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THE EFFICIENCY OF A LONG RANGE FACILITIES
PLAN IN AN ABBOTT SCHOOL DISTRICT

by
Nancy B. Knarr-Pascoe

A Thesis

Submitted in partial fulfillment of the requirements of the
Master of Arts Degree
of
The Graduate School
at
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Approved,

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ABSTRACT

Nancy B. Knarr-Pascoe
The Efficiency of a Long Range Facilities
Plan In an Abbott School District
2003/04

Dr. Dennis Hurley
Master of Arts in School Business Administration

ABSTRACT

This study investigated the efficiency of the Long Range Facilities Plan (LRFP) for the Millville School District and sought to determine, through the creation of inventories, the completed and in progress facilities projects, in addition to those that will not be completed by the close of the district's current LRFP. On-going personal communication with the district's facilities coordinator provided continual updates on the status of all facilities projects within the district. In addition, this study examined both the New Jersey Administrative Code (NJAC) (6A:26-8.1) and documentation made available on the New Jersey Department of Education's (NJDOE) School Facilities Web site to determine if the Millville School District followed existing guidelines and submitted proper documents to the NJDOE. The study also determined whether or not the current LRFP has met the district's facilities needs, as required by the NJAC (6A:26-8.1) and *Abbott v. Burke* (1997, May). The research revealed that overall not all facilities projects would be completed by the expiration of the current LRFP in 2005 and, moreover, that this plan did not leave enough time to complete all of the necessary facilities projects in a five-year time frame as it proposed to be accomplished. As a result, remaining projects will need to be carried over into the next 5-year LRFP cycle.

Acknowledgments

I would like to acknowledge and thank my mentor, Mr. Michael Calareso, Principal, Lakeside Middle School, for his support and assistance with this project and understanding throughout my internship experience. This is Mr. Calareso's second time for being my mentor. He was also my cooperating teacher during my student teaching in 1977. Mr. Calareso is an outstanding educational leader who is willing to apply educational change, turn educational theory into practice, and shows a tremendous amount of dedication to his staff and students. I have learned a great deal about leadership through observing him in action and am grateful to have the opportunity to work with him as my principal.

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Additionally recognized during this process is Dr. Dennis Hurley, my university mentor. His immeasurable knowledge of school leadership was especially helpful during my internship experience. I often refer back to the notes from Dr. Hurley's Finance and Accounting in School Systems class.

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Table of Contents

Chapter 1: Introduction.....	1
Focus of the Study.....	1
Purpose of the Study.....	1
Definitions of Terms.....	2
Limitations of the Study.....	6
Setting of the Study.....	6
Chapter 2: Review of Literature.....	10
Introduction.....	10
Review of the Problem.....	10
Review of Major Concepts Related to the Problem.....	14
Conclusion.....	18
Chapter 3: Design of the Study.....	21
General Description of the Research Design.....	21
Development and Design of the Research Instrumentation.....	22
Description of the Sampling and Sampling Technique.....	23
Description of the Data Collection Approach.....	23
Description of the Data Analysis Plan.....	24
Chapter 4: Presentation of Research Findings.....	25

Chapter 5: Conclusions.....	28
Implications of the Study.....	28
Implications of Study on Leadership Skills.....	30
Implications of Study on Organizational Change.....	30
Further Study.....	31
References.....	32
Biographical Data.....	45

List of Tables

Table 1 – Bacon Elementary School.....	35
Table 2 – Early Childhood Center.....	36
Table 3 – Holly Heights Elementary School.....	37
Table 4 – Lakeside Middle School.....	38
Table 5 – Memorial High School.....	39
Table 6 – Mount Pleasant Elementary School.....	40
Table 7 – Rieck Avenue Elementary School.....	41
Table 8 – Senior High School.....	42
Table 9 – Silver Run Elementary School.....	43
Table 10 – Wood Elementary School.....	44

Chapter 1

Introduction

Focus of the Study

This study examined the Long Range Facilities Plan (LRFP) for the Millville School District, which is a designated Abbott School District. The Millville School District submitted their facility needs to the State of New Jersey in 1999 through a LRFP that was required by law. The current LRFP concludes its cycle in 2005 and, according to the New Jersey Administrative Code (NJAC), (6A:24–8.1), 100% of all facilities construction in the Abbott school districts over this period will receive their funding through state aid.

Purpose of the Study

The purpose of this study was to determine (a) if the LRFP meets the district's facilities needs, and (b) if the LRFP has, since its initial adoption in 1999, complied with the NJAC. To that two-fold end, this study compiled data on completed facilities projects and projects that are anticipated to be completed by 2005. Research from this project provided information as to whether or not the approved facilities project needs, that were designated in the district's LRFP, have been satisfied according to the NJAC. On the basis of that information, the district administration was able to focus on those facility projects that were not completed by the expiration of the current LRFP. In all, this study analyzed the efficiency of the LRFP for the Millville School District.

Definition of Terms

Abbott v. Burke. A funding case decided by the New Jersey Supreme Court on June 5, 1990 (119 NJ 287, 394). Twenty-eight school districts in New Jersey were litigants in the original *Abbott v. Burke*. Two additional school districts were added in 1999 to bring the total number of litigants to 30.

Abbott District. A special needs school district—as defined by the New Jersey Statutes Annotated (NJSA), (18A:7–F:3)—and 1 of 30 impoverished, urban school districts in New Jersey.

The Americans With Disabilities Act of 1990 (ADA). An act passed in 1990 that established a clear and comprehensive prohibition of discrimination on the basis of disability.

Approved Long Range Facilities Plan. A plan approved by the Commissioner of Education to ensure that school facilities remain educationally adequate to support the achievement of Core Curriculum Content Standards (CCCS) over a 5-year period. An approved LRFP conforms to the requirements of the NJAC (6:23–1.1) *et seq.*

Cohort Survival Method. A chart used to show projected enrollments in a school district based on the number of births for a designated year.

Core Curriculum Content Standards (CCCS). The State Board of Education adopted the CCCS in 1996. At the time, the Board established educational standards that students would be required to meet in seven academic and five workplace readiness areas. The Board articulated common expectations for student achievement throughout all 13 years of public education in the following subject areas: (a) the visual and

performing arts, (b) health/physical education, (c) language arts literacy, (d) mathematics, (e) science, (f) social studies, and (g) world languages. The cross-content areas for workplace readiness included (a) career planning, (b) the use of technology information and other tools, (c) critical thinking/decision-making/problem solving, (d) self-management, and (e) safety principles. Standards are automatically reviewed every 5 years.

District Factor Grouping (DFG). A system that provides a means of ranking schools by their socio-economic status (SES). Group designations are based on available census information—information that identifies (a) the percentage of community members without high school diplomas, (b) the percentage of community members with some college, (c) community occupations, (d) population density, (e) income, (f) unemployment rates, and (g) poverty. Eight groupings are generated, including A—which designates the lowest socio-economic level—B, CD, DE, FG, GH, I, and J. Groupings allow comparisons to be made between districts with similar profiles for the purposes of both state aid packages and assessment information.

The Educational Facilities Construction and Financing Act (EFCFA). Passed in July 2000, the EFCFA initiated the state's large-scale school construction program.

Facilities Efficiency Standards (FES). Developed by the Commissioner of Education for elementary schools, middle schools, and high schools, the Facilities Efficiency Standards determine the extent to which a given district's construction project qualifies that district for state aid. The FES ensure that both instructional and administrative standards remain adequate to support the achievement of the CCCS.

Functional Capacity. The maximum number of students who can be housed in an academic institution, while guaranteeing that the delivery of programs and services allow for student achievement of the CCCS. Functional capacity is determined by dividing the adjusted gross square footage of a school building by the minimum area allowance per full-time equivalent students, given the grade-level of the students involved.

Gross Square Footage (GSF). The total square footage of a school facility.

Long Range Facilities Plan (LRFP). The documentary means by which school districts submit their facilities needs to the state. An LRFP must be submitted to the Commissioner of Education by a district pursuant to the NJSA (18A:7–G:4) and the NJAC (6:23–1.1) *et seq.* The LRFP must be approved by the Commissioner of Education in order for the district to be eligible for state facilities aid for construction projects.

Low-income pupils. Those who live in households with an income either at or below the most recent federal poverty guidelines, available on October 15 of the prebudget year and multiplied by 1.30 (NJSA), (18A:7–F:3).

New Construction. A school facilities project that builds new school facilities and/or makes additions to existing school facilities.

New Jersey Administrative Code (NJAC). The official publication of the Office of Administrative Law (OAL) that contains all effective regulations adopted by state agencies.

New Jersey Economic Development Authority (EDA). Established pursuant to the NJSA (18A:34–1B:1) *et seq.*, the EDA oversees and issues bonds for the construction of eligible and approved school projects.

New Jersey School Construction Corporation (SCC). New Jersey Governor James McGreevy established the SCC, a subsidiary of the EDA, in July 2002 to take over the design and construction of the Abbott schools.

New Jersey Statutes Annotated (NJSA). A compiled list of state laws.

No Child Left Behind Act (NCLB). Signed into law by President George W. Bush on January 8, 2002 that reauthorizes the Elementary and Secondary Education Act (ESEA) of 1965.

Rehabilitation. A school facilities project consisting of the reconstruction, remodeling, alteration, modernization, or repair of a school facility, without increase to the gross square footage of the school facility.

School Facility. Any structure, building, or facility used, in whole or in part, for academic purposes by a district or community provider. A school facility also includes supporting facilities used for treating wastewater, generating power or steam and other central services.

School Facilities Project. New construction used to either meet the housing needs of unhoused students or to rehabilitate school facilities in order to keep those facilities functional.

School Management Team (SMT). A school-based planning and decision-making team that includes the principal, teachers, and community members established pursuant to the NJAC (6A:24-1.3).

School Review and Improvement Team (SRI). Department of Education staff members assigned to work with Abbott districts to implement the New Jersey Supreme Court decisions pursuant to the NJAC (6A:24–1.3).

Temporary Classroom Unit (TCU). A modular unit approved for use, pending permanent construction under a district's LRFP.

Uniform Construction Code (UCC). Standard requirements for all school construction projects.

Unhoused students. The number of students in excess of the functional capacity of a school facility calculated pursuant to the NJAC (6:23–2.2(c)).

Limitations of the Study

Given that this study examined the facilities needs of the Millville School District, as delineated in the current LRFP, a list of completed and uncompleted facilities needs was developed. At this stage, though, it cannot be known (a) which of the remaining facilities needs will be met before the 5-year time frame expires in 2005, and (b) the available recourse to the district if all its facilities needs remain incomplete by the expiration of the current LRFP in accordance with the NJAC (6A:24–8.1) and *Abbott v. Burke*, May, 1997.

Setting of the Study

Millville, New Jersey encompasses an area of approximately 28.4 acres or 44.3 square miles. The town is located near the center of Cumberland County in the southern portion of the state. The Maurice River flows through Millville and empties into the

Delaware Bay. Woodlands and vacant land account for, approximately, 61% of the city, agricultural lands account for 8% of the city, residential areas, 10%, municipal, schools, recreational areas, water, sewers, streets, and the municipal airport, 13%, while commercial business and industry account for 8% of the city (Millville City Facts, 2003).

Colonel Joseph Buck, a veteran of the Revolutionary War, was the first to recognize the land with its ample forests and location on a river, and Buck drew up plans for the town in 1795. Lots went up for sale when the region was organized as a township in 1801, and, in 1866, the New Jersey state legislature officially incorporated Millville. A mayor-council form of government became the city's governing body until 1913, at which time a commission form of government took charge with the passage of the Walsh Act. Five commissioners were elected and the one commissioner with the highest vote total came to serve as mayor of the town. The commission form of government still exists in Millville today (Millville City Facts, 2003).

The total population of the city of Millville is 26,847. The ethnic composition of the city breaks down in the following way: (a) white, 76.1%, (b) African American, 15.0%, (c) Hispanic, 2.4%, (d) American Indian/Alaskan Native, 0.5%, (e) Asian, 0.8%, (f) native Hawaiian/other Pacific Islander, 0.0%, and (g) other races, 5.2% (US Census, 2000).

The educational attainments of citizens 25 years and over break down as follows: (a) those with less than a ninth grade education account for 11.3% of the population; (b) those with an education between 9th and 12th grades, no degree, account for 21.2% of the population; (c) high school graduates (including equivalency) account for 36.3% of

the population; (d) those with some college, no degree, 15.7%; (e) those with associate degrees, 4.7%; (f) those with bachelor's degrees, 8.1%; and (g) those with graduate or professional degrees account for 3.7% of the population. (US Census, 2000).

In terms of poverty, 15.2% of Millville residents live below the poverty level. Moreover, 12.5% of residents 18 and over live below the poverty level, while 21.8% of related children under 18 live below the poverty level (State Data Center, May 2002). The unemployment rate for the city of Millville stands at 7.3%. Thirty-five percent of children under the age of 18 live in one-parent homes and over 60% of school age children, classified as low-income students, receive free or reduced lunches in school. The median household income for the city of Millville is \$36,545. Given not only the average socioeconomic rank of Millville residents, the city's available occupations, its median family incomes, and the number of families living below the poverty level, but also the percentage of unemployment, the extent of urbanization, and the number of persons per household, Millville ranks as low-middle class. In addition, these statistics leave approximately 50% of Millville students classified as at-risk.

The New Jersey Department of Education introduced the District Factor Grouping System (DFG) in 1975. This DFG system provided a way of ranking school districts by their socioeconomic status. Ranking categories ranged from A—the lowest factor score—to J—the highest factor score—and are based on the following variables: (a) the percentage of adults in the district without a high school diploma, (b) the percentage of adults with some college education, (c) the median family income of residents,

(d) poverty rate, (e) unemployment rate, (f) population density, and (g) occupational standing. The Millville Public School District ranks in the District Factor B group since the community falls within the low 10% range of socioeconomic status. Since its creation, the DFG system has become a deciding factor in the *Abbott v. Burke* case and has been used to determine statewide educational aid.

The Millville School District is a Type II district, offering classroom instruction between preschool and grade 12. The Board of Education is comprised of nine, elected board members. The board also consists of four additional members from the sending school districts of Commercial Township, Lawrence Township, Maurice River Township, and Woodbine. Approximately 6,000 students attend the eleven schools in the Millville School District. These schools include The Child Family Center (for 3- and 4-year-olds and children attending pre-K); Bacon School (grades K through 5); Holly Heights School (grades K through 5); Mount Pleasant School (grades K through 5); Rieck Avenue School (grades K through 5); Silver Run School (grades K through 5); Wood School (grades K through 5); Lakeside Middle School (grades 6 and 7); Memorial High School (grades 8 and 9); Millville Senior High School (grades 10 through 12); and the Alternative School (grades 9 through 12). Grade 8 students will be housed at the Lakeside Middle School, once an addition is completed. The grade configuration at Memorial High School and Millville Senior High School will be determined when grade 8 students are placed at the Lakeside Middle School.

Chapter 2

Review of Literature

Introduction

This chapter reviewed literature on the development and implementation of LRFPs in New Jersey, as designated by the New Jersey Supreme Court and the New Jersey Department of Education (NJDOE). Literature on the Abbott School District of Millville Public Schools was particularly emphasized, alongside articles, studies, and directives from the New Jersey Supreme Court and the NJDOE in order to provide a rationale for this project.

Review of the Problem

Castaldi (1994) asserted that in planning educationally effective school buildings, educators need to consider the issue of curriculum development. That is, before an architect designs a school building, local school officials should acquaint themselves with specific information related to the curriculum. According to Bohi (1999), a dire need currently exists for facility improvements in New Jersey's public schools, but how to effectively achieve such improvements remains a point of contention.

In 1999, New Jersey Governor Christine Todd Whitman laid the groundwork for one of the largest school building programs in New Jersey's history. The proposal, stimulated by the New Jersey Supreme Court's decision in *Abbott v. Burke* (1997), was to finance more than \$5 billion in public school construction over the following decade. In the decision, the New Jersey Supreme Court directed the Commissioner of Education to

review the facilities needs of the 28 Abbott districts (two more Abbott districts have since been added) and provide recommendations concerning how the state should address those needs (NJDOE, 2003). Appropriate and alternative funding was also required to be included in the Commissioner of Education's review. The court found that the state must provide facilities for children in the Abbott districts—facilities that enable students to achieve a thorough and efficient education, as defined by the CCCS. Additionally, the court ordered that the quality of the facilities could not depend on the district's willingness or ability to raise taxes or incur debt.

The New Jersey Supreme Court also ordered the state to meet strict deadlines that required (a) blueprints from State assigned architects be completed by September 1999, and (b) construction to commence in the Abbott school districts by the year 2000. The strategy of New Jersey Governor Whitman's administration was to put forward a proposal that would address the facilities needs of schools in both urban and suburban school districts (Bohi, 1999). The program for public school facilities was established within the state building authority, and the authority then entered into contracts to construct the necessary school facilities. A limited number of styles and designs for schools would be available from which to choose and contractors were hired to build the model schools in bulk. The state expected that such a centralized program would eliminate the duplication of fees for the architectural and engineering design of common school features, and also be cost effective as a result of the centralized state purchasing of standard building materials and components.

Under the Whitman administration's plan, the building authority would issue shared revenue bonds to finance the entire state share of all projects needing funds throughout a given year. The state would then make annual debt service payments directly to the building authority; the authority would then use this appropriation to make payments on its revenue bonds. The state would cover all the costs of construction or rehabilitation in the Abbott districts, estimated at \$2.6 billion. Another 346 school districts would qualify for state aid, covering anywhere from 10% to 85% of the construction costs, depending on the districts' wealth and current eligibility for state school aid. For example, the 242 wealthiest school districts would qualify for 10% of their construction costs. Local districts would then finance the remaining share of the project costs after district voter approval.

However, school districts would qualify for state funding of approved construction only if those districts aligned their building plans to basic state models, thereby limiting the total amount of construction. Districts that received 50% or more in state debt service aid would be required to use the building authority, while districts receiving less than 50% in state debt service aid had the option of using the authority in their projects. Abbott districts, for their part, were required to use the building authority for all their construction needs. The administration under Governor Whitman contended that the building authority's hiring of engineers and architects could result in lower costs, as compared to the costs incurred by districts hiring their own professionals. Through using the authority for planning, financing, design, and construction, the state estimated that the savings would be as high as 25%.

The Whitman administration's plan, according to Bohi (1999), was contested at the time. Bohi pointed to several questions that arose in response to the plan, including, (a) would the spending outlined in the plan be enough to satisfy the Supreme Court mandate? (b) would centralized financing and construction management achieve the types of efficiencies that the state expects? (c) would building schools in a limited number of styles and designs result in so-called *cookie cutter* classrooms? and (d) are the model schools adequate to deliver sufficient programming to meet the CCCS?

According to a report entitled *School facilities: A challenge for New Jersey* (1997), neither current nor updated information was available on the physical condition of New Jersey's schools. In the report, the Public Affairs Research Institute of New Jersey found that a critical need existed for a statewide assessment of school building conditions and future needs to define the scope of the problem and provide a basis for a long-term statewide funding plan.

In 1997, the New Jersey Department of Education estimated that the statewide school facility needs were approximately \$5.3 billion. Of that amount, \$2.6 billion was earmarked for the Abbott districts and \$2.7 billion for the non-Abbott districts. A study conducted by the Vietta Group of Cherry Hill, New Jersey, claimed, though, that \$2.6 billion remained insufficient to rebuild schools in the Abbott districts. This study examined the facilities needs required to meet building codes and eliminate overcrowding, but did not include supplementary costs needed to meet (a) additional space requirements, including that for early childhood education, and (b) the CCCS. Moreover, the \$2.7 billion estimated for non-Abbott districts was based on an analysis of

reports from the 1995 Long Range Facilities Master Plans. While the statutory obligation of NJSA, (18A:33-1) established that school boards provide suitable facilities for all students in their districts, there remained a dire need for facilities funding (i.e., authority bonds) to partially finance projects in order to ease the tax burden in school districts (New Jersey School Boards Association [NJSBA], 1999).

Review of Major Concepts Related to the Problem

In order to effectively operate and improve schools, the availability of resources, which includes funding, remains critical. School budgets and the way schools are funded vary from state to state, and from school district to school district (Park, 2003). That is, different states utilize different formulas and systems for financing education. The goal of equity in school funding depends on effective strategies for closing the gap between the different local districts' abilities to raise revenues for their schools. Since local funds are generated, at least in part, on property taxes, less wealthy communities will be less able to raise funds for their schools—when compared to funds raised in wealthier school districts—leaving poorer children at a considerable disadvantage. Court battles have repeatedly determined that states need to be responsible for all education spending; even when their funding is only a minor increase to local budgets, states should not allow one district to spend vastly more than another (Park, 2003). Yet according to Hanushek (1997), critics contend that spending should not be correlated with academic achievement. In other words, no amount of funds deposited into the educational system will make a difference to education unless schools significantly change how they operate.

The New Jersey Legislature wrote and debated the facilities bill and set the total funding allocation for construction projects within the 30 Abbott districts at \$6 billion in 1998. On July 18, 2000, the Educational Facilities Construction and Financing Act (EFCFA) became law, and this law became the largest public works project in the history of New Jersey (“Schools Gear Up,” 2000). The New Jersey School Boards Association’s (NJSBA) executive director Edwina Lee stated: “[b]efore any financial assistance begins flowing from the state, school districts must complete long-range facility plans, have them approved by the state and, in many communities, obtain voter approval of the construction project.”

The EFCFA provided 100% funding for approved projects in the 30 Abbott districts and at least 40% in non-Abbott school districts. The legislation also mandated the fulfillment of prior efforts to develop an LRFP for the schools facilities needs throughout New Jersey. The five-year LRFP, which must be drawn up by every district as part of the New Jersey School Construction Initiative (NJSCI), will ensure that both the current and future needs of all students in the state will be met, with the goal that no child in New Jersey will attend school in a dilapidated, unsafe, or educationally out-dated facility (NJDOE). The EFCFA, therefore, allowed the state to borrow \$8.6 billion for school repairs, additions, and new facilities. Of that amount, \$6 billion would be applied to projects in the 30 special needs or Abbott districts, \$2.5 billion would be applied to non-Abbott projects, and \$100 million would be given to county vocational schools. In addition, the Act would provide state funding to cover a minimum of 40% of eligible costs in non-Abbott districts. By court order, the state would fully fund all eligible

construction costs in the 30 Abbott districts. Finally, the New Jersey Department of Education's *School Facilities* web site, www.nj.gov/njded/facilities/, provided a tool for school officials to utilize for the State Facilities Program.

According to NJSBA (2000), the new law emphasized planning, accountability, and educational adequacy, while requiring any school district applying for state construction funding to submit a 5-year plan to the NJDOE by December 15, 2000 (NJSBA, 2000). Abbott school districts were required to submit their LRFPs a year earlier, which was December 15, 1999. Submitted plans, as required by the Boards Association, needed to describe how the district would address its facilities needs, its projected growth enrollment, and the issues of health, safety, and educational requirements. Long Range Facilities Plan instructions and forms were located on the following NJDOE web site, www.nj.gov/njded/facilities/longrange/. In the NJSBA article, Lee argued in general, that "the need for this legislation has been clear for more than a decade," while pointing out that:

[t]he average school in New Jersey was built in 1952. That's nearly half a century ago – before educators placed such a great emphasis on areas such as technology, special education, and smaller class size. Since that time, enrollments have increased; while many school districts struggled to gain voter approval for expansions and repairs...[t]his legislation can benefit all communities. The strong focus on long-range planning, need and accountability should assure taxpayers that this massive undertaking is sound public financial policy. (p. 3)

Provisions in the bill included (a) a cost allowance—increased to \$138 per square foot from \$131 per square foot—through which the state would base its funding for new construction; (b) the opportunity for districts to file appeals for additional state funds if their eligible costs exceed the state cost allowance; (c) the opportunity for the state treasurer to designate facility construction programs that would serve as demonstration projects linking new construction with community development—a provision strongly supported by the NJSBA; (d) the opportunity for early childhood education facilities to qualify for funding; and (e) the recognition that the EDA would be responsible for construction and financing in the Abbott districts as well as in non-Abbott districts eligible for state funding of 55% (or more) of project costs.

By early 2001, acting Governor Donald T. DiFrancesco announced that the NJDOE had approved six Abbott districts' plans for school facility improvements totaling more than \$2.7 billion (NJDOE News, 2001). The acting governor vowed to invest school construction money quickly, efficiently, and properly (NJDOE News). The NJDOE then approved \$654 million in state funds to help finance more than 414 school construction projects in 172 non-Abbott school districts already completed or under construction. The NJDOE also approved the investment of \$260 million in state funds to help finance 71 school improvement projects ready to proceed to construction. Local voters in school construction referenda had already approved these projects, totaling \$643 million and involving 71 non-Abbott school districts. By 2003, over \$1 billion had been awarded for projects in the Abbott school districts and the 55% and over Non-Abbott grant agreements.

Conclusion

Decades of research have portrayed American public schools as deficient and in need of major reform and transformation (Nunnery, 1998). According to McNichol and Chambers (2003), three years have passed since New Jersey launched its \$6 billion school construction program aimed primarily at dilapidated schools in poor communities. Since then, one new school has opened in an impoverished district and 15 schools are under construction. In the suburbs, however, 140 new schools or additions are either open or under construction. McNichol and Chambers added that according to officials that the stringent supervision of the spending of state money by urban districts has kept them from making progress. A streamlining of the approval process is currently under way and should bring more construction.

From the outset, lawmakers were unenthusiastic about the court order to build hundreds of new schools in the 30 Abbott districts (McNichol and Chambers, 2003). In the suburbs, school boards freely design and build their own schools under the legislature's school-building plan, but in the Abbott districts, where the state pays 100% of the costs; lawmakers have instituted a strict oversight system. In the McNichol and Chambers article, Gordon MacInnes, assistant commissioner at the NJDOE overseeing the Abbott districts, pointed out that "[t]his was a piece of legislation premised on distrust for just about everyone in the Abbott districts" (p. 3). MacInnes also suggested that to win approval for a building contract, the Abbott districts must get endorsements from the NJDOE, the Department of Community Affairs, the Department of Labor, and the SCC. While contractors are certified, the state Attorney General's Office must review

contracts. Disagreements and miscommunications between those agencies often extend the approval process for a school design by weeks and even months. In the McNichol & Chambers article, MacInnes also concluded that less than half the money has found its way into construction projects anticipated in the 1998 Supreme Court order.

According to the Education Law Center (2003), the Abbott School Construction Program did not largely progress between 1998 and 2002. In July 2002, New Jersey Governor James McGreevey established the SCC to take over the design and construction of the Abbott schools, and as of June 2003, the SCC had taken over the development of 92 Abbott projects. As a result, one or more of the following has occurred: (a) contracts have been awarded for predevelopment work, (b) preliminary designs have been approved by the NJDOE, (c) architectural contracts have been awarded, (d) bids have been placed on the construction, and/or (e) a construction contract has been awarded. Information on New Jersey school projects was updated regularly at the SCC's web site, www.njscc.com/schools/default.asp.

Delays will contribute to rising costs according to Alfred McNeill, a retired construction industry executive appointed by the governor to head the school construction program (McNichol & Chambers, 2003). McNeill pointed out that the bidding process needed to begin anew because early in the program many potential contractors failed to meet state standards, leaving 93% of contracts unawarded. According to McNeill in the McNichol & Chambers article, due to a streamlined project approval process, the state this year has issued \$435 million in construction contracts.

In summary, the construction corporation expects to award contracts for about 50 schools or school additions in the Abbott districts by the end of 2003, with 100 new schools slated to be built by September 2005. School superintendents are currently optimistic that McNeill has resolved many of the problems that had initially slowed progress on the construction projects. McNeill now affirms that “[t]here will be a lot of building going on by 2005 and by 2005; you will have a lot of kids in new desks” (McNichol & Chambers, 2003, p. 3).

Chapter 3

Design of the Study

General Description of the Research Design

This study sought to determine (a) if the Long Range Facilities Plan (LRFP) for the Millville School District meets the district's facilities needs, and (b) if the LRFP has, since its initial adoption in 1999, complied with the New Jersey Administrative Code (NJAC, 6A:26). The code was adopted to ensure that educational facilities in the state remain safe, healthy, and educationally adequate to support the delivery of both thorough and efficient education, that which all students are entitled, as defined in the Core Curriculum Content Standards (CCCS).

The research in this thesis focuses on Subchapter 8 of the NJAC, entitled "Substandard School Facilities." The NJAC (6A:26–8.1) provides provisions for the accommodation of students in substandard school facilities. According to this section of the NJAC, substandard facilities are defined as (a) all on-site facilities that have yet to receive either the approval of the New Jersey Department of Education (NJDOE) for meeting all requirements vis-à-vis permanent school facilities or the approval of local municipal construction officials and sub-code officials for meeting State Uniform Construction Code (UCC) requirements at the time the facilities were constructed or altered, (b) all off-site facilities provided by local district boards of education or approved private schools for the disabled for use by public school students, (c) all facilities neither planned nor constructed as school facilities, though rented or leased from private owners by local district boards of education or approved private schools for the disabled, and

used as school facilities by public school students, and (d) all temporary classroom units (TCU) installed on existing school sites, whether or not those units function as part of a school facilities project.

A qualitative design was used in this study. Data derived from the LRFP for the Millville School District, the NJAC (6A:26–8.1), and the NJDOE’s *School Facilities* web site were compiled to support the information obtained from interviews with the facilities coordinator of the Millville School District regarding completed facilities projects, facilities projects in progress, and facilities projects anticipated to be completed by 2005 in the Millville School District. In addition, for each building in the school district, a rubric was generated in order to delineate facility projects anticipated to be completed by 2005, facility projects in progress, and facility projects that would not be completed by 2005. The number of complete and incomplete facility projects as illustrated in the inventories were then compared to the district’s LRFP.

Development and Design of the Research Instrumentation

The NJDOE’s *School Facilities* web site was reviewed to determine if the district followed all procedures for filing an LRFP to the Commissioner of Education. Additionally, a review was made of the NJAC (6A:26–8.1) to determine which provisions would be made for the accommodation of school students in substandard school facilities. Finally, inventories were made of completed, in progress, and non-completed facilities projects for each of the 10 school buildings in the district. Projects proposed in the district’s current LRFP required (a) building renovations in line with health and safety issues; (b) upgrades to heating, ventilation, plumbing, and electrical

areas; (c) compliance with the American Disabilities Act (ADA); (d) corrections to classroom size; (e) instructional area improvements; (f) upgrades to TCUs, and (g) additions to all school buildings. The data compiled from these inventories condensed all facility projects listed on the district's LRFP that were already completed, that were in progress, or those that would not be completed in the district by 2005.

Description of the Sampling and Sampling Techniques

This study used a purposive sampling technique given that the Millville School District employs a facilities coordinator whose job not only facilitates the use, construction, and maintenance of all school buildings, but also writes regular updates on the district's LRFP. The facilities coordinator was selected as the primary resource for this study because of this individual's direct knowledge and understanding of the issues under investigation in this research. In addition, the district's LRFP was utilized for documentation of proposed facilities changes, the NJAC (6A:26–8.1) for the regulations regarding facilities, and the NJDOE's *School Facilities* web site for facilities guidelines and documents were employed to gather data. All proposed facilities projects to be completed by 2005 for each school building were obtained through an inventory of the LRFP; analysis of the plan revealed the district's compliance with both the NJAC regulations and the guidelines found on the NJDOE *School Facilities* web site.

Description of the Data Collection Approach

This study used a direct data collection approach in order to obtain information from the facilities coordinator, the NJDOE's *School Facilities* web site, the LRFP and the

NJAC 6A:26–8.1 documents. Guidelines and documents from the NJDOE’s *School Facilities* web site were analyzed in order to determine whether the district completed the correct forms and submitted them to the NJDOE in accordance with the NJAC (6A:26–8.1). Over a five-month period, direct contact was made with the facilities coordinator on a weekly basis to keep updated on the progress of the facilities projects in the Millville School District. Details of those exchanges were documented for this study in order to compile current data on (a) completed facilities projects, (b) facilities projects that were in progress, and (c) facilities projects that would not be completed by the expiration of the district’s LRFP in 2005.

Description of the Data Analysis Plan

To analyze the data, inventories were developed through interviews with the facilities coordinator; the inventories detailed complete, in progress, and incomplete facilities projects within the Millville School District in order to provide a full accounting of (a) that which has or has not been addressed in the district’s LRFP, and (b) whether or not the LRFP functions in accordance with the NJAC (6A:26–8.1) and the NJDOE’s *School Facilities* web site documents. Through the facilities coordinator’s views, an account was made of the district’s options for incomplete facilities projects at the expiration of the LRFP in 2005.

Chapter 4

Presentation of Research Findings

Research for this project was carried out over a five-month period, between July 2003 and November 2003, in the Millville School District, during which time, direct communication with the facilities coordinator took place on a weekly basis. The New Jersey Department of Education's *Facilities Management Planning Guidelines*, drawn from the NJDOE's *School Facilities* web site, provided additional data for this research.

The developmental process for the LRFP consisted of the following procedures. First, a facilities advisory board, comprised of district parents, teachers, administrators, and community members, met throughout the process in order to discuss facility needs with each school's principal. Second, in consultation with the CCCS, discussions were held with principals and supervisors in order to determine educational adequacy needs for school facilities. Through a series of facilities condition assessments conducted in 1998, both the physical condition and the educational adequacy of each school were evaluated. These evaluations defined the state of technological readiness for each building, using the district's technology plan as a focus.

Next, enrollment projections were computed for the district using the cohort survival method, as required by the NJDOE guidelines. Enrollments were projected for five school years, between 1999 and 2004. Because the NJDOE did not notify Abbott school districts about LRFP one-year extensions, enrollment projections for 2005 were not added to the original calculations. In general, enrollment projections were calculated to determine if the educational capacity for district facilities remained adequate for the

coming five-year period. Finally, the district used the information from the facilities evaluations, the projected enrollments, and the educational program review to develop a five-year facilities plan.

The district's plan was to renovate the oldest schools first, including, Bacon, Memorial, and Wood, schools built between the early 1900s and mid 1900s. Memorial high school would serve as the temporary home for small elementary facilities during the renovations period, given that the extent of the work would take longer than the summer vacation. Some projects, though, would be completed in relatively short periods of time, allowing students from those schools to remain in their own building. Any project projected to cost under \$500,000 went to bid by the district and did not go through the SCC. In general, many of the existing school facilities needed to be renovated in order to meet building codes. For example, Bacon, Memorial, Senior High, and Wood schools needed elevators in order to comply with the Americans with Disabilities Act (ADA). Across the district, many schools needed wider doorways under the ADA code.

A facilities needs survey was completed by all building principals in the school district prior to the development of the LRFP. From this survey, the facilities coordinator finalized the LRFP according to the NJAC, which made "[p]rovisions for [the] accommodation of school students in substandard school facilities" (6A:24-8.1). The final plan estimated student enrollments at 5,716 students for the 1998–1999 school year and 5,540 students for the 2003–2004 school year. The estimated cost for facilities upgrades in the plan was \$76,475,175. The average age of the district's school buildings was 45 years old and the average age of additions was 29 years old. The existing gross

square footage (GSF) was 781,500, with a demolition GSF at 0, since all facility projects were renovations of, or additions to, hand spaces. The GSF of new construction was 84,617 and the proposed total GSF was 866,117. The NJDOE received the completed LRFP in January 1999 and final approval was given to the district in January 2000.

At the time of this research, Bacon Elementary School had completed 50% of its planned projects, and the facilities coordinator contended that additional projects would be completed before the 2005 deadline (See Table 1). The Early Childhood Center, purchased by the EDA for 8 million in December 2001, is scheduled to open in September 2004 (See Table 2). Holly Heights Elementary School had no completed projects (See Table 3). Lakeside Middle School, which had recently opened in 1999 after the renovation of an existing office building, had many projects left to complete before the 2004-2005 deadline (See Table 4). Similarly, Memorial High School had yet to complete any of its required facilities upgrades, though funding had been approved for all projects (See Table 5).

At the time of this research, Mount Pleasant School had four completed projects and seven projects with funding allocations, thus rendering them projects in-progress (See Table 6). The Rieck Avenue Elementary School had neither completed any of its projects in-progress where funding had been allocated (See Table 7), which is also true for the Senior High School (See Table 8), Silver Run Elementary School (See Table 9), and Wood Elementary School (See Table 10), which all have approved funding for their individual project upgrades.

Chapter 5

Conclusions

Implications of the Study

This research has shown that the LRFP has met the district's facilities needs, as required by the NJAC (6A:24-8.1), given that projects have been totally funded by the State of New Jersey in accordance with *Abbott v. Burke* (1997, May). The New Jersey Supreme Court identified health and safety as the areas in most need of urgent attention within the Abbott school district, and of the highest priority. Facilities projects designed to improve health and safety in the schools included new roofing, electrical system upgrades, window replacements, asbestos abatement, fire alarm system upgrades, structural repairs, boiler replacements, and general facilities upgrades to meet current codes, including ADA requirements. The data gathered during this study has revealed that all facilities projects listed in the district's current LRFP have been addressed and are either complete, in-progress, or in-progress by way of funding allotments.

The facilities coordinator in the Abbott district pointed out that the NJDOE had changed the name attached to these school upgrades in 2001. When originally developed by the NJDOE, facilities improvements were to be completed in what the state described as a *5-Year LRFP*. In 2001, though, the NJDOE changed the name of the project from the *5-Year LRFP* to simply the *LRFP*. The facilities director suggested that the name attached to the facilities plan was changed most likely because the NJDOE realized that it would be impossible to complete all school district projects within a five-year period.

Furthermore, by 2001, the NJDOE altered its definition of a project in-progress to include all projects listed in the district's LRFP with the approval of funding for said project. In the Abbott school district, for example, while the oldest schools had not been the first to complete their repairs and upgrades, as the district had wanted, because funding had been approved for those projects, they were labeled *in-progress*. In fact, numerous projects in the district as a whole currently remain at the funding approval phase, which again classifies these projects as in-progress, rather than advancing to either the under-construction phase or to final completion. According to the facilities coordinator, it would most likely take an undetermined number of years beyond the 2004-2005 deadline for all in-progress projects to be completed. The facilities coordinator also implied that in the next LRFP, a new listing of facilities needs for the district would be compiled and submitted to the NJDOE. Consequently, the next LRFP would significantly lengthen the list of in-progress projects by adding new projects to old projects approved for funding, though not actually funded and under construction.

An ever-expanding list of facilities needs in addition to future commitments to funding allocations might, as a result, weaken the political will to make good on funding approvals for projects in the Abbott school district and possibly call the future of those projects into question. For example, the estimated total cost of the original LRFP was \$76,475,175, and the projected State share of this total amounts to \$43,942,643. Although the NJDOE has approved 100% funding for the district's projects, by the time of this research, the following amounts have actually been released to the district: \$3,421,421 for architectural design fees, \$11,200,306 for construction costs, and \$358,865 in grants

from the NJDOE. While funding shortfalls impact the progress of school projects, administrative contributors to the next district LRFP should also recognize that many additional factors have slowed the progress of the facilities upgrades, such as, change order delays and the need to acquire permit approvals.

Implications of Study on Leadership Skills

Valuable interpersonal, written, and oral communication skills, along with time management skills and organizational skills, were gained throughout the course of this project. Working with administrative and instructional leaders in the school district, further developed facilitative leadership skills. Additionally, educational theory was put into action by involving key stakeholders in the attempt to analyze the efficiency of the LRFP in the Abbott school district. Finally, knowledge was gained of the types of situations with which school administrators contend on a daily basis.

Implications of Study on Organizational Change

Despite the positive connotations associated with the development of LRFPs within school districts, the best intentions of politicians and school administrators may come into question if funding needs are not delivered during the course of the five year facilities upgrades plan. Consequently, the NJDOE may need to consider productive strategies to facilitate the flow of funds for their planned repairs and upgrades within the Abbott school district.

Further Study

As the time approaches for the development of a new district LRFP in 2005, concerns have been raised about a much larger list of in-progress projects being added to the facilities needs outlined by the current LRFP. Future research could then chart the progress of both the completed and in-progress projects—i.e., those actually under construction—within the school district. In addition, a study on the effects of completed facility improvements in the district could be implemented in order to gather evidence on whether or not completed facility improvements positively impact student achievement, as mandated in the *Abbott v. Burke* decision and the more recently enacted *No Child Left Behind* Act.

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Table 1

Bacon Elementary School

Projects complete	Projects in-progress
1. Roofing	1. Additions to the cafeteria
2. Electrical upgrades	2. Additions to the office
3. Fire-alarm system upgrades	3. Interior renovations to
4. New switchgear electrical	classrooms
service from the street	4. Electrical and plumbing
5. New egress lighting	upgrades
6. New classroom outlets	5. Small group instruction
7. Sub-panels for outlets	classrooms
	6. Upgrades based on ADA
	requirements
	7. Site work

Table 2

Early Childhood Center

Projects complete	Projects in-progress
No completed projects	Early childhood center in an existing two-story office building (with 12 room addition)

Table 3

Holly Heights Elementary School

Projects complete	Projects in-progress
No completed projects	<ol style="list-style-type: none"> 1. Electrical and plumbing upgrades 2. Upgrades based on ADA requirements 3. Interior renovations to classrooms 4. Site work

Table 4

Lakeside Middle School

Projects complete	Projects in-progress
1. Roofing	1. New addition to cafeteria
2. Rehabilitation of existing facility	2. Sidewalks
	3. Curbs
	4. Basement leak
	5. New gymnasium
	6. New auditorium
	7. Site work

Table 5

Memorial High School

Projects complete	Projects in-progress
No completed projects	<ol style="list-style-type: none">1. Electrical and plumbing upgrades2. Upgrades based on ADA requirements3. Addition to the media center

Table 6

Mount Pleasant Elementary School

Projects complete	Projects in-progress
1. Electrical upgrades	1. New HVAC system
2. Fire-alarm system upgrades	2. Electrical and plumbing upgrades
3. Intercom upgrades	3. Addition to the gymnasium
4. Bricks repointed	4. Small group instruction classrooms
	5. Additions to the office
	6. Upgrades based on ADA requirements
	7. Site work

Table 7

Rieck Avenue Elementary School

Projects complete	Projects in-progress
No completed projects	<ol style="list-style-type: none"> 1. Electrical and plumbing upgrades 2. Upgrades based on ADA requirements 3. Interior renovations to classrooms 4. Addition to office 5. Small group instruction classrooms 6. Site work

Table 8

Senior High School

Projects complete	Projects in-progress
No completed projects	<ol style="list-style-type: none">1. Electrical and plumbing upgrades2. Upgrades based on ADA requirements3. Addition to cafeteria4. Addition of classrooms

Table 9

Silver Run School

Projects complete	Projects in-progress
No completed projects	Roof repair

Table 10

Wood Elementary School

Projects complete	Projects in-progress
No completed projects	<ol style="list-style-type: none"> 1. Small group instruction classrooms 2. Upgrades based on ADA requirements 3. Interior renovations to classrooms

Biographical Data

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