Statement of Qualifications for

EDGEWOOD-COLESBURG CSD

Colesburg, Iowa

September 7, 2017

FIRM PROFILE & SERVICES

FIRM PROFILE

Founded in 1982 in Dubuque, Iowa, IIW, P.C. has 35 years of experience providing creative and innovative solutions to our clients. Employee-owned since 1999, our success is based on our people and their client-centered approach to their work. We have over 75 employees offering expertise in architecture; civil, environmental, municipal, structural, and transportation engineering; land surveying; and construction services.

Core Values "Integrity. Expertise. Solutions." This is our motto and the values that drive our firm. Integrity illustrates the importance of earning trust and respect through honesty, serving our clients' interests with sincerity, establishing long lasting relationships, and placing a high value on our reputation. Expertise represents our commitment to expanding and transferring our knowledge, expanding our capabilities, and accepting challenges as opportunities. Solutions will be based on thorough analysis of our clients' goals, applying creativity, design, and innovation to gain the highest level of value. The resulting solutions are documented with technical accuracy to meet constructability and performance requirements.

Quality Quality is embedded in our culture. We have long established procedures for peer reviews of our work. These reviews are supported by design checklists that are constantly evolving to enhance our production and operation processes and provide consistency.

Project Management We understand that a design solution is only as good as its implementation. Therefore, we assign experienced professionals as project managers to our projects to provide effective and respectful leadership. Our project managers understand that proper planning and communication are critical to delivering the project ahead of schedule and within budget.

Sustainability We are committed to the stewardship of our planet. We are a member of the U.S. Green Building Council (USGBC) and many of our professionals are Leadership in Energy & Environmental Design Accredited Professionals (LEED AP). Sustainability is instinctive to our design approach and we incorporate the principles of "green" design into every one of our projects. We constantly seek to promote healthy environments to enrich where people live, work, play, and learn.

iiw

OFFICE LOCATIONS

4155 Pennsylvania Avenue
Dubuque, IA 52002

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St. Cloud, MN 56301

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Hazel Green, WI 53811
(Satellite Office)

W4862 Nature Lane
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PROFESSIONAL SERVICES

STRUCTURAL ENGINEERING

- Building Structures
- Building Modifications
- Retaining Walls
- Industrial Applications
- Structural Assessments
- Geotechnical Analysis

MUNICIPAL ENGINEERING

- Urban and Regional Planning
- Water Distribution Systems
- Capital Improvements Planning
- Street Improvements / Streetscape
- Mapping
- Sanitary Sewers

TRANSPORTATION ENGINEERING

- Highways
- Airports
- Railroads
- Bridges
- Highway Safety Training
- Traffic Engineering
- Traffic Impact Analysis
- Recreational Trails
- NBIS Bridge Inspections

LAND DEVELOPMENT & CIVIL ENGINEERING

- Commercial / Business Parks
- Storm Water Management
- Residential Development
- Industrial Parks
- Recreational Facilities
- Site Design
- Hydraulics and Hydrology
- Floodplain Development

ARCHITECTURE

- Building Design
- Facility Planning
- Facility Assessment
- Feasibility Studies
- Building Restoration
- ADA / Building Code Reviews
- Cost Estimating
- Forensic Engineering
- LEED Accredited Professionals

ENVIRONMENTAL ENGINEERING

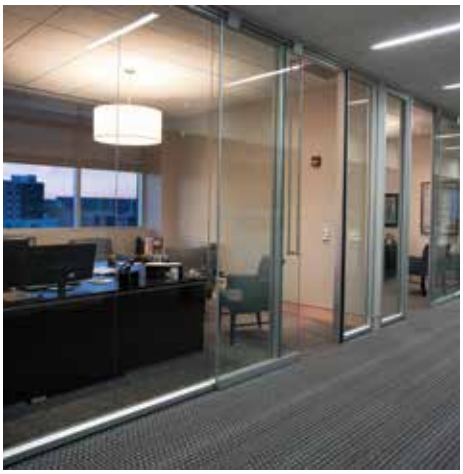
- Wastewater Treatment
- Water Treatment / Storage
- Hazardous Material Assessments
- Geothermal Well Supply
- Water Supply (Wells)
- Wetland Delineation
- Instrumentation & Controls
- Environmental Documents

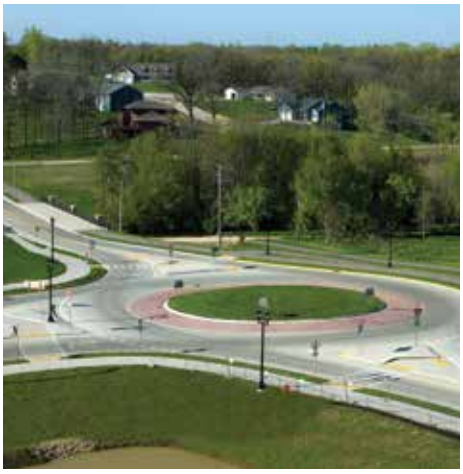
LAND SURVEYING

- Boundary and Topographic Surveys
- ALTA / ACSM Land Title Surveys
- Route and Bridge Surveys
- Aerial Control Surveys
- Construction Surveys
- Lot Surveys
- Subdivision Platting
- Acquisition / Right-of-Way Plats

CONSTRUCTION SERVICES

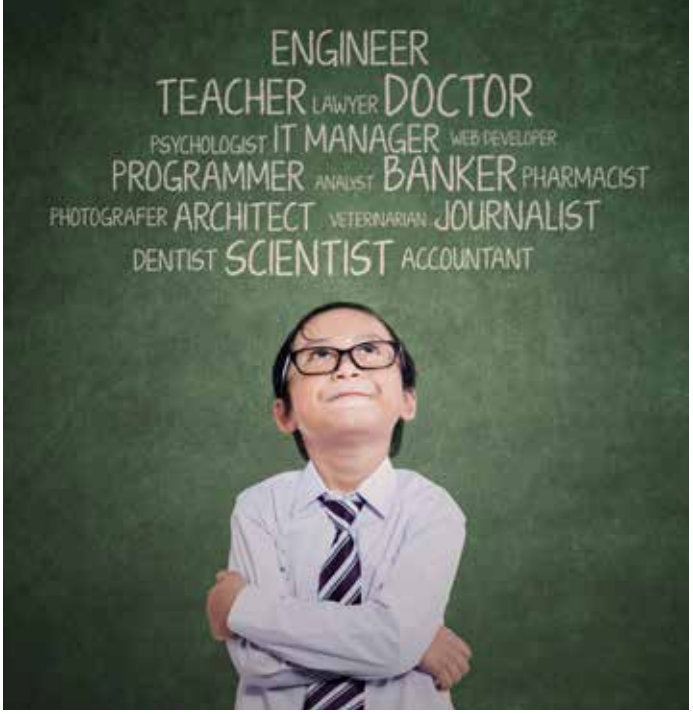
- Concrete Testing and Inspection
- Asphalt Inspection
- Soil Density and Compaction
- Soil and Aggregate Gradation
- Welding and Bolting Inspection
- Soils Classification
- Masonry Testing and Inspection





PROJECT EXPERIENCE

K-12 EXPERIENCE



- Dubuque Community School District, Dubuque, IA
  - Kennedy Elementary Addition & Remodel
  - Irving Elementary Addition & Remodel**
  - Hempstead High School Remodel**
  - Eleanor Roosevelt Middle School**
  - Table Mound Elementary School Addition and Remodel**
  - Numerous other L.O.S.T. and PPEL projects over the past 18 years
- Bellevue Community School District, Bellevue, IA
  - High School Addition**
  - Middle School Addition**
- Davey Jackson Elementary School, Jackson Hole, WY
  - New Elementary School**
- Dyersville-Beckman Catholic Schools, Dyersville, IA
  - High School Office and Chapel Addition
  - High School Gymnasium Addition
- Holy Family Schools, Dubuque, IA
  - Wahlert Catholic High School Renovation (under construction)
- Hillcrest Family Services, Dubuque, IA
  - Classroom & Gymnasium Addition
- Independent School District #742, St. Cloud, Minnesota
  - Community Facilitation for Long Range Facilities Plan - 2005, 2008, 2011*
  - Kennedy Community School - New 137,000 SF PK-8 School*
  - Westwood School Addition*
  - Science Lab Remodels in Six Buildings*
  - Remodeling at North Junior High School*
  - Remodeling at South Junior High School*
  - Talahi Elementary School Addition*
  - Oak Hill Elementary School Addition*
  - Addition and Remodeling at Madison Elementary*
  - McKinley School remodeling to ALC*
  - Discovery School remodeling of classrooms*
  - Facilities Study for additions to Kennedy, Clearview, and North Schools*
  - Additions/Remodeling at Kennedy, North Clearview, and Apollo Schools
  - HVAC Infrastructure Upgrades at Westwood Elementary, Clearview Elementary, North Junior High, and Apollo Schools
  - New St. Cloud Tech High School, 324,000 SF high school, supporting athletic fields
  - South Junior High, remodeling for a secure entry.
- ROCORI School District, Cold Spring, Minnesota
  - District-wide Building Analysis Study *
- Annandale Public Schools, Annandale, Minnesota
  - Facility Assessment and Planning *
  - New 145,000 SF PK-5 elementary school
- Nicollet School District, Nicollet, Minnesota
  - Facility Assessment and Planning *
  - Gymnasium and Auditorium Additions to K-12 School *
- Willmar Public Schools, Willmar, Minnesota
  - Community Facilitation for Long Range Plan - 2007, 2013 *
  - Roosevelt Elementary Kindergarten Addition *
- Independent School District #47, Sauk Rapids-Rice, Minnesota
  - Joint Master Plan for High School/City of Sauk Rapids Site *
  - New 360,000 SF High School*
  - Remodel Existing High School to Middle School *
  - Remodel Existing Middle School to Elementary School *
  - Remodel Existing Elementary Schools *
  - New Middle School *
  - Addition/Remodeling of Rice Elementary School *
- Cathedral High School, St. Cloud, Minnesota
  - Community Facilitation and Visioning*
  - High School - New School Study*
  - Administrative Services Building Remodeling*
  - South Building Remodel and Accessibility*
- Sartell-St. Stephen School District #748
  - Pine Meadow, remodeling for a secure entry
  - Middle School, remodeling for a secure entry
  - New High School, 295,000 SF high school and supporting athletic fields

** Work performed by David Leapaldt while a Principal at Grooters Leapaldt Tideman Architects, P.C.*

*** Work performed by IIW staff while at The Durrant Group.*

KENNEDY ELEMENTARY SCHOOL ADDITION & REMODEL

Dubuque, Iowa

The thoughtful and smart design of Kennedy Elementary not only better positioned the Dubuque area's second largest elementary school to meet the community's growing needs, it also earned the project a state honor for its significant energy savings.

When the project began, the school had the second largest student enrollment of the 13 elementary schools in the Dubuque Community School District. It also served the fastest growing residential communities of Dubuque.

With a significant list of needs, IIW worked with school leaders and the community to develop a plan that would provide the school with additional classrooms, special education space and community areas.

The final design included a 16,000-square-foot addition with four kindergarten classrooms, music and art classrooms, a 30-station computer lab, three special education classrooms, a high school sized gymnasium used by the city for after school programs, and a community conference room.

The facility features a closed-loop geothermal mechanical system that resulted in 49 percent kBTU energy savings when compared to the baseline. This earned the project the 2015 Excellence in Energy Efficient Design Award from the American Institute of Architects (AIA) in Iowa.

The selection of the geothermal mechanical system resulted from a thorough cost analysis of the school's mechanical systems as a part of the Alliant Energy New Construction Rebate Program.

IIW provided architectural, structural, site survey, civil design, bidding, and construction administration for this project.

PROJECT SUMMARY

Reference: Bill Burkhart
Manager of Buildings & Grounds
Dubuque Comm. School Dist.
2300 Chaney Road
Dubuque, IA 52001
(563) 552-3175

ELEANOR ROOSEVELT MIDDLE SCHOOL

Dubuque, Iowa

Rising enrollment and the challenges of an outdated facility led Dubuque Community Schools to build its first new school in 30 years. It marked the first middle school built in the district, and led two other schools to move to the 6th to 8th model.

The Dubuque Community School Board retained IIW to work with The Durrant Group in the design of a new 205,000-square-foot middle school for 1,100 students.

The three-floor design helps foster a more close-knit feeling for the middle school students by creating three houses, one for each grade. The three houses make up each floor of the school's tower. Students spend most of their school day in these areas and go outside of their "house" for specialty classes such as art, music, and gym.

Building this new school would not come without some creative thinking by the project's architects and engineers. The new 38-acre site where the school would be built posed unique soil conditions. With some ingenuity, IIW developed a solution and conducted an economic analysis of excavating soft soil materials under the building and placing engineered fill beneath the foundations above till instead of lowering the site and requiring the removal of excessive material. This approach provided the most economical method for good foundation conditions while maintaining site grades. The civil engineering team was able to "balance the site" and by doing so, all of the existing site soil was re-used on the site. This saved the district the costs of hauling away excess soil and bringing in additional soil.

The design of the site was planned to accommodate a future elementary school.

IIW provided land surveying and civil engineering services, including erosion and sedimentation control, earthwork, site utilities, pavement design, and traffic circulation. Among the special design elements is the design of a 9.3-acre wetland and retention pond. During construction, IIW assisted with engineering services.

PROJECT SUMMARY

Reference: Bill Burkhart
Manager of Buildings & Grounds
Dubuque Comm. School Dist.
2300 Chaney Road
Dubuque, IA 52001
(563) 552-3175

*Work performed by Mark Fassbinder while at The Durrant Group

TABLE MOUND ELEMENTARY SCHOOL

Dubuque, Iowa

Table Mound Elementary School was able to maintain its history after undergoing an extensive addition and remodel. The surrounding rural area served by the school was previously made up of several, one-room school houses. The main entrance and classroom doorways of the addition were designed to maintain this theme with the inclusion of the one-room school house motif with the belfry on top.

Student input was an important part of the planning and design process. Students were able to identify the inadequacies of their school. They drafted plans and presented their ideas to the school board. The response was overwhelmingly positive. The process helped create the most appropriate and useful design for the Table Mound community.

One of the challenges involved was that the project occurred during the school year. As a result, most of the heavy work was done before and after school hours to ensure minimal disruption to students and staff.

Student safety was a high priority, particularly regarding bus and parent pick-up areas. A parking lot and separate bus lane was added. With the new arrangement, faculty parking, parent pick up/drop off, and visitor parking were separated. This prevented students from crossing the bus lane.

The project consisted of the addition of six general classrooms and a music classroom. New administrative offices, a gymnasium, and several community-use spaces were added. Other improvements included renovations and upgrades to the mechanical, electrical, and plumbing systems; remodeling of classrooms and support areas; and a sprinkler system upgrade. A new geothermal heating and cooling system was installed, replacing a hot water boiler and unit ventilator heating system.

*Work performed by Mark Fassbinder while at The Durrant Group

PROJECT SUMMARY

Reference: Kris Hall
Transportation Manager
Dubuque Comm. School Dist.
2300 Chaney Road
Dubuque, IA 52001
(563) 552-3275

SARTELL-ST. STEPHEN SCHOOL DISTRICT

Sartell, Minnesota

Months of planning, learning and creating a vision together as a community led up to a successful referendum vote in the community of Sartell, Minnesota. A community visioning committee developed the plan that includes a new 289,000-square-foot high school, remodeling the current high school to a middle school, transforming the existing middle school into an intermediate school for grades 3-5 students, and remodeling two elementary schools.

The group developed the plans after understanding the crowding at each of the district's schools, the current growth and projected needs for the future. The total cost is $105.8 million for the five-year project that begins this summer.

IIW partnered with Cuningham Group Architects to work alongside the community visioning committee and with the Sartell-St. Stephen School District. Cuningham Group Architects and IIW will provide architectural and structural services for the project.

IIW is responsible for all of the work at the two elementary schools, and for most of the work at the current middle school, and will serve as the architect of record for these schools.

Programming and schematic design work on the new high school is in progress, with occupancy of the school scheduled for Fall 2019. The work on the two elementary schools began Summer 2017, with that construction scheduled for Summer 2017.

The middle schools work will be completed over the next three summers, and the remodeling of the existing high school will start design in either 2018 or early 2019 with occupancy of the building as a middle school in the summer of 2020.

PROJECT SUMMARY

Reference: Sartell High School
Middle School Remodeling-(Secure Entry)
Pine Meadow Elementary Remodeling (Secure Entry)

Jeff Schwiebert
Superintendent
(320) 656-3701

Steve Wruck
Director of Business Services
(320) 656-3721

ST. CLOUD TECH HIGH SCHOOL

Sartell, Minnesota

St. Cloud Area School District recently began construction on the new 324,000-square-foot St. Cloud Technical High School. The facility, set to open in the fall of 2019, will accommodate 1,600 students in grades 9-12.

Designed by Cuningham Group Architecture and IIW, the building will be divided into six integrated learning communities on two levels and will feature a combination of flexible learning spaces, group collaboration spaces, project and science labs and collaborative teaching spaces. The design is intended to be adaptable for the future, support a variety of learning styles and foster global preparedness.

The building's design was inspired by the site's diverse landscape which includes woodlands, granite outcroppings and a designated trout stream. The design team nestled the building along the north woodland edge and each of the learning neighborhoods will open and be connected to the woods and stream, providing a connection to nature from any location in the school. The site inspired an environmental studies curriculum and the building will include designated outdoor learning spaces.

Career and technical education spaces will be integrated throughout the building.

At the heart of the school is a two-story commons area that features walls of glass overlooking the landscape. In addition to school functions, the large space is intended to be used for community events.

Voters approved construction of the new school in November 2016. David Leapaldt, senior architect and project manager at IIW, has been working with the district regarding the future of Tech High School since 2005.

PROJECT SUMMARY

Reference:

Willie Jett
Superintendent
Willie.Jett@isd742.org

Mike Spanier
Owner's representative
(320) 267-6195

Amy Skaalerud
Executive Director of
Business Services
(320) 202-6851

CLEARVIEW ELEMENTARY SCHOOL EXPANSION

St. Cloud, Minnesota

Clearview Elementary, home to a sought after Spanish Immersion Program in St. Cloud School District, had not undergone an expansion for nearly 30 years. The School District called on IIW Minnesota to design a plan to give the PK-5 school much needed classroom, cafeteria and gym space and position the site to better meet growing enrollment demands into the future.

Built in 1961 on 56 acres, Clearview completed additions in 1971 and 1987 to bring the total building footprint to nearly 70,000 square feet. Enrollment growth fueled in part by the school's launch of a Spanish Immersion Program in 2007, led the elementary school to add four portable classrooms in the 2011-2012 school year.

IIW Minnesota developed a master plan to transform the Clearview site to PK-12 and then identified portions of this master plan that would be implemented to address current enrollment growth. Multiple master plans for the district have suggested expanding the school to PK-8.

In this 7,200-square-foot remodel and expansion, the school added kindergarten and early childhood classrooms to the east wing of the building and upper grade classrooms to the west wing of the building. A series of design adjustments also created better general classrooms, art space and special education space throughout the building.

The first stage of a two-stage gym to the north side of the building, and rooms that encroached on the existing cafeteria, were removed to expand cafeteria seating and serving capacity and to open up the space to the rest of the school.

This project also included the replacement of the school's entire heating and ventilating system to improve efficiency and indoor air quality. This system brings more fresh air into the building and added dehumidification to the building.

The site also underwent upgrades to provide additional parking, improve parent drop-off and pick-up areas to increase student safety and addressed drainage issues.

David Leapaldt, senior architect for IIW Minnesota, has worked with the district on its facility plans since 2005.

KENNEDY COMMUNITY SCHOOL (PK-8) ST. CLOUD AREA SCHOOL DISTRICT 742

St. Joseph, Minnesota

As a result of the community-based Long-Range Planning Facilitation led by Former Superintendent Bruce Watkins and David Leapaldt, the community passed a referendum to build a new PK-8 school in St. Joseph to address rapid growth in that portion of the St. Cloud Area School District. David led the community and the school district through the design of the new 137,000 SF school which serves 755 students. The project was constructed on a 71-acre site, which also included planning for a future school. The project was constructed under a fast-track construction process.

The community desired a school that would be family-friendly and have the community aspects of a smaller school. To accomplish this, the grade levels were separated into three learning communities – PK-2, Grades 3-5, and Grades 6-8, arranged around a central core. Along with other safety measures, bus and car traffic on the site were completely separated, and the site and school are designed so only one secure entrance is necessary to access the school. The openness and light within the school makes it feel bright and welcoming.

The community's desire for an environmentally responsible school was met by designing the school to achieve a Gold LEED certification and to receive an Energy Star designation from the USPA. The Green design of Kennedy Community School drew national acclaim when it was featured in a CNN Money segment which aired October 15, 2008.

*Work performed by David Leapaldt while a Principal at Grooters Leapaldt Tideman Architects, P.C.

SAUK RAPIDS-RICE HIGH SCHOOL
INDEPENDENT SCHOOL DISTRICT 47

Sauk Rapids, Minnesota

Working closely with the School District and the City of Sauk Rapids, David Leapaldt led a process to create a master plan for the 160 acres of City property and the 100 acres owned by the School District. The outcome was a master plan for the entire 260 acres that created the best value for the community.

David also led the design and construction process for the construction of the new, 360,000 square foot high school The high school is designed as a "school within a school", creating smaller communities of learners, while still providing interaction among all students.

The school currently has the capacity for 1500 students, but has core facilities designed to meet the needs of 2000 students. The construction of an additional classroom module would create the capacity for the additional 500 students. The design of the school is such that portions of the school can remain open for after school events or activities, or for community events, while other portions of the school would not be accessible. This same concept was used to provide additional security within the school. Large windows in the classrooms and a spacious and bright commons serve to create an exciting and welcoming interior.

Energy savings and sustainable strategies were incorporated into this design which achieved an annual operating cost savings of over $265,000.

*Work performed by David Leapaldt while a Principal at Grooters Leapaldt Tideman Architects, P.C.

LORAS COLLEGE ATHLETICS AND WELLNESS CENTER

Dubuque, Iowa

Loras College has long been known for its picturesque Rock Bowl Stadium. To complement that, the college now has a new hub with the completion of an Athletics and Wellness Center. Located in the center of campus, the Athletics and Wellness Center serves as a hub for activity for athletes and all students at Loras College in Dubuque, Iowa. The Center houses a 1,750-seat arena, locker rooms, workout spaces and equipment areas.

The varied terrain on the college campus has been known to pose its challenges for students. David Leapaldt designed the building circulation in such a way to help students more easily navigate the elevation change that separates the lower campus from the upper campus.

The team executed a variety of design techniques to create comfortable, inviting spaces, despite their large size. First, the 74,000-square-foot facility covers the terrain in three distinct structures. A roof truss design in the arena creates interest amidst the scaling ceilings necessary for volleyball and basketball courts. On the exterior, louvers, large dormers, brick and decorative case concrete units tie the facility into the historic buildings that surround it.

The design team analyzed the building's projected energy usage with the Energy Design Assistance Program and identified strategies to reduce the building's annual energy expenses. The completed facility includes high performance windows and occupancy and daylight sensors. The center also features a ground source heat pump with varied pumping. That feature alone is projected to reduce annual heating and cooling costs by 50 percent. A series of sustainable materials help reduce maintenance costs while enhancing the overall appearance.

This project was a part of the Loras College Master Plan that David Leapaldt worked with the college to develop.

PROJECT SUMMARY

Reference: John McDermott
Loras College
1450 Alta Vista
Dubuque, IA 52001
(563) 588-7132

* Work performed by David Leapaldt while Principal at Grooters, Leapaldt Tideman Architects PC.


EXIT

STEP-BY-STEP GUIDE

EFFECTIVE SCHOOL FACILITY PLANNING & COMMUNITY ENGAGEMENT

iiw

INTRODUCTION

School districts face an unprecedented facility challenge today. Gaining funding for schools has become increasingly difficult and the long-term maintenance funding has long fallen short of what school districts need to maintain their facilities and integrate technology. The way teachers engage learners has changed significantly, challenging districts of all sizes to reimagine their facilities.

Too often today, school facilities inhibit how schools educate, when they should be enabling more educational

What do your school facilities need to support the educational goals of your school district and your community?

KEY STEPS

Here's an inside look into the planning process that has delivered results for school districts of all sizes:

1. **Determine how you will engage the community.**
2. **Create a long-range facility vision.**
3. **Conduct a facility assessment.**
4. **Identify paths to the vision.**
5. **Understand the costs.**
6. **Develop your Master Facility Plan.**

Over the past 15 years, it's become increasingly apparent that for strong community engagement from the beginning of the planning process is needed for K-12 schools to be successful in executing their school facility plans. Schools need to get it right the first time. When a referendum fails, it becomes significantly harder to re-engage the community.

BEHIND THIS GUIDE

For more than three decades, David Leapaldt has been partnering with schools to find solutions to make their visions for education a reality. He is a seasoned community planning facilitator, known for his ability to pragmatically help schools reimagine the possibilities to achieve their goals. He is a licensed, award-winning architect. His passion is education and helping school districts create flexible, healthy and sustainable spaces where learning ignites and students are engaged and achieving.

STEP 1

DETERMINE HOW TO ENGAGE THE COMMUNITY

There has been a shift in school facility planning over the past two decades. In the past, school districts could keep the effort internal through a Steering Committee. Strong community engagement from the beginning of the planning process is closely tied to the district's ability to successfully execute its facility plans.

Fewer households with children in school

In the not so distant past, 1 in 2 households had children in the public schools on average. Today, in many communities, only 1 in 4 to 5 households have children in the public schools. This trend has made it critical for schools to begin their facility planning process by determining how they will engage the community.

The deeper the engagement, the more successful the outcome.

Establishing a Community-Based Committee

While the engagement varies by district, in almost every case, school districts achieve the best results when they form a facilities visioning committee or task force. This is addition to the smaller Steering Committee, which outlines and oversees the community process. The community-based committee of school and community members will work together to determine needs, cast a multi-year vision and create an action plan. Expect a deep engagement here. These members will get to know the school district's trends, facilities and challenges on a comprehensive level. An additional benefit is that this provides an opportunity to talk with the community about the district's needs.

The key roles of these committee members include:

- Seek to understand the school district's current facility picture.
- Collaborate to cast a community vision for what they want their school facilities to be.
- Identify and provide feedback on a variety of paths to achieve the vision.
- Review concepts and pricing based on the top models.
- Report informal feedback received from their networks (friends, neighbors, coworkers).

Who's Involved

Engage a broad group of members that are reflective of your community. This is not easy. It takes intention. It's often a struggle to get representative from minority populations or those who have historically been opposed to facility changes in the school.

Consider these common roles when establishing your committee:

- From the School
  - Administration
  - Board Members
  - Teachers
  - Parents
  - Students

- From the Community
  - Business Leaders
  - Residents without kids
  - Community Influencers

The goal is to engage members who wear as many hats as possible. For example, a business person who is involved in the local service organization (such as Rotary) and may or not be a parent is a good choice.

Then, evaluate and refine your list based on these characteristics:

- Number of hats
- Gender balance
- Diversity
- Varying viewpoints

Identify who your naysayers are upfront and determine how you will engage them in the process. They may serve on this committee. They may not. When school districts have engaged them on the committee, it's been common to see the naysayers naturally drift in their viewpoints. Some who have been completely against the facility plans flip and support the plan. That speaks volumes in the community.

What's the Right Size?

The size of this group often varies depending on the size of the district itself. The key is to keep the group as small as possible while still large enough to engage all the key stakeholders.

This will allow the district to accomplish more in each meeting and have fewer meetings overall. Keep in mind that this is not the only way you will engage the community in the facility planning process.

If you engage 50 people, it will take longer than engaging 25 people. That doesn't make it wrong. It simply affects the number of meetings and overall timeline.

The process works best to break the larger group into smaller groups of equal size for discussion and reflection. These smaller groups then reconvene as a larger body to report back and further the discussion.

Districts have had as few as three meetings to complete the process and as many as 10 meetings.

One district, for example, engaged 100 people to help set the vision for facilities that at the time included five buildings. This large group was split into smaller working groups that then reported back to large group. The district engaged a broad group and through effective facilitation, it achieved its goals in eight meetings.

This committee is an advisory group. School boards make the final decisions.

COMMUNITY-BASED V. STEERING COMMITTEE: WHAT'S THE DIFFERENCE

The Steering Committee oversees the Community-Based Committee and helps a facilitator shepherd the community process. The Steering Committee typically consists of superintendent, director of finance, a Board of Education member and at least one community member. Key roles of Steering Committee:

- **Identifies the Purpose Statement and the overall outcome of the community process**
- **Establishes dates and meeting times for the Community Committee**
- **Recruits members for the Community Planning Committee, as needed**
- **Meets as needed between meetings to review agendas for the next meeting and/or to address concerns or changes**
- **Serves as main conduit to Board of Education to report on progress**

Committee Outcomes & Advantages

A community engagement process that includes a broad spectrum of community members provides several advantages over internally-based planning:

- School district gains input from a wide variety of community members. When structured correctly, nearly all constituencies of your community will be represented.
- Provides a natural way the school district to inform community members about all aspects of the school district.
- Often leads to the discovery of new and creative ways to look at and address the school district's issues.
- Typically increases and promotes acceptance of the plan by the broader community.

Sample: Recruitment Steps

When recruiting members, we should do the following:

- Describe our purpose.
- Provide meeting dates, and confirm they can attend all meetings.
- Share the constituency group(s) of which we believe they are members, and ask for their affirmation of that assignment. If they don't believe they are members of the groups we identify, of what groups do they think they are members?
- Once confirmed, communicate that as a part of their charge, as members of this committee, they will be asked to communicate with their constituency groups. They will be asked to share what is discussed in the meetings and provide feedback.
- Communicate expectation to share their expertise and experiences with the group.
- Share expectation to work collaboratively toward solutions that will most benefit the students of the school distict and their communities.
- Communicate the need to come to each meeting prepared to engage in the process.

Layering Your Engagement

The community engagement does not stop with the committee. Effective planning processes involve schools layering their community engagement efforts to ensure they are communicating with the broader community, gaining feedback and creating buy-in.

Technology has made our world more connected and has increased a community's desire for information. Help put the information in their hands.

Here are a few best practices to help in that process:

- Create a central hub (likely on your school district's website) where you will post updates from the facilities committee and leverage social media to communicate to the community.
- Publish videos, presentations and reports.
- Identify points when community meetings will be held for input.
- Report on the feedback received through community meetings. This may be through your local media.
- Ask your committee members to engage their network for feedback between meetings and then have them share it at the next meeting.

A Deeper Engagement

Schools are changing and so is the depth of the community engagement. Ten to fifteen years ago, it was more common for school districts to work with a small visioning committee, ask the community for feedback and develop the designs. Today, more school districts are having the Facilities Visioning Committee also assist with the design of the new facilities or expansions.

That is a good thing. Schools are often centers of their community. Engaging the community to determine what's needed and how to get there will help schools achieve more. Often, the hardest part is getting the community into the schools to see what's happening and understand the needs.

This foundational committee helps start that process and plays a key role in engaging more community members.

STEP 2

CREATE A VISION

Creating a long-range facility vision is the most important step in the process. It's why the committee came together in the first place, and it will drive your facility decisions moving forward. The vision has the power to give your school more than you ever imagined. The world moves fast. Keep your vision focused on where (and who) you want the district to be at the end of the Master Plan implementation.

Lay Out Your Facts

Once the group comes together, the first step is to educate. They need a firm foundation upon which to build their planning efforts. You want them to understand the state of your schools and education as a whole. Begin by giving on overview of your school buildings and the school district's trends. Key information to cover at the first meeting includes:

- District enrollment trends
- Capacity of each school
- General condition of each school (This is not a complete assessment).

The first question almost always is: Can you tell us what's happening in education? Members will want to know the trends in education to help them better frame their own ideas.

Before the visioning begins, share how our world and education are changing. There are many well-done videos out there to choose from. The key is to communicate the rate of change in today's world and how education has changed over the years. (Hint: Add Sir Ken Robinson to your search and you'll find thought-provoking excerpts).

The second question usually is: What will it cost? This is not an effective time to delve into cost. It is better addressed at the end. Adding costs too early limits the creative process and the ability to achieve the most desired outcome.

Creating the Statement

Once the highest hopes have been gathered, as a group:

- Remove duplicates from the list.
- Highlight or categorize into recurring themes.
- Ask who's interested in turning the list into a draft vision statement.

Typically, a few members will get together to write a draft vision statement that they then present to the group.

Take a Tour

Once the group has agreed on a vision statement, meet as a group to tour each of the school facilities. This opportunity allows the group to learn more about the facilities and compare it to the vision they have created for the future.

The next key question is: What do you see that would prevent us from achieving the vision?

Begin Brainstorming Solutions

Once they are equipped with a local and industry perspective, ignite the brainstorming process asking:

What do you want?

> **"We see flexible, sustainable and safe facilities that support and encourage multi-faceted, leading edge opportunities for our students and community. They will build upon the success and excellence for which our school district is known. These facilities integrate technology seamlessly and foster creativity. They will include state-of-the-art venues for athletics and the arts for our school and community. The goal is to create an environment where staff and students are inspired to learn in their own diverse way.**

Reinforce the importance of creating the school district's own unique vision statement. One of the best ways to begin this is asking the group members what their highest hopes are for the school district. Remind the group members that the goal is for the facility to reflect the delivery of education, not drive it. It is common for this to be backwards in the current system. That's okay. The goal is to make the shift now with this vision.

STEP 3

CONDUCT DETAILED FACILITY ASSESSMENT

Once you know where you want to go, it's time to fully understand where you are – and more importantly, how far you are from where you want to be. A detailed facility assessment, developed by your consultant, plays a key role in providing an understanding of the road ahead. It provides the group with a thorough report on the condition of the district's facilities.

The timing of this assessment can vary. This facility assessment is more detailed than the typical condition report provided to the committee at the beginning of the engagement to help set the stage. Those districts that choose to start with a facility assessment will see a less detailed and less relevant report than those that conduct the assessment following the creation of the vision and identifying preliminary ideas to solution.

It often works best for schools to share the detailed results of the facility assessment once the group has determined where they want the school district to go.

Key Components

With the vision in hand, this assessment helps the group better prepare for the next steps. Most often conducted by an architectural firm, this report provides a detailed assessment of the district's:

- Education capacity
- Architecture
- Structure
- Mechanical
- Electrical
- Maintenance

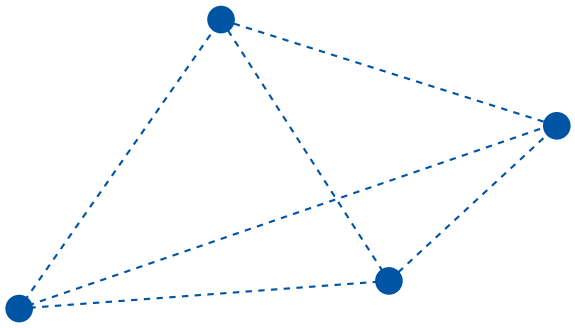
STEP 4

IDENTIFY PATHS TO THE VISION

Once the vision is cast and the current conditions established, the ideas quickly flow. Prepare for them to be all over the place. This is actually good. It means all paths to success are identified and studied. The “a-ha” moments come from the messiness of this step.

This is where effective facilitation needs to be artfully executed to help identify and gain consensus on key paths to the vision.

Keep in mind that there is always more than one way to a given destination. Start with the vision and work backwards to determine how you will get there as a school district. A series of paths should be initially identified.



The eventual goal of this step is to narrow these multiple paths down to one or two options that meet the vision.

STEP 5

UNDERSTANDING THE COST

Once the top paths have been identified, school districts will have conceptualized what their future facilities need to be. Then, the conceptual costs can be applied to the options for the purpose of comparison. These costs should roll-in the maintenance plan for the duration of the plan.

These raw numbers are not the figures that the school district would share with the community for a referendum. The purpose is to help the school district and the committee understand the magnitude of each path, compare one idea to another and help them identify their preferred vision.

The Outcome

The committee will need to choose a preferred route to make a recommendation based on:

- Vision
- Current status
- Future need
- Cost

STEP 6

DEVELOP YOUR MASTER FACILITY PLAN

Using the vision and goals as a guide, the Master Facility Plan creates a roadmap to the future. It compiles the key information uncovered through the process and provides a timeline and phasing for how the school district will achieve its vision.

Some school districts choose to have the community committee engaged in this process while others limit the involvement to the board or key leaders.

Key Components

The Master Facility Plan may be related to a building, a set of buildings or the entire district. Key components include:

1. Process Description

2. Current Facility Assessment Overview
    - Maintenance needs
    - Education capacity
    - Education gaps
    - Detailed facility assessment

3. Future Plans
    - List of needs
    - Desired outcomes
4. Costs
5. Maintenance Plans
6. Timeline & Phases

Most of the work for this plan has been completed by the time you reach this step. It simply needs to be crafted into a clearly articulated action plan.

AVOID THESE 5 COMMON MISTAKES

We've all seen a school facility building process go astray or not deliver the end result the school district – and its families – were hoping for. It's disheartening because we know school facilities can either limit or expand learning possibilities.

1. Not engaging a broad group.

Beginning the planning process by forming a Facility Planning Committee or Facility Planning Task Force has become a standard. Most schools are doing it. But where they fall short is not engaging a group of people that truly reflects their community. It's often a struggle to get representatives from minority populations. It's easier to engage people who likely agree with the administration's thinking. Time spent creating a group that covers a broad spectrum of your community will be critical to the outcomes – for years to come.

2. Steering the process too tightly.

Districts sometimes believe they know the right answer and bring the committee together with an idea that they will simply validate what the district already knows. This is a mistake. It is important for school district leaders to trust the process and their community. After all, these are their schools and the district needs the community's approval (at the voting booth) to move forward. Engage the community through the process and seek first to understand.

3. Going too fast.

It varies by the size of the group and the goals. Too many times, I've seen schools push to do what typically would take seven meetings and do it in four. Their intentions are good. They want to be respectful of the members' time. The challenge is that an expedited process does not give the members time to evaluate options, listen to each other, see the rationale and come to conclusions together. They simply get too much information and not enough time to process it or reach consensus.

4. Reducing time at each meeting.

Planning is a mental process. It takes time to gain enough information to have a fruitful discussion and begin to make decisions. It typically works best to meet for three to four hours at a time. When school districts try to do it in two or three hours, they typically short-circuit the process, spend more time repeating information and end up having more meetings.

5. Choosing the wrong time.

Yes, something as simple as choosing the wrong time of day to meet can derail the facility planning process. Schools have a tendency to want to host the meetings later in the evening after 6 pm. The result, most often, is that people will not agree to participate or even worse, will not attend every meeting. So, they opt for middle of the day, but this time eliminates people who have jobs and cannot get away long enough for an effective planning meeting. Late afternoon, around 4 pm, works, especially if the district springs for a light supper. However, every community is different and finding a time to meet that encourages the best amount of participation is worth the forethought and effort.

School buildings are centers of a community and need to be "owned" by the community. Getting the planning process right can mean the difference between expanding or building a new school – or not. The stakes are high, and the results are so rewarding.

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