

Setting priorities for the funding of public facilities in Arlington

The issue of the County and the Schools setting priorities for future funding and construction of public facilities has been a topic of discussion in all of the Subcommittees.

The following is a recommendation that has grown out of those several separate discussions. It is designed to achieve **four** goals:

- Better coordination between Schools and County and among the several County departments
- Improve the opportunity for public participation and input into the early stages of facility planning
- Bring together the information about ongoing demographic and economic changes in the County and schools with the early planning and thinking about future facilities.
- **Identify long-range strategic issues and their implications for facility needs and provide a basis for prioritizing candidates for inclusion in a future update of the CIP.**

Recommendation: Establish a Facility Strategic Planning Committee comprised of two County Board and two School Board Members (with a rotating Chair) to set policy and give direction to a Joint County/APS Staff Team chaired by a designated senior person from the County Manager's office and comprised of the key facilities planning staff from APS and County departments. **The staff person designated to lead the effort must be senior enough to provide direction and leadership to the rest of the team and be charged with taking a longer strategic view of needs.**

The Facility Strategic Planning Committee would receive annual updates on demographic trends, development market projections and other factors **(including the natural aging of structures)** that might impact the need for future facilities.

Community involvement would be achieved through a County Advisory Commission similar to the current APS FAC. It could meet jointly as needed with the FAC. Opportunities for broader community input would be established.

In developing a master list of projected future needs, the four-person Committee would review those facilities currently including in the approved pipeline (e.g. the CIP) and also various adopted plans that are part of the Comprehensive Plan, and supporting documents of the Comprehensive Plan including sector and area plans that are adopted for different areas of the County.

The details of this recommendation would need to be worked out jointly by the County and APS, assuming the two Boards wish to proceed. A more detailed working draft has been prepared (attached) and could be included as an Appendix in the Final Report to further describe the DRAFT Needs Identification Process and priority setting framework.

Priority Setting Framework for Public Facilities

The Study Committee has raised several concerns about the manner in which County and School public facility needs are currently identified, prioritized, and funded. These concerns include, among others, a lack of knowledge by the community about what is needed and how specific projects are determined, a perspective that opportunities have been missed to use land more efficiently, and that the County and APS Capital Improvement Plans (CIPs) are not a designed to strategically guide long-term plans for public facilities. The following priority setting framework is intended to establish a:

- Framework for a transparent process;
- Clear basis and understanding for public facility needs;
- Method for monitoring emerging trends/needs; and
- Comprehensive planning approach.

Recommendations:

1. Create a formalized and integrated framework at three levels: elected officials; joint County and Schools staff; and community/commission, to achieve improved coordination and collaboration.
2. Establish a process to identify needs early, raise awareness of needs with the community, and strategize alternative solutions before the CIP funding prioritization and specific siting processes begin.

Framework

Facility Strategic Planning Committee

At the highest level of the priority setting framework, a joint County Board and School Board Facility Strategic Planning Committee should be established. This committee, comprised of 2 appointments from each Board, would be tasked with achieving improved coordination and collaboration across County and School projects. Annual Chair rotation between County and School Board members would be beneficial. Through regular meetings during the year (i.e. 3 – 4x/year), this Committee of the Boards, would monitor and give strategic guidance on public facility planning and funding processes. This would occur through:

- annual briefings on changing demographics, development projects, and real estate market performance, among other factors that may impact the County's population and economic growth;
- review of future facility needs;
- development of key strategies and aspirational themes that influence long-term public facility planning;
- review of current projects and schedules offering guidance on project adjustments (i.e. timing changes, confirming or endorsing project details) should the need arise, including guidance on potential formal actions needed by each Board;
- evaluation of project analysis for emerging facility project proposals (as part of the Needs Identification & CIP Funding Process outlined below) and trade-offs including consideration of co-located facilities;
- review of priority options; and
- input from staff, a commission-based working group, and the community.

Joint County and APS Staff Capital Improvement Team

Supporting the Facility Strategic Planning Committee, a Joint County/APS Staff team, chaired by a senior staff member within the County Manager's Office and comprised of the key facilities planning staff from APS and County departments, would coordinate the County and APS CIP processes including facility needs identification. This responsibility would be broad and would entail organizing the CIP process and community engagement processes. Through regular interaction, this team would:

- identify facility needs, analyze options to meet needs, strategize options to bundle compatible needs, and make recommendations on priorities and funding;
- coordinate/collaborate County and School projects, seeking partnerships where possible;
- monitor preparation and implementation of CIP;
- monitor development, demographic, and economic data and organize briefings for the Joint CB/SB Facility Strategic Planning Committee;
- oversee community civic engagement and communications related to public facilities; and
- coordinate a new commission-based working group focused on community facilities.

Community Engagement

Two objectives are identified: a commission-based working group and broad public involvement.

A County advisory commission would be established with a role similar to the Schools' Advisory Council on School Facilities and Capital Programs (FAC). This group could meet jointly with the FAC to provide input and guidance to the Facility Strategic Planning Committee on Countywide issues, such as

- key strategies and aspirational themes;
- facility needs
- project analyses; and
- consistency with adopted County & School policies.

Secondly, the Arlington community would have opportunities to learn about facility needs and give input on options to meet facility needs and funding prioritization.

Needs Identification & CIP Funding Process ("Phase 0")

Four steps are envisioned as part of the Needs Identification and CIP Funding process to ensure there is transparency in facility planning and to create opportunities for community input: Data input; Listing of Needs; Analysis; and CIP Prioritization. The Needs Identification Process would occur prior to any Siting Process. The community civic engagement process would allow for information sharing during each step and for enhanced public involvement generally during Steps 2, 3 and 4.

Step 1 - Data Input: Under direction by the Joint County and Schools Staff Facilities Team, each agency or department would develop a list of needs based on input from service providers, population/economic growth indicators, adopted policies and plans, and from County Board & School Board priorities. A report of the needs lists would be shared with the public.

Step 2 - List of Needs: A compiled list of needs would be prepared to address a long-term horizon, approximately 20 years. Needs would be identified by short-, mid-, and long-term priority to

contextualize the anticipated timing. The list would also indicate whether the need aligns with adopted policies and/or is included in the current CIP. In cases where a need is geographically specific, a general location may be given. This step would include an enhanced level of public participation with opportunities for community input.

Step 3 - Analysis: Once a need has been identified, staff may develop alternatives for how the need could be addressed. Options may range from building expansion, relocation of a program, a change in service level, to new construction. Options for new construction may entail rebuilding at an existing site or may require a new site, which would trigger the Siting Process. The analysis would also incorporate policy guidance from the Facility Strategic Planning Committee, such as opportunities for co-location. Once a recommendation for meeting a need is developed, the preferred option is eligible for inclusion in the CIP. This step would include an enhanced level of public participation with opportunities for community input.

Step 4 - CIP Funding Prioritization Process: As part of the funding prioritization process, fiscal considerations are a significant factor in determining which projects would be included in the 10-year CIP. Generally, projects in the near term CIP funding years (i.e. years 1-4) have progressed through prior CIP cycles. Projects identified for out-year funding (i.e. years 5-10) would come from the short- and mid-term priority needs list from steps 2 and 3 above. The School Board and County Board would each adopt their respective CIPs. Unfunded projects remain on the List of Needs to be reviewed again in future cycles. This step would include an enhanced level of public participation with opportunities for community input.