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Educational Master Facility Plan Process

Winnetka School District 36

July 14, 2017

District 36: Stipulated Goals:

1. Determine the most efficient use and allocation of resources given forecasted demographics, enrollment, capacity of existing schools and other relevant variables; (**Value proposition**).
2. Propose to the School Board on a range of possible alternatives and make recommendations relative to the current use of facilities, configuration, infrastructure, practices, and procedures, taking into consideration their relevant implications, including, but not limited to, budget, facilitation of academic programs, impact on children and families, and legislative requirements and mandates; and (**Educational Adequacy / Readiness**)
3. Identify a work plan with community engagement, including a time line, to accomplish and price the above. (**Transparency & Accuracy**)

Collaborative Approach

Our role in this process is to generate and analyze information, share ideas, develop options, and offer guidance in decision making. We believe that it is our responsibility to challenge you to think differently about your facilities and how they can help become assets to continued excellence in academics and operations.

Engaged collaboration is critical in creating a reciprocally beneficial EMFP for the communities served by Winnetka SD 36. Diverse voices giving input and collectively discovering opportunity, in our experience, ensures that plans are empathetic, meaningful, and specific.

We believe in an engaged process where stakeholders from all areas of interest in the District can 1) develop a common understanding of the objectives, 2) proactively dialog, and 3) collaborate to consider available options.

Communication

High Tech: Our process includes several mechanisms by which the community can learn about the EMFP and process milestones. We recommend that the District utilize existing channels of communication to amplify information.

High Touch: We will collaboratively determine which community groups and stakeholders should be engaged at various points in the process. After Phase One: Deeper Understanding, community groups will have the first round of meaningful data to react to. During latter phases, community groups will be engaged to help refine and validate options through informal and formal feedback channels. The formal channels usually are virtual, telephone and/or in person surveys. Some districts elect to hire a consulting firm to scientifically poll the community in preparation for plan adoption.

Workshops

To engage your stakeholders, we will host a series of collaborative and interactive workshop sessions that we call Workshops. Workshop activities will include: informational presentations, direct input, feedback, and hands-on activities.

With that in mind, we would like to propose three levels of leadership and stakeholder collaboration:

The Core Team



Knowledgeable in District practice and principles, this group will be empowered to help make intermediate determinations and provide input to the architectural and engineering team. They are charged to do so while considering all perspectives and information presented with the best interest of the District and its vision in mind. The Core Team will also make recommendations to the Board of Education when appropriate to the process. The Core Team could include 8-18 members with diverse experience and roles and who are committed to the process. Core Team members should be available to meet at regular intervals as often as weekly in the final stages of the process.

My recommended Core Team Members include:

1. District administrators
2. Teachers
3. Community Members (influencers, vested stakeholders)
4. Local Business or Industry Partners
5. Union Leader
6. A Board Member (we will also be giving monthly board updates)
7. Facilities Leader

Note that we may include ad hoc members to the Core Team as appropriate to the topic of conversation. I recommend that a rotating two Board Members attend all open community meetings and Workshop workshops as their schedules allow. I also recommend that individual Board Member or two Board Member meetings occur as appropriate in the process so that they may ask questions along the way outside of the cadence of the regularly scheduled Board Meetings.

Primary Users



Administrators, Teachers and Students, as primary users, will be engaged in activities during our Workshop (collaborative workshop sessions) designed to provide specific input and directly impact the direction of the plan. These groups can range in size but tend to have 24 participants or so. Student groups will likely meet separately. We will also separately survey all teachers and building administrators on thermal comfort and other IEQ-related measures (see 1b and 1fii below).

Winnetka's School Community



Parents, community members, interested civic and business partners will be invited to participate in Workshop workshops designed both to educate them on the District's Vision and current conditions as well as seek vital input on the future opportunities. These meetings are ideally sized at fewer than 150 people, however, we can certainly make the necessary accommodations to location and participation for larger groups if the needs arise.

Phase 1 Deeper Understanding:

Anticipated Timeline: July/August/September 2017

- a. **Plan the Plan**
This kick-off meeting with your administrative team will formally outline the process, set the goals and framework for the EMFP, and start to assemble names for each of the three stakeholder groups. We will also outline major meeting dates.
- b. **Initial Understanding / Data Transfer**
We want to take time to understand existing data at hand (strategic planning, teacher surveys, instrumentation, condition reports, health life safety reports, existing drawings, ongoing committee work, etc.) so that the process is tailored to the excellence you've achieved. With that in mind, we may adjust the process outlined within this draft.
- c. **Demographics / Capacities**
Utilizing the Cropper GIS Demographic study that was commissioned last year, we'll build upon the optimum/maximum capacities for each school stemming from the Enrollment Balancing Project.
 - i. Program data modeling is an important tool when considering complex choice patterns and course level input. Once validated, we will seek out inefficiencies and future course changes to derive options during programming. Refer to the Phase 3 description for additional information.
- d. **A Day in the Life of a Student**
 We like to have a first-hand understanding of how you currently deliver education. To do so, we will become "students for a day" and observe classes of your choosing at various schools/levels/types (to be defined). We will log student activities and how they cluster (full class, small group, individual, partner, etc.) as a percentage of class time. Additionally, we will survey teachers for "sample" week activity logs to capture what we may not see. This will develop a baseline by which future instructional scenarios can be statistically compared.
- e. **Listening Tour**
 We will engage primary users in 30 minute meetings to understand current needs and curricular shifts (either underway or planned). The goal is not to locate missing electrical outlets or door squeaks; rather this should benchmark suitability of spaces to meet teaching and learning objectives.
- f. **Assessments**
To provide you with a complete picture of physical condition, educationally adequate capacity scenarios and the opportunities for future educational readiness, we plan to begin with two concurrent assessments. Later in the process, during the Discover Phase, these items will be prioritized for inclusion into the EMFP.
 - i. Educational readiness in keeping with design guidelines in support of the Winnetka's vision and goals. Each of the building's respective readiness will be graded on a relative scale of its ability to support the vision. EMFP solutions will be developed to increase readiness.
 - ii. Physical Condition Assessments/Surveys for each building:
 - Building Envelope Analysis (includes thermal imaging of walls)
 - Visual inspection of interior conditions (walls, doors, ceilings, floors)

- Indoor Environmental Quality (lighting, ventilation, CO2, visual comfort survey, thermal comfort survey, VOCs)
- Order of Magnitude Costs associated with Capital Improvements

g.

Workshop One: Winnetka School Community Introduction (two hours)

After the above activities are complete, we will be ready to meet with the Board/School Community to share the foundational data/information, outline the process, and obtain general feedback. This point in the process will also signal the first Core Team meeting as they are informed on the process and work to date. In the past, this has been a special Board meeting so that there can be dialog between the full Board and community on the information presented.



Phase 2 Discover/Explore

Anticipated Timeline: October/November 2017

This phase focuses on exploration and building common understanding among the stakeholders prior to formal planning options.

a. **Global Perspective (90 minutes)**

Cm Pulling in resources and expertise from around DLR Group, we will present topics touching K-12, higher education, and workplace around the globe. We will follow the presentation with group work designed to gain feedback from the stakeholders on what the future might hold for Winnetka SD 36.

b. **Facility Tours**

CT PrU A critical step in the process is facility tours. This affords selected members of the Core Team and Primary Users to see how other facilities can be visionary in their support of Curriculum and Instruction. We recommend that a short list of locations be developed for consideration, including both school and non-school facilities. If travel outside of Illinois is planned, we recommend that the Core Team be divided into small groups and split the trips, accompanied by DLR Group team members if the project budget doesn't accommodate larger groups traveling to each location.

c. **Workshop Two: Sustainability Charrette/UX (three hours)**

CT PrU Cm Designed to set the stage for success in sustainability and user (student, teacher, administrator, community) experience when utilizing the facilities, we will inform stakeholders on opportunities to build upon the great work in place at Winnetka SD 36 and benchmark future goals that the master plan will address through key performance indicators.

d. **Student Ideation**

Student input is critical to the process. We will engage them within the Primary User format in small groups, but in order to gain a much broader perspective, we will use Idea Walls to listen to what they need.

High-tech: We will utilize existing classroom technology services to deploy an activity for students to do that helps us understand opportunities they see in the future. (note: the content will be tailored to the age group)

d. **Student Ideation: Continued**

Optional: We will work with you to task cohorts of students (classes, clubs, or the like) with specific research- or inquiry-based questions. In the past, these activities have been conducted as class projects within curriculum.

e. **Workshop Three: Curriculum and Instruction (90 minutes)**

With a wealth of information and input, we will gather to create a day in the life (2026) charting a course for several future stakeholders and beginning to frame the context of the plan.

f. **Board of Education:**

After the Discover Phase, it will be time to present the summary information and design guidelines to the Board of Education. We recommend that the design guidelines receive Board of Education comment and possibly approval before proceeding into the next phase.

Phase 3 Program

Anticipated Timeline: December / January 2018

Leading into this phase of work, DLR Group will spend time organizing and further developing the data at hand to inform the options.

a. **Workshop Four: Program Development (90 minutes)**

This session will work directly with curriculum leaders to determine future opportunities for curricular expansion at all school levels.

b. **Workshop Five: Program Refinement (90 minutes)**

We will work through options by adjusting administrative variables and revealing the impact on space with each iteration that is developed. Programs will be refined for all school levels.

c. **Fit Analysis**

We will develop three 3D District program models to show the proposed changes and how they interrelate. The models are not a building design or architecture; rather they are visualizations of the data. These models will illustrate areas of possible new construction, renovation, or redevelopment within the schools to further the conversation. The fit analysis serves as verification of programmatic information.

Phase 4 Conceptualize

Anticipated Timeline: Mid-January 2018 – Early March 2018

We will have a series of Core Team meetings during this phase of the process. It's likely that they will be scheduled weekly as options come into clearer focus.

a. **Conceptual Design & Relational Diagrams**

Innovation comes alive through graphics, sketches, and virtual reality that portray key ideas and concepts for community information. This step is particularly important to convey complex

ideas that require specific campus interpretations. Once we understand outcomes of the first three phases, we will be better able to determine the graphic needs under this phase.

b. **Order of Magnitude Cost Models**

Order of magnitude costs models will be developed based upon the prioritized assessment items and fit analysis. The models will be forecast with expected cost escalation through the EMFP plan options completion and be conservative in nature.

Phase 5 Game Plan

Anticipated Timeline: March - May 2018

a. **Workshop Six (Series): Share, Inform and Refine (90 minutes each)**

To receive community input on three options, we will help the Core Team host three informational sessions around the School Community. DLR Group and Core Team members will be making these presentations collaboratively.

b. **Workshop Seven (Series): Synthesize /Refine**

We will facilitate this Workshop so that the information gathered from the community input can be prioritized and infused into a recommended EMFP for Board of Education consideration. Note: it is likely that more than one meeting will be required for the Core Team to arrive at refined options to take to the Board of Education.

c. **Board Presentation:**

After the Synthesize/Refine Phase, an EMFP presentation will be made by the Core Team to the Board of Education for discussion and consideration of plan implementation.

d. **Publication:**

This will signal the launch of the virtual Educational Master Facility Planning microsite and communication roll-out of final plan materials.

e. **Relate the Need**

As important as any of the above steps, information shared will be instrumental in educating your collective school community on your needs. Educational Master Facility Plans should communicate vision and strategy, but not "wants." That's the essential value proposition that will be conveyed.

f. **June 6, 2018: Anticipated Adoption**

We would like to complete the EMFP process to coincide with the completion of the 2017-2018 school year. Ultimately, the process will conclude with the adoption of the plan by the Board of Education.