



# ESSENTIALS IN SCHOOL FACILITIES PLANNING

## Facilities Master Plans

The California Department of Education (CDE) supports the development of comprehensive Facilities Master Plans (FMPs), with local community input, as an essential component to providing all students with safe and educationally supportive learning environments.

### What Is a Facilities Master Plan?

An FMP is the compilation and analysis of the information needed by a school board and its community to make informed decisions about school facilities. An FMP is a working document adopted by a formal resolution of the school board after a public hearing. The FMP must be monitored continually and updated frequently to be an effective planning tool.<sup>1</sup>

### Why Prepare a Facilities Master Plan?

Preparing a quality FMP provides numerous benefits:

1. Organizes an inventory and appraisal of the condition and capacity of existing school facilities and school sites, which is often the cornerstone of a district's communication with the community for needed facility bond measures;
2. Creates a system for considering the facility impacts of implementing educational programs, such as visual and performing arts, or incorporating more spaces for project-based activities;
3. Establishes a program of continuous comprehensive planning and financing of school facilities that is essential to ensuring that school facilities are in good repair;
4. Builds a process for collaborating with other local planning agencies, such as cities, counties, and park districts; and
5. Collects policies on school enrollment, school site size, walking, biking, and community use of school facilities and grounds.

### What Should Be in a Facilities Master Plan?

The CDE publication, *Education Specifications: Linking Design of School Facilities to Educational Programs*,<sup>2</sup> recommends that an FMP should contain nine content areas:

- Statement of purpose
- Description of the planning process
- Description of the community
- Description of the educational program
- Analysis of existing facilities
- Demographic study
- Site selection
- Financing
- Evaluation of the plan

The recommended FMP content areas can be addressed with the level of detail necessary for the district, including information on the facility impacts of the programs. Districts should expand on the suggested areas to include topics that are important to their community.

### What Resources Are Needed?

An FMP does not need to be complex. The content and level of detail will vary based on the size, resources, and needs of the district. For example, a small district expecting growth may need to focus on creating space for students, while a mature district may need to focus on existing facilities.

Regardless of the scope, coordinating among departments within the school district and with local agencies is necessary in preparing for staff and budget needs for creating an FMP.

If districts include an outside consultant to help with development of an FMP, district staff must have an active role in creating and understanding the FMP for it to be a useful planning document.

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For more information, contact the California Department of Education, School Facilities and Transportation Services Division, at 916-322-2470.

## Process Used to Develop a Facilities Master Plan

FMPs should be developed with a wide range of community stakeholders to ensure that multiple perspectives are included. Many districts find community workshops to be beneficial in both understanding the facility needs of each school and in building support for the plan and any future financing efforts. Finally, approval by the governing board demonstrates the significance of the FMP and that the plan has a high level of support.

## Communication with Local Planning Agencies

The FMP process is an opportunity for the school district and local planning agencies to communicate early on serving their common constituency and to better coordinate the use of public funds. The planning of future and existing school sites can be facilitated by early and frequent communication between local agencies and school districts, which is essential for developing new areas, revitalizing or expanding existing schools, ensuring safe walking and biking routes, and creating opportunities for shared development along with the use of school facilities.

The FMP can also provide local planning agencies with an understanding of the statutory and regulatory requirements for locating new school sites. California school siting standards are more stringent than what most jurisdictions require for

residential development, so knowledge of school siting standards will help local education agencies in the planning of sustainable communities.<sup>3</sup>

## Keeping the FMP Current and Relevant

To provide decision makers with the best information, the FMP needs to be updated to reflect changing enrollment trends, educational program needs, community needs, and the number and condition of facilities. An annual review will identify areas of the FMP that may need modification. The 21<sup>st</sup> Century School Fund provides a self-evaluation tool for evaluating and reviewing FMPs.<sup>4</sup> The governing board should also adopt any revisions to the FMP and there may be benefits in reviewing the FMP as part of the district's local planning strategies and requirements.

*Involvement of the greater community is essential for effective FMPs so that school facilities are aligned with educational programs and supported by local residents and school personnel. FMPs created by relevant stakeholders are more likely to produce facilities that are well designed, well maintained, better built, and widely used<sup>5</sup> for the communities and the students that they serve.*

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1. California Department of Education, *Educational Specifications: Linking Design of School Facilities to Educational Program*, Sacramento: California Department of Education, 1997.

2. Ibid.

3. California Department of Education, *Sustainable Communities and Schools Planning*, Sacramento: California Department of Education, 2015.

4. 21st Century School Fund, 2011, *PK-12 Public Educational Facilities Master Plan Evaluation Guide*.

5. BEST Collaborative, 2005, *Recommended Policies for Public School Facilities*, "Section 1: Facilities Planning."