

# Closing a School Building: A Systematic Approach

## National Clearinghouse for Educational Facilities

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According to an American Association of School Administrators survey, 6 percent of school districts closed or consolidated schools during the 2008-2009 school year, double the rate of the previous year. Another 11 percent are considering school closings or consolidations in 2010-2011.

During the past year, school districts around the nation have announced major school closings. Here are some examples of school districts that have recently closed school buildings:

Kansas City, MO – 21 schools  
Detroit, MI – 21 schools  
Cleveland, OH – 16 schools  
Baltimore, MD – 13 schools  
Minneapolis, MN – 3 schools  
St. Paul, MN – 8 schools  
Anoka-Hennepin, MN – 8 schools  
Milwaukee, WI – 18 schools  
District of Columbia – 20 schools

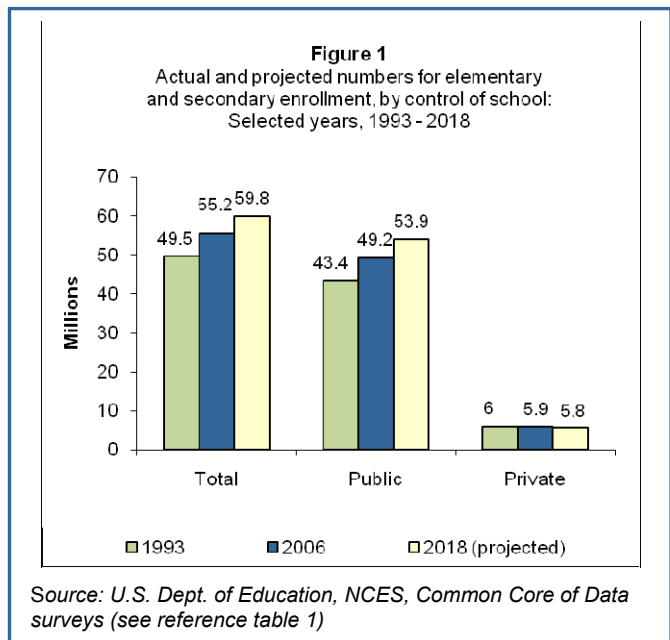
For many of these districts, additional closings are anticipated in 2011 and beyond. For example, the Detroit Public Schools will close nine more schools in 2011 and four more in 2012.

This significant number of school closings across the nation is the first since the 1980's, when enrollments decreased dramatically due to the end of the "baby boom" era. Three main reasons are driving this latest round of school closings:

1. Enrollment decreases
2. Economic downturn and budget deficits
3. School choice

During the past decade, total enrollments in elementary and secondary schools have increased nationwide. Most Southern and Western states have experienced significant increases, with lesser increases in the Midwest and Northeast. These increases created a demand for new and renovated facilities to house students.

According to data from the *Digest of Educational Statistics*, total enrollments in PK–12 increased 11.5% between 1993–2006, with public school enrollments increasing 13.4% and private schools decreasing slightly by 1.2% during this period. The same data projected total enrollments to increase an additional 8.3% by 2018, with public school increasing 9.5%, and private schools decreasing 1.8% during this period. These data are displayed in Figure 1.



Public school enrollments are projected to increase in 34 states and the District of Columbia, and decrease in 16 states. Total enrollments are expected to increase 18.0% in the South, 14.7% in the West, 0.3% in the Midwest, and decrease 5.4% in the Northeast by 2018.

Significant increases of more than 15% are projected for nine states, with Nevada and Arizona expecting increases over 49%, and Texas by 32%. The most significant decreases of 11.5% and 9.0% are projected for Rhode Island and New York, respectively.

Most of the increases are a result of higher elementary (PK-8) enrollments. These higher elementary enrollments will offset expected decreases at the secondary (9-12) level. Students at the secondary level

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are part of the “baby boom echo” generation, which are the children of the younger “baby boom” parents.

Secondary school enrollments are projected to decrease in 38 states for the period of 2006-2012, and in 25 states for the period of 2006-2018. Decreases are expected to occur in all states in the Northeast, Midwest, and most states in the South during the 2006-2012 period. Decreases for the 2006-2018 period are expected to occur mainly in the Northeast and Midwest, where 17 states will experience declines. Urban districts in these two regions will be especially impacted.

In contrast to enrollment increases, financial support for all school districts is decreasing. The national recession, which began in 2007, has significantly impacted state and local budgets. Decreased revenues from taxes, fees, and reduced federal funding, less return on investments, and increased cost to continue services, have resulted in significant budget deficits. As a result, government units at all levels are being forced to reduce funding for education,

In a March 3, 2010 article in *Education Week*, it was reported that half of the states are expected to reduce funding for 2011, in addition to the reductions they have made since 2007. Examples cited in the article include a 15% reduction in New Jersey, 6.4% in Virginia, and a \$3 billion reduction in California. These reductions in turn will force reductions at the local school level.

In the 1980's, declining enrollments were the main reason for closing schools. Today, along with the enrollment trends and economic forces, the issue of school choice is a significant factor in some sections of the nation creating the need to close schools. Parents today have a greater array of options with charter school, voucher, and open enrollment programs. The impact of these programs is especially evident in the Detroit, Milwaukee, and Minnesota closures. In Detroit, over 40,000 students attend schools outside the public schools. Charter schools and open enrollment were cited as reasons for closing schools in Minnesota districts. The Milwaukee Public Schools (MPS), however, provide the best example of the impact of these programs, as described below.

Milwaukee has more options available to parents than any other district in the United States. Its voucher program, which is the largest in the nation, and permits funding for parochial schools, has grown from 1,631 students in 1997 to 21,062 in 2009. There are two suburban exchange programs (one is open enrollment) that have grown from 5,547 in 2000 to 7,602 in 2009, and are projected to grow to 9,762 by 2014. Finally,

Milwaukee has 15 charter schools operated by the City of Milwaukee and the University of Wisconsin-Milwaukee, whose enrollments totaled 5,440 students in 2009. Combined with normal enrollment decreases due to fewer births, the enrollment in MPS has decreased from 107,043 in 1997 to 90,046 in 2009, and is projected to be 83,237 by 2014.

Closing a school is one of the most difficult and emotionally charged experiences for school district personnel and school communities. Because the school is seen as an important asset in a neighborhood, the closing of that asset is seen as a devaluation of the community. In many cases, rancor persists well after the closing, and many times the residents leave the district because they feel that the district has abandoned them.

Closing a school is not a single process. It consists of four distinct processes:

1. Decision to close
2. Closing the building
3. Maintaining the building
4. Disposition of the building

Each one is different and requires adequate input and planning in order for each to be successful.

### **Decision to Close**

Ideally, a decision to close a school should be made as early as possible in the school year, but no later than December. There are several reasons:

1. It will permit parents and students adequate time to choose a new school or get a new assignment if the district has a defined student assignment process.
2. It will provide adequate time to plan and execute the actual closing of the building (the second of the four processes).
3. It will permit the financial impacts to be included in the annual school district budget. There will be both additional costs and savings that need to be identified for that school.

When a district builds a new school or renovates an existing building, there is usually a comprehensive community involvement process used. Closing a school should also include a similar process. Adequate time to conduct this process is important so that all relevant information can be examined and included in the deliberations. This process must have integrity above all

else. Districts should seriously consider hiring an independent consultant to assist them in this effort. The consultant should be an integral member of the district's team in the same manner as a design professional would be when building or renovating a school.

How do you know that your process has integrity? In a 2005 study completed by Hayes Large Architects for the Milwaukee Public Schools, integrity was defined by addressing three questions:

1. Is the data **accurate**? Does it measure what it says it measures? If so, it has validity.
2. Is the process **reliable**? Can the process be used in other settings with similar data and get the same results? If the proposed process has been successful in other school districts, it will most likely be successful again.
3. Is the process **defendable**? If there is positive response to the first two questions, then it can be defended in response to those who question it.

In some instances, integrity flows from guidelines developed by a state. A good example is North Carolina, where the State Board of Education has developed a school closing handbook. This handbook is intended for local school districts to use in their deliberations, and identifies the types of information that should be considered prior to closing a school. It also provides the local district with a checklist as a quick reference guide.

The community involvement process should involve a full range of internal and external constituents. It should include focus group meetings with community members representing service, local, political, social service, and civic organizations, as well as large group sessions with neighborhood residents. The goal of these meetings is to solicit input regarding the criteria to be considered in the decision-making process. In addition, any framework that is developed should be based on the community's input and shared with them.

While each community involvement process is unique, there are some common factors that are usually considered:

- Building Adequacy and Condition
- Enrollments (both historical and projected)
- Student Population Characteristics such as ethnicity, special needs, free and reduced lunch, English Language Learners, etc.
- Budget and Financial Consideration
- Learning Climate
- Academic Performance
- Special/Innovative Programs
- Transportation
- Proximity to other schools

Each factor can then be applied to all of the schools as part of the decision-making framework. Once the proposed list of schools is identified, the community again must be involved to explain the rationale for their inclusion.

Since reducing budget deficits is being cited as one of the principal reasons for the current series of school closings around the nation, what are the financial impacts that would result from this action? Because costs and programs vary considerably by district and individual school, a specific cost savings cannot be identified. Generalized costs savings can be determined and used for planning purposes based on a specific district, such as Milwaukee. These cost savings must include both the savings from the closing and the costs to close and maintain the facility. Using data from Milwaukee, the net cost savings would be approximately \$500,000 for an elementary school, \$1,000,000 for a middle school, and \$2,000,000 for a high school. Other districts may realize more or less savings as they calculate impacts on an individual school basis.

Most of the savings result from non-classroom personnel costs which would no longer be required. Generally these positions include principals, assistant principals, clerical staff, food service, and custodial personnel.

Teaching staff is usually not included because the impact district-wide is based on collective bargaining agreements, retirements, and personnel who annually leave the district. At the high school level, some personnel costs associated with athletics and other extracurricular activities may be included in cost savings.

All personnel savings will depend on the individual school programs and district grade organization. In addition to any personnel savings, budget reductions will result from reduced utility cost (60% factor), infrastructure maintenance cost (90% factor), budgeted capital maintenance projects, reduced rubbish and shredding costs, and all supplies.

Offsetting these savings, the community will need to budget for costs associated with maintaining the building after closing, including daily building checks, minimal utilities (40% factor), and security costs. In addition, one-time costs for packing/unpacking by the school staff,

and costs for moving furniture, equipment, and supplies need to be included.

### ***Closing the Building***

Once the decision to close a school has been made, the second of the four processes begins – closing the building. Closing a school building requires as much planning time as opening a new or remodeled facility. Districts considering closing schools should develop a checklist of tasks and responsibilities that can be used by both the school and appropriate central services areas. This checklist can be developed prior to a decision to close so that it is available as soon as individual buildings are identified. This document should be considered a “living” document that is updated annually based on newly identified tasks or issues encountered during the closing process. It should list each task required, who is to perform or coordinate the task, where to go for assistance, and the contact person to provide the assistance. Although the majority of the tasks will be the school’s responsibility, all district non-school staff will be involved as well. A good example of such a document is from the Milwaukee Public Schools. Their document contains over 75 separate tasks that must be completed before the end of the school year. The document is a product of their ten-year experience in closing schools. (See Appendix A)

The staff and students in a school that is closing may be experiencing low morale, loss of respect, and other emotions. As such, it is imperative that their final year in the building be made as special and meaningful as possible. For staff, they need to know that they are appreciated. Activities to accomplish this include:

1. Reduce the number of commitments (e.g. meetings) outside the normal school day. This will assist in staff cooperation.
2. Assist staff in preparing for the interview process by having interview and reassignment process sessions.
3. Continue to provide as many extracurricular supervising opportunities as they have had in the past.
4. Continue to emphasize trust in them and recognize achievements on a regular basis.

For students, classroom activities must remain constant and with high expectations. Some activities for students include:

- Special field trips and activities to reward good behavior and academics.

- Fun Fridays or other weekly activities to allow for a break in schedule that are unique to students in the last class.
- Arrange field trips for students to visit other schools with their parents.
- Continue as many extracurricular activities as possible.
- Celebrate every accomplishment.

Both staff and students should create activities to celebrate the school, such as designing a special t-shirt for the last class. Provide the shirts to all students and staff and set a day of the week for everyone to wear them to establish an “esprit de corps” at the school. Other memorabilia such as cups, sweatshirts, etc. can be shared with parents and community members to celebrate the school. Finally, create a “final celebration” at the end of the school year by involving students, staff, and parents.

While the bulk of the tasks associated with closing a school are going to occur at the end of the school year, there are activities that begin earlier. Below, this suggested chronological sequence serves as a guide for such activities. The calendar for this example is based on a decision to close in December.

#### **December/January**

- Begin identification, inventory, and relocation of items with archival, historic, or artistic value. Examples include awards, trophies, plaques, photos or artwork. Place in a central location and secure.
- Identify all current adopted textbooks and supplemental resources by grade level. Packing will occur later.
- Begin inventory process of all furniture and equipment by classroom, documenting overhead projectors, textbooks, supplies and technology related equipment like computers, printers, and scanners. Identify by description, brand and model (e.g. Dell GX270).
- Begin scrapping items throughout the building such as broken furniture and equipment, obsolete or broken supplies, textbooks, and files. Begin to take personal items home. Place excess furniture and equipment in a secure central storage area when no longer needed. Custodial staff can order extra pickups as required.



- Develop a Memorandum of Understanding with appropriate bargaining units for required activities related to school closing.

### February

- Cancel or terminate contracts with outside vendors effective at the end of the school year.
- Assist parents/students in selecting a new school as part of the student assignment process.

### March

- Put out a call to district sites to submit requests for surplus furniture/equipment from closed school.

### April

- Make arrangements with finance office and receive written authority for key staff to remain throughout the summer, and funds to cover their salaries, including special payroll processes required. Key staff may include principal, head secretary, accountant, and technology coordinator.
- Determine records retention requirements for student, staff, and financial.
- Identify furniture and equipment to be made available to district sites and establish priorities for distribution.

### May

- Close the library to permit the media specialist to complete full inventory of the collection and update all records.
- Inventory media equipment and retain in library storage. Confirm with technology coordinator as to status of computer-related items located in library.
- Cancel all newspapers and magazines.
- Schedule meeting with district finance office to review closeout of accounts, retention and auditing requirements. Schedule follow-up meetings as required.
- Inventory all financial records, both current and archived. Consolidate in central location at end of school year.

- Inventory building custodial equipment and supplies. Coordinate relocation with appropriate district staff.
- Inventory all staff files, both current and archived.
- Assist staff with reassignment process.
- Inventory park and recreation equipment and supplies. Coordinate relocation with district staff.
- Inventory all student records, both current and archived. Confirm retention requirements.

### June

- Complete all inventories.
- Close out student records. Forward appropriate records to student's new school of assignment. Pack and relocate all student records to remain in file cabinets in vault.
- Receive all keys from the staff, and have them sign a form indicating keys returned. Organize keys in case in vault. Keys for furniture to be taped in bottom drawer of unit. Keys for built-in cabinets should be tagged by room number and kept with room key.
- Keep alarm cards and notify facilities staff when access can be deactivated. Alarm card will be reprogrammed for new location.
- Pack all assessment and testing materials and return to Central Services.
- Pack all curricular materials and textbooks. Organize and label by subject area.
- Pack all special education equipment, records and IEP's. Forward records and IEP's to new school assignment. Remainder should be returned to Special Education supervisors in Central Services.
- Technology coordinator should clean hard drives on all existing computers of personal information and prepare units for redistribution. Relocate all technology-related equipment to secure area and maintain inventory.
- Remove all appropriate items from asset management systems.
- Request final audit.
- Complete outstanding work orders.
- Complete evaluations for all staff.

## July

- Finalize all payments and purchase orders.
- Process miscellaneous payroll information.
- Complete all end-of-year budget items.
- Complete final audit.
- Pack and label all financial records and relocate to secure area.
- Re-key all secure storage areas.
- Shut off MC equipment and telephones, school phone number, and an appropriate message for a closed building with a point of contact for information. (One phone will be kept functional in custodian's office and modem will be kept on for gas meter. Security system and elevator phone (if applicable) will also remain operational.)
- Contact election commission to inform them of closure and arrange for pick-up of voting equipment.

At the end of the school year, the facilities staff will start its protocol to close and secure the building during the summer. A final cleaning of the building will be completed, including cleaning and disinfecting all toilets and locker rooms, sweeping all rooms, cleaning out lockers, and disposing of trash and garbage. Extra pickups should be scheduled for trash and shredding containers since there will be a greater amount than during a normal summer cleaning.

Arrangements should be made to identify and remove all hazardous materials and chemicals for disposal in accordance with appropriate regulations. In addition, the appropriate craftsmen will need to shut off plumbing, water, and gas to the kitchen equipment, air conditioning units, and other areas of the building not required for summer activities. All refrigerators and freezers throughout the building should be cleared and doors left open.

Other tasks include shutting down fans and motors; flushing valves at the valve, timer, and circuit breaker, and draining and opening boilers (unless it is a hot water system). Identify with tags which timers, switches, or valves have been closed or shut off. Finally, unplug all of the clocks, remove the flag, shut down the fire alarm system and enunciation printer, and make sure the emergency lighting is operational.

## Maintaining the Building

Upon completion of all of the school and facilities closing processes, the building is secured. This marks the commencement of the third process – maintaining the building. This process is one of the most important in ensuring that it can easily be reopened for another educational purpose, for leasing to another party, or to be held by the district for future use.

The best way to ensure future use is to make sure the building is maintained to the same standard as other district facilities. The building should be checked daily to ensure the proper temperature of 50 degrees Fahrenheit is being maintained. Since someone other than the former building custodian will likely conduct the daily check, a checklist should be developed and posted adjacent to the building alarm control panel or housed in a handbook in the custodian's office. Included on this checklist would be the following:

- Check exterior for open or broken windows and any sign of damage. Any damage should be repaired immediately.
- Check interior for water leaks and correct any that are found immediately.
- Check for graffiti and remove any found within 24 hours.
- Pick up trash or broken glass as needed.
- Establish regular schedules for grass cutting in the spring, summer, and fall, and snow removal during winter months.
- During the heating season, check boilers, pumps, air compressors, and other heating-related equipment. Record appropriate information depending on whether equipment is hot water or steam (see Appendix B for sample documents).
- Check tot lot weekly (if applicable) – tighten bolts, etc. as required.
- Check fire extinguishers monthly.
- Flush toilets and pour water down all drains as needed.
- Grease and oil motors and pumps that are used as needed.

These daily monitoring and maintenance activities have several advantages because they:

- Enable the building to be reopened with minimal expenditure of funds.
- Prevent the building from becoming an “eyesore” and impacting the surrounding neighborhood negatively – both from a crime or property value basis.
- Show the community that the district is a good steward of its physical and financial resources by not permitting a multi-million dollar building to deteriorate.

## Disposition of Building

The final process of closing a school is to determine the disposition of the building. If there was a recommended disposition included in the district’s decision to close the building, then it should be implemented. In Cleveland, for example, 13 of 16 buildings closed in 2010 were identified for demolition unless a realistic offer to purchase was received by the district. In most cases, however, there has not been any recommended action, thus creating a need to make that determination. Any decision should be the outcome of a deliberate and inclusive community involvement process involving as many sectors of the community as possible.

Making a decision on the disposition of a school building has long-term implications, and part of any process needs to include a historical context. In a December 2009 article in *School Planning & Management*

magazine, Paul Abramson, President of Stanton Leggett and Associates recounted his experiences from the school closing which occurred after the baby boom era where many buildings were sold, and when enrollments increased years later, they were no longer available to be reused. He cautioned that “It is a very shortsighted district that closes and disposes of any of its schools or property without serious consideration both of present

alternatives and future needs.” It is a caution that I concur with based on my experience in Milwaukee.

Between 1976 and 1982, the Milwaukee Public Schools closed 57 schools, 28 of which were subsequently reopened to accommodate new magnet programs that were part of the district’s compliance with its federal desegregation plan. The remaining 29 were demolished, sold, or given to other governmental units.

When enrollments increased in the mid-1990’s and required new schools, there was a lot of criticism by people with “20/20 hindsight” of the decisions made 15 years earlier to dispose of the buildings.

The school closing decisions after the “baby boom” era provide a wealth of information as to potential reuses for closed school buildings. During this period numerous articles and publications provide real-world examples. For example, the Council of Educational Facility Planners, International (CEFPI) dedicated their May/June, 1982 issue of the CEFPI Journal to closing and reuse. The National Clearinghouse for Educational Facilities ([www.ncef.org](http://www.ncef.org)) has information on potential uses, from the post-baby boom era to the present. These resources will be invaluable in the deliberations by the community and district because they provide examples of successful experiences and that historical context.



The process of determining the future of a school building varies in length and content depending on its location. Some states, such as North Carolina, require the building be offered to the state prior to any local decision. Other states, such as Wisconsin require that any school building older than 50 years be reviewed for historical significance prior to sale or demolition. Some districts have policies that require review of original purchase agreements for reversionary clauses. In all of these situations, several months

may be required in addition to the timeline set locally.

During the involvement process, a number of options should be developed for each facility. Pros and cons for each option should be developed including any potential financial impacts, if possible. Potential options include:

- Sales to another entity for educational purposes

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- Sale to another entity for an alternative use
- Lease to another entity for educational purposes
- Lease to another entity for an alternative use
- Retain for future use (mothball)
- Demolition of building and sale of land
- Demotion of the building and redevelopment of land by the district

The most contentious of these options may be the sale to another entity for educational purpose, especially if it involves existing charter or voucher schools. Many districts are reluctant to sell a facility to one of these entities because it is perceived as subsidizing the competition. This is especially true if their enrollments are one of the reasons for closing the building. In some cases, the district may have policy prohibiting such a sale. If so, the participants in the involvement process must be aware of that and any other policy that may affect their recommendation.

Since the participants determine or recommend a course of action for each site, the School Board should include public hearings as part of the deliberations. This will not only add transparency to their deliberations, but would enable participants from the community involvement

process to explain why a particular recommendation was made. The board can then take action on any or all of the recommendations.

### Conclusion

Because of the cyclical nature of enrollments, every school district will at some time experience the need to close one or more schools, including those currently experiencing enrollment increases. In some cases, districts are experiencing this need for a second time in the past 30 years. Regardless, closing a school is a difficult and emotionally charged set of processes for all involved in it, but successful outcomes are possible through an open and inclusive community-involvement process. It is important to make sure all buildings are maintained as if they were going to be used in the future, even if the ultimate decision is to dispose the facility.

This is especially important if the district decides to retain the building, because it will very difficult in the future to convince voters to approve new capital funds to build new schools when enrollments increase because existing facilities were allowed to deteriorate and become unusable. These are small costs now to save large costs in the future.

#### *Adaptive reuse – Elementary School into Education Service Center*



**Before**



**After**

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*Adaptive reuse – Elementary School into Mayor’s Office and Courtrooms*



*Adaptive reuse – Low Income Senior Housing*



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**Appendix A**

An example of a checklist from Milwaukee Public Schools:

**SCHOOL CLOSING TASKS AND RESPONSIBILITIES**

✓	Category	TASK	Due Date	Who to Perform or Coordinate	Department Assistance	Department Contact
	Archival	Relocate all items of archival, historic, or artistic value (e.g., trophies, awards, photos, artwork) to a central location. Inventory and secure items.	June	School	Finance & Operations Procurement	
	Assessment	Collect WKCE, WRCT, ThinkLink and/or other <b>test booklets and test data reports</b> . Return to Central Services.	June	School/ Principal	Finance & Operations Research and Assessment	
	Building	<b>Shut off kitchen</b> plumbing, gas, water, and all AC units (except as needed for DFMS activities continuing through summer)	June	Finance & Operations <i>Facilities</i>	Finance & Operations Facilities	
	Building	Remove <b>building signage</b> as needed.	June	Finance & Operations <i>Facilities</i>	Finance & Operations Facilities	
	Building	Complete <b>final cleaning of building</b>	June	Finance & Operations <i>Facilities</i>	Finance & Operations Facilities	
	Building	Determine if site is a <b>voting site</b> . Determine where/how future voting will occur and contact City. Collect voting equipment if site changes.	June	Finance & Operations <i>Facilities</i>	Finance & Operations Facilities	
	Building	Inventory <b>surveillance equipment</b>	June	Finance & Operations <i>Facilities, School Safety</i>	Finance & Operations Facilities, School Safety	
	Building	Identify <b>combinations to all vaults</b> and school safes. Submit combinations to the Facilities Lock Shop, Shop 904. Leave free-standing safes empty and open with the combination taped to the outside.	June	School	Finance & Operations Facilities	
	Building	Submit <b>requests and schedules for access once building is closed</b> to Facilities and Maintenance. Facilities will schedule maintenance activities accordingly and provide mobile trash receptacles as needed.	After June	School/Departments	Finance & Operations Facilities	

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Communications	<b>Inform parents, students, and community</b> of transition plans	Ongoing	School	Administrative Accountability & Department of Communications and Public Affairs	
Curricular	Shut down library to allow media specialist to collect and inventory all of <b>library collection</b> & update all records. Keep materials in library.	May	School	Ed. Services	
Curricular	Identify all current, adopted classroom <b>textbooks and supplementary resources by grade level</b> for curriculum specialists in CS.	January- Feb.	School	Ed. Services	
Curricular	Pack <b>current adoption tests and materials</b> and identify boxes. Organize all educational tests and resources by subject area to make available to other schools.	June	District	Ed. Services	
Curricular	Separate and prepare textbooks and materials for distribution to schools, following school closing process for textbooks and curriculum materials.	June	School/ District	Ed. Services	
Environmental	Complete inventory of <b>chemicals and or hazardous items</b> in the building and locations of those items. Forward to shop 926 for follow up to remove items from building.	June	School/ Engineer	Finance & Operations Facilities	
Finance Personnel Students	Of <b>records</b> retained (e.g., staff, student, financial), confirm which must be accessible, by whom, and where it needs to be located. Communication with the Department of Facilities and Maintenance Services if records need to be moved	April	Misc. Depts.	Finance & Operations Admin. Accountability Student Services HR	
Finance	Locate and inventory all <b>financial records</b> , including IFAS fixed asset sheets. Include current and archived records. Confirm retention requirements.	May	School	Finance & Operations	
Finance	Schedule <b>meeting with Finance</b> to review close-out, retention, and auditing requirements	May	School	Finance & Operations	
Finance	Identify and <b>contact school accounting</b> regarding all school financial matters (e.g., bank signature cards, requisition authorization, student activity funds, internal audit reports, accounts to be closed, etc.). List dates & names of school accounting personnel contacted	May	School	Finance & Operations	
Finance	Relocate all <b>financial records</b> to centralized secure location to be determined at the school site. Include method of organizing and labeling. Store in boxes clearly marked with contents and date of retention.	June	School	Finance & Operations	

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Finance	List names and dates, <b>PTO, PTA, and PTSA</b> contacted to complete dissolution of organization. Describe manner in which funds and assets were liquidated.	June	School	Finance & Operations	
Finance	Include copies of all recordkeeping for <b>fund raising activities</b> including manner in which accounts were liquidated.	June	School	Finance & Operations	
Finance	Arrange for outstanding contracts/leases (e.g. professional services, copiers, vending machines) to be terminated or transferred to another school. All correspondence must be in writing.	June	School	Finance & Operations	
Finance	List of all <b>end of year budget issues</b> .	June	School	Finance & Operations	
Finance	Compile <b>year-to-date expenditure information</b> as reported in IFAS (include e.g., school reports, budget folder, general ledger analysis summaries).	June	School	Finance & Operations	
Audit	Request <b>final audit</b> of school's finances.	June	School	Audit Service	
Finance	<b>Finalize all payments</b> and purchase orders.	June	School	Finance & Operations	
Finance	Process any miscellaneous <b>payroll</b> information, etc.	June	School	Finance & Operations	
Finance	<b>Reconcile all accounts</b> for the end of year status. List dates and names of school accounting personnel contacted	June	School	Finance & Operations	
Finance	<b>Cancel newspaper and other subscription</b> deliveries.	June	School	Finance & Operations	
Building	List all FMAX work orders still in process for building repairs, equipment and supplies. Complete all vandalism work orders before June 15.	June	Finance & Operations Facilities	Finance & Operations Facilities	
Finance	Provide current list of <b>fixed assets</b> to Technology, Finance, and the Department of Facilities and Maintenance Services with room locations identified.	June	School	Finance & Operations, Technology, Finance, Facilities	
Finance	List all <b>IFAS requisitions</b> still in process for building repairs, equipment and supplies.	June	School	Finance & Operations Procurement, Facilities	



Furniture	Let district sites know to submit requests for <b>furniture and equipment</b> needs to the attention of Gina Spang, Facilities & Maintenance.	March	District Sites	Finance & Operations Facilities	
Furniture	<b>Furniture and equipment</b> (includes AV equipment) to remain in existing locations in building. Any movement or redistribution of F & E is under the approval and direction of DFMS.	May	Finance & Operations Facilities	Finance & Operations Facilities	
Keys	Locate all <b>keys for file cabinets and other storage related furniture</b> by room. Tape keys to inside of those items. Keep unlocked.	June	School	Finance & Operations Facilities	
Key Cards	Disable school staff access control credentials.	June	Finance and Operations	Technology	
Keys	Turn in all <b>staff keys</b> to person in building who coordinates distribution of keys (except keys that are taped to furniture and equipment). Label all keys with the appropriate room number. This includes keys for rooms and built-ins and adjacent storage rooms. List all keys unaccounted for. Keep all built-in cabinets unlocked.	June	School	Office of Supt. Administrative Accountability	
Keys	Turn in all <b>principal/APIC keys</b> to Administrative Accountability when school closing tasks complete (except keys that are taped to furniture & equipment) Administrative Accountability will forward to Facilities, Shop 904.	June	School	Office of Supt. Administrative Accountability	
Keys	Keep <b>alarm cards</b> but let building operations know when access to the closed school can be cancelled. The same card number will be used for the staff person's new location.	June	School	Office of Supt. Administrative Accountability	
Misc.	<b>Begin scrapping</b> items in building/classrooms, e.g., furniture and equipment, files, textbooks, and supplies, that are obsolete, broken, not required for retention, etc. All files, cabinets, and drawers should be emptied. Furniture and equipment, textbooks, and supplies in good condition are to remain in rooms. Specific types of files should be dealt with as identified in this document. Scrap or take personal items home.	January - June	School	Misc. Departments	
Misc.	Provide <b>list of locations</b> that identifies where computers, equipment, files, records, keys, etc. are stored in the building.	June	School	Misc. Departments	
Operations	Schedule extra <b>dumpster pickups and trash collection</b> within the building if needed. Engineer should coordinate with school principal when/if needed.	As Needed	School / Engineer	Finance & Operations Facilities	

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Operations	Enter on-line work order request to Facilities for <b>key changes for rooms that will be used to store secure items</b> and materials. Distribution of keys will be limited to the principal, facilities planning analysts, and building operations.	As Needed	School/ Engineer	Finance & Operations Facilities	
Operations	Contact engineer to order <b>security shredding</b> receptacle if needed for disposing of confidential paperwork. Engineer should be prepared to coordinate extra pick-ups if necessary.	As Needed	School/ Engineer	Finance & Operations Facilities	
Operations	Collect <b>manuals and handbooks</b> for building functions and equipment, e.g., how to work auditorium stage lighting and sound systems, locker combinations, special technology systems, etc.	June	School/ Engineer	Finance & Operations Facilities	
Operations	Collect <b>walkie talkies</b> at end of school year except those that belong to Safety. Safety will collect those signed out to safety staff. Return remaining to Department of Technology	June	School	Finance & Operations Technology, School Safety	
Operations	Inventory building <b>engineer's equipment and supplies</b> . Building operations to coordinate any relocations.	May	Engineer	Finance & Operations Facilities	
Other	Relocate all <b>office supplies</b> to a central location and keep organized with like items.	June	School		
Personnel	Arrange with Office of Finance and receive written authorization to <b>keep key staff</b> through end of June (e.g., accountant, head secretary, principal, tech coordinator, librarian) that may need to be retained to complete the school closing and documentation process	April	School	Human Resources Labor Relations	
Personnel	Establish <b>MOUs</b> as needed for completion of school closing tasks. (Note: 30-day process)	As Needed	School	Human Resources Labor Relations	
Personnel	Locate and inventory all <b>staff files</b> . Include current and archived records. Confirm retention requirements.	May	School	Human Resources	
Personnel	Assist staff with <b>reassignment process</b> .	May	School	Human Resources	
Personnel	Forward <b>names of personnel</b> to Technology, Human Resources, and Payroll to inform them of date to end authorization access codes.	June	School	Finance & Operations Payroll & Technology Human Resources	

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Personnel	Relocate all <b>staff files</b> to centralized secure location. Include method of organizing and labeling.	June	School	Human Resources	
Personnel	List <b>unresolved assignments</b> (e.g., administrators, teachers, secretaries, assistants, and HCAs) for next school year. Record dates/names of HR personnel informed.	June	School	Human Resources	
Personnel	Make certain ALL <b>evaluations</b> (AP, teacher, clerical, engineer, food service) are completed and turned into CS.	June	School/ Principal	Office of Supt. Administrative Accountability	
Recreation	Inventory <b>recreation equipment and supplies</b> . Recreation to coordinate any relocations.	May	Academic Excellence <i>Recreation</i>	Recreation	
Phys Ed	Identify names of <b>CLC sponsors and business partners</b> . Contact and record dates ending relationships.	June	School	Office of Supt. Recreation	
Redistribution	Identify which if any <b>furniture, equipment, textbooks, supplies, and computer technology</b> will be made available to the district. Confirm priorities for distribution.	April	Misc. Depts.	Misc. Depts. (Facilities, Technology, Ed Services)	
Redistribution	<b>Advertise excess</b> furniture, equipment, textbooks, supplies, and computer technology available to the district. Remaining will be made available to the public.	June	Misc. Depts.	Misc. Depts. (Facilities, Technology, Ed Services.)	
Redistribution	Develop rank order of <b>schools eligible for receiving educational texts</b> and materials: Provide scheduled opportunities for schools to choose/pack/take items.	Jul-Aug	Academic Excellence	Ed. Services	
Redistribution	<b>Redistribute furniture</b> , equipment, textbooks, supplies, and computer technology that has been designated for other sites	August	Misc. Depts.	Misc. Depts. (Facilities, Technology, Ed. Services)	
Spec Ed	Collect all <b>Special Ed equipment and materials</b> : (ex. Alpha Smart, Assistive Technology Kits, Woodcock Johnson, Mini batteries, speech/language materials tests and protocols, Language! curriculum materials, zip drives, Sp. Ed. books, tape recorders, printers, computers, hearing aides, Sound Field Amplification mics and speakers etc., completed protocols from Psych, SSW, DT and other special education providers. RETURN ALL ITEMS TO MPSSC. All service providers should remove personal items.	June	Office of Supt. <i>Special Services</i>	Office of Supt. Special Services	

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Spec Services	Collect from <b>Nurse's Offices</b> : Recovery cot, storage cabinet, refrigerator, microwave, chair, coat rack, 2-drawer file.	June	Office of Supt. <i>Special Services</i>	Office of Supt. Special Services	
Spec Ed	For School Psychologists; remove any and all personal items from school, remove all tests, protocols, IEP computers therapy materials, classroom/social skills materials, and bring to MPSSC.	June	School/ Psych	Office of Supt. Special Services	
Spec Ed	For Speech Pathologists; remove any and all personal items from school, remove all tests, protocols, therapy materials, IEP computers, audiometers, digital recorders, and bring to MPSSC.	June	School/ Speech Dept	Office of Supt. Special Services	
Spec Ed	For School Social Workers; remove any and all personal items, remove the ABAS manual/protocols, other SSW Department curriculum/program materials and store at the MPSSSC if the SSW does not have another school to move the materials to. Review all records and either destroy (shred) if appropriate, forward to the student's fall assignment or bring records to the MPSSSC for temporary storage during the summer months.	June	School / Principal	Office of Supt. Special Services	
Spec Ed	For <b>School Social Workers</b> , remove any and all personal items from school, remove the ABAS manual and store, review all records and either destroy (shred) or bring records to MPSSSC	June	School / SSW	Office of Supt. Special Services	
Students	Locate and inventory all <b>student records</b> . Include current and archived records. Confirm retention requirements. Contact Patricia Gill for detailed procedures regarding student records.	May	School	Office of Supt. Student Services	
Students	Compile list of <b>students without school assignments</b> for the next school year.	June	School	Office of Supt. Student Services	
Students	<b>For those who haven't transferred</b> , keep organized and labeled for ease of locating and transferring at a later date. Provide list to Off. of Supt./Student Services.	June	School	Office of Supt. Student Services	
Students	Forward all <b>records for students who have transferred</b> .	June	School	Office of Supt. Student Services	

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Students	<b>Relocate all student records</b> to centralized secure location. Include method of organizing and labeling both regular and special education records. Transfer student records to file cabinets, in vault, or designated space. Contact the Department of Facilities and Maintenance Services for moving services	June	School	Office of Supt. Student Services, Special Services	
Students	Assist students with <b>reassignment process</b> .	Ongoing	School	Office of Supt. Student Services	
Technology	Inventory <b>technology</b> related equipment, e.g., computers, printers, scanners, etc. List item description, brand and model (e.g., Dell GX270). Do not include MC Room. Identify separate storage areas for technology related equipment.	May	School	Finance & Operations Technology	
Technology	Work with Technology to shut off <b>MC equipment and phones</b> , school phone number, and develop appropriate message for closed building with who to contact for further assistance. <i>One phone will be kept functional in engineer's office and modem will be kept on for gas meter. Security system and elevator phone will also remain operational.</i>	June	School	Finance & Operations Technology	
Technology	Clean all <b>computer hard drives</b> of personal information and prepare units for re-distribution.	June	School	Finance & Operations Technology	
Technology	Relocate all <b>computer technology related equipment</b> to a secure central space. Maintain inventory. Exception: library computer and server to remain in library.	June	School	Finance & Operations Technology	

Administrative Accountability will answer any other questions about the closing that schools may have. Please contact your respective administrative specialist.

**Appendix B**

**MAINTENANCE, TESTING, AND INSPECTION LOG –  
HOT WATER HEATING BOILERS**

Building: \_\_\_\_\_ Month: \_\_\_\_\_ Year: \_\_\_\_\_

Address: \_\_\_\_\_ Fuel Type: \_\_\_\_\_

Boiler No.: \_\_\_\_\_

Person(s) to be Notified in Emergency:

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

DAILY CHECKS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
(1) Record Pressure																															
(2) Record Boiler Water Temperature																															
(3) Record Flue Gas Temperature																															

WEEKLY CHECKS (Enter Date)	WEEK 1	WEEK 2	WEEK 3	WEEK 4
(1) Observe Flame Condition				
(2) Observe Circulating Pumps				

**MONTHLY CHECKS (Enter Date)**

(1) Review Condition of Or Test Each Item	(a) Flame Detection Devices		(f) Refractory	
	(b) Limit Controls		(g) Stop Valves	
	(c) Operating Controls		(h) Check Valves	
	(d) Floor Drains		(i) Drain Valves	
	(e) Fuel Piping		(j) Linkages	
(2) Manual Lift Relief Valve				
(3) Observe Gage Class on Expansion Tank				
(4) Combustion Air Adequate/Unobstructed				

General Comments: \_\_\_\_\_

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**MAINTENANCE, TESTING, AND INSPECTION LOG –  
STEAM HEATING BOILERS**

Building: \_\_\_\_\_ Month: \_\_\_\_\_ Year: \_\_\_\_\_

Address: \_\_\_\_\_ Fuel Type: \_\_\_\_\_

Boiler No.: \_\_\_\_\_

Person(s) to be Notified in Emergency:

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

DAILY CHECKS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
(1) Observe Water Level																															
(2) Record Pressure																															
(3) Record Flue Gas Temperature																															

WEEKLY CHECKS (Enter Date)	WEEK 1	WEEK 2	WEEK 3	WEEK 4
(1) Test Low Water Cutoff				
(2) Test Gage Glass				
(3) Observe Flame Condition				

**MONTHLY CHECKS (Enter Date)**

(1) Review Condition of Or Test Each Item	(a) Linkages		(f) Floor Drains	
	(b) Damper Controls		(g) Flame Detection Device	
	(c) Stop Valves		(h) Limit Controls	
	(d) Refractory		(i) Operating Controls	
	(e) Flue-Chimney Breeching			
(2) Manual Lift Relief Valve				
(3) Inspect Fuel Piping				
(4) Combustion Air Adequate/Unobstructed				

General Comments: \_\_\_\_\_

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## Additional Information

See the NCEF annotated bibliography, *School Closure, Consolidation and Co-location*, online at [http://www.ncef.org/ri/School\\_Closure,\\_Consolidation,\\_Co-location.cfm](http://www.ncef.org/ri/School_Closure,_Consolidation,_Co-location.cfm)

## Publication Notes

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