

A SELF-GUIDED WORKSHOP SERIES

Educational Facility Master Planning

A streamlined planning approach for local education leaders

Adapted from the LEA Facilities Master Planning Workshop Series

*Created by Sturtz & Company in partnership with Olsen Edvantage
for the National Council on School Facilities and the National Center
on School Infrastructure*

Version 1.0, 2026

school-infrastructure.org



Educational Facility Master Planning

This guide outlines a five-meeting educational facilities master planning process for school district planning teams.

The streamlined planning approach outlined in this guide may be especially useful to small districts that do not have facility planning staff and/or do not use outside consultants to guide the planning process. The tool is designed for district facilities or planning leads running the process internally, though it works equally well as a shared workbook for a superintendent's cabinet or a technical assistance provider guiding a district team through the sequence.

Input and participation from school and community stakeholders is essential to a strong master planning process. This guide notes engagement points along the way but does not lay out a community engagement methodology. School districts are advised to be intentional about structuring committee composition, meeting cadences, and facilitation techniques for community meetings.

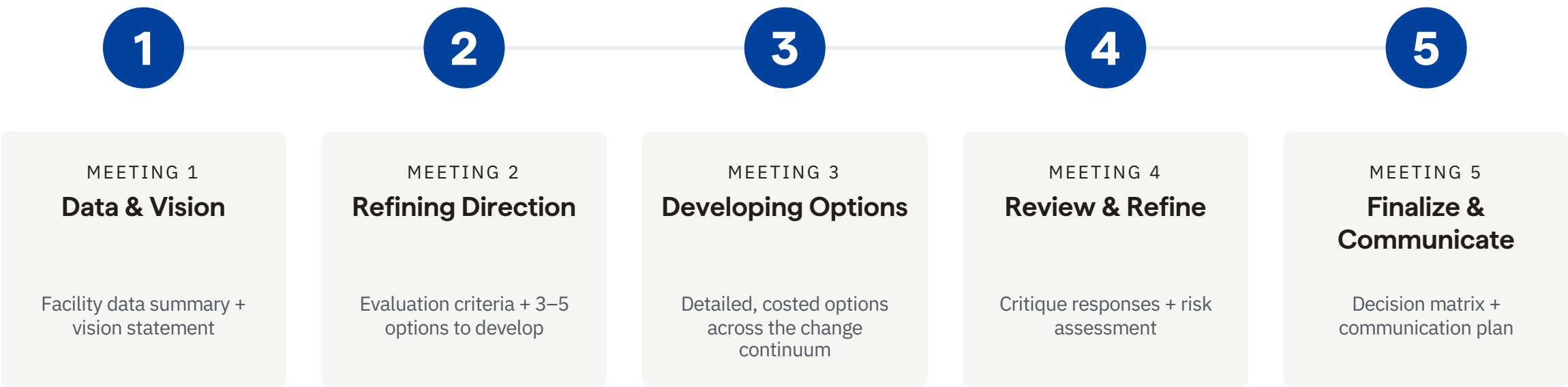
For additional resources on local educational master planning activities, including guides, tools, and examples, visit the National Center on School Infrastructure's [topic overview on Master Planning](#).

Contents of this report were developed, in part, under Award #S184R230005 from the U.S. Department of Education. However, the content does not necessarily represent the policy of the Department of Education, and you should not assume endorsement by the Federal Government.

HOW THIS GUIDE WORKS

A five-step journey

Each step builds on the last. The sequence moves from establishing a shared data and vision baseline to building evaluation criteria and a shortlist of options to costing and stress-testing those options against likely stakeholder critique to a final scored recommendation and communication plan.



CORE EXERCISE

Each of the five meetings pairs with a required **Core Exercise**, the must-do activity that produces a specific decision-ready artifact within the planning process.

EXPLORE FURTHER

The guide provides optional **Explore Further** content drawn from the fuller workshop series for district teams with more time or complexity to work through.

The analytic toolkit

Four data lenses underpin every option you will weigh. Establish these before you generate ideas.



Facility Condition (FCI)

Cost to fix deficiencies ÷ replacement value. Frames the ROI of maintaining vs. renovating vs. replacing. Rule of thumb: a full renovation of a facility can be budgeted at 80% of its replacement value. If your FCI is >50% you are approaching the investment where major renovation will be a comparable cost to repairs.



Minimum Viable Enrollment (MVE)

The enrollment a school needs to fund the desired level of service. Pair with an upper bound to set each configuration's Viable Enrollment Range.



Educational Adequacy

Does the building support the teaching model? The share of undersized classrooms (<700 SF) is the most consequential single signal for renovate / replace / repurpose. Driving question: if you addressed all the needed repairs or renovated the building, would you be left with a school that adequately supports your students the next 20 years?



Capacity & Utilization

Enrollment ÷ capacity. Flags overcrowding, room to grow, or underutilization that points towards potential boundary review or consolidation if budgets demand it (e.g., high percentage of schools < MVE).

1

MEETING 1 · FOUNDATIONS

Data & Vision

Establish a shared, data-grounded starting point and a vision for what the portfolio should achieve.

CORE EXERCISE

Summarize your data, then draft a vision

- Complete a Facility Data Summary for every school: FCI, capacity & utilization, undersized-classroom share, and access.
- Summarize this data by grade level and if applicable, high school network. You want to understand this data not only by school but within its context.
- Draft a one-paragraph vision statement centered on your core values (e.g., education quality, equity, or long-term sustainability).
- Name 2–3 preliminary directions the data seems to point toward.



EXPLORE FURTHER | Offering quality choice

Often, districts explore offering choice programs at schools facing chronic under-enrollment in an attempt to attract more families. We strongly recommend that districts ask at least two key questions when considering such an option: 1) what unique choice program can we be the very best at in our area and is there demand from our parents? 2) what is our plan to ensure this program is sufficiently resourced over time?

YOU LEAVE WITH

Facility Data Summary

one row per school

Vision Statement

the test every option must pass

Preliminary Directions

starting points for Meeting 2

“Good planning starts with good data.”

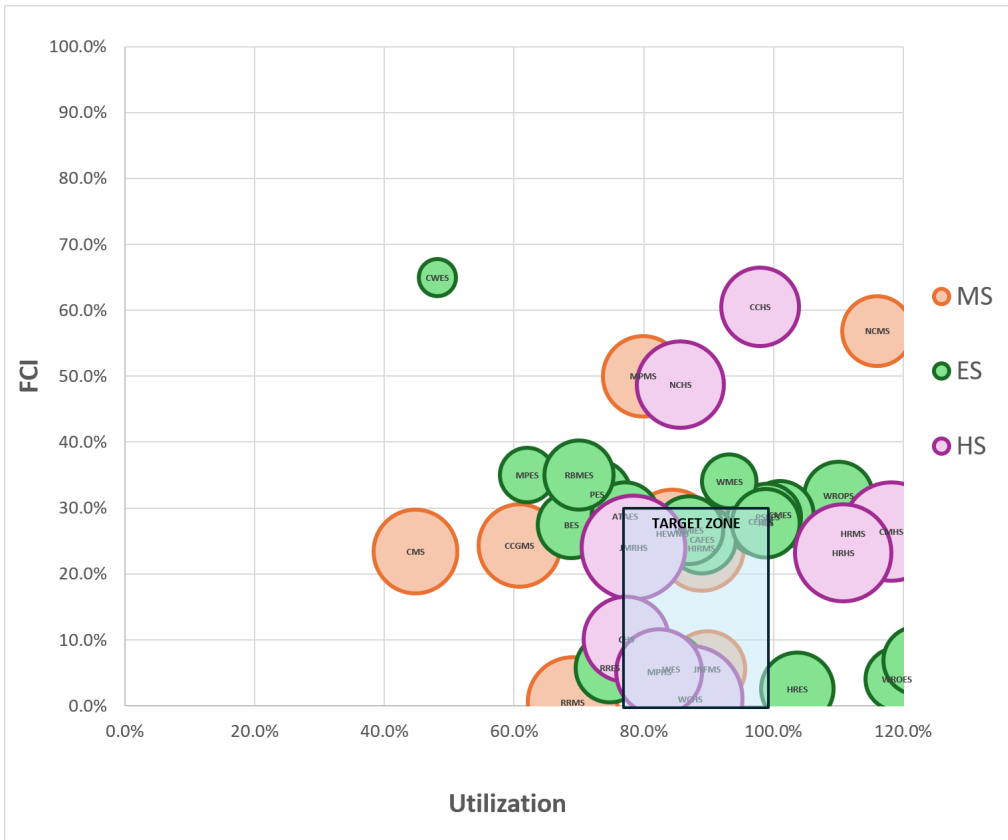
1

MEETING 1 · FOUNDATIONS

Data & Vision

Sample data

DISTRICT-WIDE DATA



What does this data picture tell you? Facility Condition Index (FCI) is along the Y-axis with Utilization along the X. A target zone was created for all schools to be under 30% FCI and b/t 80-100% utilized based on their program capacity. Diameter = building size/capacity.

Elementary schools (ES) are evenly split on either side of the utilization target zone with most at/above the target FCI. Middle schools (MS) are mostly in or below the target zone for utilization with all by two within zone for condition. Four high schools (HS) are within zone on both metrics with two over-utilized and two with high FCIs.

1

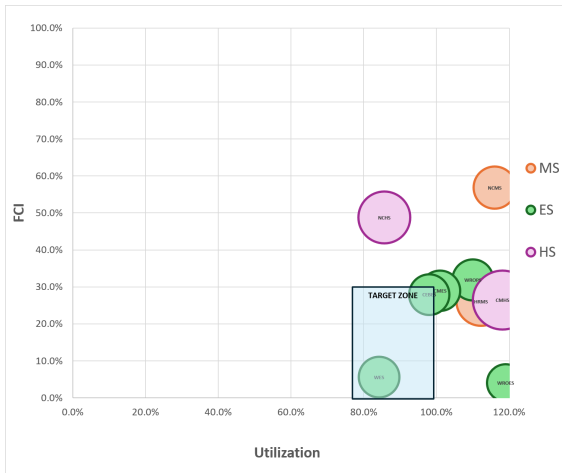
MEETING 1 · FOUNDATIONS

Data & Vision

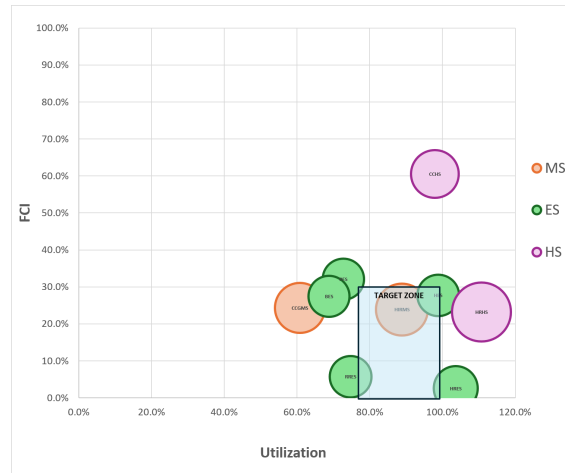
Sample data

DATA BY GEOGRAPHY

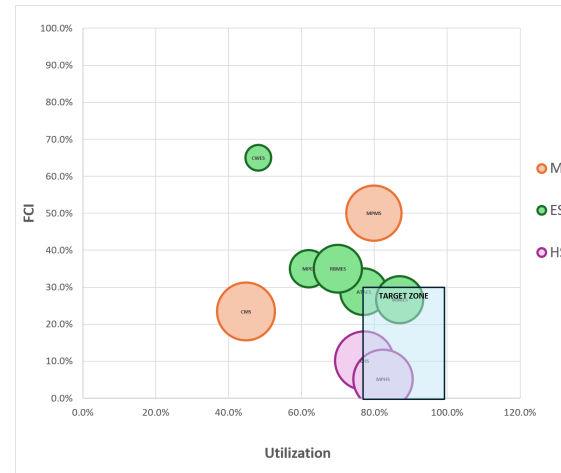
NORTH



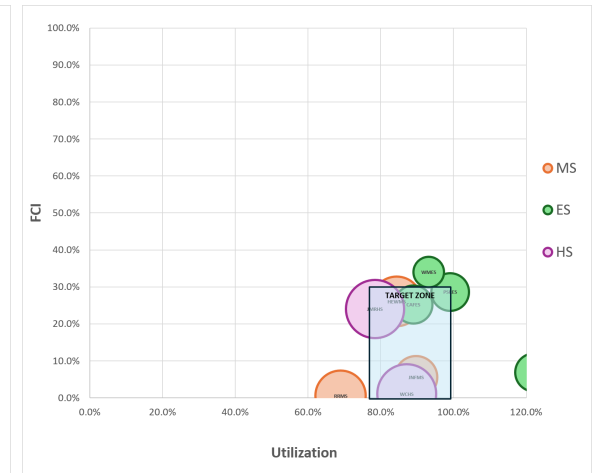
SOUTH



EAST



WEST



When you look at the data by planning area it tells a story based on distinct geographies around the District. The North needs to add capacity while renovating/rebuilding several schools. The South needs to balance enrollment, add HS capacity, while likely rebuilding the small HS in poor condition. The East is under-utilized with several buildings in poor condition (likely a candidate for a newer/fewer strategy) while the West is largely in-zone, though additional ES capacity is needed. These areas do not need the same investments; they need the investments their data suggests.

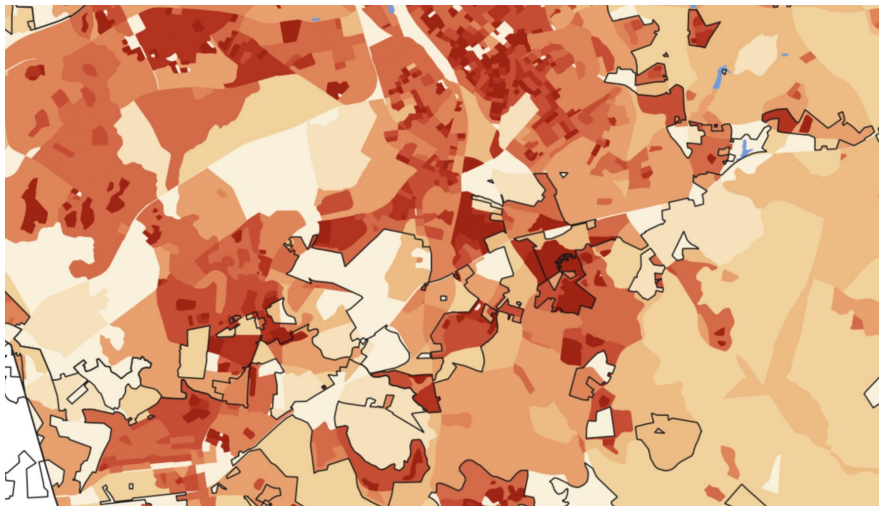
1

MEETING 1 · FOUNDATIONS

Data & Vision

Sample data

DATA BY GEOGRAPHY



After you have a picture of how your portfolio's condition, capacity/utilization, viable enrollment, consider where schools of the same configurations are located relative to your population as a measure of accessibility.

Avoid decisions that leave an area without equitable access to a school (accessibility differs based on geography & population).

Look for areas where too much capacity is concentrated around too few students and vice-versa.

1

Data & Vision

Sample data

ADEQUACY

School	Percent Undersized Classrooms
Jefferson ES	85%
Madison ES	30%
Lincoln ES	0%
Roosevelt ES	90%
Franklin ES	25%

Quantifying a building’s functional adequacy helps answer the question, “If we renovated this facility, would we be left with a school we want to educate students in for the next 20+ years?”

Classroom size is a foundational part of any adequacy measure and can, on its own, inform renovation vs. replacement decisions. Often classrooms cannot reasonably be resized during a renovation.

Undersized classrooms, e.g., <700 SF, all but dictate lecture-based instruction, as normal-sized classes of 22+ students are forced to sit in rows with minimal room to navigate the space.

With major renovations costing 75%+ the cost of a new school of the same size, investing nearly the cost to renovate a school where most classrooms are under-sized perpetuates sub-optimal teaching and learning opportunities for students.

2

MEETING 2 · REFINING DIRECTION

Build the evaluation framework

Decide how you will judge options before you become attached to any of them, then narrow the field.

CORE EXERCISE

Set criteria, test fit, narrow to 3–5

- Build evaluation criteria across four lenses: data/constraints, vision alignment, strategic advantage, and barriers.
- Screen candidate option types against your data and vision.
- Narrow to the top 3–5 options worth developing in detail.

A STRONG SHORTLIST...

- ✓ Addresses your most critical facility needs
- ✓ Aligns with the vision
- ✓ Spans different cost ranges
- ✓ Covers a range on the least-to-most-change continuum
- ✓ Avoids near-identical duplicates
- ✓ Is realistic to develop and evaluate

EXPLORE FURTHER

Run a structured reflection on what surprised you in the data, what confirmed your assumptions, and where you believe both your data and your vision could converge in the future. **Always keep options faithful to your data, vision, and budgets.** Anything less is not a priority investment, not the best you can offer students or simply a wish you cannot afford to implement.

Options are where your data and vision converge. Be creative. Build from data. Create an attainable plan to best serve your students and community.

3

MEETING 3 · DEVELOPING OPTIONS

Build the evaluation framework

Develop options across a deliberate range — from least to most change — so the board sees real choices.

CIP

Tier 1 · Least Change

Targeted repairs & system replacements. Maintains current facilities, locations, and enrollment patterns.

e.g., district-wide HVAC + technology upgrades

CIP / FMP

Tier 2 · Moderate Change

Comprehensive renovations, additions for capacity, repurposing buildings to new grades/uses.

e.g., modernize two schools, add classrooms, convert a building

FMP

Tier 3 · Significant Change

New construction to replace aging schools, consolidations and closures, major boundary changes.

e.g., consolidate two under-used schools into one new build

FMP

Tier 4 · Transformational

Fundamental reimagining — district-wide grade reconfiguration, campus consolidation, new models.

e.g., shift K-5 + 6-8 to a network of K-8 schools in whole or part

Least change → most change · greater cost, impact, and community readiness required

3

MEETING 3 · DEVELOPING OPTIONS

Build & cost each option

Turn shortlisted directions into concrete, costed, scheduled options.

CORE EXERCISE

Develop 3–5 options

- For each option: name and tier, 2–3 sentence description, facilities and scope of work.
- Show how it answers your data needs, vision, and equity gaps.
- Add a preliminary cost estimate, timeline, and pros / cons.

EXPLORE FURTHER

Run the afternoon financial-modeling block — debt capacity, funding sources, operating-cost implications, and phasing — to move from rough estimates to financially viable plans.

COST RULE OF THUMB

75%+

A major or full renovation of a building replaces most-to-all systems other than the foundation and load-bearing structure. Budget 75%+ for this type of renovation and then ask yourself: If we spend that much on this facility will we be left with a building suitable to educate students in for the next 30+ years? This is where Educational Adequacy and Minimum Viable Enrollment data play a significant role. If a facility is too small to be economically viable in the long-term and/or its classrooms are too small or limited, it is likely a wiser long-term investment to rebuild it new rather than renovate.

4

MEETING 4 · REVIEW & REFINE

Pressure-test the options

Turn stakeholder reactions into stronger options, and surface risk before your stakeholders do

CORE EXERCISE

Prepare critique responses + assess risk

- For each predictable critique, prepare a response: underlying issue → facts → empathy → solution.
- Tailor messaging for board, community, and staff. Always root in data, point to the vision.
- Score each option's risk across financial, political, operational, and educational categories.

CRITIQUES TO EXPECT

- Cost of new schools or renovations relative to ongoing repairs; show how investing in buildings over time is inevitable and lay out the pro/cons of maintaining a building beyond its useful life. Some buildings were designed to operate for centuries; most schools were not built this way.
- The process of closing a school is understandably hard on families; identify the risks and challenges of not closing the school. Create a viable plan for how the District will create operational savings through the consolidation and reinvest those savings in students; if the District cannot commit to creating these savings and reinvesting them in students, a consolidation option is not viable.



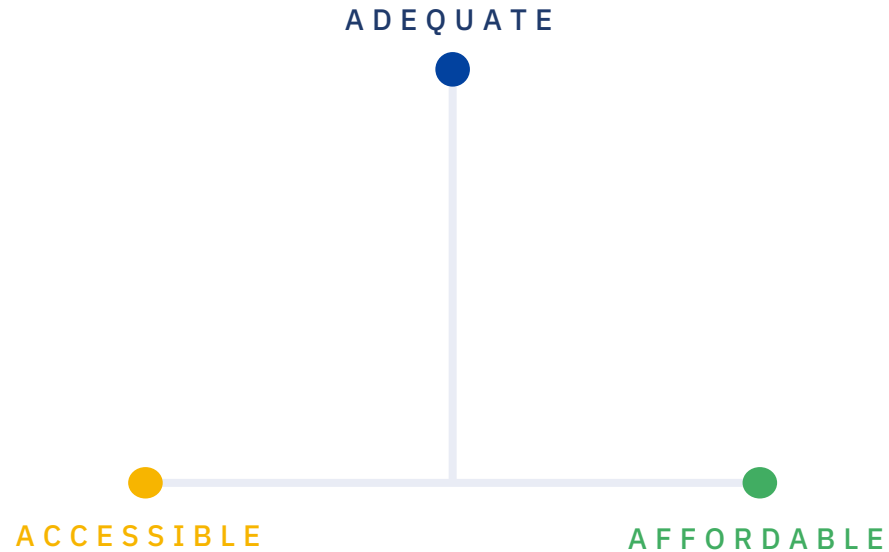
EXPLORE FURTHER

Attempt to model the costs of the status quo. Often, we falsely believe that the risks associated with change are greater than the risks associated with not changing. If your stakeholders believe changing nothing is without cost, the status quo will seem more viable than it really is.

4

MEETING 4 · REVIEW & REFINE

The test of a good plan



Planning has to consider the portfolio as a whole and its impact on operations, academics and budgets. If a plan is simply the sum of its parts, it is not a plan it is a list.

ADEQUATE

Every student deserves clean air, clean spaces, enough room for varied instruction, and most importantly, **enough caring & competent adults to teach & support them**. Does the resulting portfolio of schools support this outcome for every student? Does the current portfolio do this?

AFFORDABLE

A plan must have reasonable financial logic — staffed and maintained for the foreseeable future.

ACCESSIBLE

Schools must serve every community. Accessibility is locally defined by geography, density, and **to schools of equitable condition and resources**.

5

MEETING 5 · FINALIZING

Decide & communicate

Choose a recommendation through a balanced lens, then plan how you will carry the community with you.

CORE EXERCISE

Score the matrix, then plan the message

- Evaluate each option in light of your data & overarching goal.
- Create your recommendation — or present two strong alternatives with trade-offs.
- Draft a communication plan for board, community, and staff.



EXPLORE FURTHER

Build out the communication materials checklist (executive summary, FAQ, board & community decks, fact sheet) and review the common pitfalls — surprising stakeholders, over-promising, going silent after approval.

THE FOUR LENSES

Educational

Advances outcomes & equity?

Financial

Fiscally sustainable?

Operational

Can we implement it?

Political

Can we build support?

Your master-planning toolkit

Working through the core path leaves a district with this set of decision-ready artifacts.

1 Facility Data Summary
Condition, capacity, and adequacy for every school

1 Vision Statement
The standard every option is held to

2 Evaluation Framework
Four-lens criteria and a 3–5 option shortlist

3 Option Development Worksheets
Costed, scheduled options

4 Critique Responses & Risk Register
Prepared answers and likelihood/impact scoring

5 Communication Plan
For board, community & staff

5 Final Decision Matrix
Four-lens scoring of finalists

THE PLANNING IS DONE — NOW EXECUTE IT

Every child, every day, in a great school

Your students will learn in better buildings with better resources because of the work you've done.

Adapted from the LEA Facilities Master Planning Workshop Series

Created by Sturtz & Company in partnership with Olsen Edvantage for the National Council on School Facilities and the National Center on School Infrastructure

Version 1.0, 2026