


“Roles, Goals, and Controls”

Managing Expectations


 Board of Education Workshop
 Park Ridge-Niles Community Consolidated School District 64

creating places to *learn*
 September 12, 2011

Park Ridge-Niles Community Consolidated School District 64

Agenda

- Introductions
- Purpose
- Facility Master Planning Overview
- “STEPS” Process
- Identify Issues
- Roles, Goals and Controls – Purpose
- Facility Goals
- Break
- Input Process
- Outcomes
- Research/Gathering Data
- Community Engagement
- Q&A



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Master Plan Focus

- Address your enrollment trends and capacities
- Improve and create a more efficient and cost effective operation
 - Academically
 - Building Life
 - Building Operations



“There was never a time we felt Fanning Howey didn't have the child's best interest at heart. The impact of a facility of this caliber is evident in everyone's classroom. Children take pride in the building. The community takes pride in the facility and the administrators and teachers have an ideal work environment.”

- Susan Mann, Principal, Meridian Middle School

Master Plan Process

listen

- **Organizational Workshop**
- Data Collection
- Assess District Facilities
- Examine Capital Budgets
- Community Engagement

understand

- Develop ArcView GIS Data – students, locations, boundaries, etc.
- Develop Enrollment Projections
- Incorporate Academic Program
- Research Grants and Incorporate into Master Plan
- Analyze Distribution of Resources

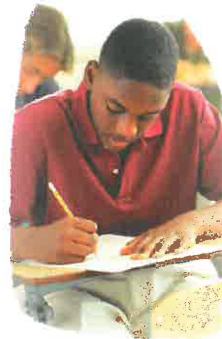
create

- Cost Estimating
- Development of Options
- Determine Solutions and Develop Master Plan

STEPS® – Introduction to the Workshop

Discussion Items

- Goals
 - What are we going to do?
- Process
 - How are we going to do it?
- Input Sources
 - Who is going to help us do it?
- Decision-making
 - Who will make final decisions?
- Deliverables
 - What will the process produce?
- Schedule
 - When do we need to complete it?



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STEPS® – Introduction to the Workshop

- *The three major roles of the board in a planning process.*
 - *Steward of the Process*
 - *Ensure value*
 - *Make good decisions for the stakeholders*
- *Our role is to be your resource and your advocates.*
 - *Help steward the process through Expertise*
 - *Ensure value through Cost Control*
 - *Help you make good decisions with a Proven Process*



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STEPS® – Introduction to the Workshop

Board of Education Roles - *Stewarding the Process*

- Understand and agree with the long-term educational vision
 - Be able to articulate how this program will support this vision
 - Relate how this plan will meet/exceed that expectation
- Understand clearly the components of the Building Program
 - Be able to explain
 - What the program will accomplish
 - When things will occur
 - The input and decision-making process
- Demonstrate commitment to the Building Program
 - Be the eyes and ears of the community
 - Report stakeholder concerns and issues in a timely manner



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STEPS® – Introduction to the Workshop

What it is:

- Value-based community planning process - *Strategic Plan*
- Value-based decision-making process
- Provides assurance to the Board of Education and the Community of:
 - Successful educational facilities planning
 - For all buildings
 - *Students at the center of the process*



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STEPS® – Introduction to the Workshop

Our process has clearly defined steps for ensuring that the outcomes reflect:

- *Community Values*
- *Educational Vision*
- *Reasonable Options*
- *Realistic Costs*
- *Board Control*



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STEPS® – Introduction to the Workshop

Why do we use this process?

- Potential Conflicts
 - Staff, Board of Education, Administrators, and Community Groups have differing agendas
 - Board has unspoken expectations
 - Promises are made to the public and must be kept
 - Outside influences



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STEPS® – Introduction to the Workshop

Purpose of This Workshop

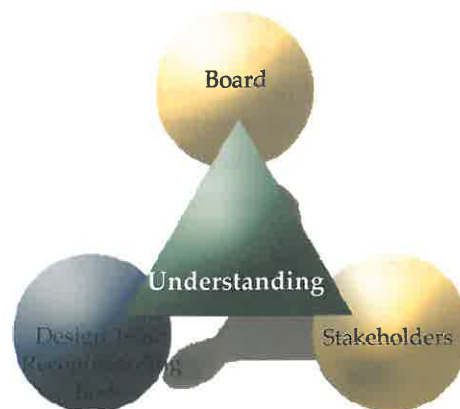
- Establish District values - *Strategic Plan*
- Establish District facility goals and criteria - *Strategic Plan*
- Provide a system for Facility Master Plan input
- Provide a system for design input
- Provide a system for evaluation of input
- Establish a process for achieving consensus



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Achieving Consensus Through Understanding



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Park Ridge-Niles Community Consolidated School District 64

Achieving Consensus Through Understanding

Building Bridges

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Overview

- Evaluation**: Examine How the Building Meets the Vision
- Celebration**: Celebrate Achievements and Maintain Community Support
- Construction**: Protect the Investment
- Design**: Give Core Values Form and Substance
- Funding**: Secure Financial Support
- Engagement**: Engage Community/ Achieve Consensus
- Research**: Examine Existing Conditions
- Vision**: Identify Core Values and Goals

STEPS®
Building Consensus One Step at a Time

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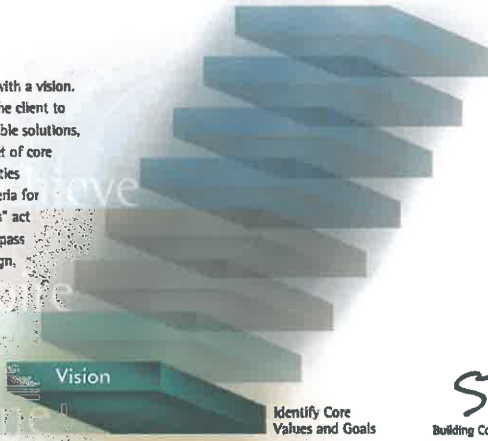
Vision

Dream for the Future

Every successful journey begins with a vision. STEPS® begins by encouraging the client to move beyond debate about possible solutions, focusing instead on creating a set of core values, goals, and program priorities which serve as the project's "criteria for success." The "criteria for success" act as the creative and practical compass for the rest of planning and design, and serve as useful tools for conflict resolution and creative problem solving.



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STEPS®
Building Consensus One Step at a Time

Step One – Vision Discussion

Identify the issue(s) to be solved

- A statement of the global issue(s)

Identify issue(s) that can't be solved in this effort, but may influence a solution

- Political issues that cannot be solved, but influence the outcome
- Procedural issues, such as approvals



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Step One – Vision Discussion

Identify the issue(s) to be solved:

- A statement of the global issue(s)
 - Older Buildings
 - Funding
 - Building Community Trust
 - Providing 21st century spaces for students
 - Poor Indoor Air Quality
- An outline of the major tasks to complete
 - Strategic Plan – 2nd year of Implementation
 - Physical Assessments – In Progress
 - Maintenance Plan
 - Educational Adequacy Evaluation
 - Agree to a Facility Master Plan
 - Implement the Facility Master Plan: Design and Construct the Projects



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Step One – Vision Discussion

Identify issues that can't be solved in this effort, but may influence a solution

- Unanimous Board of Education support for this project?
- Board of Education change in membership?
- Promises made during the process?
- Political issues?
- Groups that may have differing agendas?
- Funding through FAA and other external funding?



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Board Roles, Goals and Controls

- Allows for input from stakeholders
- Maintains final authority at Board of Education level; where it belongs
- Assists Board of Education in clearly defining their expectations for success



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Board Roles, Goals and Controls

- District's facility goals and criteria guide the overall design effort
- Design Teams develop the detailed recommendation
- The recommendation may be presented to a subcommittee
- Board makes final decision
- Use Goals as the deciding factor in decision-making and conflict resolution
- Goals cannot be violated, except by the Board of Education



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Step One – Vision

Why have Board Facility Goals and Criteria?

- Usually not addressed or discovered until a major decision needs to be made or has been made
 - By then it is too late to implement rational and agreed upon parameters
 - Emotions and politics can cloud the issue, and the best decision for students is not reached
 - Micromanagement of results
 - The Law of Unintended Results is activated



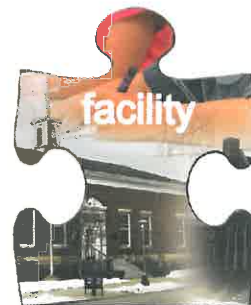
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Step One – Vision

Sample District Facility Goals

- Design schools to support the educational philosophy and curriculum
- Design schools aligned with the District strategic plan
- The design will be sensitive to its setting
- Finishes and building systems to be evaluated based on lifecycle costing



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Step One – Vision

Sample District Facility Goals

- The design will reflect our community's desire for a non-institutional look
- Site utilization will be carefully evaluated and developed
- Designs will be energy-efficient
- Maximize natural lighting
- Buildings will be LEED Silver
- Buildings will have Energy Star rating
- The Project Budget will not be exceeded
- Critical schedule milestones are... .



Step One – Vision

Sample District Facility Goals

- The process will involve the community
- The process will involve the staff
- The process will not involve the entire staff, only certain individuals
- The design will reflect our Community's architectural style
- Provide facility equity among all facilities
- Students come first in all decisions!



Step One – Vision

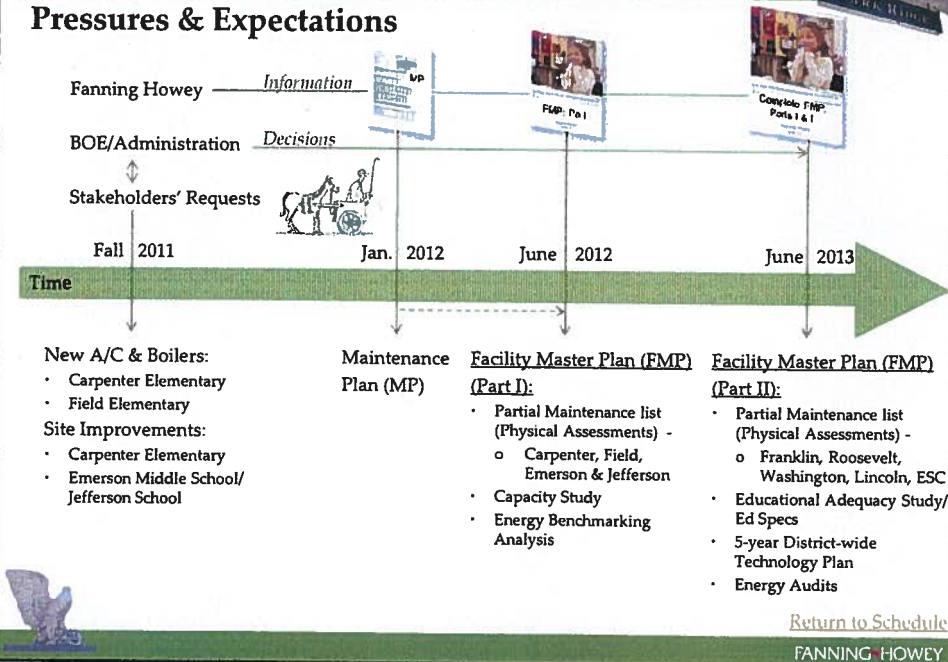
Sample District Facility Goals

- Develop a realistic schedule and adhere to it
- Fulfill these commitments to the community by: _____
- We will utilize sustainable design strategies
- The following curriculum areas are priority: _____
- Maintain as much "Green Space" as is possible



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Pressures & Expectations



--BREAK--

Step One – Vision

Input Process

- Identify stakeholders and those who will provide input
 - A broad-based planning effort produces the best results
- Establish planning teams who have a clear understanding of
 - their roles
 - their limits of authority
- Allow the Architect to facilitate the input and recommendation process



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Step One – Vision

Input Process

- Designate contact points for project communications:
 - Scott Mackall – Park Ridge-Niles CCSD 64
 - Keri VanSant – Fanning Howey
- Provide for input from each stakeholder group
- Provide for review from each stakeholder group as the design progresses
- Develop and review potential solutions
- Board approves final solution



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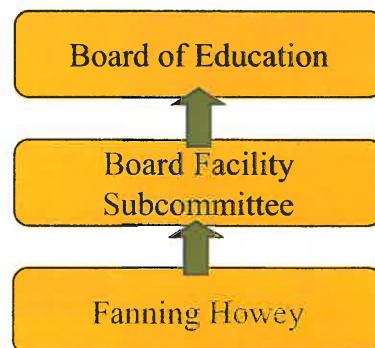
Step One – Vision

Input Process

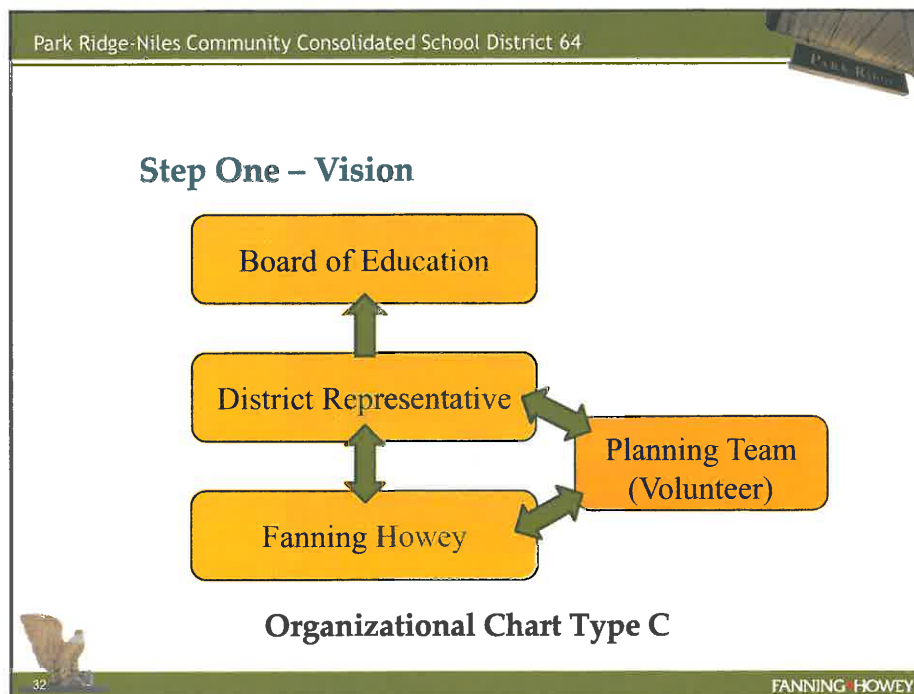
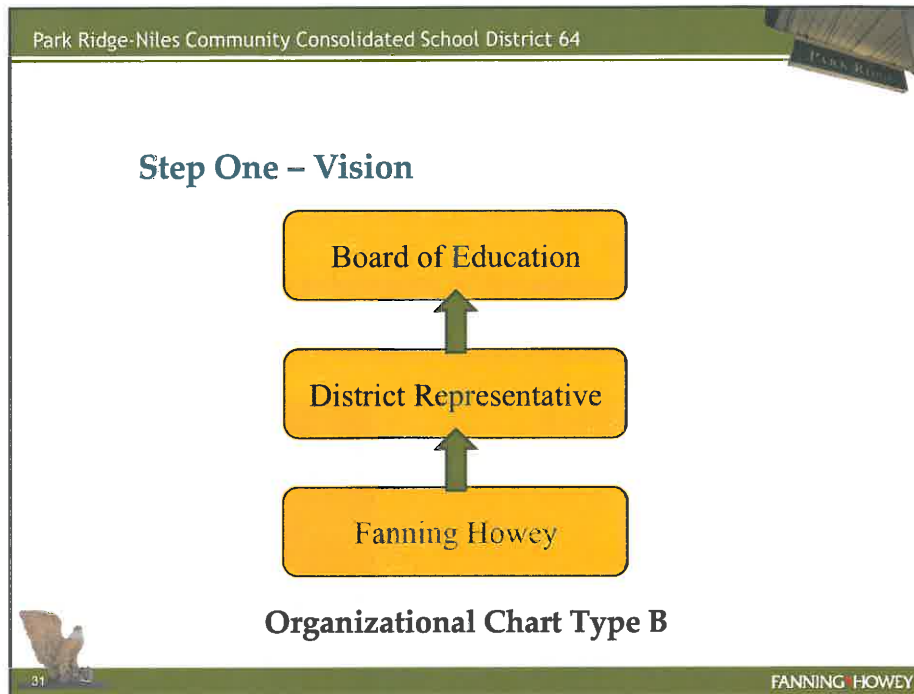
- Design progress will be presented as required at regular Board meetings
- Information may be posted on the District website
- Keri VanSant & Greg Monberg will facilitate the input process



Step One – Vision



Organizational Chart Type A



Step One – Vision

Input Process

- Planning Team Involvement
 - Active through planning process
 - More initial involvement; later limited involvement during actual design/construction
 - Make recommendations to Board of Education regarding proposed solutions
 - Final decision by Board of Education



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Step One – Vision

Input Process, Master Planning Phase

- Planning Team Involvement
 - Include input from Curriculum Leaders, Principals and key staff
 - Meet with Architect as needed
 - Regular meeting schedule to be developed
 - Adhere to District facility goals and criteria
 - Approval of recommendations by the Board



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Step One – Vision

Input Process, Facility Improvement/Construction

- Planning Team (in the future)
 - Comprised of approximately 10-15 people
 - Include Principals and key staff
 - Meet with Architect bi-weekly through development of Schematic design
 - Adhere to goals and criteria set by Board of Education
 - Tours of other facilities
- Planning Teams Needed (in the future)
 - Middle School??
 - Elementary/Early Childhood Schools??



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Step One – Vision

Step One Outcomes

- Board Facility Goals and Criteria written and agreed to by:
October 17, 2011
- Designated contact points established
- Decision-making process adopted
- Board update schedule established
- Planning Teams established



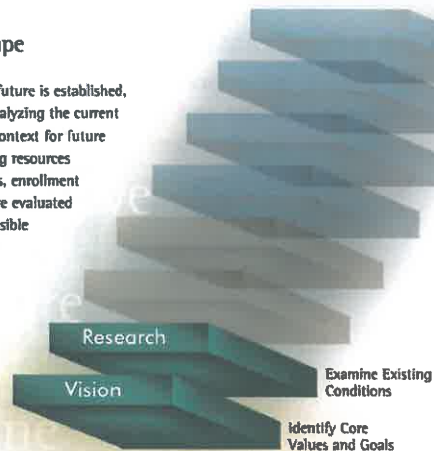
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Step Two – Research

Mapping the Landscape

Once the client's vision for the future is established, STEPS® turns to the present, analyzing the current landscape to create a tangible context for future action. Key stakeholders, existing resources and facilities, educational trends, enrollment projections, and other factors are evaluated to provide a clear picture of possible challenges and issues which will affect the building program.



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Step Two – Research

Tasks:

- *Strategic Plan – 2nd year of implementation*
- Facility Master Plan
 - Physical Assessment
 - Maintenance Plan
 - Capacity Study
 - Educational Adequacy
 - Energy Benchmarking
 - Facility Plan
- Technology Plan - Complete
- Site Information
 - Surveys
 - Site Utilities



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Step Two – Research

Establish a timeframe and a detailed schedule

- Set realistic milestones for adequate analysis and community involvement
- Agree upon approval/presentation process



Step Two – Research

Schedule: Facility Master Plan

- | | |
|--|------------------------|
| ▪ <i>Physical Assessments</i> | <i>September, 2011</i> |
| ▪ <i>Capacity Study</i> | <i>October, 2011</i> |
| ▪ <i>Energy Benchmarking</i> | <i>November, 2011</i> |
| ▪ <i><u>Maintenance Plan</u></i> | <i>TBD, 2012</i> |
| ▪ <i>Educational Specifications</i> | <i>October, 2012</i> |
| ▪ <i>5-year District Wide Technology Plan</i> | <i>October, 2012</i> |
| ▪ <i>Energy Audits</i> | <i>October, 2012</i> |
| ▪ <i>Complete Facility Master Plan: Parts I and II</i> | <i>June, 2013</i> |

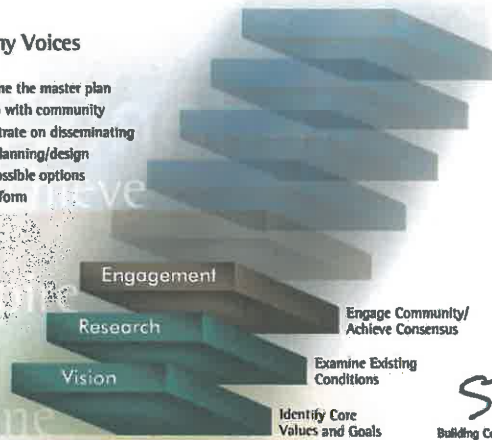


Step Three – Engagement

One Community, Many Voices

Stakeholder input begins to refine the master plan by connecting the client's vision with community needs. Initial workshops concentrate on disseminating information and outlining the planning/design process. Participants examine possible options in an open forum and begin to form consensus on a plan of action.

The resulting master plan is then presented to the planning committee for final approval.



STEPS
Building Consensus One Step at a Time

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Step Three – Engagement

Present Facility Master Plan and/or solutions to stakeholders in light of values, goals, and criteria

- Communicate Board facility goals and criteria to maintain the vision
 - Post on District Website?
- Establish Project websites?
- Presentations to other groups?
(Kiwanis, Rotary Club, Chamber of Commerce)

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