



A Broader Perspective

Why master planning is critical for effective use of district construction dollars



Catherine Cruickshank, MA, Dip. Arch.



Mark S. Boehlke, ASLA



Sam Statz, LEED AP BD+C

Master planning is ideal for any district, especially those that are considering adding a new facility due to population growth or struggling with decreasing enrollment and excess facilities.

You wouldn't want your doctor to take a myopic view of your health at a check-up, would you? That could result in second guessing, unexpected health scares, and future expenses that could have been avoided. Similarly, our students, teachers, parents and taxpayers look to school district leaders to explore a holistic view of what our school facilities need, both now and in the foreseeable future.

Engaging in a master planning effort is an excellent way to position a district for a successful future. This effort can help identify excessive energy use, compile and prioritize facility issues, and pinpoint educational strengths and weaknesses in school buildings. Conducting a

master plan can also provide a “road map” to proactive (instead of reactive) decision making, which can greatly aid in the effective use of a district's construction dollars.

Envision the Future

When planning a facility, it is vital to evaluate the educational appropriateness, taking into account projected enrollment and anticipated changes in instruction and technology. An important consideration must be how the space can be made flexible to accommodate current and future learning practices. Two of the primary goals should be to provide flexibility and to increase alternatives for learning experiences.

New construction offers an

opportunity to work on a clean slate; to dream and to consider the unique and specific needs of students, teachers and staff.

Electronic connectivity is critical and should be a vital factor in every construction project. Ample charging stations and a wireless network have become necessities for the multitude of digital devices that contribute to keeping students competitive in this new economy. A key aspect of the educational agenda is to prepare a workforce that is proficient in the STEM (science, technology, engineering and math) disciplines. In order to equip your students to compete globally, be certain that your new space provides a platform for these opportunities

Students, teachers, parents and taxpayers

look to school district leaders to explore a holistic view of what our school facilities need, both now and in the foreseeable future.

in addition to the arts and social sciences.

■ Identify Site Issues

A program for present-day and projected school use should address the optimal land area. The site must have enough usable area to accommodate the current and future program needs, including educational and maintenance buildings, sports facilities, parking and drainage or storm water management zones.

The physical and environmental restrictions of a potential site need to be thoroughly documented and

evaluated. Steep slopes, wetlands, floodplains, existing easements and zoning restrictions, such as setbacks, are just a few of the site issues that may limit the area that can be developed. If not properly examined, some sites may initially appear to be sufficient, but as the needs assessment unfolds and design begins, you may find that the site is just not large enough. A site that is too small can increase costs, create future expenses, and hinder specific building design expectations.

Additionally, it's important to confirm that the zoning and land use are appropriate and that any obsta-

cles can be overcome to accommodate the proposed school use. If the site is zoned for other land use, it may require rezoning and/or a land use plan amendment.

As you consider the impact on the community, it is important to be aware that many municipalities experience revitalization in the neighborhood of a new school, boosting the economy and further improving community morale and momentum.

With growth of the impacted area in mind, the site should be in a location that delivers suitable and safe access to and from the new



A successful master plan includes site evaluation and selection. Make sure that the site you select has enough usable area to avoid future costs.



Effective master planning can lead to proactive versus reactive decision making, which can make wise use of a district's construction dollars.

building(s). Parent, student, bus, and visitor traffic should be carefully examined during the site evaluation process. Jurisdiction of all adjacent streets should be confirmed and the proposed school access and traffic issues considered with appropriate government agencies so as to avoid future problems, reactive solutions, and more expense.

■ Consider Your Buildings' Condition

Evaluating the physical condition of your existing buildings provides a mechanism for scheduled maintenance. Developing a scheduled maintenance plan contributes to a more accurate budget for the district and allows district leaders the ability to proactively address items instead of react to surprises.

In the long-run, a plan will save the district dollars by decreasing the risk of large and unanticipated repair expenses.

CASE STUDY: Move to a New Site or Add-On?

Hoffman Planning, Design and Construction, Inc., was hired by a school district to study and make recommendations for renovating their middle school and expanding it to relieve overcrowding at the elementary school.

Occupying a small, landlocked and sloping site, the original portion was built in the 1920's as a high school. Several additions had been built cheaply and were in poor condition. The school board was encouraged to expand the scope of the study to include all three of their facilities.

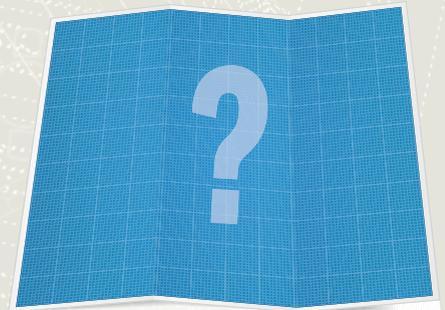
After evaluating seven options, including building a new school on land owned by the district just outside the city limits, it was determined that the most cost-effective option was to add a middle school onto the 18-year-old high school.

The existing high school, due to declining enrollment, had the capacity to share most of its facilities other than the general classrooms, science labs, and media center. While the middle school would have a separate wing for its core classes, the expensive components such as a kitchen and cafeteria, family and consumer education classrooms, and workshops for

technical education would be shared with the high school. In turn, the existing high school would benefit from an additional gym and other physical education facilities that could be included in the middle

school addition. In addition, it was more economical to address existing security issues as part of a larger project.

The addition is being designed for collaborative, innovative learning, unlike the old building with its multiple levels, winding corridors and poor wireless Internet reception. Although this option cost more than restoring the old building, it cost less than all the other options and was a better long-term solution. In addition to enhancing the learning environment for both the middle and high school students, it should greatly reduce operating costs for the district. □



In the long-run,
a plan will save the
district dollars by decreasing the
risk of large and unanticipated
repair expenses.

■ Address Safety and Security

In the midst of master planning, be certain to identify safety and security concerns. We have found this to be a great opportunity to develop options for addressing deficiencies and examining cost estimates. But, don't just consider human threats. Are there genuine or perceived environmental hazards on-site or on neigh-

boring properties? Such hazards include high-voltage transmission lines, landfills, toxic waste, or industrial uses. Surrounding land that is used for commercial, low-density residential, and manufacturing may be considered inappropriate or hazardous, negatively impacting education or referendum success.

A judicious eye and quality research can often eliminate options or prevent problems that could cause concern or prove financially costly.

■ What Matters Most?

Personally, we would all be thrilled if we were able to buy stock in the hottest industry, save for our children's (or grandchildren's) entire college needs, buy a new sports car, renovate the kitchen, build a pool

and take a month-long European vacation all this year. However, this is a fantasy for most people. Most of us have to prioritize.

Similarly, it's important to identify all of the district-wide needs and rank them to create a master plan in which projects can be tackled independently, within a logical sequence. When we master plan with purpose, we gain a broader perspective, serve our communities on a completely different level, and, most importantly, position our districts for financial success. ■

Boehlke is a senior land planner/landscape architect with more than 30 years of experience in providing site-related services.

Cruickshank is a senior project designer and has over 22 years of experience designing educational and residential facilities.

Statz is director of construction services and a 20-year veteran of the construction industry.

Is your insurance provider a
phone number or a partner?

Personal service.
That's the strength
of our Community.



Community Insurance Corporation provides liability insurance coverage for cities, towns, villages and school districts. We offer broad coverage, designed to specifically meet the needs of Wisconsin public entities under ONE single liability policy form to include:

- General Liability
- Auto Liability
- School Board Legal Liability
- Public Officials Errors and Omissions

Unlike other insurance companies that provide coverages based solely on price and are not heard from again until renewal time, we work directly with our clients in partnership to control their insurance costs through a unique risk management and aggressive claims philosophy. And because we are local government, we always keep the end goal of saving taxpayer dollars in mind.

Take control of your insurance needs with Community Insurance Corporation. It just makes sense.



To learn more, please contact Karen Flynn or John Dirkse, Aegis Corporation,
1.800.236.6885 or karen@aegis-wi.com/john@aegis-wi.com