

Board Goal Update

Master Planning Process

Included with this Board packet is material related to a structured master planning process that includes Community Engagement, Facilities Dialogue and Prioritization of Projects, that is designed to go beyond just conversations surrounding “brick and mortar”

This process includes educating the school community on the current status of the buildings, as well as programs, technology, finances, and staffing history and projections. You will see that the proposal that has been reviewed by Scott Johnson of Richard L. Johnson, Architects includes information from UNICOM ARC and BLDD, Inc. UNICOM ARC is a company who is involved with many different community engagement scenarios for a variety of purposes; most of their work either leads to a referendum or a decision to pursue or not pursue some type of community vote. BLDD is an architectural firm, who recently opened a Davenport office, and has collaborated with BLDD on a number of large-scale projects. One example of this collaboration that is local is a massive, comprehensive planning project for the Iowa City Public Schools.

Mr. Puentes and Mr. Snodgrass were present during the presentation by UNICOM ARC and BLDD and I believe we were all impressed with the technology involved and available, the professionalism of the firms, and their willingness to partner with our District. It is my recommendation that we are satisfied with the resources that these firms bring to the District, the process, and to a relationship with Scott Johnson.

You will see that the proposal is essentially 12 months of dialogue and sessions, and is designed to conclude with a plan that would be prepared in time for a possible referendum in November, if that is called for from the process. We are excited to begin this planning, prioritizing, and preparing for our future. We will also be able to complete our 2015 Ten Year Health/Life Safety Survey work concurrently with this master planning process. We estimate that the total costs for the year will be approximately \$70-75,000. We believe this is money well spent to help prepare for the next 30-40 years.

RECOMMENDATION 1: Approve the Owner/Architect Agreement with Richard L. Johnson Associates as presented to engage work with the District Architect, BLDD, and UNICOM ARC with an expected total fee of \$73,000.

RECOMMENDATION 2: Approve the Owner/Architect Agreement with Richard L. Johnson Associates for the 10 Year Life Safety Re-Survey with an expected fee of \$39,572.

Your Objectives:

Like School Districts across the country, your School District must constantly address an array of facility needs on an ongoing basis. Issues such as aging facilities, underutilized facilities, facilities that are over capacity, and inequitable educational environments are just a few of the concerns that you must navigate, each having its own cost consequence. How do you know which to address and in which order? Should you build new or renovate? Is it smarter for one particular facility to remain in service or should it be retired? How can we be sure that we are getting the most value for taxpayer dollars? Questions like these require the development of planned responses. A planned response answers these questions by:

1. Assessing the physical and educational needs of your facilities.
2. Imagining, developing, and selecting the best plan to meet your long term needs
3. Engaging the community, obtaining public permission, allowing you to move forward.

Our Approach:

Together we need to "mine the gaps" and discover the best plan for the Geneseo Community School District; a plan that allows you to focus on your core mission by maximizing the effectiveness of your facility dollars and freeing up resources for educational use. Using a process that is based upon national standards and objective analysis rather than subjective opinions, we will overcome the inertia of uncertainty and develop a clear and effective path for the future.

Assessment of Physical and Educational Environment Needs. The development of a comprehensive plan starts with assessment which has two parts. The first part includes an assessment of the existing building physical needs and a report of findings. This work involves initial preparatory work (reviewing plans, previous reports, obtaining maintenance history, etc.), followed by surveys of the district's educational facilities by architects and consulting engineers, a recommendation for remaining service life for building components, a recommendation for scheduled repairs and/or renovations, and an estimated cost of corresponding repair and/or renovations. This information is recorded creating a database of building conditions. Once created, this database becomes a powerful planning tool, helping the school district to understand and budget appropriately for its capital improvements needs for the future.

Part two is an assessment of the adequacy of the existing educational environment. This work begins by reviewing the assessment tool developed by the Council of Educational Facility Planners International and making any appropriate revisions to reflect the goals of the School District. Using the revised assessment tool, members of assessment team accompanied by members of the School District tour each facility, sitting down at the conclusion of each building tour to complete the evaluation of that facility. Once obtained and entered into our database, this information is analyzed and the educational adequacy for each building is identified.

Once both parts (physical conditions and educational assessments) are complete, comparisons of the effectiveness of the existing facilities are performed and the cost / benefit value of each facility, in its current state, is identified. At the end of the assessment, the district will have clear picture of the problem to be solved.

Modeling and Analysis of multiple Master Plan approaches. This is a process of invention, and our process has three parts: Visioning, Curriculum Mapping, and QLEO analysis. A Visioning Workshop with District staff is typically convened to examine upcoming trends and best practices for the purposes of creating a vision statement, and an educational specification that will become the standard to be satisfied by each solution. Following Visioning, the educational specification will be mapped over the existing structures to identify where renovations can feasibly meet the standard, as well as if and where building additions may be needed. A brainstorming session with the school district will follow to uncover the raw ideas for possible scenarios for evaluation (a "status quo" scenario will be among the scenarios considered). Once the scenarios for consideration have been imagined, a QLEO evaluation will be performed identifying the comparative performance of each scenario given the assumptions made.

Community Engagement. School districts are always seeking public permission, and we are convinced that authentically engaging the community in the development of a plan for the future is the key to obtaining that permission. Typically school districts use community engagement as the process to obtain voter approval of a referendum question. Community engagement can also be used in a variety of ways to meet differing goals: from specific tasks like selecting a building site to general tasks like building a comprehensive plan from the ground up. We have proposed a schedule to engage the community for your district.



**Geneseo CUSD 228
Community Engagement Program
Tentative Calendar**

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|----------------|---|
| Sep 2 – Sep 13 | Facilitating Team Recruitment |
| Sep 24 | First Facilitating Team Meeting (FTM #1): Orientation |
| Oct 1 | FTM #2: Calendar, Communications, Branding and more |
| Oct 15 | FTM #3: Rehearsal for first community-wide meeting |
| Oct 22 | Community Engagement Session (CES) #1: State of the District presentation by Dr. Kuffel followed by work/consensus building activity |
| Oct. 29 | FTM #4: Debriefing |
| Nov 12 | FTM #5: Rehearsal for CES #2 |
| Nov 19 | CES #2: Presentation by the Leadership and Learning Center's Blueprint on the Future with possible work activity regarding the facility implications of that report |
| Nov 26 | FTM #6: Debriefing |
| Dec 2 – Mar 30 | Facility assessment program. This could involve building level meetings to allow community members to help with the assessment (see Apr 15 presentation) |
| Dec 10 | FTM #7: Rehearsal/plan for CES #3 |
| Jan 7 | CES #3 (Presentation on 21st century facilities with work activity on planning principles for facility plan) |
| Jan 14 | FTM #8: Debriefing on CES #3 |
| Jan 28 | FTM #9: Rehearsal for CES #4 |
| Feb 11 | CES #4: Devoted to an issue such as technology, staffing, early childhood education, perhaps curriculum goals to drive student performance |
| Feb 18 | FTM #10: Debriefing on CES #4 |
| Mar 4 | FTM #11: Rehearsal for CES #5 |

Mar 11	CES #5: Another presentation on an issue relating to curriculum/student performance/ or perhaps finance
Apr 8	FTM #12: Rehearsal for CES #6
Apr 15	CES #6: Presentation of facility plan options
Apr 22	FTM #13: Debriefing on CES #6
May 6	FTM #14: Rehearsal for CES #7
May 13	CES #7: Further refinement of facility plan
May 20	FTM #15: Debriefing on CES #7
Jun 3	FTM #16: Rehearsal for CES #8
Jun 10	CES #8: Development of Final Recommendations
Jun 17	FTM #16: Rehearsal of Presentation to Board of Education
Jun 18 – Jun 30	Report to Board of Education
Jul 1 – Jul 31	Board processes recommendations
Aug 1 – Aug 10	Decision is made on next steps, including some type of referendum

OWNER/ARCHITECT AGREEMENT

10 Year Life Safety Re-Survey

Project No. 13-071

THIS AGREEMENT,

made this 12th day of September, 2013 by and between GENESEO CUSD #228, hereinafter called the OWNER and RICHARD L. JOHNSON ASSOCIATES, INC., Architects / Interior Designers, hereinafter called the ARCHITECT;

WITNESSETH, that whereas the Owner intends to have the Architect prepare a 10 Year Life Safety Re-Survey for Northside Elementary School, Milikin Elementary School, Southwest Elementary School, Geneseo Middle School, Geneseo High School and the Geneseo Foundation Athletic Center, hereafter called the project.

ARTICLE 1. ARCHITECT'S BASIC SERVICES

- 1.1 Prepare Ten Year Life Safety Re-Survey Report
 - 1.1.1 Prepare required floor plans and site plans on CAD
 - 1.1.2 Complete on-site survey of the buildings and sites
 - 1.1.3 Prepare Schedule of Violations
 - 1.1.4 Prepare Life Safety Amendments for the Schedule of Violations
 - 1.1.5 Complete required information on IWAS
 - 1.1.6 Review past Life Safety Amendments to verify completion
 - 1.1.7 Attend meetings as required to review the report with the Owner

ARTICLE 2. OWNER'S RESPONSIBILITIES

- 2.1 The Owner shall provide access to the sites.
- 2.2 The Owner shall provide existing school building site and floor plans.

ARTICLE 3. ARCHITECT'S COMPENSATION

- 3.1 The Architect agrees to provide the Basic Services as set forth in 1.1 thru 1.1.7 above based on 10 cents a square foot of building area plus reimbursables. Fee = 395,717 sf x \$.10/sf = \$39,572.00 plus reimbursables.

Northside Elementary School	32,392 sf
Milikin Elementary School	44,897 sf
Southwest Elementary School	42,750 sf
Geneseo Middle School	84,000 sf
Geneseo High School	151,358 sf
<u>Geneseo Foundation Athletic Center</u>	<u>40,320 sf</u>
Total Square Footage	395,717 sf

- 3.2 Compensation for reimbursable expenses as described below shall be based on 1.15 times the amounts expended by the Architect and Consultants in the interest of this project.
 - 3.2.1 Expense for out-of-town travel @ \$.50/mile.
 - 3.2.2 Renderings and Reproductions.
 - 3.2.3 Postage.

RICHARD L. JOHNSON ASSOCIATES, INC. – architects – interior designers

OWNER/ARCHITECT AGREEMENT

10 Year Life Safety Re-Survey

Project No. 13-071

ARTICLE 4. CHANGES AND ADDITIONAL SERVICES

4.1 If the Architect is asked to perform services in addition to those listed herein by reason of changes ordered by the Owner, or for projects not listed, the Architect shall receive compensation for these additional services in accordance with fees to be determined.

ARTICLE 5. PAYMENTS TO THE ARCHITECT

5.1 Payments to the Architect shall be made monthly and shall be in proportion to services performed and within 30 days after presentation of Architect's invoice.

ARTICLE 6. TERMINATION OF AGREEMENT

6.1 This agreement may be terminated by either party upon seven days' written notice should the other party fail substantially to perform in accordance with its terms through no fault of the other. In the event of termination due to the fault of others other than the Architect or discontinued, at the Owner's request, the Architect shall be paid for services performed to termination date, including reimbursements then due.

ARTICLE 7. OWNERSHIP OF DOCUMENTS

7.1 Ownership of documents as instruments of service shall remain the property of the Architect.

7.2 The Architect shall provide reimbursable copies of all documents to Owner.

ARTICLE 8. SUCCESSORS AND ASSIGNS

8.1 The Owner and the Architect respectively bind themselves, their partners, successors, assigns, and legal representatives to the other party to the Agreement and to the partners, successors, assigns and legal representatives of such other party with respect to all covenants of this Agreement. Neither the Owner or the Architect shall assign, sublet or transfer any interest in the Agreement without the written consent of the other.

OWNER

Geneseo CUSD #228
648 N. Chicago Street
Geneseo, Illinois 61254

ARCHITECT

Richard L. Johnson Associates, Inc.
4703 Charles Street
Rockford, Illinois 61108

Date _____

Date _____

OWNER/ARCHITECT AGREEMENT

Long Range Facility Master Plan & Community Engagement Services Project No. 13-070

THIS AGREEMENT,

made this 12th day of September, 2013 by and between GENESEO CUSD #228, hereinafter called the OWNER and RICHARD L. JOHNSON ASSOCIATES, INC., Architects / Interior Designers, hereinafter called the ARCHITECT;

WITNESSETH, that whereas the Owner intends to have the Architect with consultants BLDD Architects and Unicom-Arc, facilitate a Long Range Facility Master Plan and Community Engagement process for the Geneseo CUSD # 228, Geneseo, Illinois, hereafter called the project.

ARTICLE 1. BASIC SERVICES

- 1.1 Meet with Owner representatives to review scope of work including Planning Services and Community Engagement services, financial considerations and schedule.
- 1.2 Assessment of the existing building physical needs.
- 1.3 Assessment of the adequacy of the existing educational environment.
- 1.4 Hold Visioning Workshop with District staff to examine upcoming trends and best practices for the purpose of creating a vision statement and educational specification that will become the standard to be satisfied by each solution.
- 1.5 Map out the educational specification over the existing structures to identify where renovations can feasibly meet the standard as well as if and where building additions may be needed.
- 1.6 Hold brainstorming session(s) with the District to uncover the ideas for possible scenarios for evaluation.
- 1.7 Once the scenarios for consideration have been imagined, a QLEO, Quantified Learning Environment Outcome, evaluation will be performed identifying the comparative performance of each scenario given the assumptions made.
- 1.8 Integrate a community engagement process into the services above to involve the community in developing the long range facility master plan and providing their approval through referendum. See attached tentative calendar for Community Engagement process timeline.

ARTICLE 2. OWNER'S RESPONSIBILITIES

- 2.1 The Owner shall provide access to the sites.
- 2.2 The Owner shall provide existing school site and floor plans.

RICHARD L. JOHNSON ASSOCIATES, INC. – architects – interior designers

OWNER/ARCHITECT AGREEMENT

Long Range Facility Master Plan & Community Engagement Services Project No. 13-070

ARTICLE 3. ARCHITECT'S COMPENSATION

3.1 The Architect agrees to provide the Basic Services as set forth in 1.1 thru 1.8 for a Fee of **\$73,000.00.**

3.1.1	Architectural Fee	\$10,000.00
3.1.2	QLEO Analysis (BLDD)	\$33,000.00
3.1.3	Community Engagement Process (UNICOM-ARC)	\$30,000.00

3.2 Compensation for reimbursable expenses as described below shall be based on 1.15 times the amounts expended by the Architect and Consultants in the interest of this project.

- 3.2.1 Expense for out-of-town travel @ \$.50/mile.
- 3.2.2 Lodging
- 3.2.3 Renderings and Reproductions.
- 3.2.4 Postage.

ARTICLE 4. CHANGES AND ADDITIONAL SERVICES

4.1 If the Architect is asked to perform services in addition to those listed herein by reason of changes ordered by the Owner, or for projects not listed, the Architect shall receive compensation for these additional services in accordance with fees to be determined.

- 4.1.1 Social Media Consultant

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RICHARD L. JOHNSON ASSOCIATES, INC. – architects – interior designers

OWNER/ARCHITECT AGREEMENT

Long Range Facility Master Plan & Community Engagement Services Project No. 13-070
transfer any interest in the Agreement without the written consent of the other.

OWNER

Geneseo CUSD #228
648 N. Chicago Street
Geneseo, Illinois 61254

ARCHITECT

Richard L. Johnson Associates, Inc.
4703 Charles Street
Rockford, Illinois 61108

Date

Date