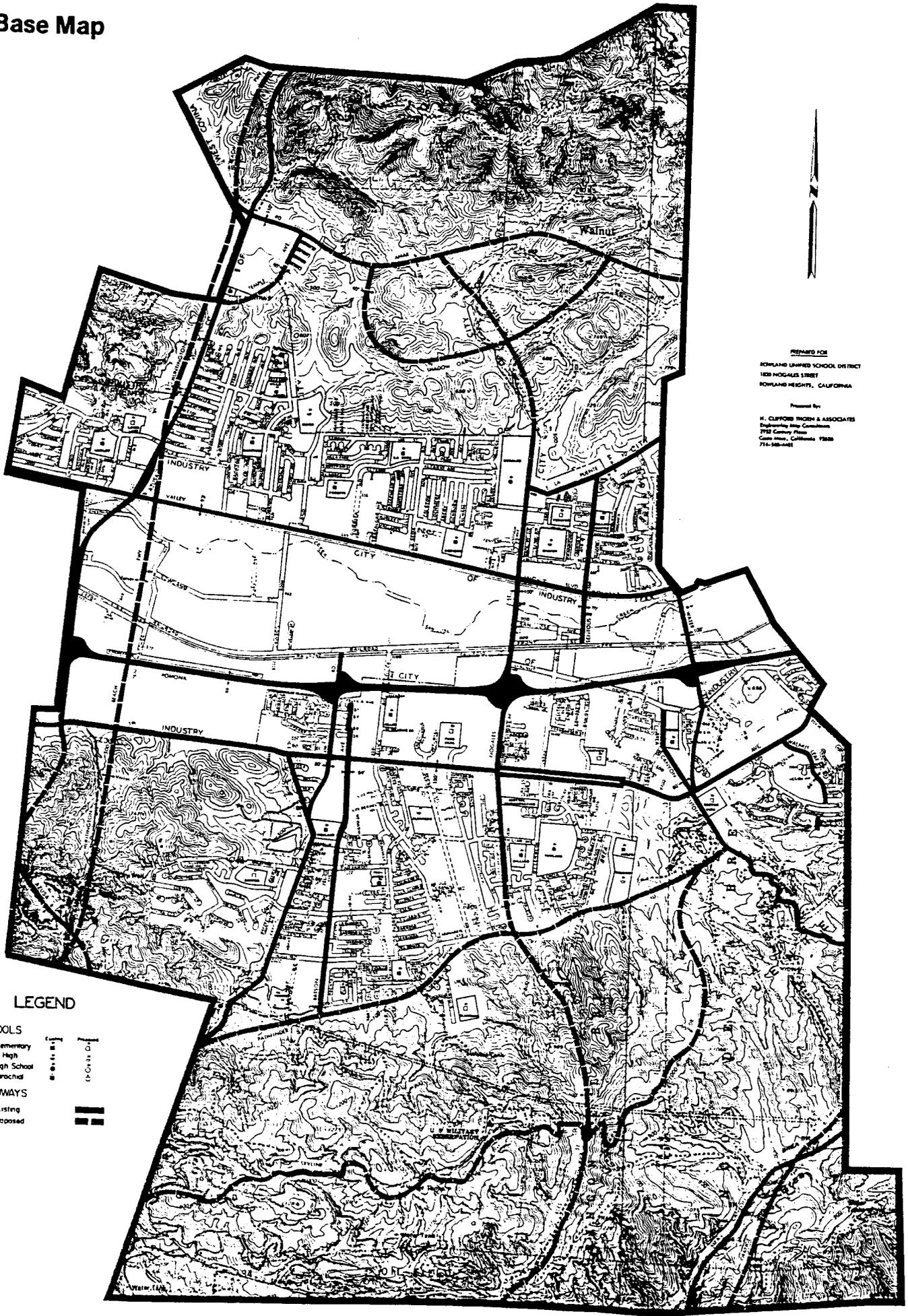
Terrain character _____

Market-ability _____

Redevelopment potential _____

Estimated rate of growth _____

Base Map



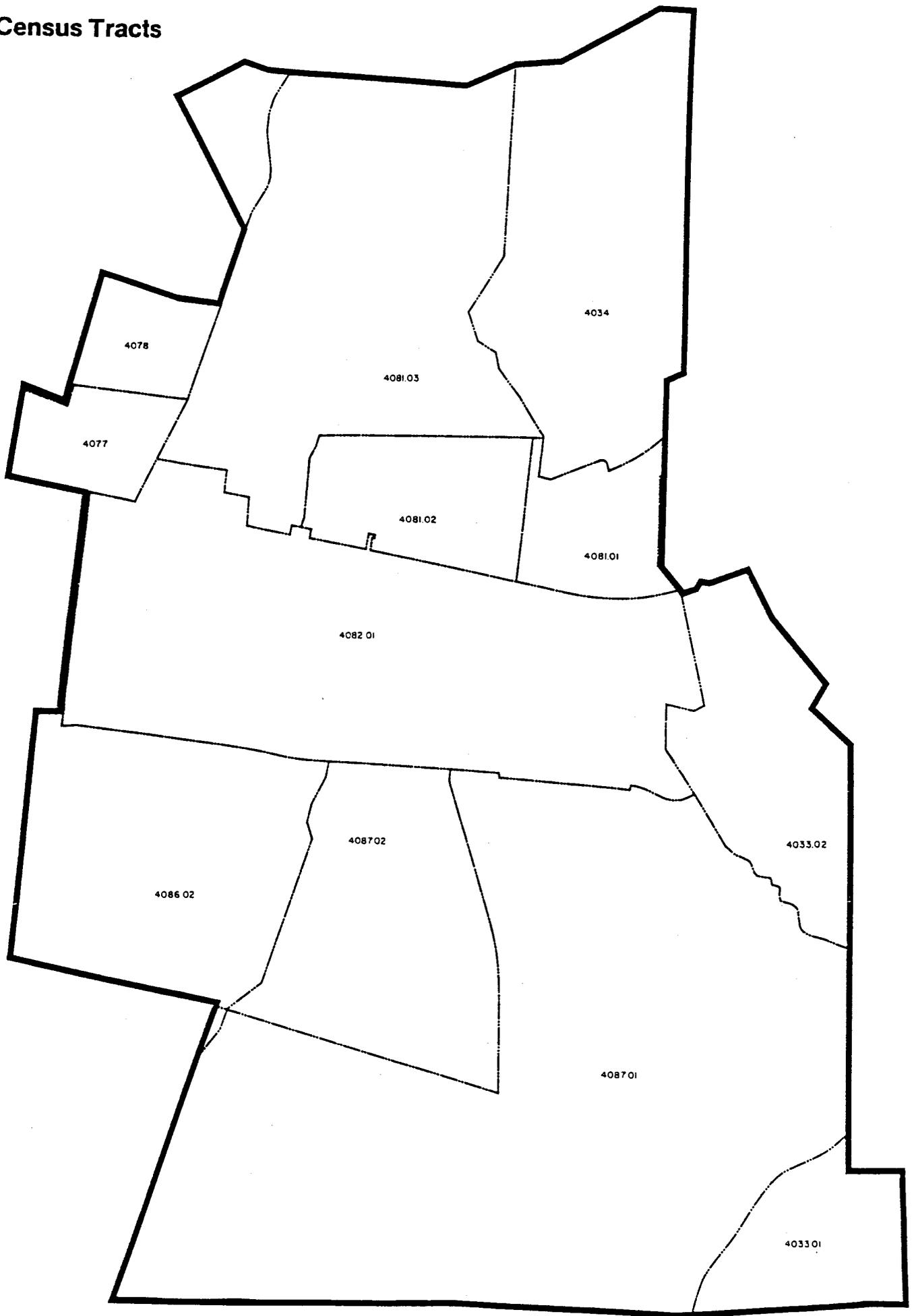
PREPARED FOR
 ROWLAND UNIFIED SCHOOL DISTRICT
 1225 HOGGALES STREET
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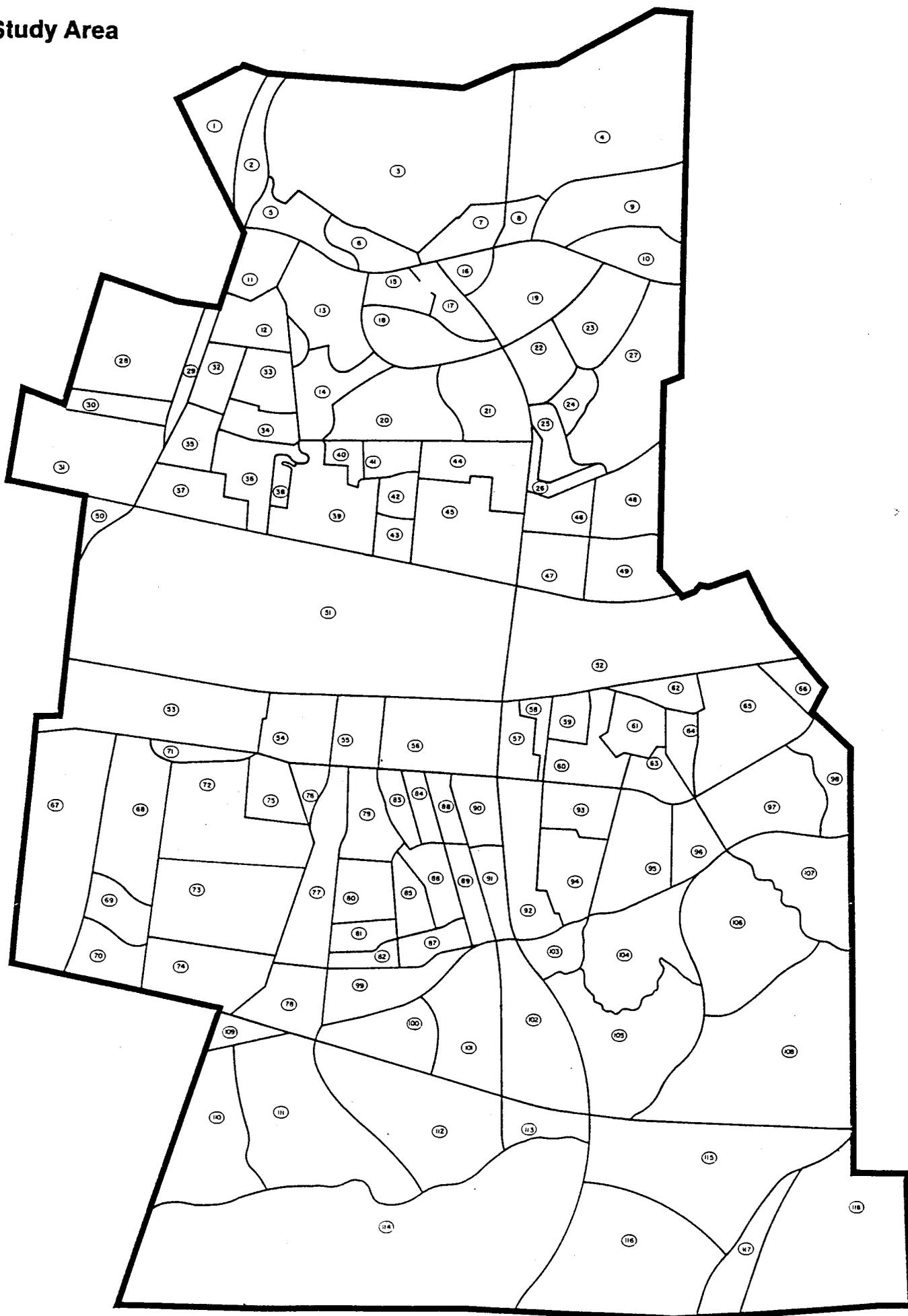
LEGEND

- SCHOOLS**
- Elementary
 - Jr. High
 - High School
 - Parochial
- ROADWAYS**
- Existing
 - Proposed

Census Tracts



Study Area



B. Collection of Statistics. After statistical study areas have been established, the collection of base statistical data may proceed.

1. *Census base.* One of the most complete and comprehensive systems of collection is the special census. The system suggests that the services of the State Department of Finance's population research unit be used for coordinating and overseeing the process of the census. By gaining census responses to specific questions, the district will have the tools for making valid judgments with respect to each study area.
2. *Annual information*
 - a. In addition to the special census base, a system for collecting statistical information about each study area must be established that will be accurately repeated annually to provide historical data for projecting enrollment.
 - b. The minimum necessary annual information is as follows:
 - (1) Total existing housing units by study area
 - (2) Total preschool children by age and study area
 - (3) Total regular pupils by grade and study area
 - (4) Total special education pupils by type, grade, and study area
 - (5) Total ethnic pupils by type, grade, and study area
 - (6) Private school pupils by grade level and study area
3. *Source.* The basic source for these data may be a special card file, a revision of an existing directory card file, or a data processing system containing data on all pupils. In addition to name and address of each pupil, include preschool siblings at that address, the study area number of that address, regular or special education status of pupils, and the ethnic groups of the pupils. Once the system has been established to record the data, it must be continuously maintained on a current basis by adding and deleting cards for transient pupils.
4. *Recording.* Cards and/or printouts of individual pupils should be counted by study area to obtain the number of preschool pupils, regular pupils, and special education pupils and an ethnic count of the pupils. At the same time, each address should be listed by study area to give a directory and a house count for presently enrolled pupils. This information may then be recorded on the demographic enrollment proj-

ect form. (See Section C, Enrollment Projection.)

5. *Augmenting information*

- a. Each study area should be canvassed by street to record the addresses of all housing units not shown on the list. These homes should be contacted to obtain the ages of any preschool children or the age and grade levels of any child attending private or parochial school. Vacant houses should be indicated.
 - b. This added information updates the previously recorded study area data to give an accurate house, pupil, and ethnic count.
 - c. Pupil count is divided into house count so that a current pupil per house per grade can be established and recorded for each study area.
6. *Update.* Each year when the official California Basic Educational Data System (CBEDS) enrollment report is prepared, existing information for each study area is moved back a year on the demographic enrollment projection forms, and a new existing pupil, house, and factor is recorded for projecting purposes. Over a period of five years, an accurate historical data bank will be developed that serves as a basis for projecting by study area.
- C. Enrollment Projection. Beginning with the enrollment projection data, the district will maintain, for each study area, continuous data as outlined in the previous portions of this part regarding mapping, analysis, statistical collection, and recording.
1. *Continuity*
 - a. The combined information shall be tallied annually on the same date as the CBEDS report is due. The information will be put on the demographic enrollment projection form, SFU Form 1.02g (see page 22), to develop an information bank that is current and consistent.
 - b. Because the data so compiled will be used for making revisions to and for updating both the projections and the total developmental plan, any interruption of the continuity of data will prevent the development of reliable statistical information for future planning.
 - c. If historical data are not available for the initial projection, individual judgments will have to be made as to pupils and homes for each area. With each succeeding year, more clearly definable trends will emerge.

2. *Master data bank*
 - a. A master set of the demographic enrollment projection for each study area should be maintained up-to-date by the demographer, along with the master set of study area evaluation reports. This master set becomes the basis for analysis, reporting, and implementation of requirements and proposals involving facilities planning.
 - b. An example of the demographic enrollment projection form is shown on page 22.
 - c. Summaries of projections by study area of pupils by grade level should be compiled and incorporated in this plan annually.
3. *Summary data.* Summary data should be presented as follows:
 - a. Regular pupils by grade level and study area
 - (1) Present date
 - (2) Maturation date
 - b. Special education pupils by grade and study area
 - (1) Present date
 - (2) Maturation date
 - c. Ethnic distribution by grade and study area
 - (1) Present date
 - (2) Maturation date
 - d. Grade group (kindergarten through grade six, grades seven and eight, or grades nine through twelve) projections by study area
 - (1) Present date
 - (2) One-year through seven-year projections
 - (3) Maturation date
 - e. Private school pupils by grade level and study area

Part IV

Implementation Plan

Part IV of the long-range facilities plan involves preparing a statement of the priority in which the district proposes to solve its school housing problems.

A. Plan of Schools, by Grade Level Grouping

1. On the basis of the data and policies developed in the preceding sections, design a master maturation plan that shows existing and future schools with their ultimate attendance boundaries. The plan should represent the most efficient method of school housing that will meet the district's ultimate needs in accordance with present standards and the best available information on what may reasonably be expected to occur.
2. Each grade level grouping shall be shown on a transparent overlay of the base map that shows present schools, present sites, future sites, and the ultimate number of pupils attending the schools.
3. The concept of a developmental plan is that the ultimate plan may change in conformance with changes in the educational program or in the demographic data regularly compiled. However, such changes should be adopted only after an in-depth analysis and consideration in accordance with the planning procedure outlined in Section IV C.
4. The incremental plans that mesh into the overall design should be developed for consideration by the planners and school board in the same manner. Examples of maturation plans are illustrated on the following pages.

B. Compliance with the California Environmental Quality Act. Set forth the district administrative regulations that have been drawn up to meet requirements of the California Environmental Quality Act (CEQA) on a framework related to and guided by the guidelines as promulgated in Chapter 3, Division 6, Title 14, Natural Resources, *California Administrative Code*, Section 15050.

C. Identification of Facility Requirements. Compile a definitive list of facility requirements for consideration and ranking as to justification, feasibility, priority, and implementation. Consideration should also be given to alternatives and plans in case enrollments stabilize or begin to decline.

D. Implementation Procedure

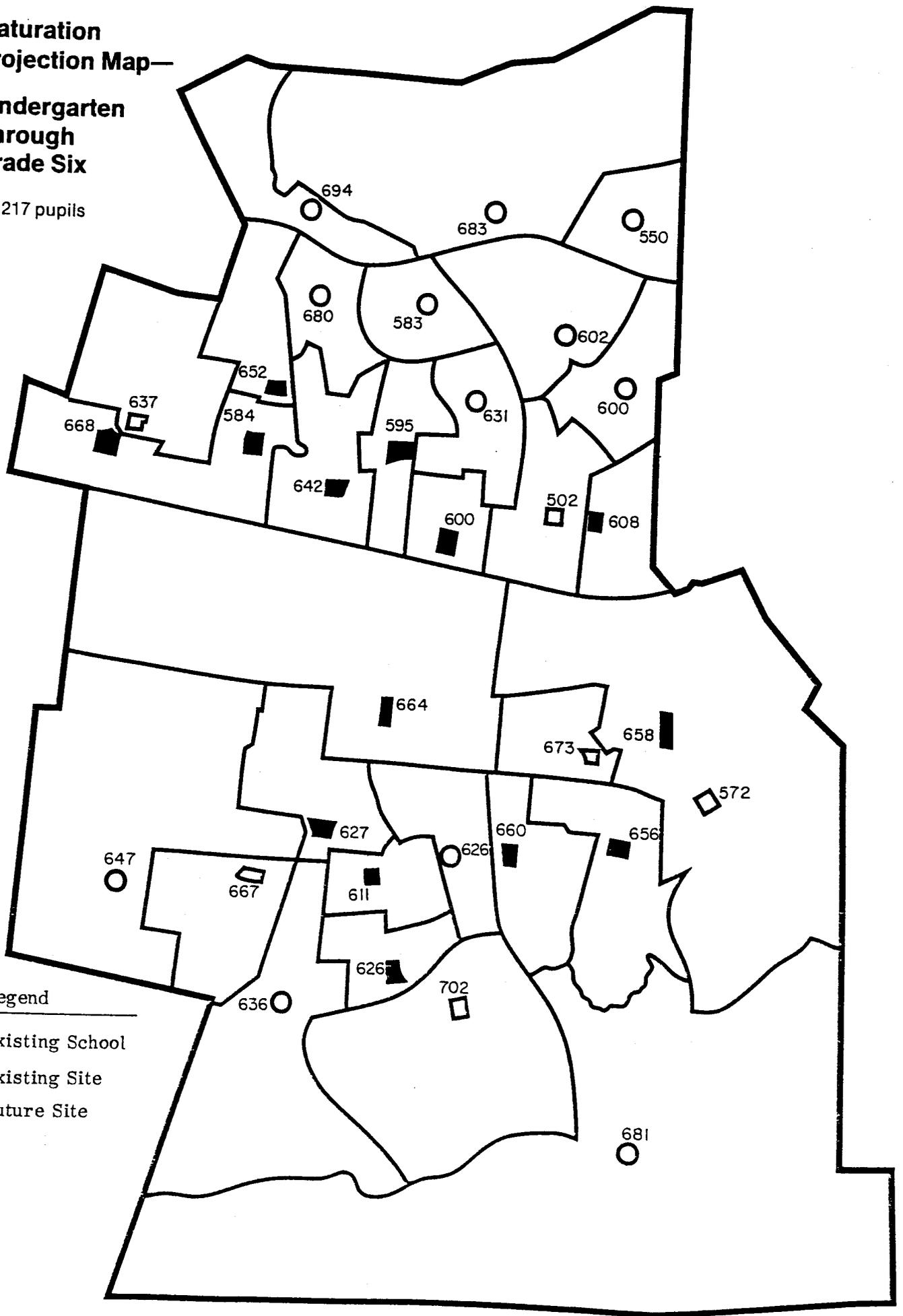
1. Define the policy and procedure for processing identified requirements for facilities. The following is a suggested approach for implementation.
2. Responsibility for coordination of the educational facility's needs should be assigned to one high-level school administrator. This administrator shall be kept informed of the following: currently identified requirements as well as those that occur as a result of growth, changes identified as this study develops, legislation, new programs, changing instructional methods, or other pertinent factors. Assigning one administrator to this task will simplify collection of appropriate information, comparison with the developmental plan, and analysis.
3. The administrator in charge shall canvass all divisions of the district, request written evaluations concerning the implications and priority assessments of the identified problem, and then compile and report the findings to the superintendent's planning committee for further assessment and recommendations.
4. The superintendent's planning committee shall study all aspects of the problem and take appropriate action.

E. Progress Record. All action related to facilities planning as a result of this study or as implementation to this study should be entered in this section as an historical record. The developmental plan should be maintained in a form, such as a loose-leaf notebook, so that it may be readily updated and revised.

**Maturation
Projection Map—**

**Kindergarten
Through
Grade Six**

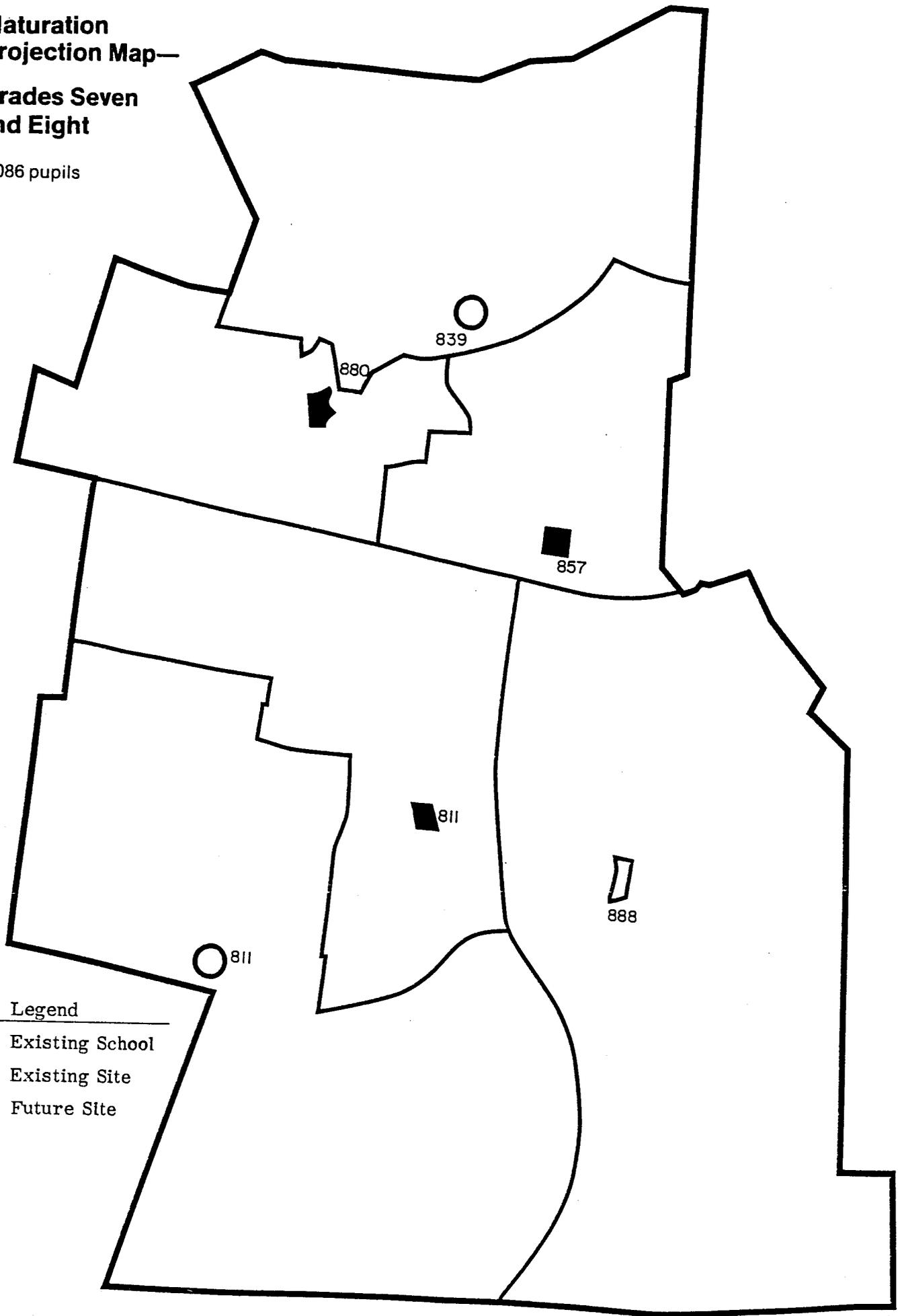
20,217 pupils



**Maturation
Projection Map—**

**Grades Seven
and Eight**

5,086 pupils



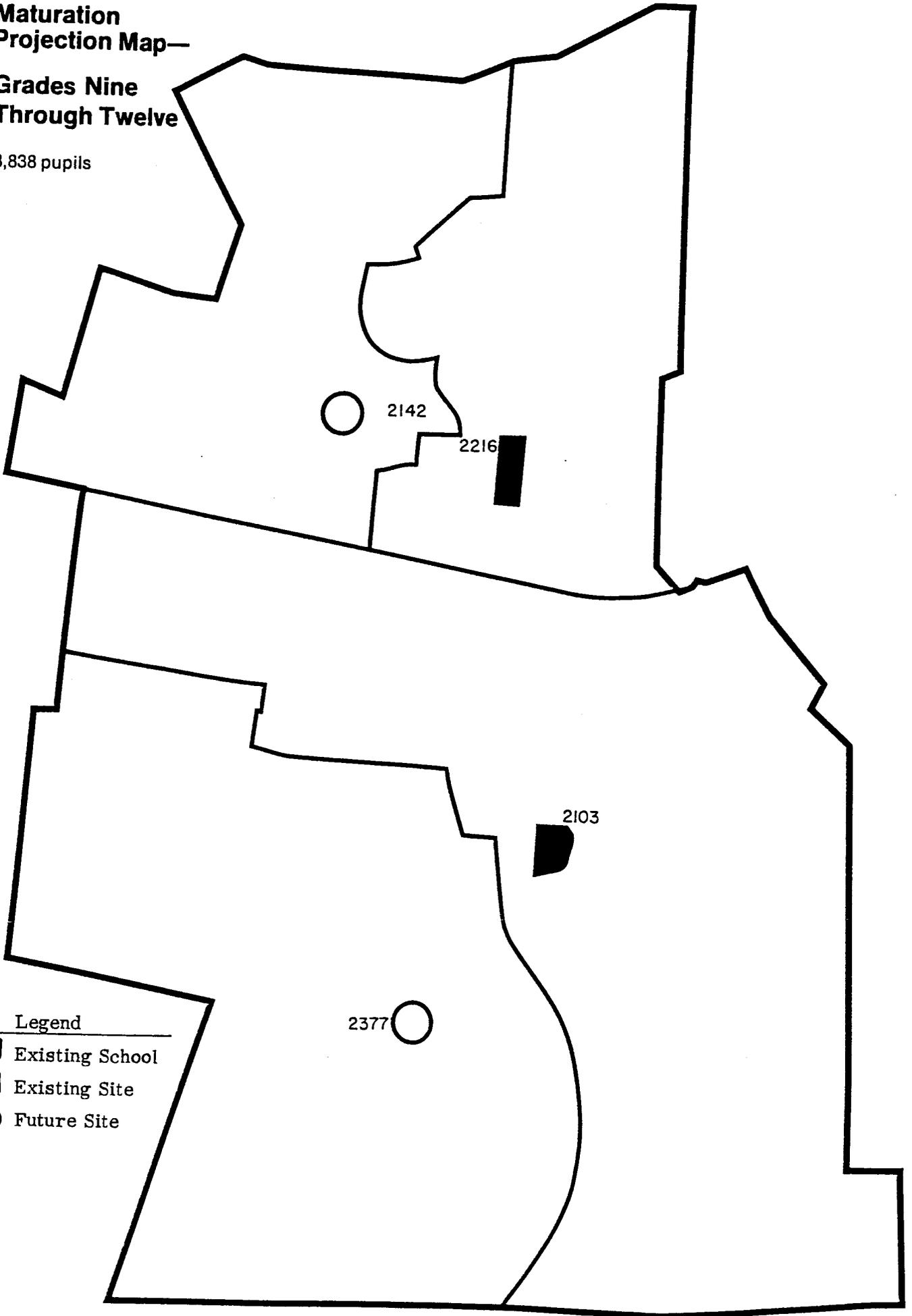
Legend

- Existing School
- Existing Site
- Future Site

**Maturation
Projection Map—**

**Grades Nine
Through Twelve**

8,838 pupils



Part V

Evaluation Plan

Part V of the long-range facilities plan involves preparing a policy to ensure that the plan is kept up to date.

A. Evaluating the Long-Range Facilities Plan. State the policy of the district for reviewing and evaluating continually the long-range facilities plan. An annual schedule with specific responsibilities and a deadline for submitting the plan to the superintendent is preferable.

B. Updating the Long-Range Facilities Plan. State the policy to ensure continual updating of all divisions of the long-range facilities plan. Any changes in program, facilities, or demographic data should be immediately analyzed for their implication to the overall plan and accommodated through the implementation plan, by appropriate revisions recommended to the district's board of trustees.