

Master Facility Plan Update

June 10, 2025





AGENDA

June 10, 2025

Today's Presenters

John Pahlman

Senior Director of Buildings & Grounds

Jennifer Costanzo

STR Partners

Megan Simmons

STR Partners

Discussion Topics

Timeline Review

Progress Update

Required Maintenance

Appendix



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Timeline Review



UPDATED TENTATIVE TIMELINE



STAKEHOLDER ENGAGEMENT

- **Facility Advisory Committee (FAC)** - Master Facility Plan update presented Dec. 3, 2024; Mar. 4, 2025; **May 20 and June 9, 2025**
- **Cross-Agency Sustainability Exchange (CASE)** - meeting on Dec. 3, 2024; Mar. 4, 2025; **May 20, 2025**
- *Space Utilization Review with **Principals' Insight***
 - **Elementary Case Study** - Feb. 20, Mar. 13, **April 17**
 - **Middle School Case Study** - **Mar. 20; April 10**
- **PTO** participation in space use survey (4 of 10 Schools)
- Public **BOE** presentations (Sept. 10 & Dec. 10, 2024; **Mar 18, 2025**)
- Future input gathering sessions for each facility (in progress)





Progress Update



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CAPACITY AND UTILIZATION ANALYSIS

What We've Done

- **Completed space use plans** for each school and documented space challenges and opportunities
- **Completed the capacity Analysis** for each facility with D97 Staff input and guidance
- **Confirmed the required program spaces** with all principals.



What's In Progress

- **STR Compiling** draft report for D97 review.
- **STR Compiling** draft report for D97 review.
- **STR Compiling** draft report for D97 review.



PRINCIPAL INSIGHTS

D97 Admin + Principal Collaboration

Confirming key spaces and criteria to evaluate space needs and gaps



Brooks feeder schools + Admin



Julian feeder schools + Admin



FACILITY CONDITION ASSESSMENT

What We've Done

- **Completed all condition assessment surveys** (roofing, hardscape, exterior walls, mech/elec/plumbing, architectural)
- Created a **"Recommended Improvements Worksheet"** template in collaboration with D97 Administration



What's In Progress

- **Organizing data into worksheets** for each facility in for future use in prioritizing the potential improvements.



Recommended Improvements Worksheet

Template Recommended Improvements Worksheet

D97 School Facility Name Here

DATE:
ACCOMPLISH:

Category of Work	Observations	Condition Assessment (Critical / Fair / Good)	Target Year (on or before)	Estimate (as of 2023)	Alignment with Guiding Principles				D97 Prioritization of work (1-5) not important
					Climate Ready (to Open Buildings)	Enhanced Safety	Cost-Effective (to Open Buildings)	Address Critical Infrastructure Needs	
Site	<p>Site Scope Assessment of the condition of asphalt paving, concrete paving, and sidewalks. Estimates align with recommendation if asphalt condition requires full replacement in next year or within 5 years.</p> <p>General Assessment related to circulation around the site, school and community use of site, and alignment with Cross-Agency and Community initiatives (i.e. non-vehicular travel and demand, perimeter fencing, landscaping, community connectivity, student parking, etc.)</p>	Critical	2024	\$0	Total estimate of all items below	On the Radar			
Building Envelope	<p>Exterior Wall Survey of the integrity of the exterior walls as part of the building envelope. Repairs to address issues are documented within a repair plan.</p> <p>Roof Systems Survey of the integrity of the roofing system as part of the building envelope. Depending on the condition of the roof, repairs may be recommended, or full replacement may be required.</p>	Good	2024	\$0	Total estimate of all items below		4		
Architectural Elements	<p>Security and Safety A physical security assessment performed to identify both strengths and weaknesses of the existing security program in the ability to deter, detect, delay, and respond to an incident. Security systems, products, and practices are evaluated.</p> <p>Accessible Route Spaces on routes within and around the building that are not in compliance with ADA, and in conditions that are barriers to inclusive using the facility (e.g. approach to building, entry door, vertical circulation, door widths, clear space, etc.)</p> <p>Flooring A review of the condition of floor finishes throughout the facility. In general the flooring is considered in good or fair condition with the exception of the noted items below.</p> <p>Ceiling A review of the condition of ceiling finishes throughout the facility. In general the ceiling is considered in good or fair condition with the exception of the noted items below.</p> <p>Interior Walls A review of the condition of walls and doors throughout the facility. In general the walls and doors are considered in good or fair condition with the exception of the noted items below.</p> <p>Cabinets A review of the condition of cabinetry (countertops, cabinets, doors, and hardware) throughout the facility. In general the cabinetry is considered in good or fair condition with the exception of the noted items below.</p> <p>General Miscellaneous building elements or features evaluated against the educational goals of the facility. This may include educational enrichment concerns, opportunities for arts and culture moments, integrating sustainability in everyday activities, etc.)</p>			\$0	Total estimate of all items below				
Building Systems	<p>Plumbing A review of the plumbing system and fixtures throughout the facility to identify any conditions in conflict with current plumbing codes.</p> <p>Mechanical A review of the mechanical system to identify any improvements to better its ability to be efficient, meet performance needs, and provide comfort.</p> <p>Electrical A review of the electrical distribution panels, devices, interior and exterior lighting systems, and conditions related to code and safety of these systems.</p> <p>Equipment A documentation of plumbing, mechanical, and electrical equipment indicating age (where possible), condition and recommended replacement priority.</p>			\$0	Total estimate of all items below				

- Separate worksheet for each facility
- Four categories for improvements:
 - Site
 - Building Envelope
 - Architectural Elements
 - Building Systems
- Improvements generated from:
 - Facility condition surveys
 - Space utilization walkthroughs with principals
 - PTO comments during walkthroughs
 - Communications from principals to B&G
 - CASE action items



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Recommended Improvements Worksheet

Template Recommended Improvements Worksheet

D97 School Facility Name Here

Site:

Category of Work	Observations	Condition Assessment (Critical / Poor / Good)	Target Year (on or before)	Estimate (as of 2025)	Aligned with Guiding Principles	D97 Prioritization of work (1 is most important, to 5 is least important)
Site						
Hardscape	Assessment of the condition of asphalt paving, concrete paving, and sidewalks. Estimates align with recommendation if asphalt condition requires full replacement or mill and overlay. <i>Paving area identified for replacement or repairs</i>	Critical Poor	202X	\$0	Total estimate of all items below	On the Radar
General	Assessment related to circulation around the site, school and community use of site, and alignment with Cross-Agency and Community Initiatives (i.e. non-vehicular arrival and dismissal; perimeter fencing, landscaping, community composting; student gardens; etc) <i>Description of item</i>		202X	\$0	Total estimate of all items below	

Category of Work	Observations	Condition Assessment (Critical / Poor / Fair / Good)	Target Year (on or before)	Estimate (as of 2025)	Climate Ready-to-Open Buildings Enhanced Safety	Cross Agency Sustainability Exchange Goals	Arts and Culture Investments Address Critical Infrastructure Needs	Community Support Opportunities Educational Spaces are Aligned with Curriculum	ISBE Health and Life Safety Requirements	D97 Prioritization of work (1 is most important, to 5 is least important)
Site										
Hardscape	Assessment of the condition of asphalt paving, concrete paving, and sidewalks. Estimates align with recommendation if asphalt condition requires full replacement or mill and overlay. <i>Paving area identified for replacement or repairs</i>	Critical Poor	202X	\$0	Total estimate of all items below					On the Radar
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Item Description

Condition

Estimated Cost



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Recommended Improvements Worksheet

Template Recommended Improvements Worksheet

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Prioritization of improvements
(completed with FAC)

Evaluation against Guiding Principles
(green aligns; red does not)

Target year for work
(comes after prioritization)

Category of Work	Observations	Condition Assessment (Critical / Poor / Fair / Good)	Target Year (on or before)	Estimate (as of 2025)	Climate Ready-to-Open Buildings Enhanced Safety	Cross Agency Sustainability Exchange Goals	Arts and Culture Investments Address Critical Infrastructure Needs	Community Support Opportunities Educational Spaces are Aligned with Curriculum	ISBE Health and Life Safety Requirements	D97 Prioritization of work (1 is most important, to 5 is least important)
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Recommended Improvements Worksheet

Conditions Legend

Critical	Systems or components that pose a potential safety risk or may create a failure in necessary systems within the building and should be replaced within 1-2 years.
Poor	Systems or components that are approaching the end of their useful life and should be considered for replacement within 5 years
Fair	Systems or components are generally performing as expected but may require repairs to maintain working order. They should be monitored for replacement within 10-15 years
Good	Systems or components that are performing as expected or have been recently replaced. They should be monitored for maintenance schedule and/or replacement.

Priorities Legend

*To be defined in collaboration
with FAC, D97 Admin, and STR*



Recommended Improvements Worksheet

In-progress **Guiding Principles** against which to evaluate recommended improvements.

- Anticipate Climate Extremes with **Ready-To-Open Buildings**
- Contributes to **Enhanced Safety**
- Aligns with **Policy 4.72 Sustainability, Climate and Environmental Justice** and **Cross-Agency Sustainability Exchange (CASE)**
- Supports **Arts & Culture Investments**
- Addresses **Critical Infrastructure Needs**
- Supports **Community Support Opportunities**
- **Aligns Educational Spaces with Curriculum**
- Addresses ISBE **Health and Life Safety Requirements**



SAFETY AND SECURITY ANALYSIS

What We've Done

- West 40 ROE has redirected free work hours forfeited by other districts toward D97 Safety and Security Assessments.
- All 10 facilities to be assessed with the following at **no cost**
 - **Two Middle Schools**
 - **Two Elementary Schools**



What's In Progress

- **Scheduling** assessments with West 40 team to integrate with Master Facility Plan





Required Maintenance Concurrent with MFP Activities



IMMEDIATE CONSIDERATIONS

We're Preparing for Rising Costs

Slower revenue growth due to lower Consumer Price Index (CPI) levels underscores the need for ***thoughtful financial planning and forecasting***. This is critical as the district anticipates substantial future capital project costs related to master facilities planning.

To responsibly address both immediate and long-term facility needs, the district has identified the following budget for **Summer 2026:**

- ***Facility improvement critical needs budget:*** **\$4,000,000**
- ***Contingency for emergency repairs:*** **\$ 400,000**

The district remains committed to integrating financial forecasting with master facilities planning to ensure infrastructure projects are completed responsibly and sustainably.



IMMEDIATE CONSIDERATIONS

The goal is to start ***addressing critical items*** the summer of 2026.

- Bidding construction work should ideally occur during ***September through October*** prior to the summer of work.
- Master Plan is scheduled for ***December 2025*** completion.
- The scope of the D97 required maintenance projects will take many years to address.
- Start ***addressing critical issues for Summer 2026 while continuing to evaluate and prioritize remaining work*** in the Master Facility Plan for upcoming years, including Summer 2027.



IMMEDIATE CONSIDERATIONS

Master Facility Plan is continuing:

- Core Team meetings to identify synergies between stakeholders and work items which align with the Guiding Principles
- Collaboration with Bulley & Andrews during summer 2025 to provide cost estimates for Recommended Improvements
- Engagement with FAC to prioritize work during summer/fall 2025
- Continual collaboration with D97 on **annual funding level adjustments** to address required maintenance of most critical systems **beginning with Summer 2027**.



2025 - PROPOSED CONCURRENT TIMELINE

2025	Summer 2026 Critical Improvements Timeline	Master Facility Plan Timeline
May	Identifying critical items for Summer 2026 and confirm within \$4mil annual budget	Completing Facility Assessment surveys - Architectural
June	Confirm Summer 2026 Scope and Review with FAC	-Collaborating on Guiding Principles -Data input into recommended improvement worksheets
July	Prepare Construction Documents for Summer 2026	Collaborate with Bulley & Andrews on estimates for recommended improvements
August	Prepare Construction Documents for Summer 2026	-Finalize estimates and any synergies of work items -Prioritization of Recommended Improvements with FAC
September	Review Summer 2026 Construction Documents with FAC	Prioritization of recommended improvements with FAC
October	Issue Summer 2026 Construction Documents for public bidding	Prioritization of Recommended Improvements with FAC
November	Review bids with FAC	FAC meeting FORC meeting
December	-Recommendations to BOE -BOE to Award Summer 2026 Contract	-Joint FAC/FORC meeting -Present MFP to BOE



2026 - PROPOSED CONCURRENT TIMELINE

2026	Summer 2026 Critical Improvements Timeline	Master Facility Plan Timeline
January		-Joint FAC/FORC meeting -BOE adopt MFP
February	Reassess critical items within MFP items for Summer 2027	
March	Confirm Summer 2027 Scope and Review with FAC	
April	Begin Construction Documents for Summer 2027	
May		
June	Summer 2026 Construction Begins	
July		
August	Summer 2026 Construction Ends	
September	Review Summer 2027 construction documents with FAC	
October	Issue Summer 2027 Construction Documents for public bidding	
November	Review bids with FAC	Kick Off Summer 2028 Scope Review based on adopted Master Plan
December	-Recommendations to BOE -BOE to Award Summer 2027 Contract	



NEXT STEPS

- Identify required critical improvements for Summer 2026
- Confirm Summer 2026 projects are within \$4million budget
- Review scope with FAC
- Kick off Summer 2026 project planning
- Ongoing Master Facility Plan tasks
 - Data input
 - Cost estimate generation
 - Continued collaboration with the MFP Core Team
 - Collaboration with FAC



QUESTIONS?



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Appendix



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FACILITY CONDITION ASSESSMENT

Presented 12-10-2024 to BOE

What We've Done

- Roof condition surveys complete
- Hardscape conditions surveys complete
- Facility Assessment Workbooks completed by D97 maintenance staff
- Introduced the Master Facility Plan to FAC
- MEP Interior Surveys over winter break



What's In Progress

- Compiling Roofing Report (findings, recommendations, and estimates)
- Compiling Hardscape Report (findings recommendations, and estimates)
- FAC finalizing the sub-committee
- Reviewing legacy open items for potential carry over



CAPACITY AND UTILIZATION ANALYSIS

Presented 12-10-2024 to BOE

What We've Done

- Facility walk with principals and PTO at all schools
- Based on walk throughs, documented areas in conflict with program and/or curricular goals
- Draft Capacity Analysis
- Created criteria to evaluate each school. Aligned criteria with D97 Admin



What's In Progress

- Creating utilization plans and documenting concerns
- Confirmation of space uses with principals
- Compiling report for both capacity and utilization, highlighting outliers and key actions to take
- Working with D97 Team on how to gather input (i.e. survey for Building Leaders)



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STAKEHOLDER ENGAGEMENT

Presented 3-18-2025 to BOE

Facility Condition Assessment	Capacity & Utilization Analysis	Safety & Security Analysis	Alignment w/ Sustainability Task Force Plan
<ul style="list-style-type: none"> ✓ STR (architectural) ✓ CS2 (Mech, Elec, Plumb, Fire Protection) ✓ STR -SEG (roofing & hardscape) → D97 Buildings & Grounds → D97 Principals → FAC ✓ Teachers & Students (survey) 	<ul style="list-style-type: none"> → STR ✓ D97 Principals ✓ D97 Program ✓ PTO ✓ Administrators ✓ D97 Building Leaders ✓ Community ✓ Students 	<ul style="list-style-type: none"> ✓ STR ✓ Safety Consultant(s) ✓ D97 Buildings & Grounds ✓ D97 Chief of Safety & Restorative Practices ✓ D97 Principals ✓ Teachers ✓ Students 	<ul style="list-style-type: none"> → STR (architectural) ✓ CS2 (mechanical, electrical, plumbing, fire protection) ✓ STR -SEG (building envelope, hardscape) → D97 Sustainability Task Force ✓ D97 Buildings & Grounds ✓ D97 Administration ✓ FAC Committee ✓ Community ✓ Students



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STAKEHOLDER ENGAGEMENT

Presented 3-18-2025 to BOE

- **Facility Advisory Committee (FAC)** - Master Facility Plan update presented Dec. 3, 2024; Mar. 4, 2025
- **Cross-Agency Sustainability Exchange (CASE)** - meeting on Dec. 3, 2024; Mar. 4, 2025
- *Space Utilization Review with **Principals***
 - **Elementary Case Study** - Feb. 20, Mar. 13
 - Future **Middle School Case Study** - Mar. 20
- **PTO** participation in space use survey (4 of 10 Schools)
- Public **BOE** presentations (Sept. 10, 2024; Dec. 10, 2024)
- Future input gathering sessions for each facility (in progress)



CAPACITY AND UTILIZATION ANALYSIS

Presented 3-18-2025 to BOE

What We've Done

- **Prepared space use plans** for each school and documented space challenges and opportunities
- **Draft Capacity Analysis complete** for each facility with D97 Staff input and guidance
- Used Irving School as a **case study to define required program spaces** (Student and Staff)



What's In Progress

- **Confirming** our understandings with principals.
- **Confirming** the Capacity Study against final space use plans
- Planning to **meet with all principals** to review required program spaces against **school specific challenges/opportunities**.



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FACILITY CONDITION ASSESSMENT

Presented 3-18-2025 to BOE

What We've Done

- **Roofing condition** draft report complete for D97 review
- **Hardscape condition** draft report complete for D97 review
- **Wall survey condition** draft report complete for D97 review
- **Mech/elec/plumb/fire protect. condition** survey draft report complete for D97 Review



What's In Progress

- Upcoming task to **determine data points** necessary for decision making and internal tracking
- Scheduling **architectural condition assessment of Interiors**



SAFETY AND SECURITY ANALYSIS

Presented 3-18-2025 to BOE

What We've Done

- Applied for a grant to cover costs of a Safety and Security Assessment of all elementary and middle schools



What's In Progress

- Pending grant approval



MFP GUIDING PRINCIPLES (IN PROGRESS)

Presented 3-18-2025 to BOE

D97 began outlining guiding principles to provide a framework for decision making when considering prioritizing work across the facility plan.

- Climate Ready-To-Open Buildings
- Enhanced Safety
- Cross-Agency Sustainability Exchange (CASE)
- Arts & Culture Investments
- Data for Future District Planning



REQUIRED MAINTENANCE

Presented 3-18-2025 to BOE

In keeping with the Guiding Principles,
some maintenance is required prior to MFP completion

- **Roof Replacement at Middle Schools**
 - Roof System selection with **durability**, **ease of maintenance**, and **sustainability** as priorities
 - Roof replacement areas = **On-site solar panel** ready

GUIDING PRINCIPLES

- ✓ **Climate Ready-To-Open Buildings**
 - Enhanced Safety
- ✓ **Cross Agency Sustainability Exchange**
 - Arts & Culture Investments
 - Data for Future District Planning



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REQUIRED MAINTENANCE

Presented 3-18-2025 to BOE

In keeping with the Guiding Principles,
some maintenance is required prior to MFP completion

- ***Air Handling Unit replacement at Mann (feeds open pod clsrn and cafeteria)***
 - ***Investigating options between electrical and gas*** for consideration.
 - Order of magnitude estimates:
 - \$1.9mil: Replace with gas heat in kind
 - \$2.4mil: Replace with electric heat (includes increased electric service for building to be future ready)

GUIDING PRINCIPLES

- ✓ **Climate Ready-To-Open Buildings**
 - Enhanced Safety
- ✓ **Cross Agency Sustainability Exchange**
 - Arts & Culture Investments
 - Data for Future District Planning



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REQUIRED MAINTENANCE

Presented 3-18-2025 to BOE

In keeping with the Guiding Principles,
some maintenance is required prior to MFP completion

- ***Theater Lighting - LED Retrofit***
 - D97 is pursuing new retrofit LED bulbs for the auditorium house lighting systems at the middle schools utilizing the existing dimming system and fixtures.
 - Aligns with cross-categories of Sustainability and Arts & Culture goals.

GUIDING PRINCIPLES

- Climate Ready-To-Open Buildings
- Enhanced Safety
- ✓ **Cross Agency Sustainability Exchange**
- ✓ **Arts & Culture Investments**
- Data for Future District Planning



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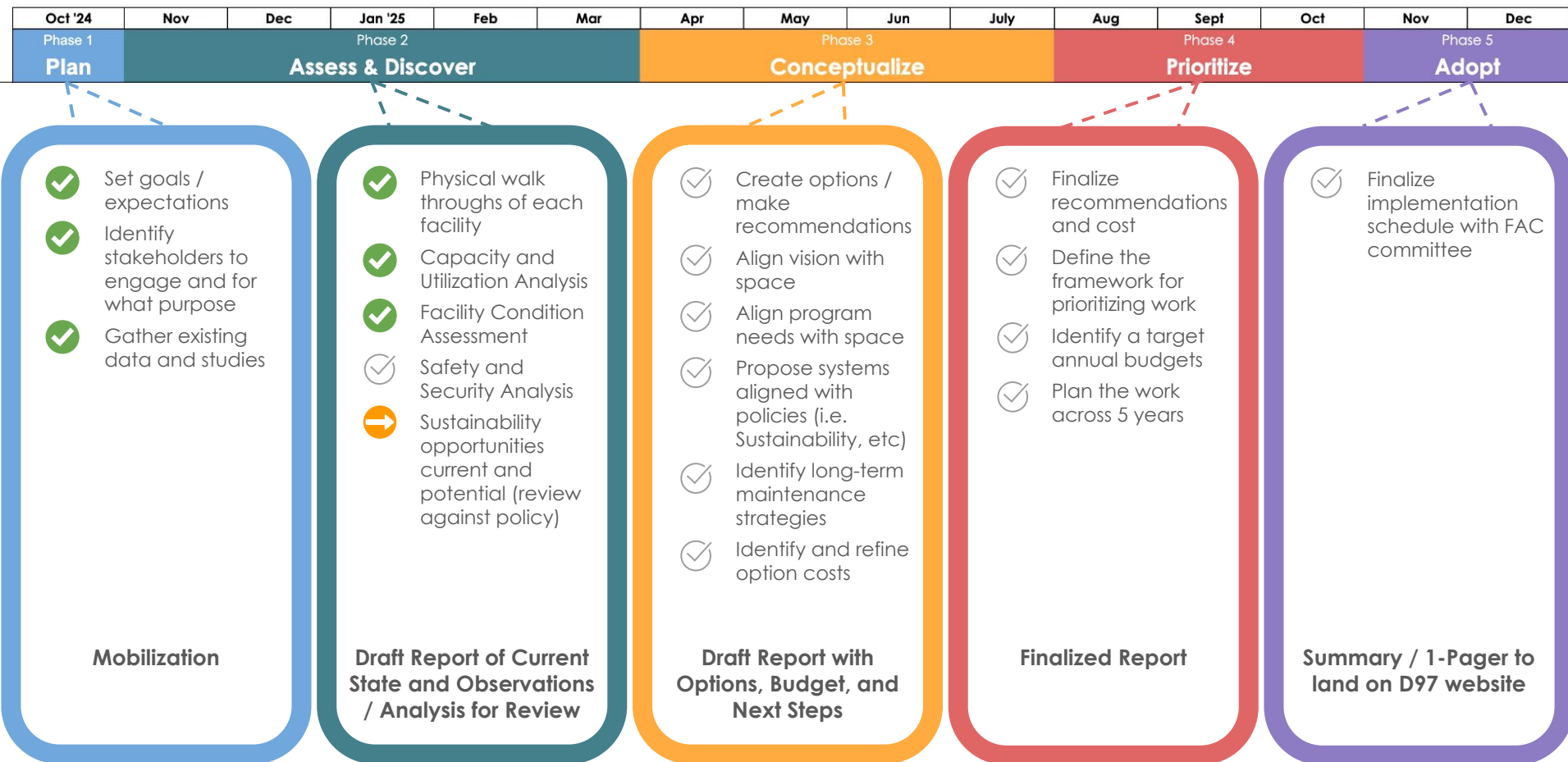
UPCOMING CONSIDERATIONS

Presented 3-18-2025 to BOE

- How will required maintenance inform the FY 2026/2027 Budget?
- For selected required maintenance items, what is the bidding and implementation timeline?
- How does the Sustainability Policy inform decisions with respect to short and long term costs and environmental impact?
- How do we anticipate the impact of tariffs and changes to the Inflation Reduction Act as we make our calculations?



UPDATED TENTATIVE TIMELINE



STAKEHOLDER ENGAGEMENT

Facility Condition Assessment	Capacity & Utilization Analysis	Safety & Security Analysis	Alignment w/ Sustainability Task Force Plan
<ul style="list-style-type: none"> ✓ STR (architectural) ✓ CS2 (Mech, Elec, Plumb, Fire Protection) ✓ STR -SEG (roofing & hardscape) ✓ D97 Buildings & Grounds ✓ D97 Principals ➔ FAC ✓ Teachers & Students (survey) 	<ul style="list-style-type: none"> ✓ STR ✓ D97 Principals ✓ D97 Program ✓ PTO ✓ Administrators ✓ D97 Building Leaders ✓ Community ✓ Students 	<ul style="list-style-type: none"> ✓ STR ✓ Safety Consultant(s) ✓ D97 Buildings & Grounds ✓ D97 Chief of Safety & Restorative Practices ✓ D97 Principals ✓ Teachers ✓ Students 	<ul style="list-style-type: none"> ➔ STR (architectural) ✓ CS2 (mechanical, electrical, plumbing, fire protection) ✓ STR -SEG (building envelope, hardscape) ➔ D97 Sustainability Task Force ✓ D97 Buildings & Grounds ✓ D97 Administration ✓ FAC Committee ✓ Community ✓ Students



IMMEDIATE CONSIDERATIONS

Next Steps

- Currently identifying the critical items to address in Summers 2026 and 2027 within the \$4mil budget
- Tentative Schedule:
- Summer 2025: Review scope for Summer 2026 with FAC
- September 2025: Share construction documents with FAC for review
- October 2025: Issue documents for public bid
- November 2025: Review bids with FAC
- Nov/Dec 2025: BOE Award Contracts
- February 2026: Reassess critical scope for Summer 2027



UPCOMING CONSIDERATIONS

- How will required maintenance inform the FY 2026/2027 Budget?
 - Adaptive Adjustment from MFP progress to address critical infrastructure before MFP is completed (can't wait due to end of useful life)
 - Use the email language from Dr. Shah
 - Timeline: regularly re-evaluate these priorities
 - Tie to FAC meetings and FORC meetings
- Show concurrent timelines of critical and MFP ongoing

