

## **LONG RANGE FACILITY MASTER PLANNING SCOPE OF WORK**

### **Task 1 – Kick-Off Meeting**

The Kick-Off meeting is intended to be the initial start of the process of Facility Master Planning. Consultant will gather all pertinent data on the sites and facilities. Consultant will meet with the Steering Committee. A meeting prior to this with Administration will take place to review the agenda. The agenda will include, at a minimum, an explanation of the process, establish lines of communication, the time line, and the tasks. Consultant will also establish times and dates for the meetings with the Steering Committee.

### **Task 2 – Prioritization Committee Development**

At the same time Consultant shall conduct the Kick-Off meeting. Consultant will discuss with the District the makeup and background of the various members of the Prioritization Committee. Consultant will create a survey for the committee members to ask about their relationship to the District, if any. In an effort to be fully transparent, this will delineate all the relationships each member has with the District in aggregate, including who is a resident, a parent in a “family” or neighborhood, an administrator, staff, faculty and /or all other relationships that they may have with the District. The development of the “Prioritization Committee,” is the only deliverable for this task.

### **Task 3 – Educational Specifications Development and Master Products Development (Master Products Development is Optional)**

#### Educational Specifications Development:

Consultant will examine the current Educational Specifications. Factors that may have an effect on the specification include, but are not limited to:

- Technology, including one to one initiative
- Local Control and Accountability Plan (LCAP) Goals
- Linked Learning Academies
- Special Education

In addition, Consultant will hold input meetings with the K-12 Operations Department, Special Education and the Technology Department.

Consultant will create a survey for the most recently constructed school(s), that were built with the latest versions of the educational specification, to obtain a functional post-occupancy survey information. After use of a space for a year or two, the students, staff and administration could have great insight on suggested modifications to improve the specifications.

Throughout the community meeting process, the master planning team will be aware of direct and indirect effects the community input may have on the educational specification.

Consultant will complete up-to-date amendments to the educational specifications. This process is not expected to result in a need to completely rewrite the District’s Ed Spec documents.

#### Master Products Development (Optional):

Consultant will evaluate the current Master Products List & Sole Source Products, approved by the School Board in 2011. The goal being to make any updates that would make them compatible with current industry standards and

to look for areas that would reduce overall costs to the District. This evaluation will be completed in two phases; phase one, evaluation and phase two written changes. The following sub-tasks represent the process:

#### Phase One

- 3.1 In house review and evaluation of current material to determine any and all potential updates and or suggested changes. This task will include specialized expertise within the Darden team as well as outside consultants in the field of Mechanical, Electrical, Technology, Low Voltage systems, Access Compliance, and other areas.
- 3.2 Meet with Facilities and Construction and Maintenance and Operations to gain input on suggested changes and or updates that they have discovered in the Product lists.
- 3.3 Complete a survey to Architects that have worked with the District to discover any and all potential issues with the use of the current products.
- 3.4 Meet with Information Technology, Curriculum and Instruction and K-12 Operations to gain input on suggested changes and or updates to the Products list.
- 3.5 Meet with Facilities and Construction and Maintenance and Operations to review draft recommendations.

#### Phase Two

- 3.6 Complete written documentation of all changes. (This sub-task is based on changing 40% of the current document)
- 3.7 Presentation of Document to the School Board for approval.

#### **Task 4 – Demographic and Enrollment Projections**

Consultant will review the Projections of the Charter Schools, and the data for the overall District as it becomes available. This work can be done concurrently with the other fact finding tasks. Consultant has included SchoolWorks as a member of our team to review the data from the District's sources, and then work with other members of the Darden team and the District to analyze and determine optimum school sizes. Optimum school sizes are based upon enrollment, demographics and programs. One of the key items Consultant will study is the overall percentage of students enrolled in the Charter Schools and Private Schools in comparison to the District schools. The enrollment/projections data, together with school capacity and program needs, will also be utilized to assess the need for repurposing of schools, if applicable. This task will be accomplished by utilizing both the data available from the District along with census data. These ratios will be compared to other districts with similar demographics to verify that projections for the Charter Schools are reasonable. Also, part of our analysis will determine the overall capacity needs of the District, so Consultant can verify any sites or facilities proposed for Charter School use that will not be needed for District students over the next ten years.

#### **Task 5 – Priority Project Site Reviews / Assessments**

Consultant will complete a full facilities needs assessment on all priority schools (20 as listed). There are six (6) District sites that are currently closed and will not be assessed, but a site walk will be done in consideration of these sites for future use. Consultant will be using a "tablet" based system that considers all aspects of the condition of the buildings and the site. Prior to doing our on-site assessments Consultant will discuss our points of review with the facilities and maintenance staff. This work will be completed during the summer break. Consultant will also do a follow up in early fall with a "quick review" of the occupied spaces to see how the spaces are being used for the educational program. When completed Consultant will produce a Facility Conditions Index (FCI) for each facility and site. The FCI is an index that can be used to compare the cost of updating the current building to a new building with comparable square footage.

The assessments will incorporate all of the "best practices" standards of the industry associated with facility assessments, and what is stated in both the District Governing Board Policies 7115 and the District recommendations, standards and policies. These assessments will be prime indicators, along with all of the data collected during the process, for the basis of estimating completed during Task 10.

In addition, Consultant has identified several elements that impact student performance. They will include:

- Acoustics
- Thermal Comfort
- Indoor Air Quality
- Daylighting
- Furniture, Comfort and Flexibility
- Technology
- Safety

As Consultant develops the assessments for the twenty (20) priority schools, these elements will be reviewed and scored. The twenty (20) schools to be assessed:

1. Cameron Elementary School
2. Chavez Elementary School
3. Collins Elementary School
4. Fairmont Elementary School
5. Grant Elementary School
6. Highland Elementary School
7. Lake Elementary School
8. Ohlone Elementary School
9. Olinda Elementary School
10. Riverside Elementary School
11. Shannon Elementary School
12. Stege Elementary School
13. Valley View Elementary School
14. Wilson Elementary School
15. Crespi Middle School
16. Hercules High School
17. Kennedy High School
18. Richmond High School
19. Alvarado Adult Education School
20. Serra Adult Education School

The six (6) schools that are closed and will be assessed for future use include:

1. El Sobrante Elementary School
2. Seaview Elementary School
3. Adams Middle School
4. Portola Middle School (Former Site; Korematsu Middle School interim housing currently sits on the site)
5. Harmon School-Knolls Center
6. North Campus (Former Kerry Hills Elementary)

#### **Task 6 – Steering Committee (8 Meetings Minimum)**

The Steering Committee is a crucial part of a community supported Facilities Master Plan. Consultant projects the need to meet with this committee a minimum of eight (8) times during the process. This will include, but not be limited to, the following topics:

- Kick-off meeting: Introductory meeting for explanation of the master planning process. .

- Data review meeting: This meeting will occur after Consultant has assembled all the information on the priority sites, completed the review of the demographics, and completed the review and update on the educational specifications. It will also come after the physical review and assessments of the priority sites.
- Community input and prioritization review meeting: This meeting will occur after the input meeting with the community and the site meetings at the priority sites, Task 8 and the discussion of the non-priority sites (if completed) in Task 9. The Steering Committee will also review the prioritization criteria established by the Prioritization Committee in Task 7.
- Review options meeting: Once Consultant has developed several options in Task 10, Consultant will bring them to the Steering Committee for review and discussion. The options will pass through the Prioritization Committee prior to this meeting to review priorities and to narrow the selection based on the priorities. The Steering Committee will be asked to narrow the options.
- Draft review meeting: The Steering Committee will be presented a draft of the complete Long Range Facilities Master Plan for discussion. The Steering Committee will be asked to make a recommendation for the Board of Education to consider.

#### **Task 7 – Prioritization Committee (6 Meetings Minimum)**

As stated in Task 2 above, Consultant will begin this work with a discussion with the District administration and survey of the committee participants. The survey preparation will begin immediately, and once Consultant has a member list Consultant will distribute. The survey will be electronic, simple and provide data that can be used to demonstrate transparency and to demonstrate that no one particular group is represented. The survey will also help us in determining how to develop consensus. Consultant will meet with the Prioritization Committee an estimated six (6) times throughout the process, and will include, but not be limited to, the following topics:

- Process Meeting: At this meeting Consultant will explain the process for completing the Facilities Master Plan and the critical role of the Prioritization Committee. Consultant will also answer any questions the members may have on the survey.
- Review Survey results and initial prioritization criteria discussion: Consultant will provide the data from the survey, usually in the form of graphs. Consultant will also present data from the site assessments and reviews, the community meetings in Task 8 and other input to date. Consultant will develop consensus on the criteria in order to advance options being developed in Task 10.
- Finalize Prioritization Criteria and review the Prioritization Tool: At this meeting Consultant will wrap any discussions remaining on the criteria, and Consultant will also present the Prioritization Tool for review and discussion. Consultant has developed several output spread sheets that can be used as a model. However, Consultant has found that every district has its unique characteristics that need to be incorporated.
- Review Options: The Prioritization Committee will be presented several options, developed in Task 10, for review. Each option will contain an analysis based on the Prioritization. The Committee will be asked to narrow, by consensus, the recommended options.

#### **Task 8 – Community Meetings**

Consultant anticipates using various mediums of communication throughout the planning process, including:

- Community Survey – through an online system
- Document sharing through a team-hosted cloud portal
- Regular, written updates and presentations of final findings to the District
- Strategic asset value (SAV) analysis/visioning session

- Regular progress meetings, conference calls, and web based (Internet based) meetings
- Presentations of initial findings to the West Contra Costa Unified School District
- Small and focused interviews with administration and faculty
- Focus groups and planning workshops with user groups, community members, and other stakeholders
- Facilitation of larger community meetings
- Electronic survey

Specifically the following Meetings have been planned in our approach:

- **Site Council Meetings - 40 Meetings**  
There will be two (2) meetings at each of the twenty (20) priority sites. The first meeting will be to explain the process and to discover input on the specific school site needs. The second meeting will include the community that surrounds the school to show the options for the site development and the establishment of priorities. If there is already an established Site Council or Committee Consultant will work with them. If not Consultant can help the school Principal set up a Council or Committee. The Committee should have school staff, teachers, students and community or “family” members. These meetings are generally interactive, and depending on the number of attendees, Consultant may break into subject matter groups to discuss topics such as safety, traffic, curb appeal and other topics.
- **Community Meetings - 12 Meetings**  
There will be two rounds of general community meetings held at a collective area, such as the comprehensive high schools. (Consultant has planned two (2) meetings at the six high schools for a total of twelve (12) community meetings.) These meetings will build consensus through listening, and, most importantly, acknowledging common themes and desires. The initial meetings will be for fact gathering to set a baseline of “what the community believes is the current state of schools facilities and sites.” Consultant will also be looking for input concerning “work to date.” Generally, this first meeting is used to explain the process of the master plan and ask some basic questions to either one group or several small groups, depending on the size of audience. Breakout sessions may include “hot topics” or topics that have been common from one site to another. Before the second meeting Consultant will have common themes identified and preliminary priorities will be established. At this second gathering, Consultant will also bring forward ideas and comments from each of the school site council meetings. The community will be asked to give input and comments. A District representative should be present at each community meeting.
- **Broader Community Meetings and Communications - 16 Meetings Minimum**  
There will be five (5) meetings with the various cities, a minimum of five (5) meetings with the neighborhood groups, and six (6) meetings with the Citizens Bond Oversight Committee. This will be an informational meeting and a chance to gather input from the Cities and the surrounding neighborhoods. Consultant will meet with the Citizens Bond Oversight Committee during the process to inform them of the progress. A District representative should be present at each Community Meeting.

#### **Task 9 – All Non-Priority Site Reviews (Optional)**

The “District Sites 2015 Update” spread sheet sent to us as part of the RFP contains a great deal of information that can be used as a basis of beginning this review. In addition, Consultant will meet with the District Administration and Facilities Department to review all sites. This discussion will include the cost of maintenance and repairs, energy usage, technology readiness and any changes in the educational strategies. Consultant will also want to apply any changes in the Educational Specifications and Standards to all sites to determine updates and timing of the updates. This optional service includes a full site assessment of the district sites that have not been touched for five or more years, which is roughly thirty (30) school sites, and all the Administration spaces within the District.

### **Task 10 – Options and Recommendations Development**

Consultant will work with the District to create options. These options will incorporate all facts collected to date from all stakeholder groups, themes that have been identified, costs, and policies. This task is comprised of the following steps:

- Assembly of all of the Common Themes that were repeated through the process of collecting input.
- Creating several options that address the common themes, any identified demographic concerns and the input from the Community, Facility Committee, Administration and all other stakeholders.
- Applying the Prioritization Tool established in Task 7 to all options.
- A Current and Future “concept” site plan will be developed for the twenty (20) priority schools to show “diagrammatically” how the school sites may change as a result of the options.
- All options will have costs estimates established.

Cost estimating is part of our FCI indexing, the prioritizing process and the development of the master plan implementation. An estimate will be completed for modernizing, building new or replacing the facilities on the various sites. Working with the District staff, Consultant will identify the methodology of these estimates and the construction cost escalation that may be applied for projected facilities, repairs, upgrades, additions and renovations.

The options will be taken to the Prioritization Committee, the Steering Committee for review, discussion and narrowing. The Steering Committee will be asked to make a recommendation of one or two of the options. The final options will be used in the second round of community and site committee presentations.

### **Task 11 – Develop Preliminary Funding Strategy**

After the narrowing of the options Consultant will work with the District’s funding consultant, School Facility Consultants, to create a strategy for the identified unfunded projects. Consultant has included the following steps to complete this task:

- Quantify total need beyond funded projects
- Determine available fund balance based on current commitments
- Determine optimal scale and timing of future General Obligation Bond measures
- Administration presentation of projected cash flow model
- Administration discussion on alternative funding / Leverage options
- Develop financial assumptions to support scope and schedule assumptions in master plan

### **Task 12 – Board of Education Reviews (2 Meetings)**

A workshop will be scheduled with the Board of Education after the initial data is ready, including the site assessments of the priority schools, the demographics, and the initial meeting with the Steering Committee and the Prioritization Committee about midpoint in the process. The second workshop will be for the presentation of the Facilities Master Plan for adoption.

### **Task 13 – The Master Plan Document**

The Long Range Facilities Master Plan document will include all collected data, facts, FCI reports, cost estimates and recommended priorities. It will contain an implementation plan that is based on the prioritization program and the availability of funding and an overall schedule of activities. The final document will be submitted to the Board of Education for Approval.

The document will be prepared in both hard copy printed form (25 copies estimated) and electronic format.

