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## Four Best Practices Of School Building Closeout/Turnover



By *Deisy Brangman* and *Amber Brown*

When building or renovating a school, changes occur throughout design and construction. Milestones shift, natural disasters occur, and problems crop up. The first day of school, though, cannot change. Even the days leading up to it are largely immutable, as staff needs time to settle in and concentrate on teaching. The plan and process of closeout/turnover thus plays a

critical role in ensuring that everything gets done, gets done right, and gets done on time.

The following best practices can help your project succeed and facilitate a smooth turnover process from construction to facility management:

1. **A good closeout/turnover process starts at the project's outset.** Start thinking about turnover and closeout far before the date of substantial completion. The project team should plan for turnover and closeout *at the early stages of design and construction*. They must determine definitions, milestones, and obligations. For example, how are you defining substantial completion? What is the contractual obligation date of each turnover deliverable? Making these determinations up front ensures all team members share and can meet expectations.
2. **Identify stakeholders and communicate with them throughout.** Stakeholders that will be managing the facility after construction is complete should be engaged throughout the entire turnover and closeout process. Ideally, every stakeholder should have a checklist at least halfway through the project outlining what they're responsible for, what they're handing over or receiving, how much time they have, etc. That means you need to know early on who is involved, and what their roles and responsibilities are.
3. **Leave time to problem solve.** Open the lines of communication as early as

possible during the project and at least 2–3 months before substantial completion. Personnel and policies can change, so start early and be ready to recalibrate. Issues *will* come up, so think through how you can be flexible and continue progressing.

4. **Thoughtfully prepare for training.** Make sure all stakeholders are aware of *when* training occurs. Otherwise you risk having systems up and running, and contractors ready to start training... while the facilities team is busy opening 15 other schools and school staff is getting ready to start teaching on Day One. Also consider what training for frontline staff looks like. Who will champion coaching the staff on how to use their new space? Can the architect and contractor do hardhat tours so the staff can see the space ahead of time? Do you have support from facilities and the school system so they reinforce proper operating procedures? Because the most advanced, well-installed doors make little difference if teachers leave them propped open.

Closeout/turnover is complicated and tedious, but best practices like these will help ensure everything goes smoothly. We have put these best practices into place with great success, most recently on the city of Baltimore's [21st Century Schools](#) project.

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## Redwood City School District Navigates Enrollment Decline

Studies Underway To Determine How Best To Move Forward With The Right Programming Mix To Benefit Students



By *Mark Newton*

The Redwood City School District (“RCSD”), located in the San Francisco Bay Area, serves approximately 7,700 K–8 students across 16 elementary and middle schools. But those numbers are declining, and the district is having to respond quickly and strategically in the face of a forecasted \$10M operational budget shortfall over the next three years.

When RCSD originally called in B&D in 2016, the plan was to complete a typical modernization project with B&D providing implementation services. Between gentrification, rising housing costs, and the impact of charter schools taking away as many as 1,000 students from the enrollment area, the district has been facing significant budget reductions. B&D recommended pausing modernization projects, taking a step back, calling in a demographer, and then rethinking the entire program—because we all recognize the problem of modernizing a facility only to close it when there are not enough children to fill seats. In the case of RCSD, the district may consolidate or repurpose campuses.

To help RCSD stave off the worst impacts of a declining budget as it tackles a necessary compression, B&D has begun advising the district and conducting a variety of studies. Those studies might include:

- An enrollment analysis
- A facilities assessment
- A capacity analysis for each site
- A forecast of what modifications can be made to each site to accommodate changes in enrollment
- An analysis of the district’s geography (including availability, access for students to travel, etc.)
- An analysis of specialized education programs (e.g., language immersion programs)

B&D will provide options and recommendations to help RCSD bring its sites up to a fuller capacity. B&D will also manage the design of the eventual projects, to aid RCSD in making smart investments.

The issue of compression is not unique to California's Bay Area. Housing inventory has become inaccessible for young families across the country. Meanwhile the conversation about how charter schools impact the system continues. Programs responding to compression are difficult, but they are navigable. RCSD, fortunately, is now on a path to success.

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## What Has B&D Been Up To Recently?

In recent months, B&Ders have presented at and attended a number of K-12 conferences to engage with the industry and continue growing as professionals. Highlights include:

- **Greg Smith** (Austin) co-presented “#AISDFuture—Building It Together” at A4LE Southern. View the full presentation [here](#).
- **Beth Penfield** (DC) moderated the panel “School Building and Citizenship: How Can School Facilities Be Leveraged As Broader Community Assets to Enhance Citizenship?” at A4LE Northeast. View the full presentation [here](#).
- **Kelly Connelly** (Baltimore) facilitated a [learning tour](#) of Fort Worthington Elementary/Middle School and a discussion with our Baltimore City 21st Century Schools Program as part of A4LE Northeast. The talk was titled “Beyond Bricks and Mortar: Interactive Ways To Involve Communities In Addressing Unique School Modernization Circumstances.”
- **Ty Specht** (Northern California) attended A4LE and provided thoughtful and fun updates over Twitter through #Top3A4LE. Follow him [@Mr\\_Ty\\_K12](#).
- **Shilpa Khatri** (DC), **Jeff Bonvechio** (DC), and **Greg Smith** attended the National Charter School Conference.
- **Ty Specht and Ola Gbadamosi** (Northern California) sat on panels at CASH (Coalition for Adequate Student Housing).



We have also been very excited to begin working with Falls Church City Public Schools on the [George Mason High School Construction Project](#).

In upcoming newsletter issues, look out for more conference engagement, our advisors' articles being featured in publications like *School Business Affairs*, *School Construction News*, and *Governing*, and exciting news of school openings across the country! In the meantime, check out [Sarah Pearlstein's twitter](#) to see progress photos of projects like Washington, DC's Murch Elementary School, and [Jenny Derry's brand-new twitter](#) to learn more about projects like Northern California's Evergreen Valley College.

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*B&D has three quarterly newsletters (Higher Education, K-12, and Venues). [Learn more.](#)*

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