

model public policies

A Public Policy Report published by National Trust Forum, a program of the Center for Preservation Leadership

Model Policies for Preserving Historic Schools

by Katherine Stevenson

This article is based on Constance Beaumont's *State Policies and School Facilities* (www.nationaltrust.org/issues/schools) and the publication *Recommended Policies for Public School Facilities* (www.nationaltrust.org/issues/schools/policies.html), researched and drafted by Ms. Stevenson and Sydney Becker, state and local policy program assistant in the Department of Public Policy.

From 1995 to 2004 approximately \$253 billion was spent in the United States on public school construction and renovation. While many districts have chosen to retain and modernize their older and historic schools, some districts have demolished their schools because they believe that older school buildings cannot be brought up to modern standards or because state policies set unreasonable standards for rehabilitation. Clearly, all older schools cannot, and should not, be saved. However, there are many that are, or can become, high-performing facilities that meet the needs of students, teachers, and the community.

The source of funding and the decision-making bodies for school facilities vary widely from state to state. However, there are common policies and/or legislative approaches that appear in the states with the most successful school facility programs. These policies emphasize flexibility, decision-making based on facts and expert advice, and cooperation between and among decision-makers and community members. Key provisions include:

- Flexible acreage standards that allow communities to determine the best use of the site—whether it is an existing site or a new site.
- Policies that encourage joint planning for and joint use of community facilities, including school buildings, libraries, sports areas, etc., to maximize community investment and use.
- Policies and procedures that allow private funds, or other public funds, to be used in conjunction with school funding to maximize resources available for the facility and the site.
- Policies that require feasibility studies comparing the cost of building a new school with the cost of renovating, and perhaps expanding, an existing school.
- Policies that facilitate the sale or reuse of an older or historic school building for another purpose if the building cannot be renovated as a school.

What Works?

Coordinate Planning Efforts

Coordinating school facility planning with other community planning allows the community to evaluate the benefits of collocation or proximal location of school facilities and other public



Schools located within walking distance of students and families can serve as important community anchors. In Albuquerque, N. Mex., a downtown post office and courthouse was recently converted into the Amy Biehl High School. Photo courtesy of the General Services Administration.

infrastructure such as libraries, recreation centers, health clinics, transportation routes, etc. Requiring consultation with city planning and other community planning agencies assures that the necessary connections between processes are made for the benefit of the community. For example, an older school might not have a large gymnasium and it might be cost effective, as well as socially beneficial, to locate a planned new playground or community center next to the school.

Since 1990 West Virginia has required each county to have a Facilities Master Plan developed with input from an architect, an educational facility professional, and a local planning committee. The state of Washington requires school districts to survey contiguous school districts to identify unused or underutilized school facilities prior to receiving state funds. Collaborative planning is required in New Jersey, Maine, and Rhode Island. Florida directs school boards and local governments to “agree on a process for assuring coordination and cooperation in the provision of educational facilities.”

Keep Schools as Centers of Community

In smaller towns and dense urban areas, schools have always been a center of community life. Today, communities and neighborhoods are reexamining their schools to maximize their public use and value. In some cases this means opening up the gymnasium after hours and on weekends. Other times it means something more

Continued



Consultation with parents, teachers, students, community officials, and other interested parties will provide useful input about various aspects of the school building and its location. Photo by Deborah Cash.

ambitious, such as co-locating a library and a clinic in the school, or leasing the cafeteria as a private venture, open to the public. The goal is to identify the community needs and determine the potential of cooperation with the school district and neighborhood schools for the benefit of the school and the community.

Identify and Protect Important Historic Schools

Most states have a program that identifies historic buildings and sites across the state. However, only one state, Connecticut, considers its survey (which includes historic schools) complete; no other state can, or does, make that claim. Thus, many historic schools have no formal recognition. Laws or policies that require the evaluation of significance for buildings when public funds will be spent on them assure that a thoughtful assessment of the project will be undertaken. These laws can be established at the state level (New York, Pennsylvania, Vermont) or at the community level (Philadelphia; Washington, D.C.; Boulder, Colo.). They usually do not require that a historic building be preserved, only that the pros and cons be seriously considered prior to action. There are also specific ordinances that delay demolition until judgments about significance can be made. (See Julia Miller, "Protecting Potential Landmarks through Demolition Review" available from the National Trust's law department, 202-588-6035.)

Require Feasibility Studies

Feasibility studies for the continued use of older schools should be undertaken by architects who are knowledgeable about historic buildings. Individuals involved in preparing the studies would be ineligible to bid on the project. Cost estimates for any new building should be prepared by architects with experience in new school construction. They too should be disqualified from further work on the project to assure impartiality. The building program should establish that all associated costs will be considered a part of the estimate. For example, in new construction, land costs should be included as well as ongoing costs for transportation if the new school requires transporting more students because they cannot reach school by walking. Other considerations include demolition costs and materials disposal costs.

Massachusetts requires that applicants for school facility fund-

ing demonstrate that a new building is the best option only after they have reviewed the alternatives of renovating the existing school building or an existing building in the community. (See the National Trust guide to feasibility studies at www.nationaltrust.org/issues/schools/school_feasibility_study.pdf.)

The National Clearinghouse for Educational Facilities has a large bibliography of successful renovation projects at historic schools: www.edfacilities.org/rl/build_or_renovate.cfm. Also see the case studies at www.nationaltrust.org/issues/schools/studies.html and the CEFPI's *Appraisal Guide for Older and Historic School Facilities* at www.cefpi.org.

Encourage Public Participation

Public participation in all phases of school facility planning, design, and construction is essential. The process needs to be transparent and to provide for meaningful public input and involvement at all stages. "Sunshine Laws" (laws that assure public access to public documents held by the government) are vital to enforce this transparency. Kentucky encourages community participation in school facility planning through public meetings and public hearings.

What Policies or Practices Threaten the Renovation or Reuse of Older and Historic Schools?

In 2004 the Council of Educational Facility Planners International (CEFPI) revised its influential *Guide for Planning Educational Facilities* that informs best practices for the renovation and construction of school facilities. CEFPI has embraced the notion that schools and their sites need to be responsive to the setting, the client, the teachers, and the students. Recognizing that a "one size fits all" approach is dated and can work counter to a variety of goals, CEFPI no longer recommends minimum acreages for school sites. However, some states and localities still use approaches that adversely affect older schools. Acreage policies by state are available on the CEFPI website at www.cefpi.org/issuetraks.html.

The Two-thirds Rule

The "two-thirds rule" is an arbitrary standard adopted by some states. It dictates that the cost of renovating an older school cannot exceed two-thirds (or another arbitrary percentage) of the cost of building a new school. Ohio has the "two-thirds" rule, and Minnesota maintains a "60 percent rule." Problems exist with this rule. First, the rule often does not



Many historically important schools, such as this former Rosenwald school in North Carolina, can be renovated to serve a community use. Photo by Denise Alexander.



With a shared vision, commitment to excellence, and dedication to downtown revitalization, the Amy Biehl High School, GSA, the New Mexico SHPO, and the community were able to renew a local Albuquerque landmark and return it to productive life. Photo courtesy of the General Services Administration.

take into account the associated costs of new construction—land, demolition, disposal of hazardous materials, transportation, infrastructure expansion, etc. Second, when a school is relocated outside the neighborhood, the community loses an important part of its identity and a civic anchor. Third, if the costs are the same or very close, it makes sense to utilize existing building materials and maintain the community character provided by an older school while assuring a quality environment—often close to the housing served by

the school. In Maryland, state law requires that school construction “encourage revitalization of existing facilities, neighborhoods and communities.”

Poor or Deferred Maintenance

In school districts where maintenance is a low priority, schools become candidates for replacement unnecessarily. Maintenance is a low priority in some school districts where officials like to see new

construction that highlights public dollars expended. However, long-term maintenance assures the best use of tax dollars because it prolongs the useful life of buildings and reduces major repair costs. In Massachusetts, half of the state-provided dollars must be spent on maintenance. Maine requires that at least 2 percent of the operational funds be spent on maintenance. Vermont denies new state construction funds if the need for a new facility is the result of poor or deferred maintenance.

Building Codes

Some states set standards for the number of stories and for materials allowable for school buildings in general or for schools for certain grade levels, such as elementary schools. Safety of the students should be the most important factor. However, modern fire and life-safety systems and modern materials obviate the need for outdated requirements. Some states have adopted the International Building Code that assures the protection of occupants by allowing sufficient variations to address life-safety standards for historic and other buildings while allowing the historic integrity of the building to be maintained.

To Learn More

This article is meant only as a starting point for those interested in preserving historic and older schools. There are substantial public policy matters relating to planning, management, finance, and schools as centers of community that space constraints prohibited our including here. These issues are addressed in detail in *Recommended Policies for Public School Facilities*. This publication, produced by the National Trust Department of Public Policy for the BEST (Building Educational Success Together) collaborative (www.21csf.org), can be downloaded from www.nationaltrust.org/issues/schools/policies.html.

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Model School Facilities Policies by State

Arizona

Public/private use of school buildings (AZ statute Title 15- 364). Annual inventory of buildings, directs funds for maintenance if found out of compliance. Established adequacy standards and a “Deficiency Correction Fund” to aid schools that don’t meet the adequacy standards. Arizona Statutes Title 15-2031 “Students First” and 15- 2021 Deficiencies Correction Fund.

California

Flexible site selection standards (Title 5 California Code of Regulations, Division 1, Chapter 13, Subchapter 1). Encourages schools within walking distance of students (www.cde.ca.gov/ls/fa/sf/documents/schoolsiteanalysis2000.pdf). Requires a 3 percent restricted maintenance fund for state-funded projects. www.opsc.dgs.ca.gov.

Connecticut

School condition annual assessment. www.state.ct.us/sde/dgm/sfu/reports.htm.

Florida

Inventory of school conditions every 5 years (www.firn.edu/doe/edfacil/fish/fish.htm), provides for review by the Division of Historical Resources if a historic school is receiving state funds. The state also requires that a feasibility study be undertaken to determine if there is a prudent or feasible alternative if a historic school is proposed for demolition or substantial alteration.

Hawaii

Inventory of school conditions is maintained by the State Department of Education.

Iowa

Community use of schools. Public agency cooperation. Iowa Code Title 1, Subtitle 10.

Indiana

Before a historic site or structure owned by the state or a historic site or structure listed in the Indiana Register of Historic Sites and Structures or the National Register of Historic Places may be altered, demolished, or removed by a project funded in whole or in part by the state, a certificate of approval must be obtained from the Historic Preservation Review Board. www.in.gov/dnr/historic/106statereview.html.

Kentucky

Requires broad public involvement in school facility planning. KRS 100.361 requires that “adequate information concerning [state] proposals shall be furnished to the planning commission.” KRS 100.324 provides that proposals for public facilities be “referred to the commission to be reviewed in light of its agreement the comprehensive plan,” and that permits for construction or occupancy of such facilities are delayed for a period of up to 60 days in order to allow the commission to issue a report concerning the consistency of the public facility with the comprehensive plan.

Maine

Inventory of school conditions on a 3-year cycle (Maine Statutes Title 20A Education, Part 7: School Finance, Chapter 609). Suggests that schools annually invest 2 percent of replacement value for future renewal (www.maine.gov/education/const/pw000.html). Assesses public involvement, the existence of a “renovation vs. new construction” analysis, and location within a locally designated growth development zone as part of the funding criteria.

Maryland

Educational Facility Master Plans (www.pscp.state.md.us). Comprehensive Maintenance Plans (<http://mlis.state.md.us/1997rs/billfile/SB0389.htm>). Encourages location in designated growth areas, and encourages additions to existing schools. www.pscp.state.md.us/GI/gioverview.htm.

Massachusetts

Requires feasibility and cost analysis of renovation before new construction (www.doe.mass.edu/lawsregs/603cmr38.html?section=03). Requires applicants for state funding to have spent 50 percent of the previous year’s funds on “foundation utility and ordinary maintenance.” www.mass.gov/legis/laws/mgl/70b-8.htm.

New York

School districts must consult with the state historic preservation office if state funds will affect any building over 50 years of age. http://nysparks.state.ny.us/shpo/environ/freq_ques.htm.

North Carolina

Community use of schools ([www.ncga.state.nc.us/EnactedLegislation/Statutes/H TML/ByArticle/Chapter_115C/Article_13.html](http://www.ncga.state.nc.us/EnactedLegislation/Statutes/H%20TML/ByArticle/Chapter_115C/Article_13.html)). Applicants for state funds must demonstrate the cost and feasibility of new construction and of renovating the existing building.

Ohio

Half a million dollars levy for maintenance—schools must track the funds. Ohio Statutes Section 3318.35 O.R.C.

Pennsylvania

Encourages the retention (all reasonable efforts) and adaptive use of school buildings by public or nonprofit groups. www.pde.state.pa.us/k12/cwp/view.asp?Q=56801&=11.

Rhode Island

District must demonstrate new construction is the best alternative and must have considered renovation options if an existing building is available. The analysis must include related infrastructure costs. Incentive bonuses are awarded for repair and renovation. www.ridoe.net/funding/construction/glossary.htm.

South Carolina

Prohibits minimum acreage requirements. www.scstatehouse.net/code/t59c023.htm.

Vermont

Funding for repairs, renovations, and additions are given preference over new construction, and when a historic school is involved, the state recommends the participation of a preservation professional. The state historic preservation office is provided the opportunity to review the plans for state-assisted school renovation and construction. The state also allows an increase in the amount of state funds for a historic school. The state also encourages districts to develop adaptive use plans for school buildings that are no longer needed. www.state.vt.us/educ/new/html/pgm_construction/guide_05.html.

Washington

Co-location of facilities (<http://apps.leg.wa.gov/WAC/default.aspx?cite=180-25-070>). Facility inventory (Washington Statute 180-27-405). Requires schools to be located in urban growth areas whenever possible.

West Virginia

Educational Facility Master Plans. www.wvs.state.wv.us/wvsba/MIP/mipmnpng.htm.

Wisconsin

Annual inventory of school building conditions (Wisconsin Statute 115.33(4)).

Resource: Stuart Meck, ed., Growing Smart Legislative Guidebook: Model Statutes for Planning and the Management of Change (Chicago: American Planning Association, 2002).