Long Range Facility Planning
What is a Long Range Facility Plan?

Looks at facility needs over time

Ten-year capital improvement plan (but should consider needs beyond that timeframe)

Includes population projections

Identification of desirable school sites, site acquisition schedules and programs

Assessment of building and site condition

Analysis of

• Alternatives to new construction and major renovation
• Measures to increase efficient use of school sites
Elements of the plan

Educational Program
:: General Education
:: Full-Day Kindergarten
:: Pre-School
:: STEM
:: Technology
:: Textbooks

Enrollment and Capacity
:: Growth
:: Capacity
:: Utilization
:: Boundaries

Facility Condition
:: Health and Safety
:: Accessibility (ADA)
:: Infrastructure
:: Sustainability
:: Life Expectancy
What is not included?

:: Detailed floor plans
:: Detailed numeric programs
:: Specific site information
Why do a long range plan?

:: A State requirement for large School Districts (ORS 195.110)
:: Helps Districts to strategically plan for future facility needs
:: Provides the information needed to make informed decisions
:: Allows coordination with other development occurring in your district.
:: Established an on-going cycle for keeping your capital investments up to date
Who should be involved?

:: 30-40 people
:: Superintendent
:: CFO
:: Facilities staff
:: Principal representatives from elementary, middle and high school
:: Teacher representatives
:: Community member representatives
:: Student representatives
:: Parent representatives
:: Planning jurisdiction
:: Partners
Three levels of involvement

Community Advisory Committee
:: 30-40 people
:: Mainly community members, parents
:: Diversity of opinion (swayable nay-sayers)

District Steering Committee
:: 6-8 people

Optional Executive Committee
:: 2-4 people
What materials do you need?

:: Building facility information
   site plans, building plans, repair/replacement data, reports (asbestos, seismic, facility condition, accessibility) deficiency lists, modular buildings

:: Enrollment projections (20 years)
   Districtwide, by school, ethnicity, building capacity

:: Strategic Plan
   Mission, values, vision, educational initiatives, education specifications

:: Background information
   Previous studies, bond history, partnerships, recent history of development
When you should do it?

:: Every 10 years
:: 2 year prior to a capital campaign
:: Times of growth (or decline) in population
:: Change in leadership or direction
:: Prior to previous bonds retiring
:: Changing regulations/initiatives
## How long does it take?

- **6-7 months** to develop the plan
- **1 year** to share with community, get input
- **Time to modify the plan as required**
How long does it take?

Phase One:
- Task 1.1 Management/Start-up
- Task 1.2 Collect and Review Existing Data
- Task 1.3 Prepare 2D District Basemap
- Task 1.4 21st Century Schools Powerpoint
- Task 1.5 Work Session #1: Project Kick-Off, Visioning, Program Principles
- Task 1.6 Summarize demographic report
- Task 1.7 Identify existing school capacity
- Task 1.8 Develop capacity options
- Task 1.9 Work Session #2: Enrollment and Capacity & Guiding Principles
- Task 1.10 Develop assessment forms
- Task 1.11 Conduct facilities assessment/interview design teams
- Task 1.12 Document Assessment
- Task 1.13 Develop order of magnitude costs
- Task 1.14 Establish Plan Priorities
- Task 1.15 Work Session #3: Facility Condition, Facility Principles

Phase One: Education Specification
- Task 1.16 Prep
- Task 1.17 Educator Visioning: Set Parameters
- Task 1.18 Focus Group Sessions: Elementary (half day)
- Task 1.19 Focus Group Sessions: Middle (half day)
- Task 1.20 Focus Group Sessions: High (one day)
- Task 1.21 Consolidate information/write draft
- Task 1.22 Follow-up
- Task 1.23 Finalize document

Phase Two: Draft Plan Development
- Task 2.1 Develop Draft Guiding Principles
- Task 2.2 Develop Plan Scenarios
- Task 2.3 Work Session #4: Review Guiding Principles and Scenarios
- Task 2.4 Refine Plan Scenarios
- Task 2.5 Test Scenarios with Costs
- Task 2.6 Work Session #5: Refine Guiding Principles and Scenarios
- Task 2.7 Finalize LRP Plan and Capital Prioritization Strategy

Phase Three: Confirmation and Documentation
- Task 3.1 Write and Assemble LRP
- Task 3.2 Prepare Final Presentation
- Task 3.3 Work Session #6: Draft Long Range Plan Presentation

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Overview of Process

1st Meeting  Clear goals for the plan
2nd Meeting  Academic program
3rd Meeting  Enrollment
4th Meeting  Facility condition
5th Meeting  Plan development
Community open houses (if you know you
are going for a bond within 2 years)
6th Meeting  Plan refinement
7th Meeting  Draft Plan
Elements of the Plan
Goals

- How big is too big?
  - Plan for expanded Pre-K

- Consolidate with neighbors?
  - Students have skills to be successful

- More Land for Growth
  - Plan for socio-economics of community

- Plan for Growth Now
  - Equitable Facilities in District

- Support Adult Education
  - Provide a facility for safe walking/biking

- New corner center @ district level
  - Consider all the issues associated with "Old Bones"

- District Partnership
  - Support service growth w/ population growth

- Air Quality, Water Quality, and light
  - Support service growth w/ population growth

- Energy Efficient zone spaces
  - Increase capacity @ Elementary

- Efficient + Functional Size
  - Classroom to support class size

- No portables
  - Support Multi-cultural population

- Life cycle cost
  - School as a shelter for community

- Sustain loyalty to the district
  - Elementary no bigger than 500

- Work in conjunction with city for shared use
  - Support multi-use, flexible spaces

- Efficient + Functional zone spaces
  - Support Multi-cultural population

- No portables
  - Consider all the issues associated with "Old Bones"

- Efficient + Functional zone spaces
  - Support Multi-cultural population

- Systems past life
  - District owns Deardorff property

- Serve better
  - Classroom density too high

- More capacity for transportation (buses)
  - Multnomah tax rates are high

- More fields for year-round use
  - Bond passed in 2012 (retired bond)

- Repair/replace aging facilities
  - District is a good steward of community

- Community (parks, non-profits, misc.)
  - State task force looking @ other funding options

- Serve Special Ed Students better district-wide
  - Transportation infra structure is critical part of plan

- Learning opportunities that mirror industry
  - DDHS Triage site, homeland security

- Provide for social service space in the schools
  - Gilbert heights communication site

- Food pantry
  - Staff training + meeting space

- Alice OTT (not meeting ED needs)
  - Outdoor learning space
Elements of the Plan

Educational Program

- Facility Condition
- Enrollment and Capacity

The Vision

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Educational Program

Full-day kindergarten
Preschool
STEM/CTE

Variety of sizes of space—small, medium, large groups
Capacity

Elementary School
450-600

Middle School
500-900

High School
1700-2000
Elements of the Plan

The Vision

- Educational Program
- Enrollment and Capacity
- Facility Condition
Enrollment vs Capacity

Elementary Students 550 Target

- Target
- Cherry Park
- Earl Boyles
- Gilbert Heights
- Gilbert Park
- Lincoln Park
- Menlo Park
- Mill Park
- Ventura Park
- West Powellhurst

- Under
- Over
- Target
Enrollment Projections

<table>
<thead>
<tr>
<th>Elementary School Catchment</th>
<th>Current HH</th>
<th>Projected HH (current plan)</th>
<th>Projected HH (proposed plan)</th>
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<tbody>
<tr>
<td>Cherry Park</td>
<td>3,519</td>
<td>13,173</td>
<td>6,543</td>
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<tr>
<td>Earl Boyles</td>
<td>1,776</td>
<td>2,407</td>
<td>2,100</td>
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<td>Gilbert Heights</td>
<td>2,488</td>
<td>4,000</td>
<td>3,546</td>
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<td>Gilbert Park</td>
<td>3,119</td>
<td>4,621</td>
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<td>Lincoln Park</td>
<td>2,481</td>
<td>3,590</td>
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<td>Menlo Park</td>
<td>2,771</td>
<td>4,650</td>
<td>3,709</td>
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<td>Mill Park</td>
<td>2,378</td>
<td>3,587</td>
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<td>Ventura Park</td>
<td>3,140</td>
<td>6,613</td>
<td>4,434</td>
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<td>West Powellhurst</td>
<td>2,232</td>
<td>3,448</td>
<td>3,048</td>
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</table>
Elements of the Plan

- Facility Condition
- Educational Program
- Enrollment and Capacity

The Vision

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Facility Condition

11 facilities are in the modernization category (25-50% of replacement cost)
Lowest Ranking: Alice Ott, DDHS South Campus, North Powellhurst & South Powellhurst.
Facility Condition

:: Health and life-safety
:: Protect capital investment
:: Accessibility
:: Program enhancement
The Intersection

The Vision

Educational Program
Facility Condition
Enrollment and Capacity
Plan Development

Band-aid approach

Strategic Phased Plan

The whole enchilada
Plan Development

- Additions
- Renovations
- New Schools + Replacement
- Acquire Property
- Community Amenity
Plan Development

240 million option

A $240 million bond option will make significant progress towards updating aging district facilities. Three bonds of similar magnitude would allow the district to fully update facilities within a 24-30 year timeframe. In this first phase, all new sites would be acquired. New schools would be constructed to meet anticipated demand through 2014: 2 elementary, 1 middle school, and a high school addition. Five elementary schools would be replaced and significant improvements can be made to existing middle schools and high schools. The table below quantifies the expenditures in the first bond. The charts on the following pages illustrate the potential degree of impact that could be achieved in the full update program.

<table>
<thead>
<tr>
<th>Site Acquisition</th>
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<tr>
<td>Elementary</td>
<td>$10,000,000</td>
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<tr>
<td>Middle</td>
<td>$5,000,000</td>
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<tr>
<td>High</td>
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<tr>
<td><strong>Sub Total</strong></td>
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<tr>
<td>New Schools</td>
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<tr>
<td>Elementary</td>
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<td>Middle</td>
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<td><strong>Sub Total</strong></td>
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<tr>
<td>Replacement Schools</td>
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<td>Elementary</td>
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<td>Middle</td>
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<td>High</td>
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<tr>
<td><strong>Sub Total</strong></td>
<td>$90,000,000</td>
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<tr>
<td>Additions/Renovations</td>
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<tr>
<td>High</td>
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<td><strong>Sub Total</strong></td>
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<td>Community Amenities</td>
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<tr>
<td>High</td>
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<tr>
<td><strong>Sub Total</strong></td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$239,000,000</strong></td>
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Lessons learned

:: Don’t go in with the answer
:: Distill information and allow the committee time to talk
:: Build the plan around REAL community participation
:: Allow adequate time for community outreach
:: Everyone should get something
:: The core message should meet the 3 “C’s”
   - Clear
   - Concise
   - Compelling
:: Facilities will require on-going repair, maintenance and replacement (i.e. “You are never done”)
Full-day kindergarten

:: Impact to enrollment
:: Special considerations
  - Size of space
  - Special equipment/heights
  - Dedicated play
  - Location in the building
  - Lunch
:: Options
  - Add to existing building? (pro’s and con’s)
  - Displace students to new school?
  - Portables?
Mercer Island
Mercer Island
Forest Grove
SITE PLAN

1. Bus Loop
2. Parking
3. Entry Plaza
4. Field
5. Garden
6. Service Road
7. Wetland Buffer
8. Service Area
9. Fire Lane
10. Pre-K - K Play Area
11. Play Area
12. Administration
13. Pre-K - Kindergarten Classrooms
14. Classrooms
15. Special Education
16. Art
17. Library
18. Music
19. Commons
20. Gym
Wilkes
Wilkes
Wilkes