

LEAD 8230
FINANCING AND MANAGING EDUCATIONAL FACILITIES
3 SEMESTER HOURS
Dewar College of Education
Department of Curriculum, Leadership, and Technology
Valdosta State University

Conceptual Framework: Guiding Principals

Dispositions Principle: Productive dispositions positively affect learners, professional growth, and the learning environment.

Equity Principle: All learners deserve high expectations and support.

Process Principle: Learning is a lifelong process of development and growth.

Ownership Principle: Professionals are committed to, and assume responsibility for, the future of their disciplines.

Support Principle: Successful engagement in the process of learning requires collaboration among multiple partners.

Impact Principle: Effective practice yields evidence of learning.

Technology Principle: Technology facilitates teaching, learning, community-building, and resource acquisition.

Standards Principle: Evidence-based standards systematically guide professional preparation and development.

Positively Impacting Students through Evidence-Based Practices

Suggested Textbooks

Taylor, K.C. (2006). *Educational facilities planning: Leadership, architecture, and management*. Allyn & Bacon: Boston.

Additional Resources

Castaldi, B. (1994). *Educational facilities: Planning, modernization, and management*. Boston: Allyn & Bacon.

Association of School Business Officials. (Eds.) (2000). *Schoolhouse planning: A school administrators guide to planning construction projects for new facilities, renovations of existing buildings*. Park Ridge, ILL: Research Corporation of the Association of School Business Officials.

Facilities services resources (2006). Georgia Department of Education. Atlanta, GA.

Course Description

An examination of the relationship between educational facilities and an appropriate learning environment. The course addresses the role of educational leaders in planning, financing, constructing, modifying, renovating, maintaining, and managing educational facilities. The course format is two hour lecture/one hour performance - based activities.

College of Education Conceptual Framework Standards (CFS)

The educational leader will:

1. Facilitate the development, articulation, implementation, and stewardship of vision of learning that is shared and supported by the school community.
2. Advocate, nurture, and sustain a school culture and instructional program conducive to student learning and staff professional growth.
3. Ensure management of the organization, operations, and resources for a safe, efficient, and effective learning environment.
4. Collaborate with families and community members, responding to diverse community interests and needs, and mobilizing community resources.
5. Act with integrity, fairness, and in an ethical manner.
6. Understand, respond to, and influence the larger political, social, economic, legal, and cultural context.
7. Synthesize and apply knowledge and skills learned in standards 1-6 in real settings under the guidance of university supervisors and school personnel

Course Objectives (CO):

Candidates will:

1. Demonstrate that procedures for educational facilities construction, maintenance, and management are designed and executed to maximize opportunities for student learning. (ELCC 1, 3, 4; PCS 1, 3, 4; BOR 5, 7, 8, 10)
2. Demonstrate the ability to assure educational facilities, equipment, and support systems operate safely, efficiently and effectively. (ELCC 3; PSC 3, 6; BOR 8)
3. Demonstrate the processes for financing improvements to educational facilities are managed responsibly, efficiently and effectively. (ELCC 3; PSC 3, 6; BOR 7, 8, 10)
4. Demonstrate knowledge of emerging trends in facilities construction, maintenance, and management. (ELCC 3; PSC 3, 6; BOR 7, 8, 10)
5. Demonstrate the ability to align financial, human, material resources, system vision,

and goals to facilities planning, construction, maintenance, and management. (ELCC 1,2, 3, 4; PSC 1, 3, 4, 5, 6; BOR 7, 8, 10)

6. Demonstrate a working knowledge of the ethical implications of proper business practices and financial management while dealing with facilities management. (ELCC 3, 5; PSC 3, 5, 6; BOR 7, 8, 10)
7. Demonstrate knowledge of the development of the Georgia five year facilities planning process. (ELCC 4, 6; PSC 3, 4, 6; BOR 7, 8, 10)
8. Demonstrate knowledge of construction plans and blueprints. (ELCC 4, 6; PSC 3, 4, 6; BOR 7, 8, 10)
9. Demonstrate knowledge of the preparation of educational specifications for facility renovation, modification, and construction including the involvement of all stakeholders in the preparation of the specifications. (ELCC 4, 6; PSC 3, 4, 6; BOR 7, 8, 10)
10. Demonstrate knowledge of environmental concerns which must be addressed in the facilities planning and management process. (ELCC 3, 4, 6; PSC 3, 4, 6; BOR 7, 8, 10)
11. Demonstrate knowledge of the Georgia Capitol Outlay Program. (ELCC 3; PSC 2, 3, 4, 6; BOR 7, 8, 10)

Course Activities/Assignments/Requirements

Candidates will:

Read assigned materials related to class assignments and participate in class activities. (ELCC 1, 2, 3, 4, 5, 6; PSC 1, 2, 3, 4, 5, 6; BOR 5, 7, 8, 10)

In groups, prepare and present to the class a research project on one of the following topics: (ELCC 1, 2, 3, 4, 5, 6; PSC 1, 2, 3, 4, 5, 6; BOR 5, 7, 8, 10)

- Systems approach to planning
- Facilities planning and preparation of educational specifications
- Facility site selection and environmental concerns for facilities planners
- Georgia's Capitol Outlay Program
- Developing a Five Year Facilities Plan
- Funding educational facilities projects
- The role of technology in facilities planning and management
- The construction management alternative

Read and abstract 4 professional journal articles on emerging trends in educational facilities construction and management. (ELCC 1, 2, 3, 4, 5, 6; PSC 1, 2, 3, 4, 5, 6; BOR 5, 7, 8, 10)

Embedded Performance-based Activities

In groups, prepare and present a planning design for a school for 800 students to include a funding proposal, a simulated plan for involving stakeholders in the design process, a simulated set of specifications, and a rough conceptual design to maximize student learning. **(PBA)** (ELCC 1, 2, 3, 4, 5, 6; PSC 1, 2, 3, 4, 5, 6; BOR 5, 7, 8, 10)

Prepare a portfolio outlining concepts learned and documentation to support the following performance-based activities: (ELCC 1, 2, 3, 4, 5, 6, 7; PSC 1, 2, 3, 4, 5, 6; BOR 1-10)

1. Spend one day with the Director of Facilities (or similar position) in your system. Review capitol outlay plans, the five year facilities plan, visits to facilities and construction sites (if appropriate), and review planning procedures for your system. Explore traffic flow and parking issues. Discuss the concept of construction management identifying both positive and negative concerns. Prepare a learning reflection to describe your findings, your critique of the current situation, and what you learned from this activity. **(PBA)**
2. Review a set of blueprints for a facilities project in your system with the Director of Facilities (or similar position). Prepare a learning reflection to describe your findings, your critique of the current situation, and what you learned from this activity. **(PBA)**
3. Spend at least three hours with the person responsible for supervising maintenance in your system. Review job descriptions, maintenance plans including preventative plans, maintenance request procedures, work order procedures, tracking, and evaluation of work performed identifying strengths and areas of need. Prepare a learning reflection to describe your findings, your critique of the current situation, and what you learned from this activity. **(PBA)**
4. Spend at least two hours with the Director of Finance (or similar position). Review expenditures per FTE for maintenance, processes for funding capitol outlay and maintenance projects, ESPLOST, and bonds for capitol outlay. Prepare a learning reflection to describe your findings, your critique of the current situation, and what you learned from this activity. **(PBA)**
5. Spend at least two hours with the Director of Technology. Review the system technology plan, how facilities modification and renovation are accommodated in the plan and what plans are for assuring technology is addressed in new construction. Prepare a learning reflection to describe your findings, your critique of the current situation, and what you learned from this activity. **(PBA)**

6. Review your system Policy Manual sections on facilities and describe the role of the Board of Education, the Superintendent, the DOE, advisory committees, school personnel. Note policies addressing selection of architects, bids and bidding, site selection, property purchasing, five year facilities plans, financing of facilities, environmental concerns, designing of educational specifications, and other policy issues. Prepare a learning reflection to describe your findings, your critique of the current situation, and what you learned from this activity. **(PBA)**

Class Policies and Expectations

1. Only typewritten papers are acceptable. Handwritten papers will be returned. The exception to this rule is in-class writing when a computer is not available.
2. Near-letter quality dot-matrix printouts with rough-shaped letters are unacceptable. (See page 238 of the APA publication manual).
3. Before submitting paper assignments, be sure they adhere to the following guidelines:
 - a. Typed and double-spaced. – 12 point font
 - b. Cover page with the name of the assignment, title of the articles, name of the authors, name of the publication, date of the publication, your name, and submission date.
 - c. Papers more than one page should be stapled. (No folders please)

Course Evaluation

Class participation	10%
Research projects and presentations	40%
Performance Based Portfolio	40%
Article Abstracts	10%

Grading Scale

90 – 100	A
80 – 89	B
70 – 79	C
Below 70	F

Grading Rubric for Written or Oral Assignments

- A** Excellent performance reflects detailed in-depth use of course materials. Papers follow APA guidelines with proper sentence structure and punctuation.
- B** Performance reflects use of course materials and case information but is weak in depth, detail or logical development. Papers follow APA, but have some errors.

C Good faith effort at the assignment but performance is flawed by many errors.

F Failure to submit work as assigned. Work reflects little effort, or is incomplete.

Attendance Policy

Graduate candidates are expected to attend all classes. Failure to attend without prior permission will result in grade reductions.

Policy Statement on Plagiarism and Cheating

The full text of this policy is available in the College of Education Dean's Office, EC room 227. The following penalties will be enforced, as stated in the Policy:

- **FIRST OFFENSE:** The candidates will earn a "0" on the assignment, test, project, etc.
- **SECOND OFFENSE:** The candidate will earn the letter grade "F" for the course.
- **THIRD OFFENSE:** The candidate will earn the letter grade "F" for the course, and further action involving referral of the matter (with documentation) to the appropriate college (university) officials within the administrative structure will be taken. (Please also see page 39 of the VSU Student Handbook.)

Special Needs Statement

Valdosta State University is an equal opportunity educational institution. It is not the intent of the institution to discriminate against any applicant for admission or any candidate or employee of the institution based on the sex, race, religion, color, national origin or handicap of the individual. It is the intent of the institution to comply with the Title VI of the Civil Rights Act of 1964 and subsequent executive orders as well as Title XI in Section 504 of the Rehabilitation Act of 1973.

Candidates requesting classroom accommodations or modifications because of a documented disability must contact the Access Office for Students with Disabilities located in Room 1115 Nevins Hall. The phone numbers are (229) 245-2498 (voice) and (229) 219-1348 (tty).

Instructor

Outline for a Critique

The required format for a Critique in this class is as follows:

Identification of the material read: Use APA Style

Abstract - A succinct summary of the work—major view/ideas included, and findings (if a research study). This should be written so that someone who has not read the work can understand broadly what it covers, concludes, contends or proposes. The abstract should be no more than half of the entire critique.

Critical Evaluation - This section evaluates how well the author(s) make their case, how well they prove, argue or support what they conclude or contend.

Implications for the Course or Subject Area – Finally in this section you get to speak. Here you tell what implications the written work has for this course or the field the course covers. Does it add new, useful knowledge? Does it clarify some aspect? Does it suggest a change? Does it challenge existing practice? Contend something new is needed? Does it clarify something you didn't understand before reading it?

In summary, the critique answers these three questions:

1. What are the main ideas of the written work?
2. How well does the work do what it tries to do?
3. What, in your opinion, are the implications, if any, for this course or subject area?

Topical Content

Educational facilities construction, renovation, modification, maintenance, and management

Constructing and equipping educational facilities to assure student learning, safety, and efficient operation

Financing educational facility renovation, modification, construction, maintenance, and management

Aligning financial, human, and material resources in facilities construction and management to system vision and goals

Ethical and legal implications and proper business practices for facilities planning and construction

Development of Georgia's Five Year Facilities Plan

Reading and understanding blueprints

Planning and preparing educational specifications

Environmental issues and concerns in facilities planning and construction

Georgia's Capitol Outlay Program

Facility site selection process

Bids and bidding facilities projects

Construction management

Technology and facilities planning

Policy issues related to planning and constructing facilities

Current trends and issues in educational facilities planning, construction, and management

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