

PLANNING A SCHOOL BUILDING PROJECT?

READ THIS BEFORE YOU BEGIN

by Jim Hardy

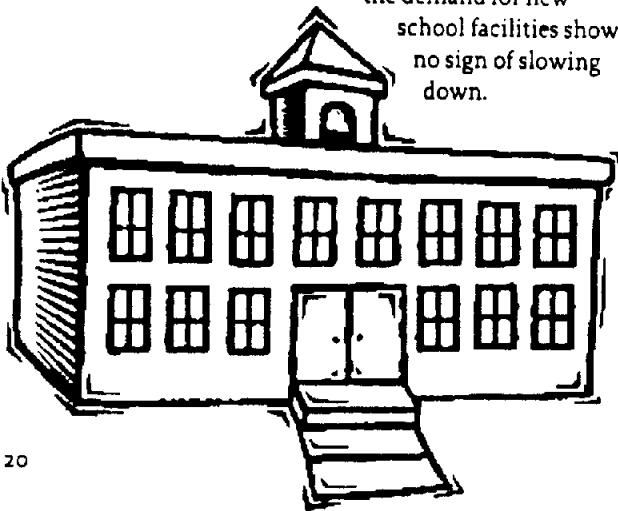
Are your class sizes larger than desired? Are you running out of space to house classrooms? Can your current facilities support the increased demand for ventilation and electrical service imposed by

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increasing technology needs? Are your school buildings, many of which are forty to fifty years old, placing overwhelming demands on maintenance accounts already sorely underfunded? Many communities in the Commonwealth can answer yes to some or all of these questions.

It is no secret that increasing enrollments are placing a larger burden on many of the school buildings in the state. And with the increased demand for electrical and telephone services to support the needs of technology and to improve ventilation,

The demand for new school facilities shows no sign of slowing down.



The Fiscal 1997 School Building Assistance Priority List contains applications from 132 school districts across the state. The applications are for elementary, middle and high schools. The projects were initiated in order that the schools in question could:

- ◆ comply with state and federal desegregation requirements (category 1 projects),
- ◆ respond to enrollment increases (category 2 projects), or
- ◆ undertake major renovations for reasons other than the above (category 3 projects).

According to Jim Anderson at the School Building Assistance Bureau (SBAB), the Department of Education processes approximately 70 applications for School Building Assistance each June. On an average, 25-30 category 2 and 3 building grants are awarded each fiscal year. The state will spend \$186 million dollars this year to fund the School Building Assistance Act.

If you are a school district facing some of these issues, you may be wondering: "How do we get started?"

First, you must determine under which of the following three project categories you will be applying for assistance:

Category One: Districts seeking reimbursement to correct a racial imbalance in a school or schools.

Category Two: Districts seeking reimbursement to add on to an existing building or to build a new building because they need space for students or "to provide a full range of educational

programs and to maintain full accreditation."

Category Three: Districts seeking reimbursement for "other projects to meet significant facilities needs."

Technical assistance is available from the Department of Education's School Governance staff (currently consisting of two people) to help with the several steps of the application process.

FILING PROCESS

The steps leading up to filing an application for School Building Assistance are:

1. *Determine the need for new space by evaluating existing school facilities and developing enrollment projections and educational program needs.*

Most cities and towns accomplish this by establishing a Building Needs Committee. Along with a small appropriation (\$5,000 to \$10,000), the committee conducts the facility evaluations, program needs surveys, and enrollment projections for the district. The funding could be used to hire consultants to assist the committee.

2. *Develop a long-range plan for the school system, including educational and building needs as well as estimated costs.*

In cooperation with the superintendent and the school management team (principals, business manager, curriculum directors, etc.) the committee formulates an Education Plan for the district. The Department of Education can furnish specific criteria the Education Plan has to identify.

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DO'S AND DON'TS FOR SCHOOL BUILDING COMMITTEES

DO

1. **Develop a communications plan.**
Voters support issues they understand.
2. **Keep town management informed.**
A unified presentation is critical to success.
3. **Sponsor focus groups and public opinion surveys early in the process.** The community has to feel involved in the planning.
4. **Involve school principals in the planning.** Their involvement with parents, staff and students provides for feedback on how the community feels towards the project.
5. **Write promotional materials simply.**
Leave out educational jargon and "buzzwords".
6. **Discuss tax increases in dollars and cents.** Many people cannot compute "millions" to their budgets. Break it down to their impact on households: for example: \$\$/week on an (x) value home.
7. **Identify supporters and get them to the polls.** Do not assume any vote!
8. **Be selective with Clerk of the Works, Architect, General Contractor and any Consultants used.** Check references on previous work (were they on time, within budget, cooperative, etc.).
9. **Keep time frame reasonable.** An architect will need six to eight months to complete plans.
10. **Keep accurate records.** A detailed list of invoices, change orders, payments, etc., will help facilitate any audits.

DON'T

1. **Do not operate in a vacuum.** Keep community leaders informed.
2. **Do not discuss project cost estimates until the feasibility study has been completed.** The first number people hear tends to be the one they remember.
3. **Do not ignore comments and suggestions.** Issues left unresolved will appear at Town Meeting or during ballot question elections.
4. **Do not waste time on changing people's minds.**
Changing an entrenched "no" voter's mind is difficult, if not impossible. Instead, concentrate your efforts on identifying supporters.
5. **Watch out for side issues.** Often, voters don't really object to the tax increase, but are frustrated by a side issue. These can include a school site, school committee- superintendent credibility, rezoning, grade restructuring and racial issues.
6. **Do not make any assumptions.** Make sure all constituencies understand the issues.
7. **Do not get into specifics.** Many people do not understand square footage for children and site requirements. Focus on what the building program means instructionally for the district's children.
8. **Do not avoid the media.** Often, working closely with the local reporter will help describe the district's needs objectively.
9. **Every community is different.** Communication techniques that work in Mashpee may not work in Framingham. Identify what methods have been successful in your own district.
10. **Don't rush.** Allow adequate time and discussion in explaining the issues and gaining community support.

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3. Receive the endorsement of the School Committee for all parts of the plan.

Massachusetts General Laws c.71, s.68 states that a member of the school committee is to be

There is no magic formula for success at town meeting or referendum elections. What it takes is a systematic "education" program of the needs, a well-organized network of supporters, and a commitment from the community.

appointed to serve on the building committee, and as a matter of practice, the school committee representative should give regular updates on the progress the building committee makes. During these updates, specific concerns the school committee may have can be addressed as the process evolves. This is also an ideal time to begin the "education process" of community. It's important to learn what concerns school councils may have, and whether the booster clubs, PTA's, etc. understand and support the project. Are the school committee and other elected officials unified in their support and understanding of the needs? A building committee should take every opportunity to "educate" the community on the needs identified.

4. Arrange a Building Needs Conference with DOE staff to review the long-range educational and facilities plan for the school system.

The Department of Education staff will review a district's plan for the school system to determine how many school buildings should be built, renovated, razed, etc.

5. Develop building specifications, bid documents and preliminary drawings which must be approved by the Department of Education.

The cost of bid documents and drawings must be paid for initially by the town. The building committee will have to hire an architectural firm to complete this step. The Department's approval is to insure the project will meet the specifications required by regulations and as determined at the Building Needs Conference. The cost will be eligible for reimbursement at the rate established by the Legislature.

6. Authorize bonding for the total cost of the project.

Before an application can be submitted to the Department, the district must vote in favor of the project and authorize the sale of municipal bonds. For a town, this usually means Town Meeting approval and the passage of a Debt Exclusion ballot under the provisions of Proposition 2½. The Department recommends that the town's Bond Counsel prepare the wording for the Town Meeting Article.

While there is no magic formula for success at Town Meeting or referendum elections, a systematic "education" program of your building needs, a well-organized network of supporters, and a commitment from the community can work in your favor. Keep in mind that there are restrictions on the use of public funds relating to ballot questions. To receive an information guide, you can contact the Office of Campaign and Political Finance.

7. Complete an application and submit it to the Department by June 1st.

For a project to be considered for priority ranking for June 97, a completed application has to be submitted by June 1, 1997.

Applications received after June 1, 1997 will not be ranked until June 1998. The current list contains ranked applications from the FY96 and FY97 lists. Projects listed in FY98 will be added behind the currently ranked projects. Once a project is approved for funding, the state pays the established percentage on both the principal and interest over a 5-20 year period. A 20-year loan enables the state to fund more projects in a given year because the yearly amount is less.

The building committee also serves as the school committee's representative on the project. In conjunction with the architect, the committee will approve bid documents to ensure compliance with the Public Bid laws.

The committee also hires the clerk of the works, who serves as the committee's representative on a daily basis on the project. The clerk will work with the architect, general contractor, and school and town officials to ensure a timely completion.

The committee is also responsible for proper documentation of all change orders, invoices and bills paid. The Department conducts regular audits on building projects to ensure that the specifications and conditions set forth at the Building Needs Conference have been followed. Town or city treasurers can also be very helpful in establishing the proper "paper trail."

It seems an overwhelming task, but it is not without its rewards. The improved opportunities the new facilities will make possible for your students makes the work worth the effort. ♦

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