

Reports, Reports, Reports 201 - HLS, FA, SA and MP

... *“WHAT ARE THEY, AND HOW
CAN I LEVERAGE THEM?”* ...

Thursday | April 30 | 2:45 p.m.

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INTRODUCTION

MODERATOR

Beau Cardenas; Business Development
TRIA Architecture, Inc.



PRESENTERS

Jim A. Petrakos AIA, LEED AP; Principal Architect
TRIA Architecture, Inc.



Keri VanSant, AIA, WELL AP; Principal
DLR Group



Edward L. Wright, AIA, LEED ®AP BD+C; Principal
DLA Architects, Ltd.



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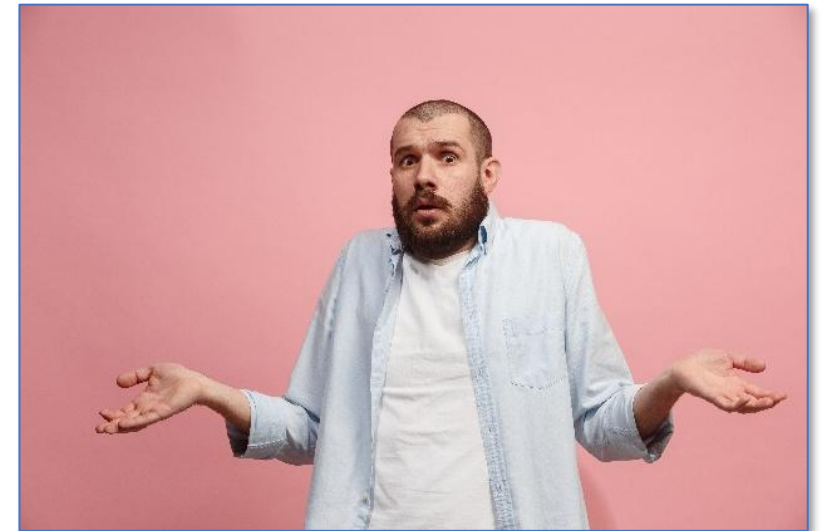


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PRESENTATION GOALS

Clarify The Wide Range Of Reports Firms Are Proposing... And How To Leverage Them To Your Needs.

- Health and Life Safety Report
- Facility Assessment
- Security Assessment
- Master Plan



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HEALTH AND LIFE SAFETY

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REPORT REQUIREMENTS

105 ILCS 5/2 STATE BOARD OF EDUCATION - POWERS AND DUTIES

(105 ILCS 5/2-3.12) (from Ch. 122, par. 2-3.12)

Sec. 2-3.12. School building code.

(a) To prepare for school boards with the advice of the Department of Public Health, the Capital Development Board, and the State Fire Marshal a school building code that will conserve the health and safety and general welfare of the pupils and school personnel and others who use public school facilities.

(b) Within 2 years after September 23, 1983, and every 10 years thereafter, or at such other times as the State Board of Education deems necessary or the regional superintendent so orders, each school board subject to the provisions of this Section shall again survey its school buildings and effectuate any recommendations in accordance with the procedures set forth herein.

(1) An architect or engineer licensed in the State of Illinois is required to conduct the surveys under the provisions of this Section and shall make a report of the findings of the survey titled "safety survey report" to the school board.

(2) The school board shall approve the safety survey report, including any recommendations to effectuate compliance with the code, and submit it to the Regional Superintendent.

1

REPORT REQUIREMENTS

Required Contents of Report

- Either a Certificate of Compliance, or:
- Site Plan Showing Each Building's Location
- A Schedule of Violations Discovered on State Provided Form
- Safety Reference Plans
- Descriptions of the Physical Plant of Each Building in Format Provided by the State



REPORT REQUIREMENTS

- Is This A Life Safety Amendment Or A 10 Year Survey?
- An Amendment Requests Permission To Levy Taxes Or Sell HLS Bonds.
- A Survey Is Just A State Requirement And Is A Report.



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CODE MAINTENANCE

Why Do We Survey Your Buildings On A Regular Basis?

- Systems Wear Out
- Work Is Done In-house
- Space Use Change
- Additions And Remodeling Create Issues With Existing Building

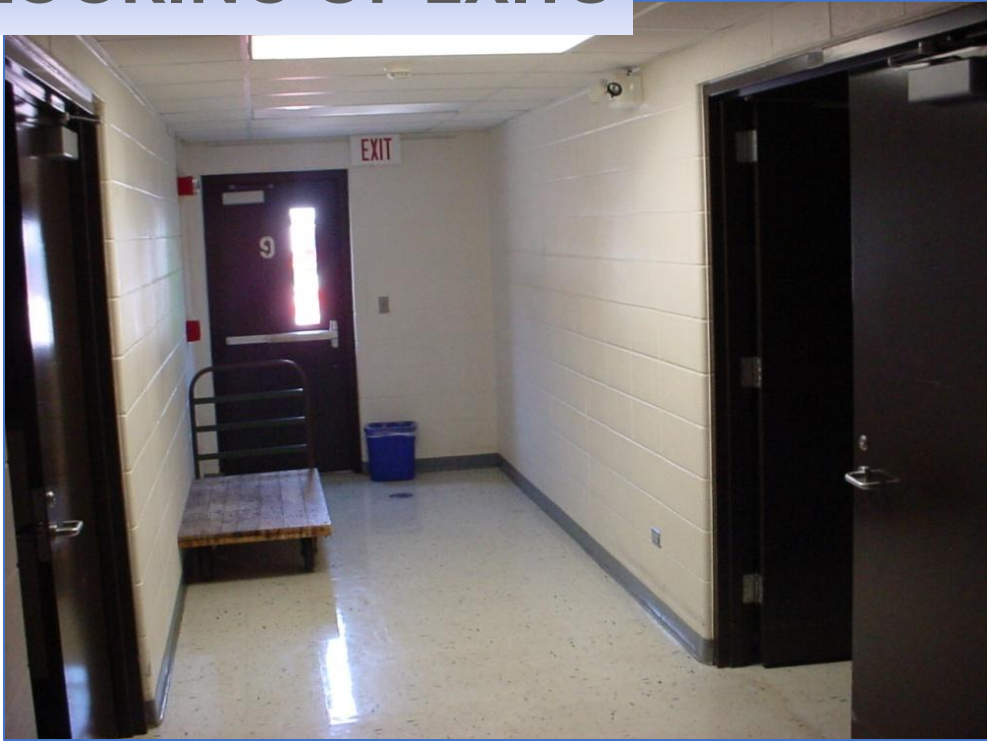
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EXAMPLES

BLOCKING OF EXITS



CHANGING OF ROOM USE



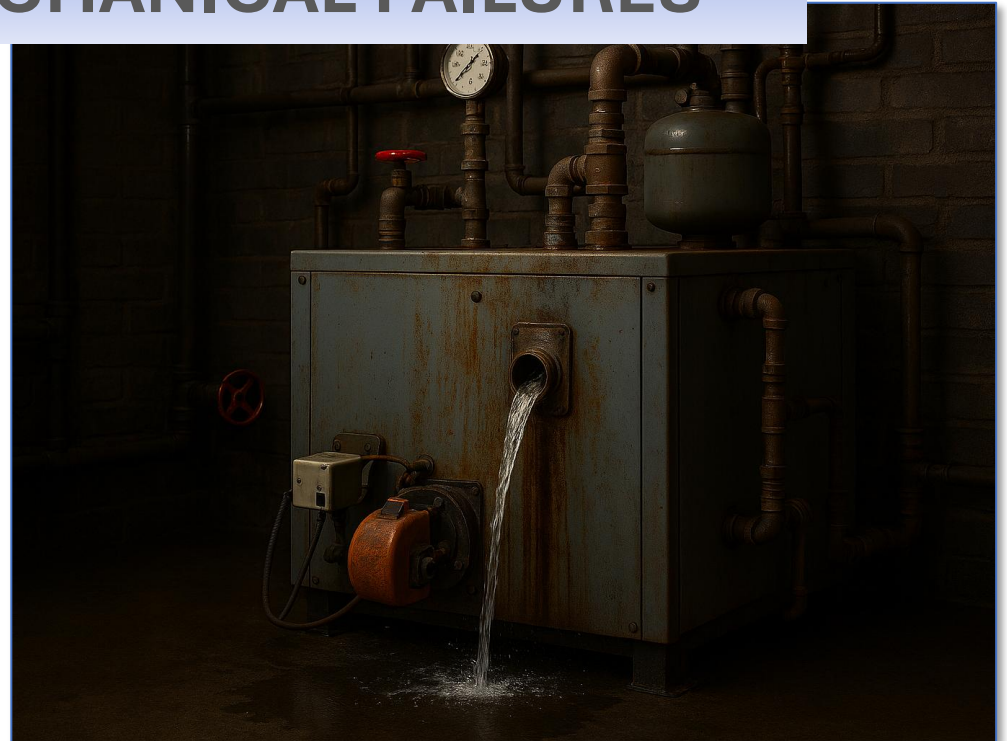
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EXAMPLES

ROOF LEAKS



MECHANICAL FAILURES



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WHAT ITEMS CAN BE APPROVED?

TRADITIONAL ITEMS

- Doors and Hardware
- Flooring
- Glazing
- Tuckpointing
- Abatement



WHAT ITEMS CAN BE APPROVED?

SYSTEMS

- Mechanical Systems (Heating and Cooling)
- Roofing
- Communications
- Elevator
- Security (All Other Violations Must Be Funded First)
- Paving (Separate Board Hearing)

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PROCESS

Architect

- Inspects Buildings For Violations, Repairs Or Alterations. (**Typically Summer Or Over Break**)
- Prepares A Report Of The Inspections.
- Certifies That To The Best Of His/Her Knowledge, The Recommendations And Estimated Costs To Abate The Violations Are True And Accurate And Submits An Original Certificate Of Approval To The Regional Superintendent And To The State Superintendent.

School Board

- Public Hearing To Formally Approve The Violations.
- If The District Intends To Issue HLS Bonds To Finance Repairs Or Alterations To Any School Building, The District Must File A “Request For Authorization” With The Regional Superintendent/IWAS.

PROCESS

Regional Superintendent

- Checks The Accuracy And Completeness Of The Proposed Amendment And The Reasonableness Of Estimated Costs.
- Submits The Amendment Through The IWAS HLS System To ISBE.
- Issues **Certificate Of Approval**.
- (After The State Approves The Amendment) Issues An **Order To Effect** Directing The District To Undertake Such Improvements.

State Superintendent

- Checks The Accuracy And Completeness Of The Proposed Amendment And The Reasonableness Of Estimated Costs. (**COULD TAKE UP TO 2 MONTHS**)
- Approves Or Denies All Or Part Of The Recommendations Itemized In The Amendment.
- Issues **Certificate Of Approval** For The Proposed Work That Is Signed By State Superintendent.

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FUNDING

- Life Safety Levies or HLS Bonds
 - Required To Spend Only On Life Safety Items
 - Must Have Amendments Created And Approved To Spend L/S Funds
 - District May Only Issue HLS Bonds To The Extent Of State-approved “Amendments”
- Grants
- O&M Funds
- Referendum



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FACILITY ASSESSMENTS

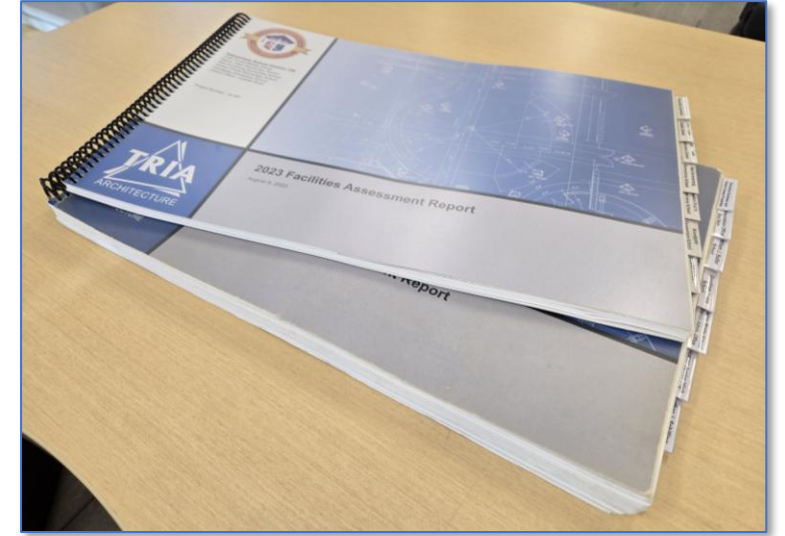
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FACILITY ASSESSMENT

- Above And Beyond The Life Safety Survey
- Can Be Combined With Life Safety Survey
- Can Be Done Anytime
- Review Existing Items For Wear And Tear
- Include Code Violations Of The Health/Life Safety Code
- Includes Some General Security Items



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FACILITY ASSESSMENT

- Can Include Construction Costs due to Program and Operational Needs/Changes
- Assemble a 3 or 5 Year Master Plan
 - 10 or 20 Year Plans Can Be Done, But Not Always As Relevant
- Meant as a “Wholistic View” of the District’s Capital Needs



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FACILITY ASSESSMENT

You are Looking For:

- End of Life Cycle Items:
 - Finishes
 - Flooring
 - Paint
 - Cabinetry
 - HVAC Units
 - Electrical
 - Panels
 - Lights
- Plumbing
 - Piping
 - Fixtures
- Fire Protection Equipment
- Gymnasium Flooring/Equipment
- Site (Optional)
 - Playground Equipment
 - Parking Lot



FACILITY ASSESSMENT

You are Looking For:

- Energy Saving Upgrades:
 - Tuckpointing
 - Roofs
 - Windows
 - Doors
 - MEP



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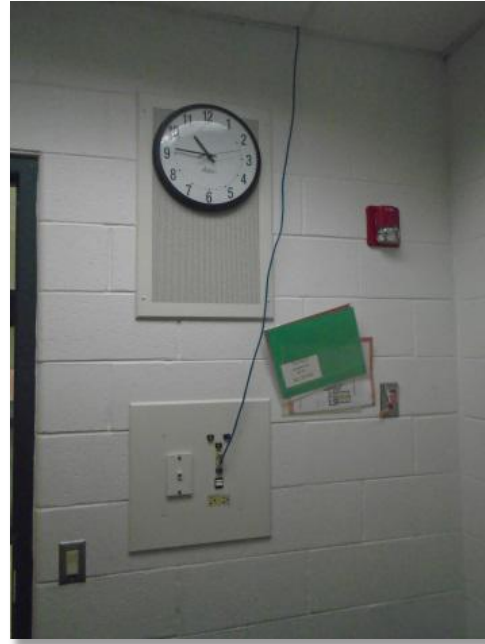
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FACILITY ASSESSMENT

You are Looking For:

- Owner Requested Items:
 - Office Remodeling
 - Generator Backup
 - Food Prep Relocation

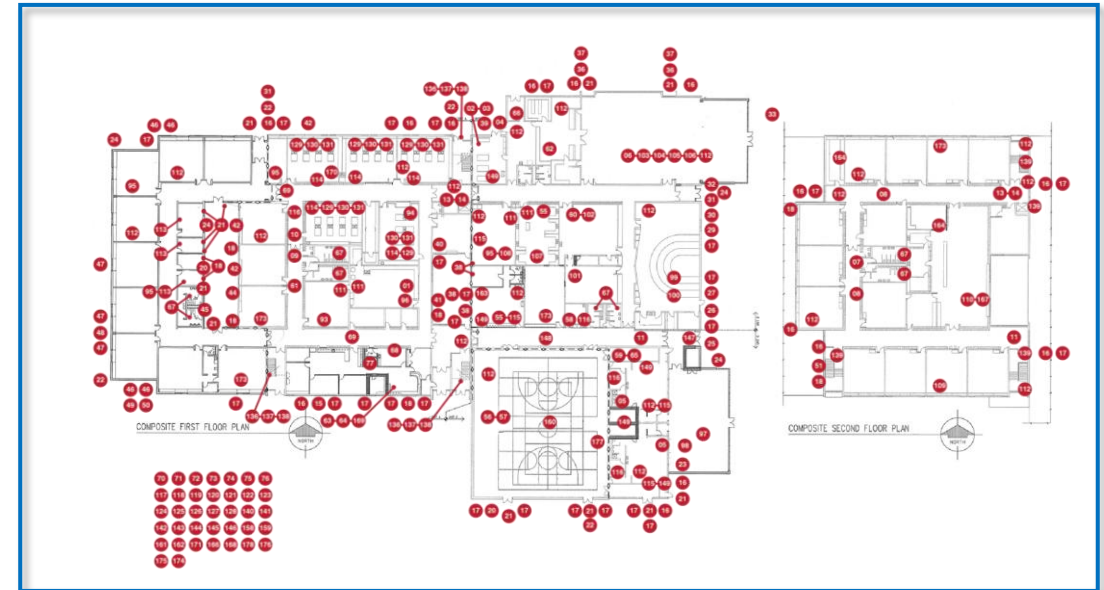


END RESULT

Item/Picture ID	Photo (Y/N)	School	Location	Description	Priority Code (Urgent, Required, Recommended)	Priority (M, L, 2, 3)	Recommendation to Correct
HJ 91	N	Homer Junior High School	Roof	Unsecure ladder	Required	1	Provide ladder guard
HJ 92	Y	Homer Junior High School	Roof	Roof drain dome loose	Required	1	Reinstall dome
HJ 109	Y	Homer Junior High School	Room 201	Excessive paper decorations are on the walls and could be beyond the flame-spread requirements and ratios by the IBC and local fire department.	Required	1	Remove excessive flammable material
HJ 110	Y	Homer Junior High School	Room 202	Fire extinguishers not at accessible height	Required	1	Relocate fire extinguishers
HJ 116	N	Homer Junior High School	Rooms A-127, B-128, C-106, C-115	Occupied areas do not have ventilation air	Required	1	Provide ventilation air system
HJ 138	Y	Homer Junior High School	Stairs	Storage in stairwell	Required	1	Remove stored items
HJ 148	Y	Homer Junior High School	Vestibule, Corridor	Glass display cases are not tempered. Total for (4) in the corridor (by the gymnasium) and (1) in the main entrance vestibule.	Required	1	Replace the glazing with safety glass or replace the units in their entirety.
HJ 149	Y	Homer Junior High School	Room 130, Locker Rooms, Mechanical Room, Storage Room	Unsealed penetrations are present.	Required	1	Seal penetrations.
HJ 177	Y	Homer Junior High School	Gymnasium	Wall base is damaged	Required	1	Repair wall base
HJ 63	N	Homer Junior High School	Boiler Room	Hollow metal frame doors are rusted	Recommended	2	Replace doors and frame
HJ 107	Y	Homer Junior High School	Room 139	The home economic area is outdated, has various accessibility issues, needs exhaust hoods over the cook stations and is nearing the end of its useful life.	Recommended	2	Renovate the home economic area.
HJ 127	N	Homer Junior High School	School	Hallways and classroom floor tiles are asbestos	Recommended	2	Abate and replace floor tile
HJ 170	N	Homer Junior High School	Room 122	Science case/work stations are obsolete	Recommended	2	Remove stations and repair flooring
HJ 62	N	Homer Junior High School	Boiler Room	Fire doors are asbestos	Recommended	2	Abate and replace fire doors
HJ 06	N	Homer Junior High School	Cafeteria	Floor tile is asbestos	Recommended	2	Abate and replace floor tile
HJ 10	Y	Homer Junior High School	Corridor	Holes in door and frame from old hardware	Recommended	2	Patch doors and frame
HJ 28	N	Homer Junior High School	Envelope	No soft joint at stone sill	Recommended	2	Provide soft joints
HJ 52	N	Homer Junior High School	Exterior by Cafeteria	Yard drain is broken	Recommended	2	Install new yard drain
HJ 54	N	Homer Junior High School	Exterior by Fitness	Yard cleanout is broken	Recommended	2	Install new yard cleanout
HJ 55	N	Homer Junior High School	Faculty Lounge and Home Economics	Sink insulation is asbestos	Recommended	2	Abate and replace insulation
HJ 58	Y	Homer Junior High School	Gymnasium Concessions	This room could be more sanitary, has various accessibility issues, and seems to be too small for the intended use and equipment.	Recommended	2	Renovate this room.
HJ 67	Y	Homer Junior High School	Men's and Women's Restrooms	Toilet rooms are outdated and are in poor condition. There are also various accessibility issues.	Recommended	2	Renovate the restrooms.

Construction Division 1995	List Generated From: Architect, Engineer, Admin, Staff	Action ID (A=abandon in place, B=remove, C=repair, D=relocate, E=rebuild, F=improve)	Type (A=Safety Standards, B=Energy/Conservation, C=Handicapped Access, D=School Security, E=Asbestos Treatment, F=Paving Improvements, G=Other Improvements)	Cause (A=Improper operation or use, B=Inadequate maintenance, C=Defective design, D=Defective material or workmanship, E=Required component or system missing, F=Accidental damage, G=vandalism, H=Swim beyond normal life, I=Other specialty)	Notes
7	Architect	C	H	C	
7	Architect	C	H	H	
N/A	Architect	B	A	A	
10	Architect	D	C, G, H	I-Code required	This can be done in-house
15	Architect	F	H	C	Per 10 Year Health and Life Safety Report
N/A	Architect	B, D	A	A	There is a need for additional storage building wide. Further investigation may be required.
8	Architect	F	G	C	
7	Architect	F	H	D	
9	Architect	F	G	F	
8	Architect	F	G	H	
Multiple	Architect	F	C, H	H, I-Code change	Further investigation is required by the design team. Also reference 2016 asbestos six-month surveillance report dated 12/28/2016 and three year re-inspection report dated 06/06/2016 from Phoenix Consulting Services. Refer to Item # 146.
9	Architect	F	E	H	Demolition of the stations might be able to be done in-house. Refer to Item #144.
9	Admin	B, F	H	I-Room updates	Also reference 2016 asbestos six-month surveillance report dated 12/28/2016 and three year re-inspection report dated 06/06/2016 from Phoenix Consulting Services.
8	Architect	F	E	H	Also reference 2016 asbestos six-month surveillance report dated 12/28/2016 and three year re-inspection report dated 06/06/2016 from Phoenix Consulting Services.
9	Architect	F	E	H	Also reference 2016 asbestos six-month surveillance report dated 12/28/2016 and three year re-inspection report dated 06/06/2016 from Phoenix Consulting Services. See Item #107.
2, 15	Engineer	C	H	A, B, E	
2, 15	Engineer	C	H	A, B, E	
15	Architect	F	E	H	
5, 6	Architect	F	G	H, I-Code change	
Multiple	Architect	F	G	H, I-Code change	Refer to Items #73 and #168

Units of Measure	Estimated Quantity	Estimated cost (in 2017 dollars)	Funding Type: 1=Life Safety, 2=Capital Improvements, 3=Maintenance	Year to Complete by
LS	1	\$2,000.00	3	2018
I	1	\$500.00	3	2018
LS	1	\$0.00	3	2017
LS	1	\$0.00	3	2017
LS	4	\$85,000.00	2	2019
LS	1	\$0.00	3	2017
LS	1	\$9,750.00	2	2019



END RESULT



15711 Bell Road Homer Glen, Illinois 60491
Original Year built: 1981
Additions built: 2004
Size: (2) Stories, 101,710 g.s.f. (est.)

Facility Assessment Cost Summary

Homer Junior High School Priority

1	2017-2019	\$4,855,775.00
2	2019-2021	\$4,656,050.00
3	2021-2026	\$1,620,600.00
M	Maintenance	\$25,850.00
Total - Homer Junior High School		\$11,158,275.00

*Above totals do not include items listed as an estimated quantity of (Per). These items require further investigation for a more accurate estimated cost. Refer to the Facility Assessment Matrix for further information.

Estimated building replacement cost / asset value: \$30,004,450.00
(based on a cost of \$295.00 per s.f. and does not include land value)

SECURITY ASSESSMENTS

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SECURITY ASSESSMENT

- Much More Specific Than Life Safety Survey and Facility Assessment
- Can be Done Anytime
- Review Existing Buildings and Grounds for Security Needs
- Can Include Construction Costs Due to Program and Operational Needs/Changes
- Assemble a Master Plan

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SECURITY GOALS

1

Prevent & Deter

- Secure Your Envelope
- Policy, Procedure and Training

2

Minimize Damage

- Lockdown Procedures
- Partition Building

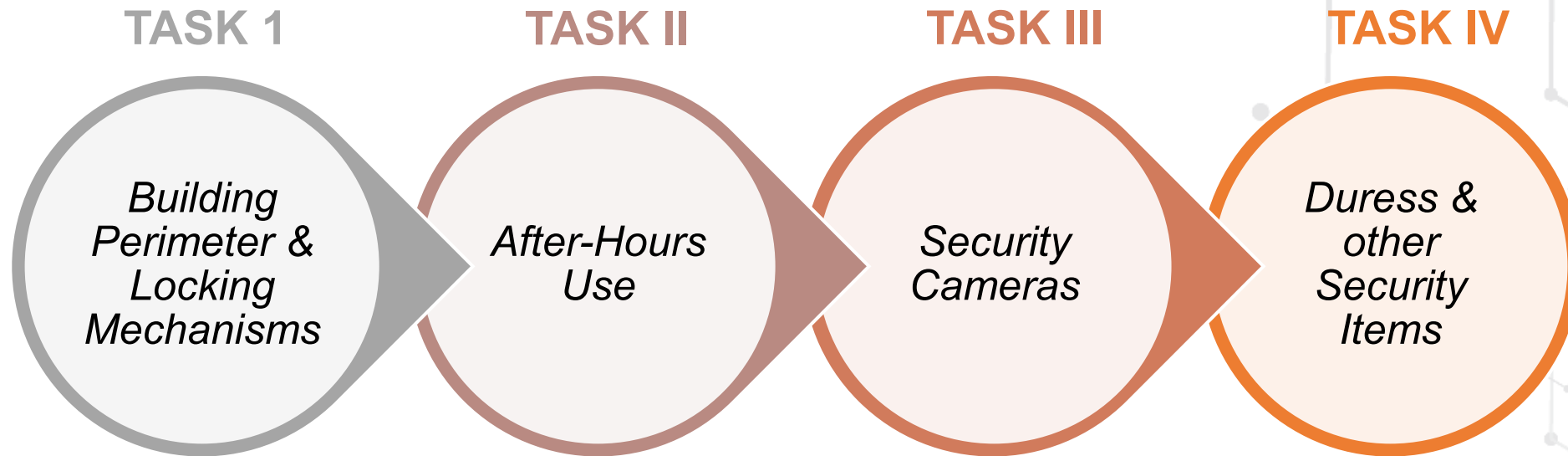
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Review Incident

- Cameras

SECURITY ASSESSMENT

MAIN OBJECTIVES OF ASSESSMENT



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SECURITY ASSESSMENT

TASK I: BUILDING PERIMETER & LOCKING MECHANISMS

Site Access

- Separation of Buses Vs. Cars?
- Building / Playfield Crash Barriers?
- Public Access?
- Areas of Concern? Nearby Tree Line, Commercial Parking Lot?

Building Access

- **Use Of Different Entrances?**
 - **Main**
 - Parent / Visitor Entrance (Secured Vestibule)
 - Deliveries (Small And Large)
 - Day-care, Kindergarten, Etc.
 - **Secondary**
 - Student Entrance
 - Employee Entrance
 - **Tertiary**
 - PE Class
 - Exit Only Vestibules
- **Keys/Key Cards (Grand Master, Master, Storage, Etc.)**
- **Who's Got What Access?**

SECURITY ASSESSMENT

TASK I: BUILDING PERIMETER & LOCKING MECHANISMS



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SECURITY ASSESSMENT

TASK I: BUILDING PERIMETER & LOCKING MECHANISMS

Strength of Doors / Windows

- **Durability? Repairs?**
 - Fix / Adjust all Hardware and Latching
- **Strike Protection / Ballistic Glass Film?**
- **Working Locks? Exterior AND Interior?**
 - Make Sure Doors Self-Close
 - Remove Hold-Opens, Door Kick Stops on All Exterior Doors
 - Remove all Rubber Door Stops Near All Exterior Doors
- **Hinges - Five Knuckle Vs. Continuous?**

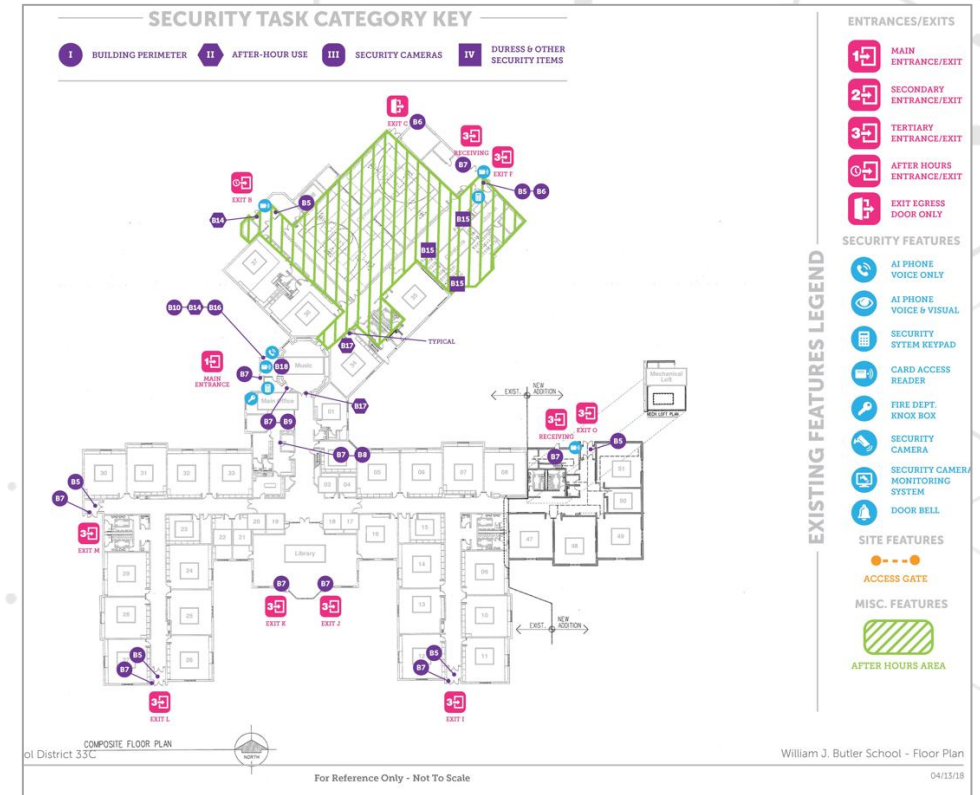


SECURITY ASSESSMENT

TASK II: AFTER HOUR USE

Building Access

- Use Of Different Entrances ?
- After-hours Extent Of Use? (1 Room Vs. 1 Wing)
 - Limit And Contain
 - Careful Of Egress Paths In Case Of Fire
 - Internal
 - After-school Care, Athletics, Teacher Meetings, Etc.
 - External
 - Scouts, HOA's, Athletic Clubs, Park District

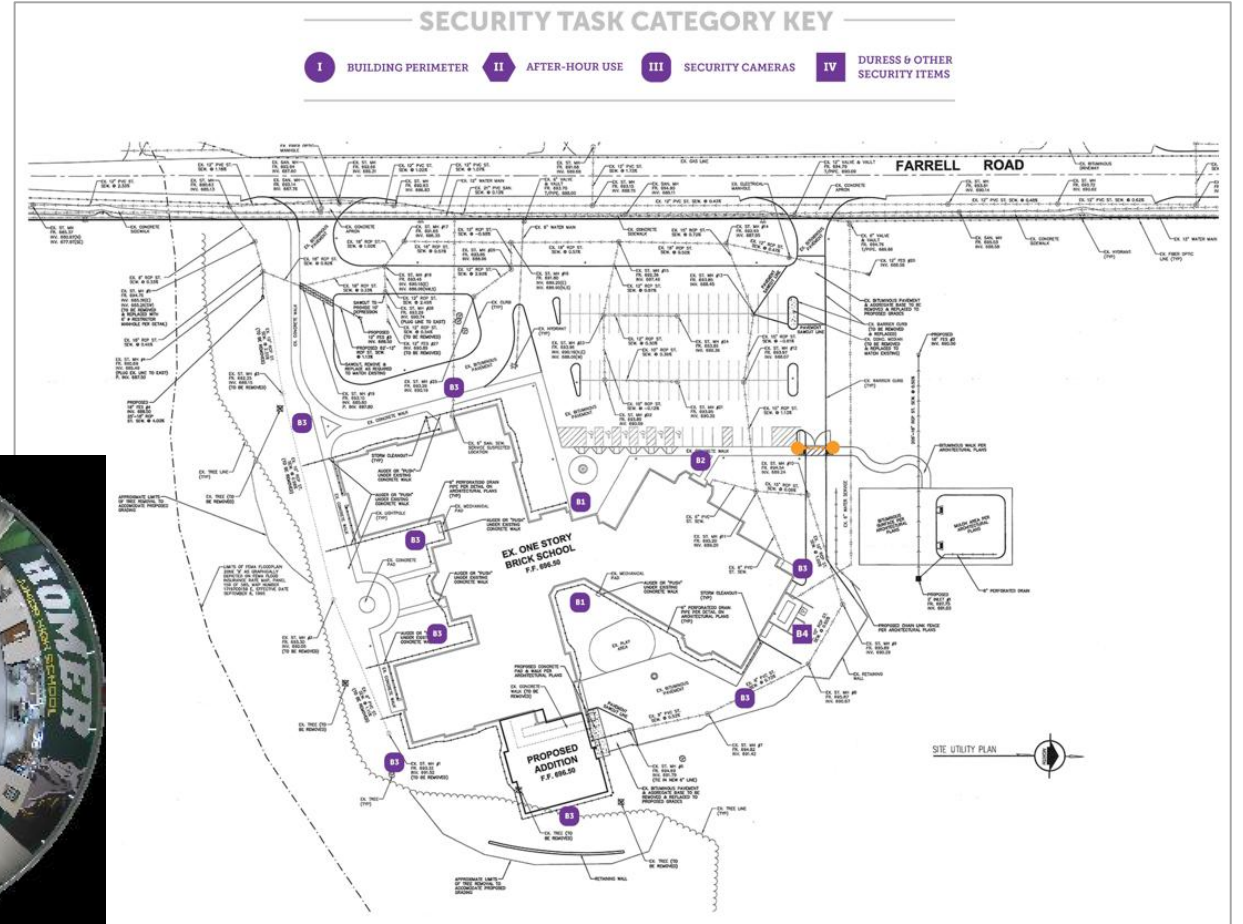


SECURITY ASSESSMENT

TASK III: SECURITY CAMERAS

Camera Locations / Coverage

- Operating?
- Views?
- Fixed Vs. Pan/Tilt/Zoom?
- External Vs. Internal?



END RESULT

Mr. Christi Tyler, Assistant Superintendent for Business Services
 Community Consolidated School District 286
 District Wide Security Assessment
 Project Number: 17-072
 Security Report
 April 13, 2018
 Page 5 of 31

William J. Butler



1900 Erie Lockport, Illinois
 Grades: 1st - 5th
 Original Year: 1900
 Addition: 1900

View (1) Slides with images in presentation

Observations:

- Task I – Building Perimeter and Locking Mechanisms**
- All exterior entrances are marked along the perimeter.
 - At least one set of classroom windows are located on the inside, and can be hard to see from the outside.
 - Exterior classroom windows have a lock.
 - Exterior classroom doors have a lock with a key.
 - The main entrance is secure controlled access entrance with a door that can provide "base-line" cross access.
 - Visual confirmation at the main entrance.
 - Some secondary and tertiary entrances some do not.
 - All vestibules have hold open devices if doors cannot have locking hardware.
 - Egress only doors have pulls on the inside.
 - The perimeter doors and roof materials including a door.
 - Typically the all interior doors are lock.

TRIA ARCHITECTURE
 West Suburban Office: 221 MacCormac Drive
 South Suburban Office: 320 N. 72nd Street
 Company Mail: 221-459-4500
 www.triaarch.com

Budget Cost Summary:

Task I – Building Perimeter and Locking Mechanisms

- Upgrade existing Sonitrol Security panels - \$5,500.00
- Upgrade existing access control module - \$1,500.00
- Re-Key existing door locks (Interior and Exterior) - \$18,500.00
 - Option to upgrade classroom locksets to higher security
 - Add \$1,800.00 each x 35 locksets = \$63,000.00
 - Add \$5,000-\$10,000.00 for communication hubs and additional network devices.
- Provide (6) secure secondary vestibules - \$33,000.00
- Remove pulls and hold-opens at egress only door - \$125.00
- Add card reader device and electric strike - \$650.00 each x 9 = \$5,850.00
- Main Office work to prevent cross access - \$6,250.00
- Upgrade iPhone - \$12,250.00
- Repair malfunctioning locksets - \$250.00
- Replace select glazing in the main entrance vestibules - \$8,500.00

Task II – After-Hours Use

- Provide additional signage - \$500.00

Task III – Security Cameras

- Basic 32 Camera NVR with 4TB of Storage, Switch, Monitor and CCTV UPS - \$5,000.00.
- 3 MP Outdoor Camera \$1,500.00 each x 12 = \$18,000.00

Task IV – Duress and other Security Items

- Provide shot detection - \$11,250.00
- Upgrade existing PA system - \$69,750.00
- Provide a minimal amount of glass film at cafeteria windows and doors - \$2,750.00

Total for Butler School: \$271,975.00

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 www.triaarch.com

Total for Butler School: \$271,975.00

END RESULT

District Budget Cost Summary (by Task)

Task I – Building Perimeter and Locking Mechanisms

- \$1,391,225.00

Task II – After-Hours Use

- \$29,250.00

Task III – Security Cameras

- \$160,500.00

Task IV – Duress and other Security Items

- \$913,013.00

Sub-Total:	\$2,493,988.00
10% Design Contingency:	\$249,398.00
10% Construction Contingency:	\$249,398.00
10% GC OH&P:	\$249,398.00
Grand Total:	\$3,242,182.00

District Budget Cost Summary (by School)

Transportation Building

- \$44,200.00

William J. Butler School

- \$271,975.00

Goodings Grove School

- \$296,925.00

Hadley Middle School / District Administration Office

- \$458,430.00

Homer Junior High School

- \$410,608.00

Luther J. Schilling School

- \$411,825.00

William E. Young School

- \$600,025.00

Sub-Total:	\$2,493,988.00
10% Design Contingency:	\$249,398.00
10% Construction Contingency:	\$249,398.00
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Grand Total:	\$3,242,182.00

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GRANT PROCESS

What Is It?

- 2018 Cops Office Stop School Violence: School Violence Prevention Program (SVPP) (<https://Cops.USdoj.Gov/>)
- First Grant - June 25th, 2018 - Grant Opened
 - July 30th, 2018 – Grant Closed
- Provides Funding Directly To States, Units Of Local Government, Or Indian Tribes To Improve Security At Schools And On School Grounds In The Jurisdiction Of The Grantee Through Evidence-based School Safety Programs
- We Were Awarded This Same Grant Twice. Once In 2018 And Again In 2021
 - The Process Was Completely Different



GRANT PROCESS

Budget Narrative

- *“WCSD And Homer 33-C Respectfully Requests Funding Of \$500,000 Of The Total Budgeted Costs Of **\$1,380,913**, To Be Used Towards Equipment And Technology. Homer 33-C Will Fund The Remaining Budgeted Costs Of **\$880,913.**”*

Matching Grant

- First Time In 2018 We Shot High On The Total And Were Committed To Match \$881K
- Second Grant In 2021 We Went For A Clean 25% Match, So Our Total Budget Called For \$670k; \$500k From The Grant And \$170k Match. It Was Much Better

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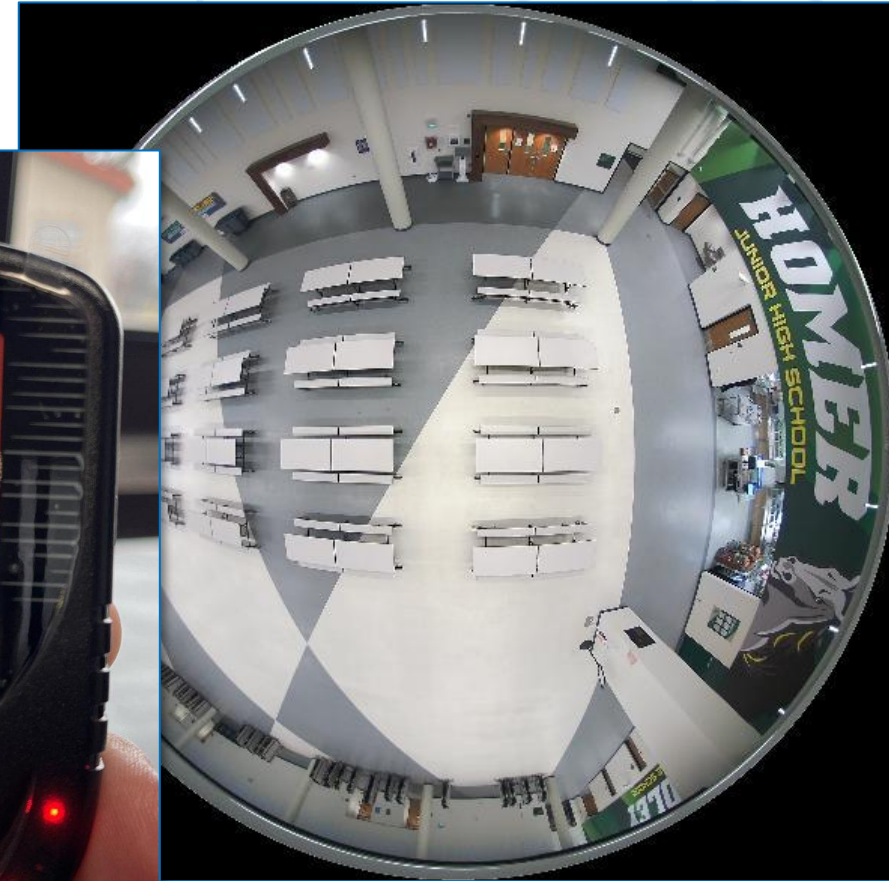
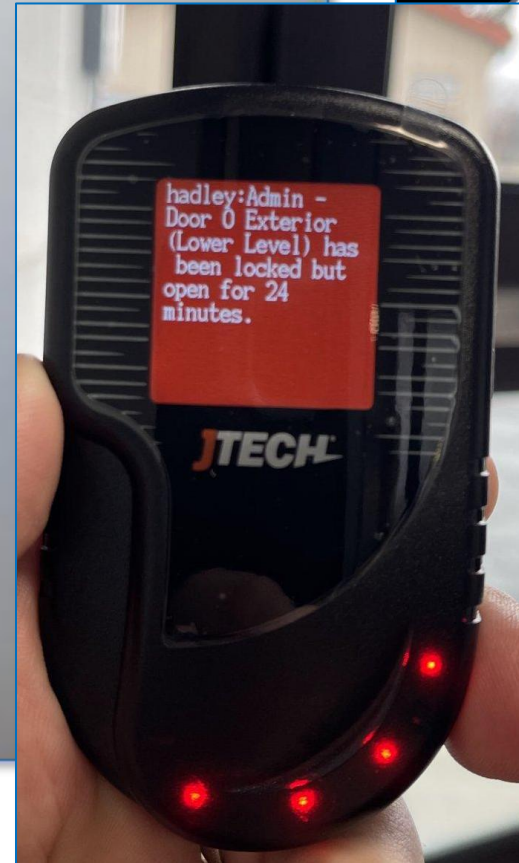
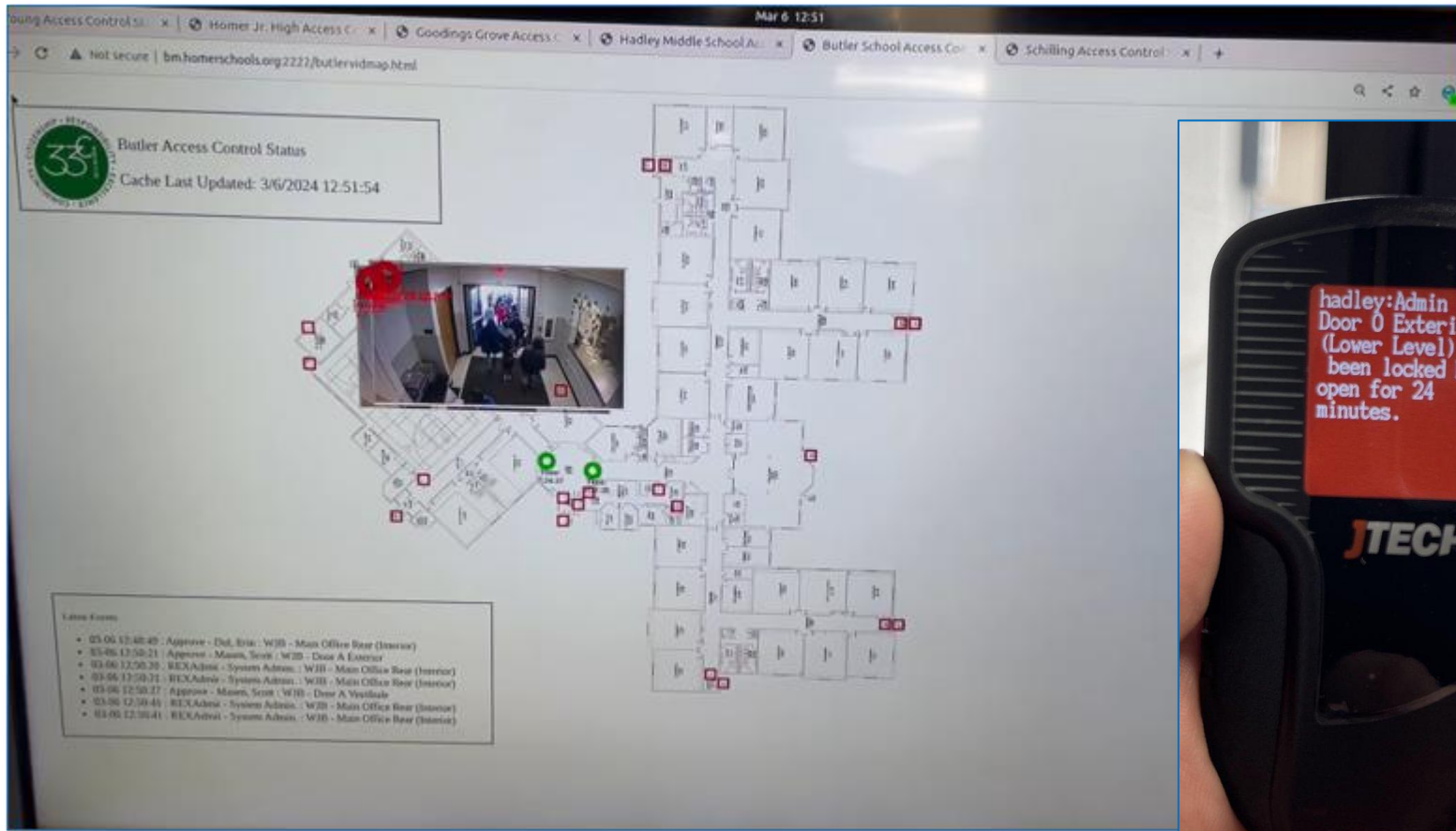
GRANT PROCESS

- 2018 - \$500,000 Grant Award | \$880,913 District Match
- 2021 - \$500,000 Grant Award | \$170,000 District Match

TOTAL - \$1,000,000 Grant Award



IMPLEMENTATION

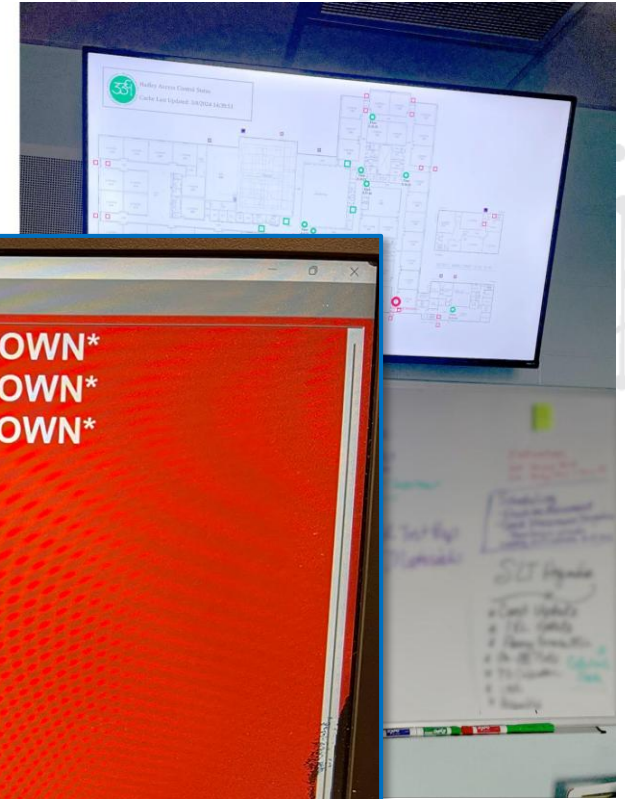
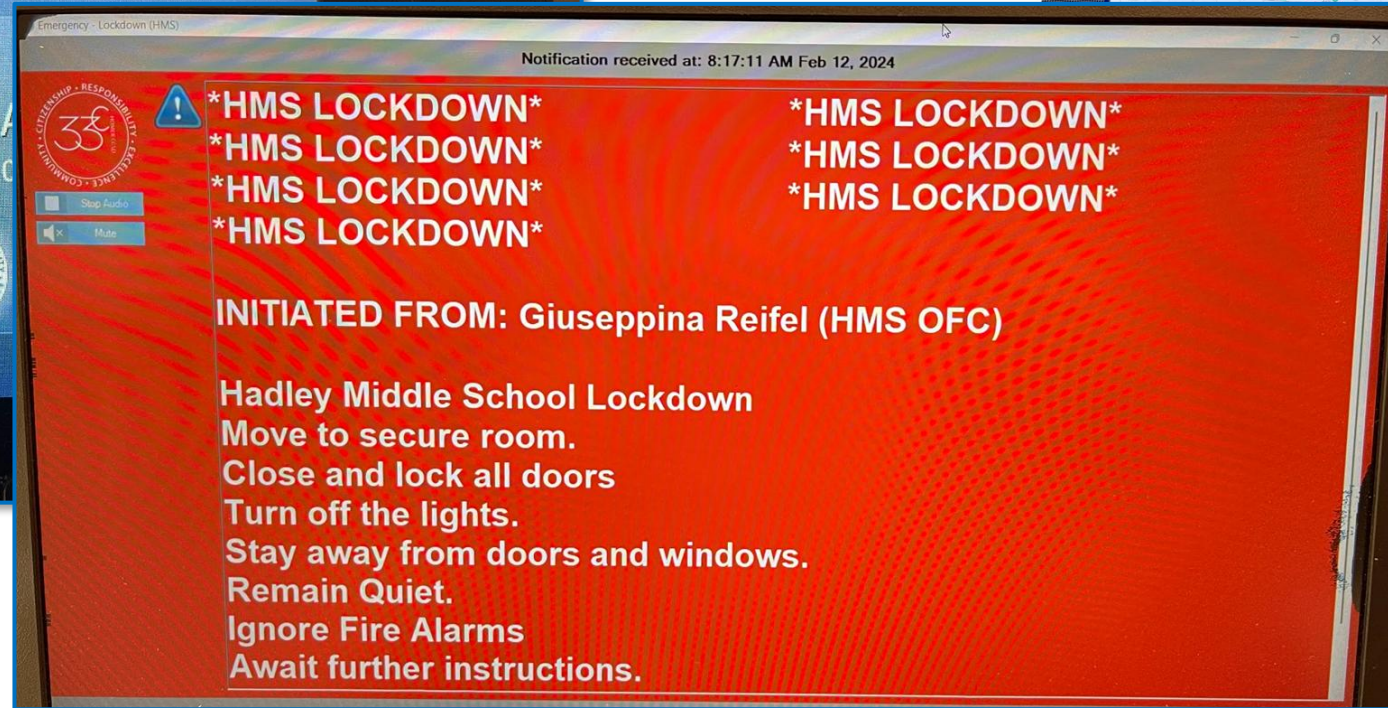
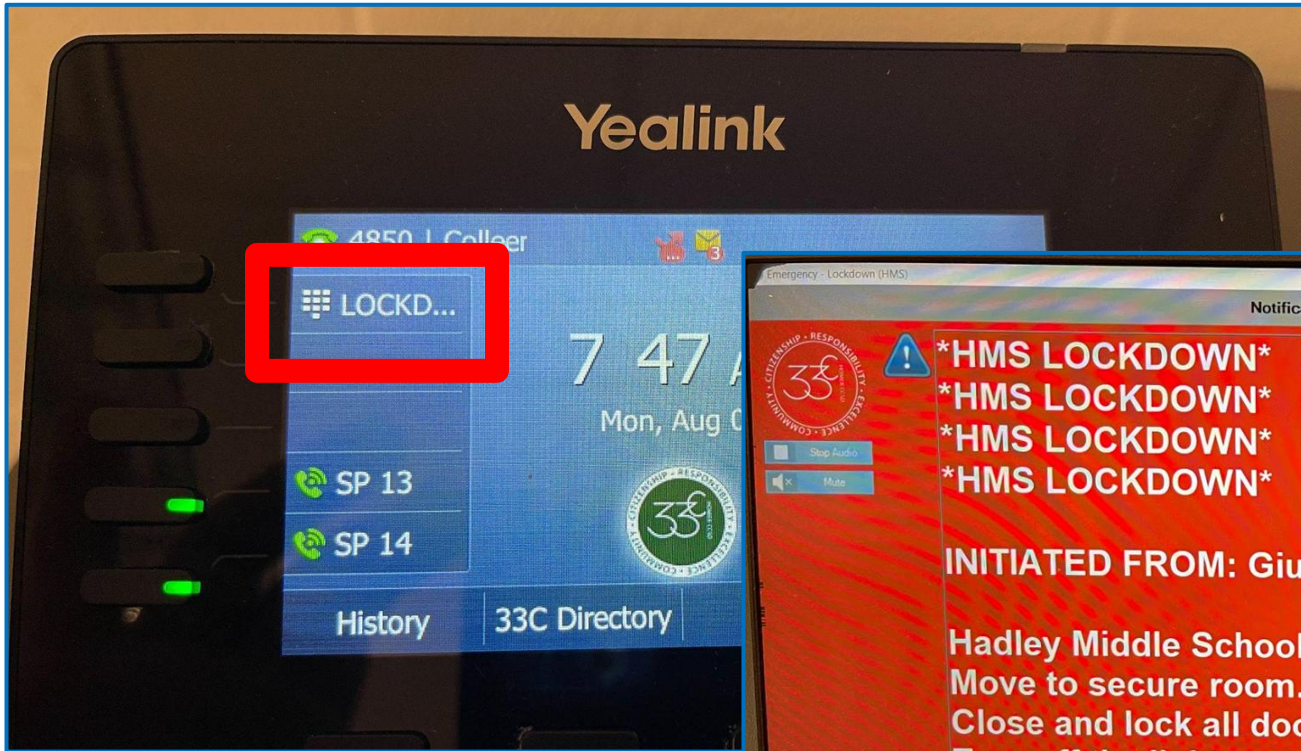


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IMPLEMENTATION



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MASTER PLANNING

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MASTER PLANNING

- **Traditional Long-range Facility Plans** Examine The Components Of A Building, It's Structure, Systems And Condition
- An **Educational Long-range Facility Plan** Also Examines The **Educational Adequacy** (Today) And **Educational Readiness** (In The Future) Of Your Schools To **Meet Your Vision**, So You Can Ensure **Lasting Value To The Community, Teachers And Students**
- The Goal Is To Align The Form To Its Function

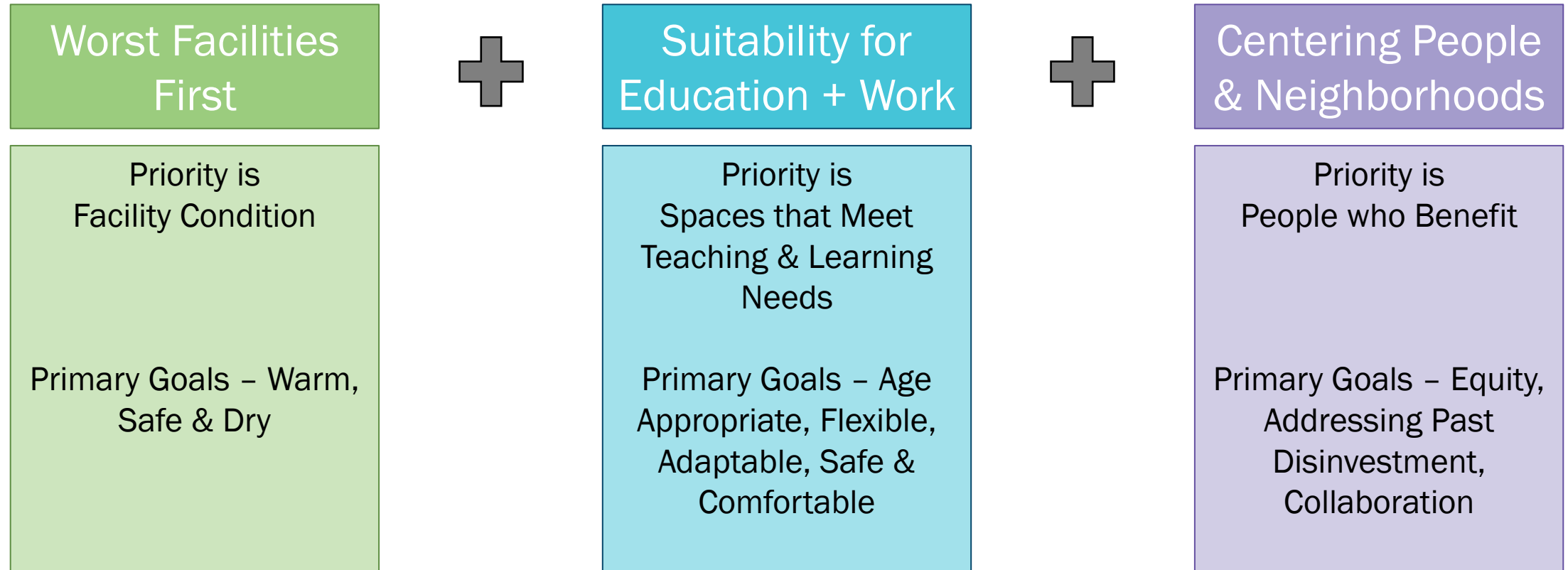
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Where to Invest? How to Invest? Who Benefits?

Evolution of Planning



Reframing Capital Planning

Consider Prioritizing Engagement And Investment In The Schools Where Needs Are Greatest/Communities That Are Historically Marginalized



Students & Families



Neighborhoods



Facilities

focus on these

to understand the impacts of this

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Long-range Facilities Planning Process

* Engagement With Various Stakeholders Should Occur Throughout



1 - Learn

- Site Visits/Listening Tours
- District-wide Surveys
- Facility Condition Assessments
- Educational Suitability Assessments
- Building Capacity & Utilization Analyses
- Safety & Security Analyses
- Utility Use Analyses
- Sustainability Standards



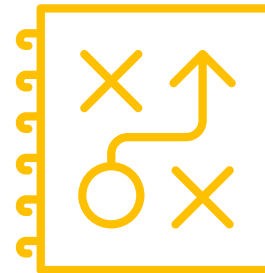
2 - Explore

- District's Vision for Learning Environments
- Space & Programming Needs Assessments
- Programming/End User Meetings
- Community Visioning
- Types of Spaces and Use
- Staff Interviews/Surveys
- Sustainability & User Experience Goals



3 - Strategize

- Define the Challenges
- Prioritize Needs
- Review Gaps Between Existing & Goals
- Consider Solutions
- Strategy for Short and Long-term Needs
- Conceptual Scenarios
- Rough Order of Magnitude (ROM) Costs

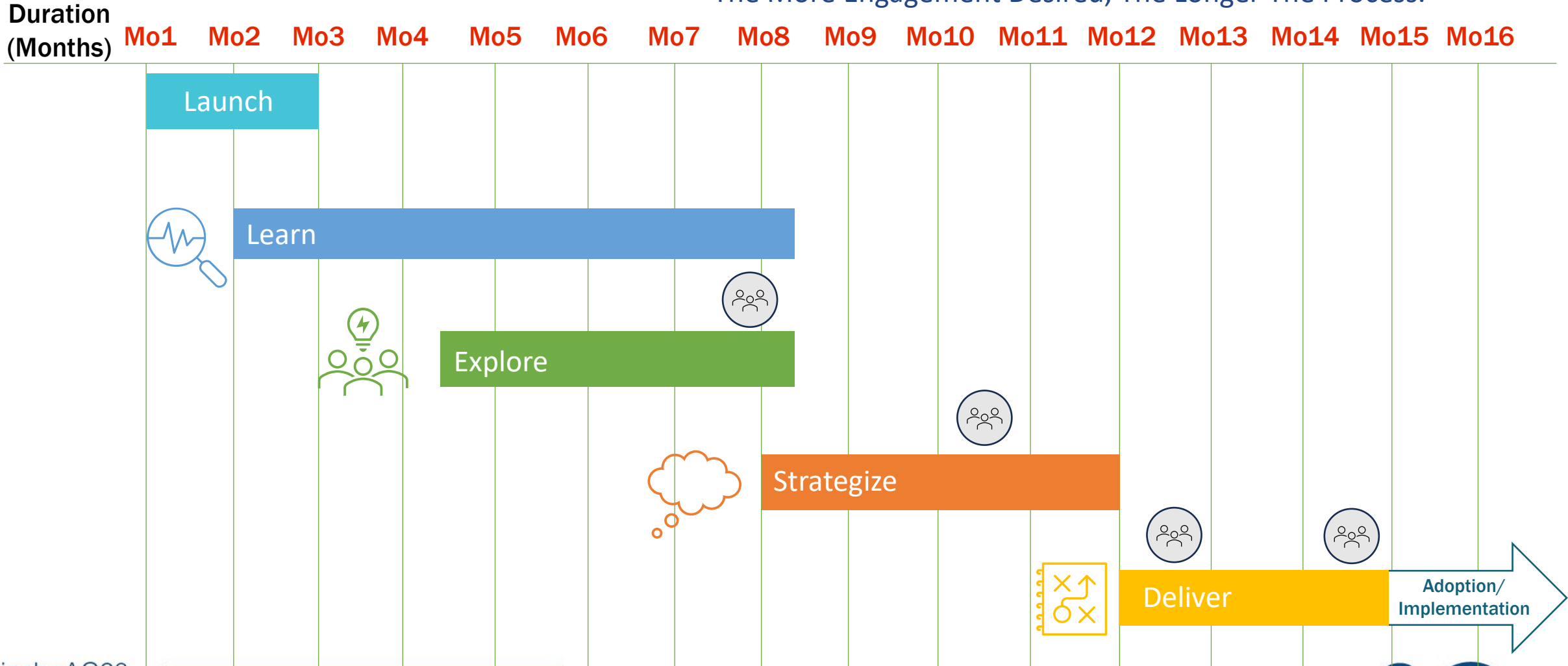


4 - Deliver

- Provide Database/Decision-making Rubric
- Draft Final Report
- District and Community Presentations
- Documentation of all Engagement Activities & Feedback
- Final Deliverable with Revisions (Digital Plan)
- Board Approval
- Next Steps → Implementation Planning

Possible Timeline

* Engagement With Various Stakeholders Should Occur Throughout.
The More Engagement Desired, The Longer The Process.



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A Holistic Focus

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VIII. MASTER PLAN RECOMMENDATIONS

High School,
Middle School, and
Elementary Schools

42



Combine reports into a single plan document –

- District-wide Surveys/Engagement Feedback
- Facility Condition Assessments
- H/LS Improvements
- Educational Suitability Assessments
- Building Capacity & Utilization Analyses
- Safety & Security Analyses
- Utility Use Analyses
- Sustainability Standards & Goals

INTRODUCTION

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