GORDIAN® DA DISTRICT ADMINISTRATION®



# Turning Capital Plans Into Completed School Facilities Projects

## Introduction

School districts face difficult decisions about how to maintain aging buildings, accommodate changing educational needs and make the most of limited capital funding. Addressing those demands requires a clear understanding of facilities conditions and a plan that connects priorities, available resources and the work needed to complete improvements. Without that connection, districts risk investing in projects that overlook underlying needs or may encounter costly obstacles once work begins.

Two years of research conducted by *District Administration* reveal persistent funding constraints and challenges to completing facilities projects on time and within budget. The findings also point to a need to strengthen the connection between long-range planning and project delivery. For administrators, that means considering how projects fit together across the district, whether funding and staffing can support the work, and how today's investments will affect future facilities needs.

Effective capital planning is part of the equation when it comes to addressing these challenges, but it must be paired with predictable project execution. Prioritizing needs across facilities and aligning improvements with available funding can strengthen community confidence and inform an ongoing cycle of planning an reinvestment.

# Understanding What Prevents Projects From Moving Forward

The surveys included facilities and finance professionals, principals and superintendents, with respondents representing a mix of district growth patterns. Funding emerged as the dominant concern: less than one-third of the money required to address a community's facilities needs is consistently available. That lack of predictable funding makes it difficult to plan for recurring investment and leaves teams focused on protecting the resources they already have.

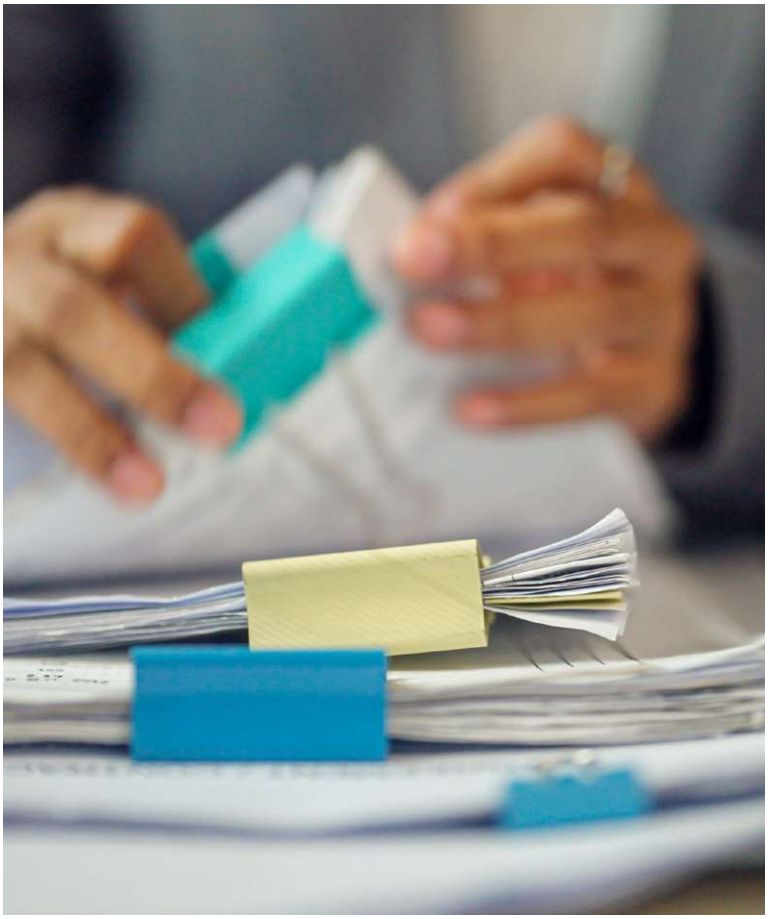
Districts must manage that uncertainty while responding to overlapping demands, including HVAC and other mechanical systems that need attention, along with roofs, windows and walls that require investment. Buildings must also accommodate changing technology and security needs, leaving administrators to weigh these competing demands and determine which projects will deliver the greatest value for students, teachers and the broader community.

Funding constraints, however, do not explain every difficulty. Additional challenges include keeping projects on schedule and within budget. An incomplete scope, an unsuitable delivery team or a risk overlooked during planning can leave staff confronting conditions they were not prepared to manage. Those surprises often require additional money and time. When a deadline cannot move, the pressure to finish can increase costs further.

A stronger approach to capital planning and project delivery centers on four connected priorities:

1. **Predictability:** Establish a delivery process in which participants understand what should happen at each stage.
2. **Visibility:** Make costs, risks and project conditions clear enough to support informed decisions.
3. **Integration:** Connect the district's facilities strategy to its funding strategy.
4. **Execution**: Maintain the connection between planning decisions and the work needed to complete each project.

Together, these priorities give administrators a way to examine both the health of their capital program and the likelihood of completing individual projects on time and within budget.





# Prioritizing Needs Across the Entire District

A project can appear urgent and reasonable when considered on its own. However, understanding where it belongs in the district's overall facilities plan requires a broader view. Administrators need to know what the project will accomplish, which other improvements it depends upon and how its value compares with competing needs.

Without that context, the most visible deficiency or the loudest concern can drive investment. A project may address a real problem while overlooking another condition that must be resolved first. The resulting disruption can undermine the schedule and budget that initially made the project seem achievable.

For example, an Arizona district once planned to replace air conditioning units before the hot summer months. Cooling was an essential need, but the planning process did not fully account for the poor condition of the roof supporting those units. The roof had to be addressed before the air conditioning work could proceed, adding cost, complexity and timing challenges. A more complete assessment would have identified that dependency before the district committed to the work.

Preventing such surprises requires a way to bring information from across the district into the planning process. A custodian or service contractor may know about a condition that calls for significant investment, yet that knowledge may never reach the people responsible for allocating capital. Even when these individuals perform their immediate responsibilities well, sharing that information with district decision-makers may fall outside their understood role.

A shared inventory of properties and needs helps make that knowledge usable. When information is held in one place and updated regularly, administrators can compare needs across buildings, identify dependencies and make choices with a clearer understanding of the consequences.

# Building a Capital Plan the District Can Carry Out

Districts often devote substantial attention to major construction decisions, such as adding or replacing a school building. Smaller capital improvements, however, often receive less planning attention, even though they need to be prioritized and coordinated with those larger investments. Without that coordination, administrators may undertake the district's next major project without having a cohesive understanding of the concurrent facilities needs that arise around it.

A long-range capital plan brings those decisions together. It assesses the buildings the district has today, considers how they must serve students and teachers in the future and connects the required improvements to available funding. That combination allows administrators to adjust priorities as conditions change while maintaining a view beyond the next emergency.



An achievable capital plan rests on three essential foundations:

1. **A clear picture of the facilities portfolio:** Understand which buildings the district owns or operates, their condition, prior spending and the needs likely to come next.
2. **An understanding of educational priorities:** Determine how well facilities support the district's instructional needs and the characteristics its community values most. This means looking beyond physical condition to consider how each space should function. A room may need more than repair or a new finish if its original design no longer supports its intended use. Restoring it to its condition from 20 years earlier could miss an opportunity to adapt it to current needs.
3. **A realistic assessment of available funding:** Establish how much the district can invest and where additional resources must be pursued to meet identified needs.

Funding discussions must be equally candid. A plan that exceeds the district's ability to pay for it can create expectations the district cannot meet. At the same time, documenting necessary improvements helps clarify where administrators need to seek additional dollars. Bringing those pressures together produces a more realistic, prioritized and fundable plan.

# Planning for Delivery Before Work Begins

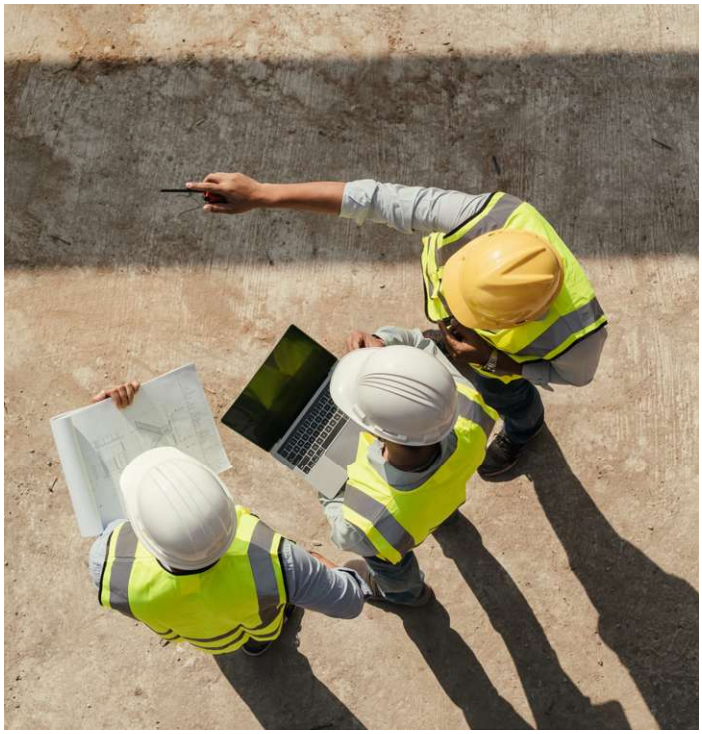
Approval and funding mark the start of a project's delivery responsibilities. A district still needs a sound project concept, a coherent delivery process and sufficient technical expertise to carry the work through completion. Even a capable implementation team will struggle to overcome an unclear scope or a misunderstanding of what the building needs.

Delivery planning should account for predictable obstacles before they interrupt the work. These obstacles include:

- Procurement that takes longer than expected
- A selected team that lacks the right capabilities
- A project scope that leaves out part of the need
- Insufficient district staff to manage construction and closeout, even when the project has a sound planning foundation

For example, a midsize Southern California district once faced that capacity problem while operating under significant budget constraints and a hiring freeze. It had secured funding and identified its project needs, but it lacked sufficient internal capacity to manage delivery and closeout. By engaging third-party consultants for construction management and project closeout support, the district supplemented its resources and completed the project on time and within budget.

The lesson applies to work performed by district staff as well as work supported by outside partners. Administrators need to match each project with the people, tools and delivery approach required to complete it. The scale of those resources will vary, but the need to define and support the work applies to small improvements and major construction alike.



# Strengthening Community Confidence Through Predictable Delivery

Public facilities projects involve many participants whose work must fit together, making it important for everyone to understand what to expect at each stage and how their responsibilities connect. That shared understanding helps make the delivery process more predictable, from project development and financing through completion. When those stages proceed reliably, participants can focus on the quality and value of the work.

That reliability can also influence how project partners approach the work. When design and construction teams trust the district's process, they have less reason to anticipate becoming trapped in delays or unresolved problems. A clearer process can help reduce the uncertainty that contributes to higher costs.

The same reliability matters to the community. Residents can see whether projects proceed smoothly, meet budget expectations and provide facilities that serve students and teachers well. Successful delivery can strengthen confidence in the district's stewardship and its case for future funding.

That confidence develops through performance. A district's ability to explain a project, carry it out and show what the investment accomplished helps establish credibility for the next facilities decision. Predictability therefore supports both the immediate project and the district's ability to sustain investment over time.

## Making Completed Projects Part of the Next Planning Cycle



A completed project creates future responsibilities for care and reinvestment. Because buildings and systems begin aging as soon as they enter service, project completion marks the start of the next phase in an ongoing stewardship cycle. During this next phase, districts need to track:

- What has been accomplished
- What requires attention next
- When today's improvements are likely to require additional investment

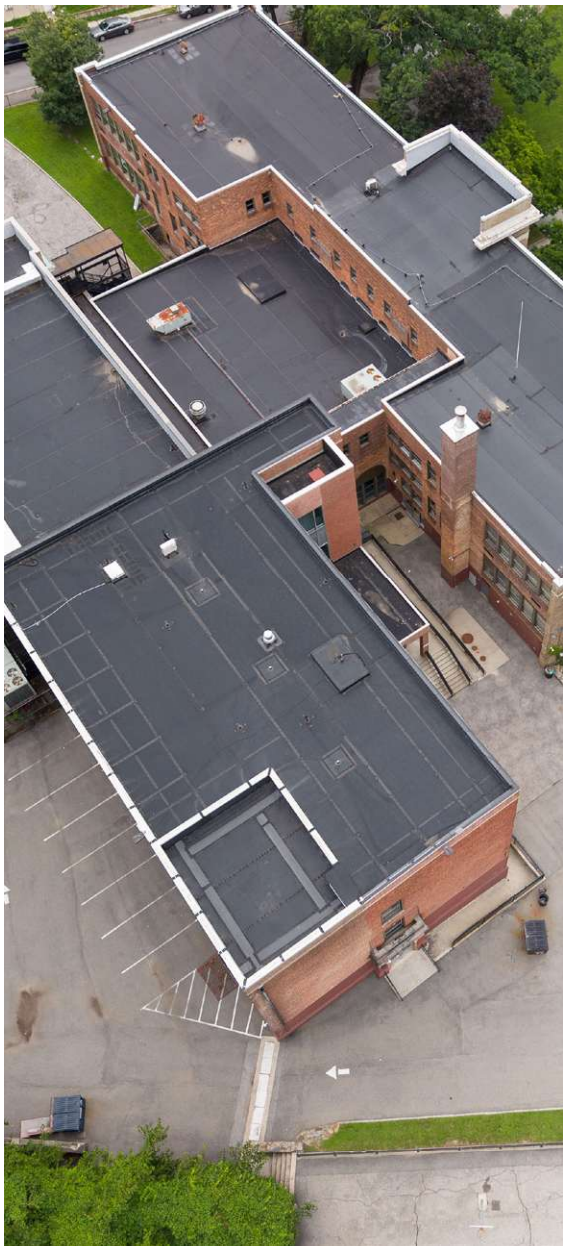
Using that information to plan 10 years ahead gives districts time to anticipate needs, establish priorities and assemble funding. That planning horizon also helps accommodate differences in project preparation. Some improvements may require six months of planning, while others may take three or four years to get underway.

The plan must also account for changes in cost over time because fluctuations in material and commodity prices can affect how much the work identified today will cost to complete. Considering those changes during assessment and planning helps districts understand the financial implications of project timing.

To sustain this planning process through changes in district administration, facilities records must remain accessible and useful to the next team. The person overseeing a new building or system may have retired or moved to another role before the next major investment is due. Preserving information about completed work, anticipated needs and future costs helps incoming administrators continue planning for those assets.

Looking ahead to these responsibilities also helps districts make more informed decisions before committing to new work. Understanding an improvement's expected life and care requirements allows administrators to weigh its immediate benefit against the long-term investment it will require.

# Taking the First Steps Toward More Strategic Investment



Moving out of a reactive maintenance cycle begins with recognizing the pattern and making time to assess it. That pause can be difficult when equipment is failing and immediate demands keep arriving. Yet examining current conditions and the decisions that produced them can help administrators make better choices about what comes next.

Districts can begin that work through the following steps:

**Assess the current situation.** Review building conditions and the choices that have kept the district responding primarily to immediate needs.

**Consolidate the information.** Build an inventory of properties and needs that can be maintained and updated in one place.

**Establish priorities in context.** Consider educational suitability, project dependencies and available funding across the full portfolio.

**Match projects with delivery resources.** Identify the staff, outside expertise, tools and processes needed to manage work through closeout.

**Carry results into future planning.** Record completed improvements and use that information to anticipate subsequent care and investment.

Together, these steps give districts a practical starting point for moving from reactive decisions to more deliberate capital investment.

# Final Thought: Sustaining Progress Beyond Project Completion

Turning capital plans into completed projects requires districts to connect their understanding of facilities needs with realistic funding decisions and a delivery process capable of carrying out the work. By considering priorities across the entire district, identifying project dependencies early and matching responsibilities with available expertise, administrators can make more deliberate use of limited capital dollars while strengthening community confidence.

Gordian can support this work by helping districts build an inventory of their properties and needs, organize that information for regular updates and use it to guide project prioritization. A clearer understanding of building conditions and educational requirements gives administrators a stronger basis for deciding where to invest and how individual improvements fit into the district's broader facilities strategy. Once priorities are established, Gordian's Job Order Contracting (JOC) solutions can help districts move from planning to implementation by enabling multiple projects through a single competitively awarded contract. This approach reduces the administrative burden of bidding each project separately and helps work begin sooner.

As projects are completed, the knowledge gained should inform the next round of planning. Maintaining that continuity helps districts anticipate future investment, prepare incoming administrators to care for existing assets and sustain facilities that serve students, teachers and the community over time.

*This white paper is based on the* District Administration *Ed Talk, "Turning Capital Plans Into Completed Projects: What Two Years of District Research Reveals," sponsored by Gordian. The themes, interpretations and synthesis presented here reflect a consolidation of the webinar discussion.*

*The Ed Talk drew on two infographics, "K-12 Facilities Realities and Challenges" and "The Facilities Gap: Budget, Delays and the Road Ahead for School Districts", presenting findings from surveys conducted over two years by* District Administration *in partnership with Gordian.*

To learn more, **watch the Ed Talk**.

**Watch On-Demand**

## About Gordian

Gordian is a leading provider of Building Intelligence™ solutions, delivering facility and construction insights, technology and expertise across every phase of the building lifecycle. Serving organizations throughout North America, Gordian helps customers plan, budget, build and maintain capital intensive facilities and infrastructure through industry-leading data, software and advisory services. Its portfolio includes RSMeans™ Data, facilities planning and capital management solutions, and construction procurement services that help organizations make informed decisions and maximize the value of their physical assets. For more information, visit **gordian.com**.

## About District Administration

*District Administration* (DA) digital media serves the top K12 leaders for districts across the U.S. with strategic information on how to most effectively manage their school systems. DA helps administrators make informed decisions about best practices and research-based approaches designed to help them improve teacher quality and increase student achievement across their districts. DA brings journalistic excellence with in-depth reporting and analysis, as well as success stories that can be shared among peers from district to district.