

mahlum

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

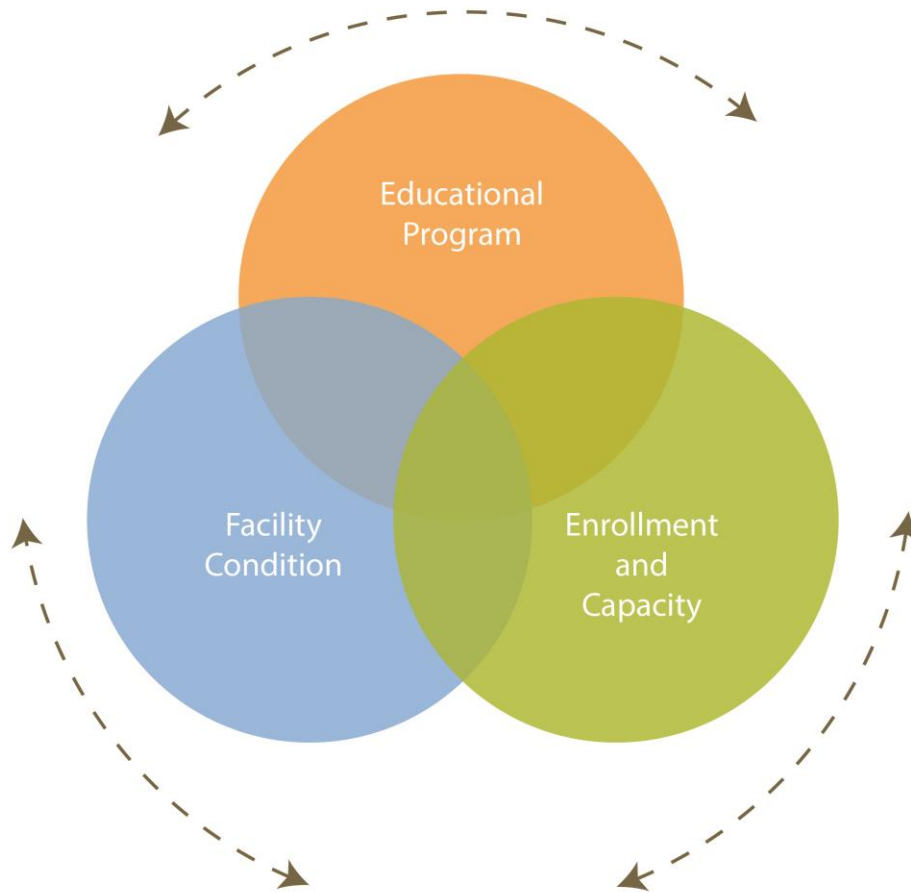
Identification of desirable school sites, site acquisition schedules and programs

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

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

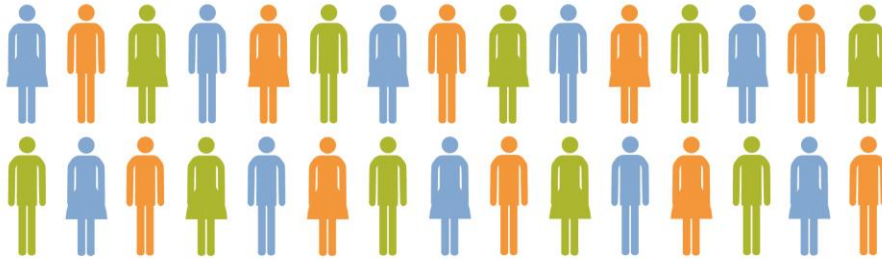
Three levels of involvement

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

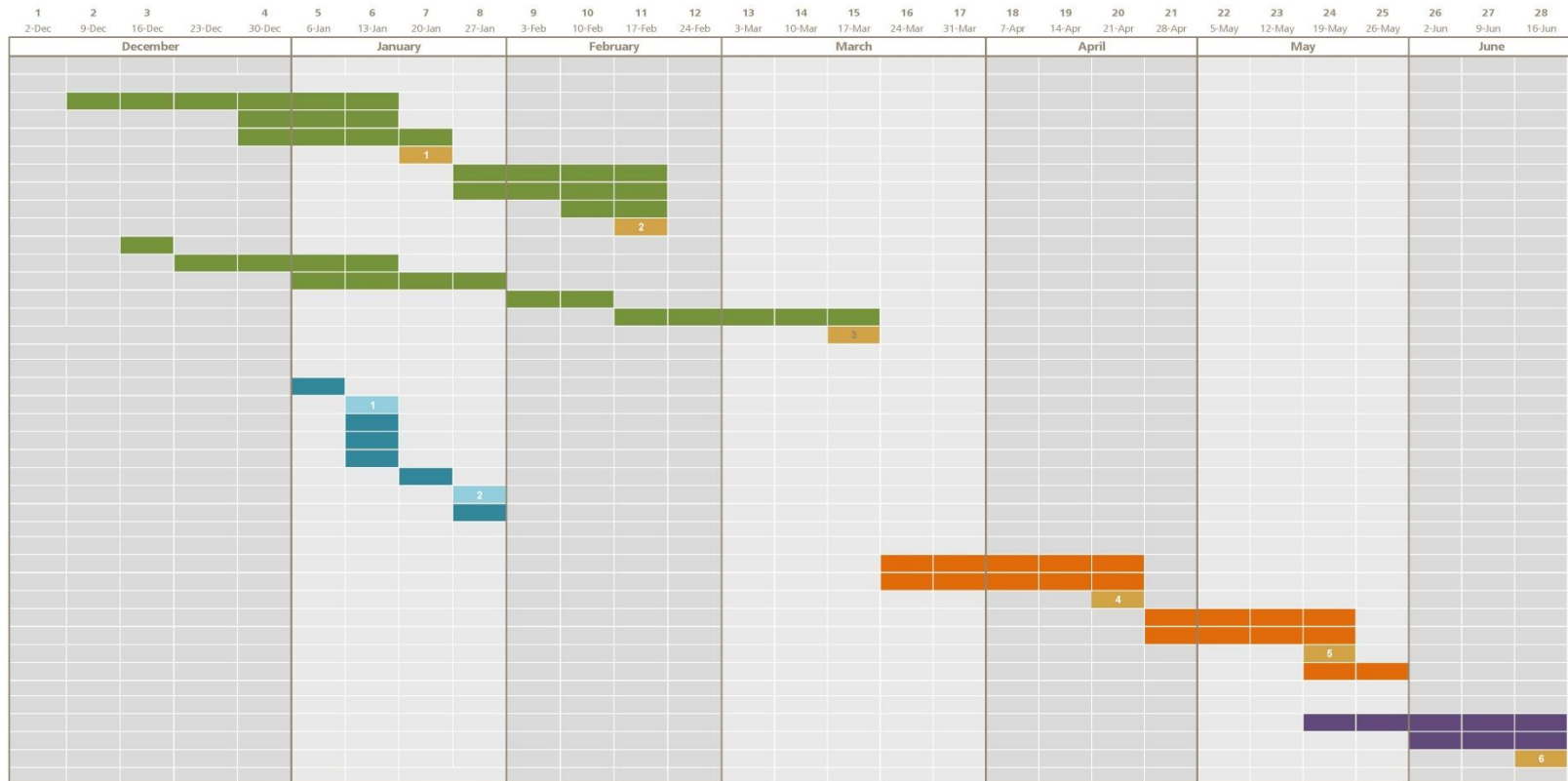
- :: Background information

 - Previous studies, bond history, partnerships, recent history of development

When you should do it?

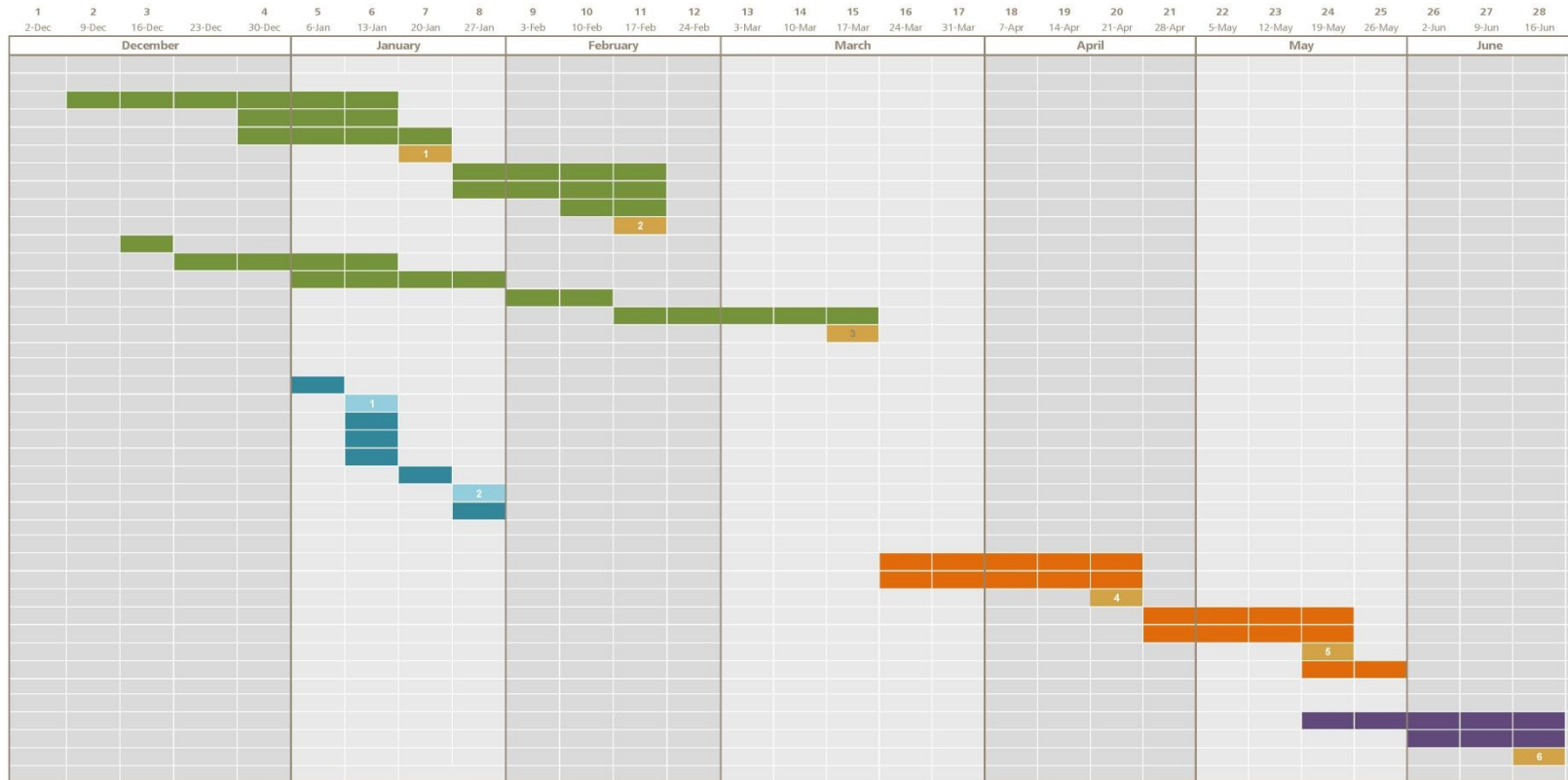
- :: Every 10 years
- :: 2 year prior to a capital campaign
- :: Times of growth (or decline) in population
- :: Change in leadership or direction
- :: Prior to previous bonds retiring
- :: Changing regulations/initiatives

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

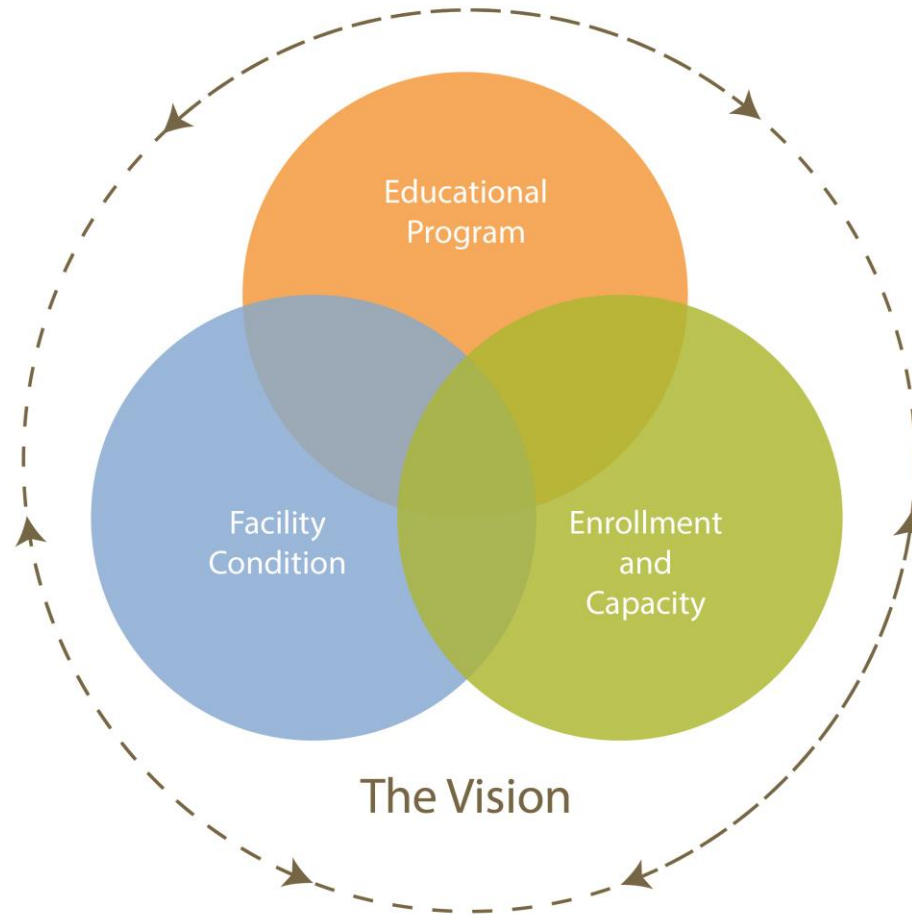
- Task 3.1 Write and Assemble LRFPP
- Task 3.2 Prepare Final Presentation
- Task 3.3 Work Session #6: Draft Long Range Plan Presentation



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?	Consolidate with neighbors?	More Land for Growth	Plan for Growth Now
Plan for expanded Pre-K	Students have skills to be successful	Plan for Socio-economics of community	Equitable Facilities in District
Safe and Healthy Learning Environment	Support Adult Education	Provide a facility for safe walking/biking	Air Quality, Water Quality, and Light
Neighborhood schools @ Elementary	New comer center @ district level	District Partnership	Consider all the issues associated with "Old Bones"
Work in conjunction with city for shared use	Increase capacity @ Elementary	Classroom to support class size	Support service growth w/ population growth
Energy Efficient zone spaces	Efficient + Functional Size	Support Multi-cultural population	No portables
Life cycle cost	Multiple story school within a school	Utilize natural light	School as a shelter for community
Sustain loyalty to the district	Consider the identity of David Douglas	Elementary no bigger than 500	Support multi-use, flexible spaces
Repair/replace aging facilities	Community (parks, non-profits, misc)	Serve Special Ed Students better district-wide	Systems past life
Learning opportunities that mirror industry	Serve better	More capacity for transportation (buses)	More turf fields for year-round use

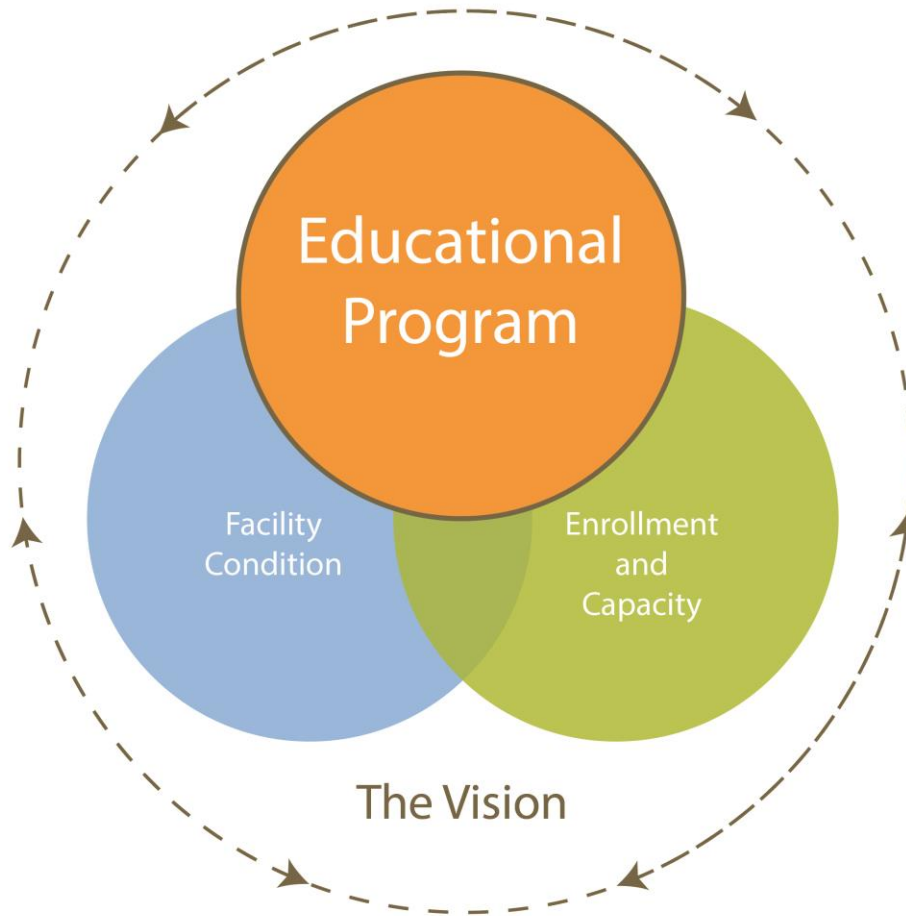
Facts

District owns Deardorf property	Classroom density too high
There is no land in the district to build	Multnomah tax rates are high
Bond passed in 2012 (retired bond)	District is a good steward of community money
State task force looking @ other funding options	Transportation infrastructure is critical part of plan
DDHS Triage site, homeland security	Gilbert heights communication site

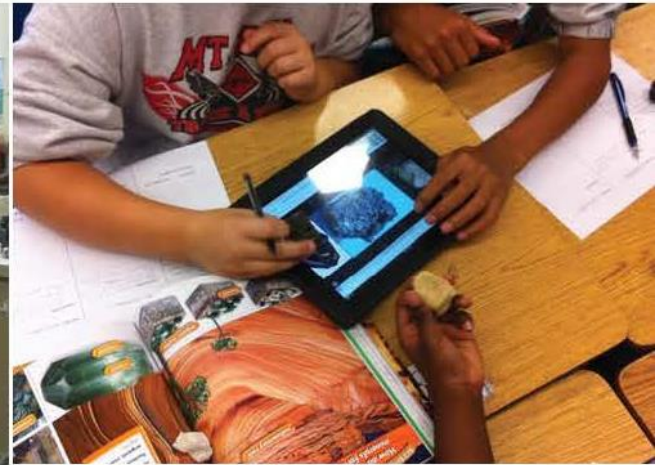
Needs

Provide for social service space in the schools
Food pantry
Alice OTT (not meeting ED needs)
Staff training + meeting space
Outdoor learning space

Elements of the Plan



Educational Program



Full-day kindergarten

Preschool

STEM/CTE

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

Capacity



**Elementary
School**
450-600

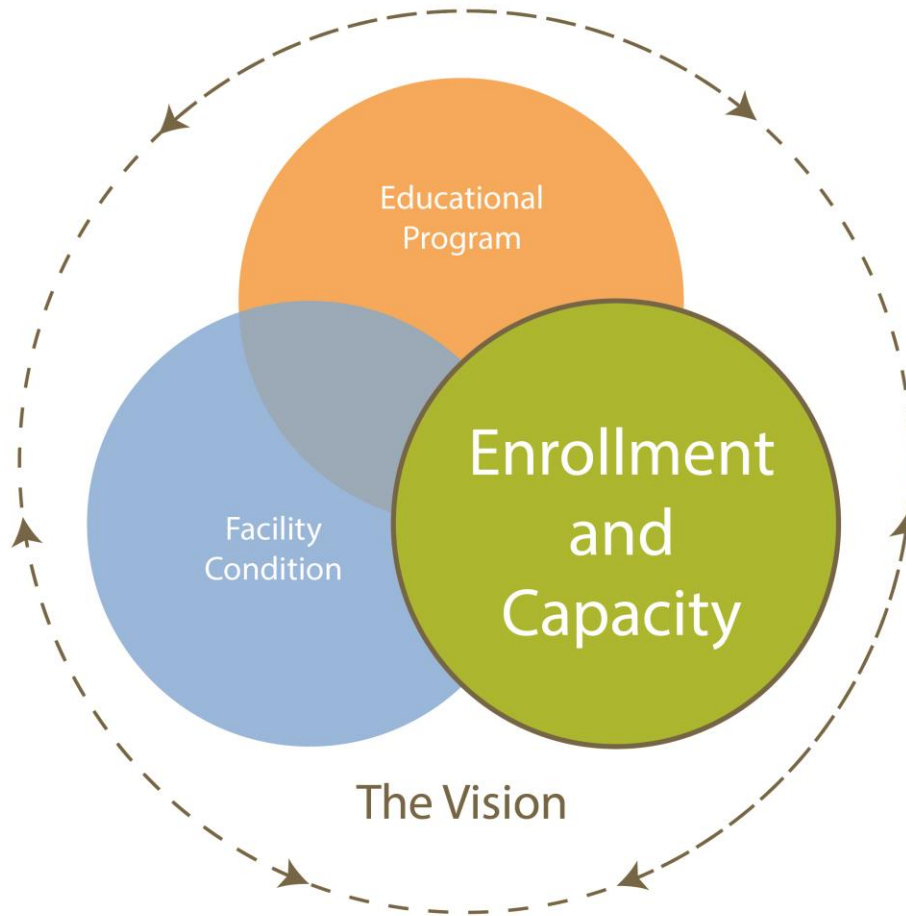


Middle School
500-900

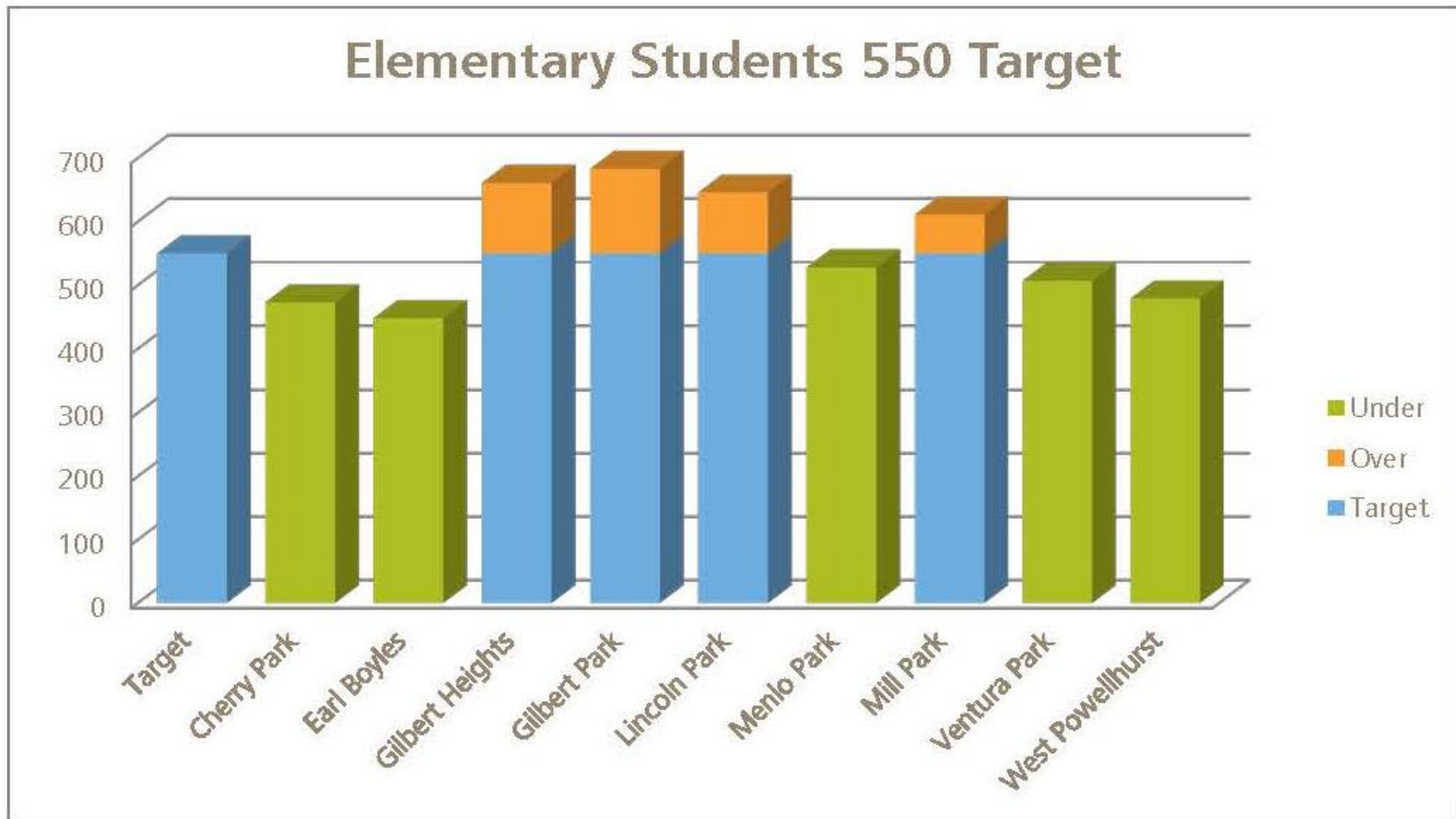


High School
1700-2000

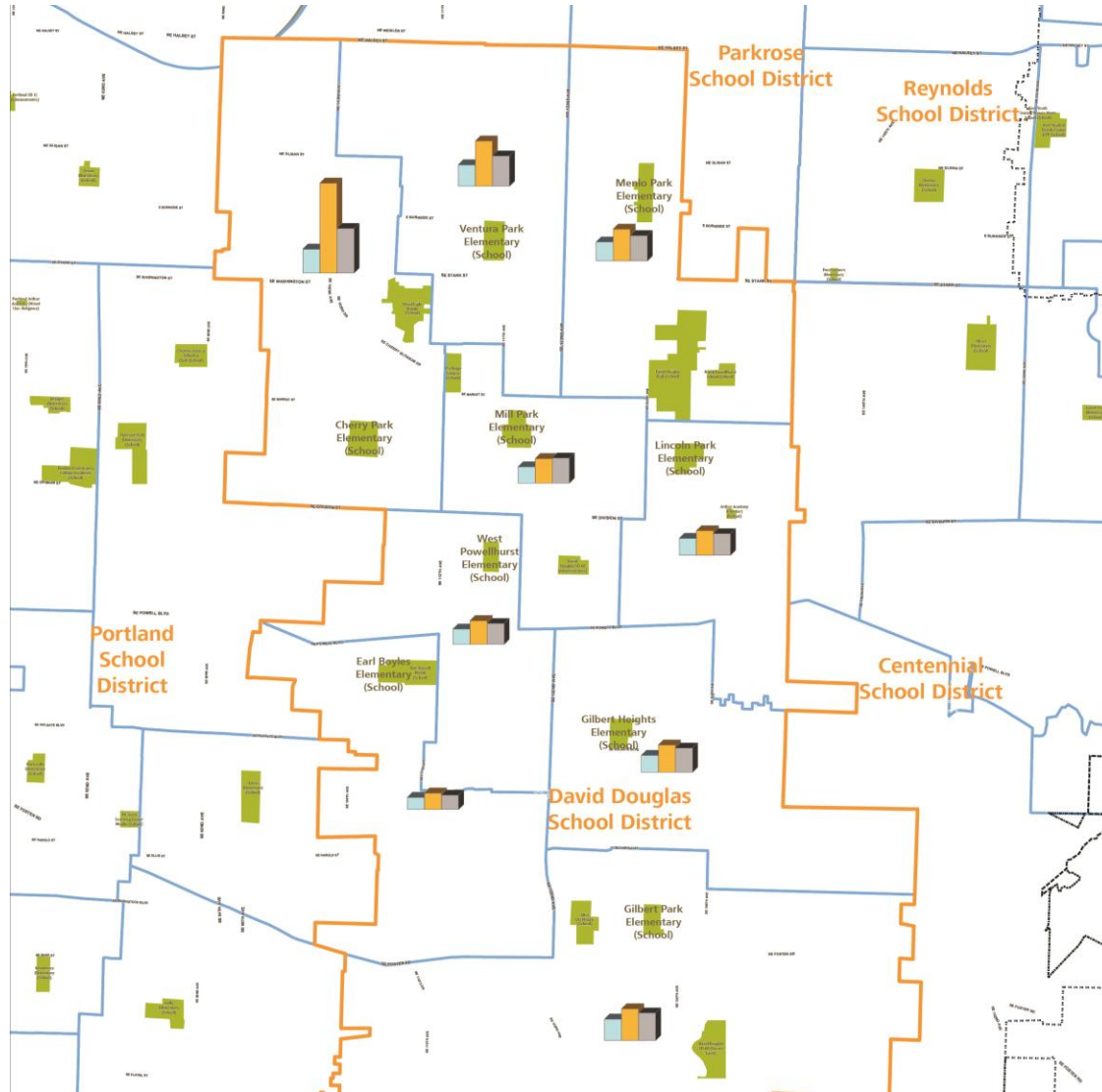
Elements of the Plan



Enrollment vs Capacity

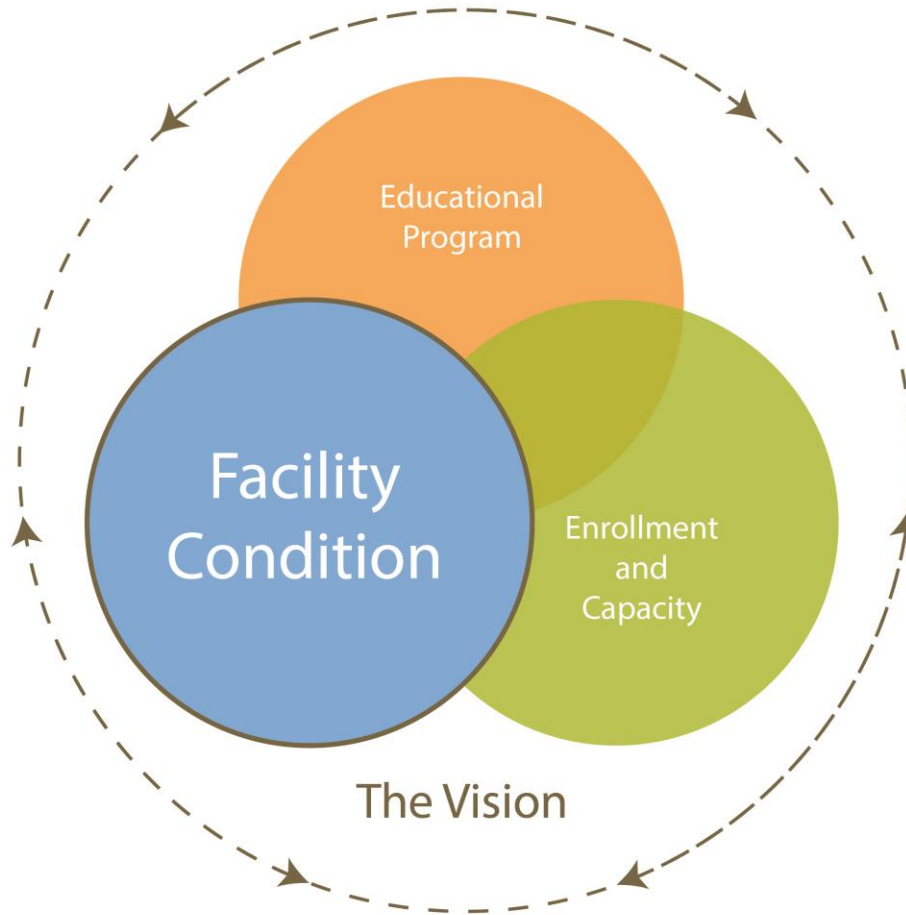


Enrollment Projections

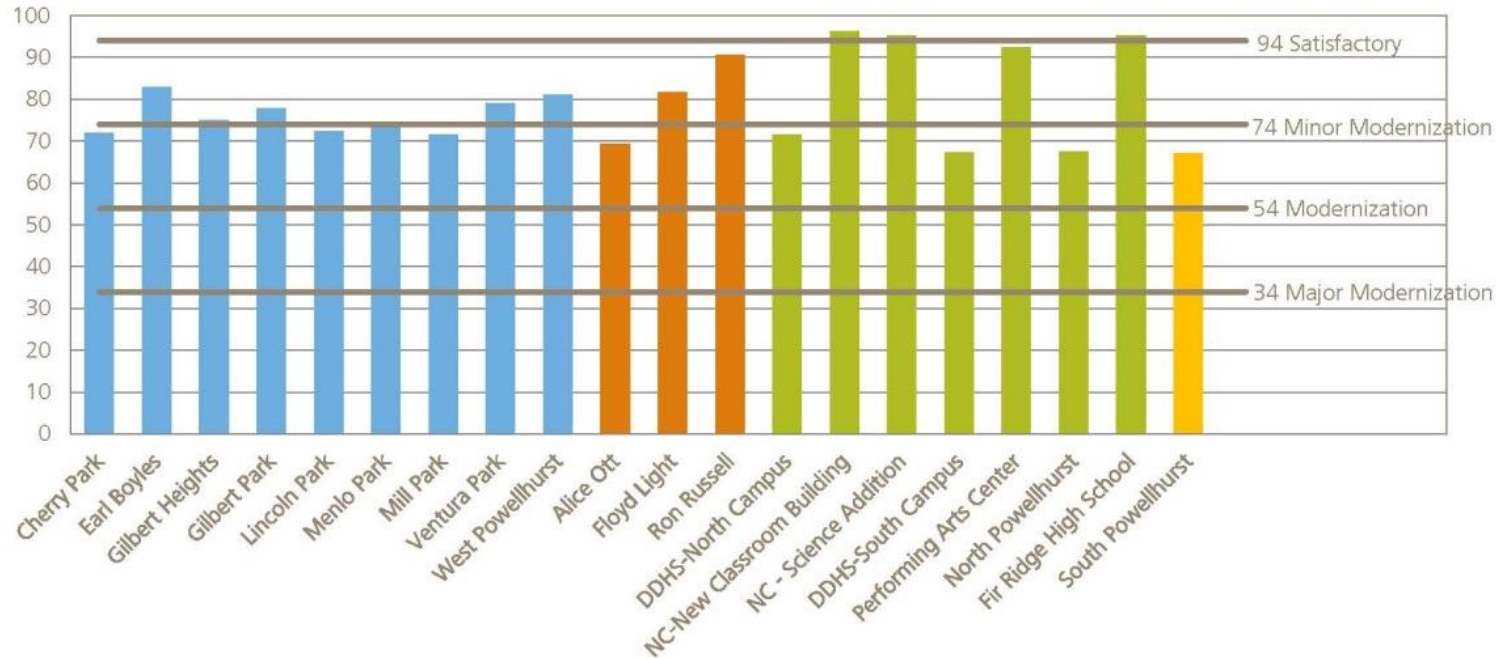


Elementary School Catchment	Current HH	Projected HH (current plan)	Projected HH (proposed plan)
Cherry Park	3,519	13,173	6,543
Earl Boyles	1,776	2,407	2,100
Gilbert Heights	2,488	4,000	3,546
Gilbert Park	3,119	4,621	4,017
Lincoln Park	2,481	3,590	3,169
Menlo Park	2,771	4,650	3,709
Mill Park	2,378	3,587	3,666
Ventura Park	3,140	6,613	4,434
West Powellhurst	2,232	3,448	3,048

Elements of the Plan



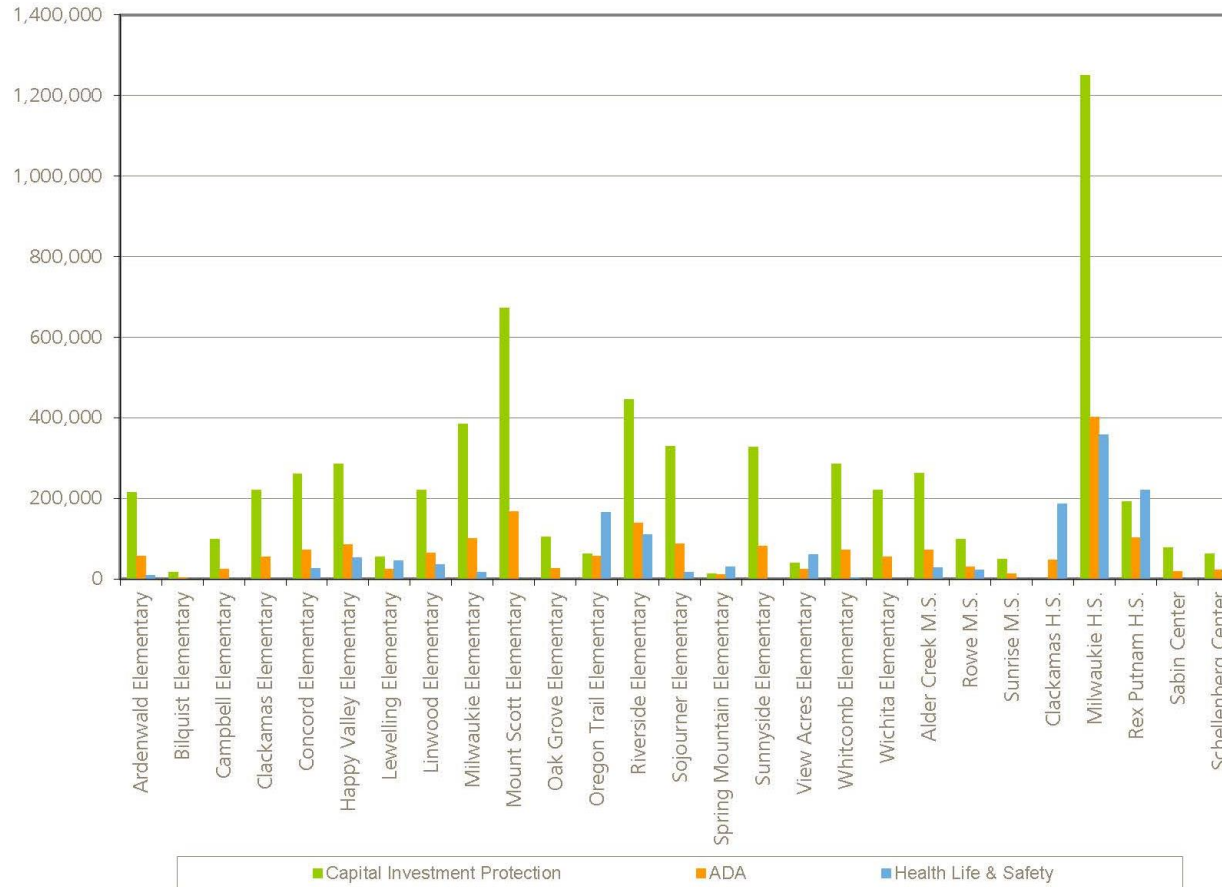
Facility Condition



11 facilities are in the modernization category (25-50% of replacement cost)

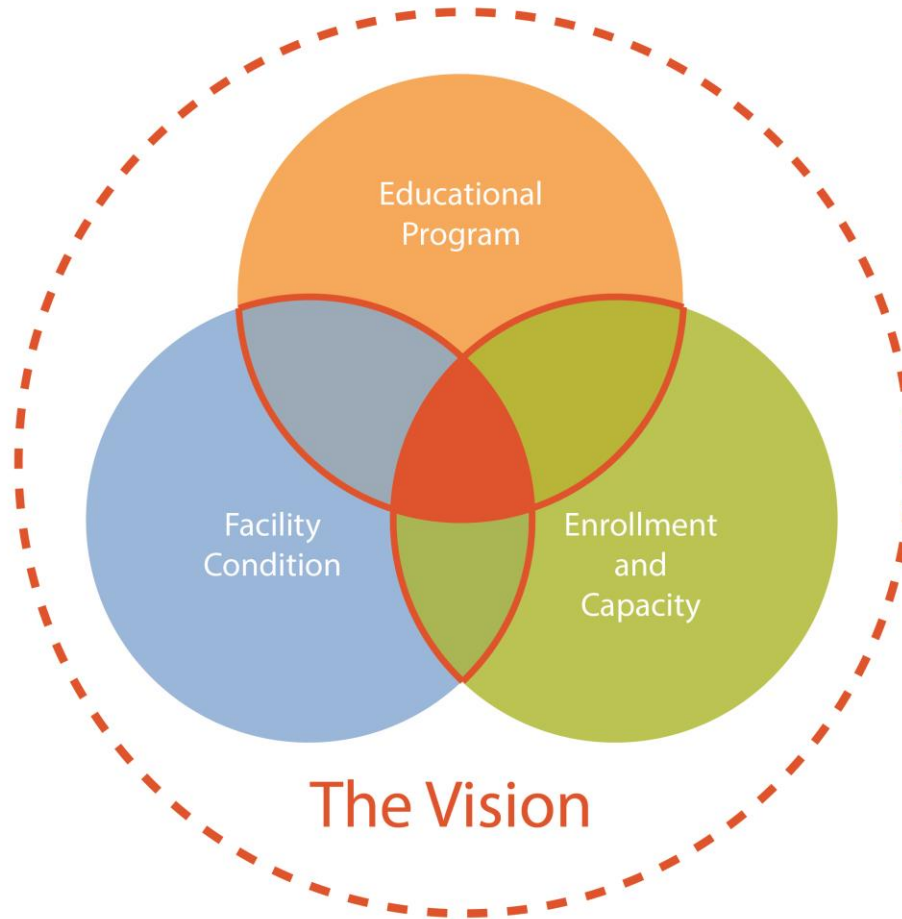
Lowest Ranking: Alice Ott, DDHS South Campus, North Powellhurst & South Powellhurst.

Facility Condition



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

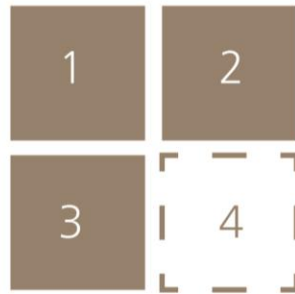
The Intersection



Plan Development



Band-aid approach



Strategic Phased Plan



The whole enchilada

Plan Development



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.

Site Aquisition

Elementary	\$10,000,000
Middle	\$5,000,000
High	\$10,000,000
Sub Total	\$25,000,000

New Schools

Elementary	\$35,000,000
Middle	\$27,000,000
High	\$0
Sub Total	\$62,000,000

Replacement Schools

Elementary	\$90,000,000
Middle	\$0
High	\$0
Sub Total	\$90,000,000

Additions/Renovations

Elementary	\$5,000,000
Middle	\$18,000,000
High	\$35,000,000
Sub Total	\$58,000,000

Community Amenities

Elementary	\$1,000,000
Middle	\$1,000,000
High	\$2,000,000
Sub Total	\$4,000,000

Total **\$239,000,000**

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

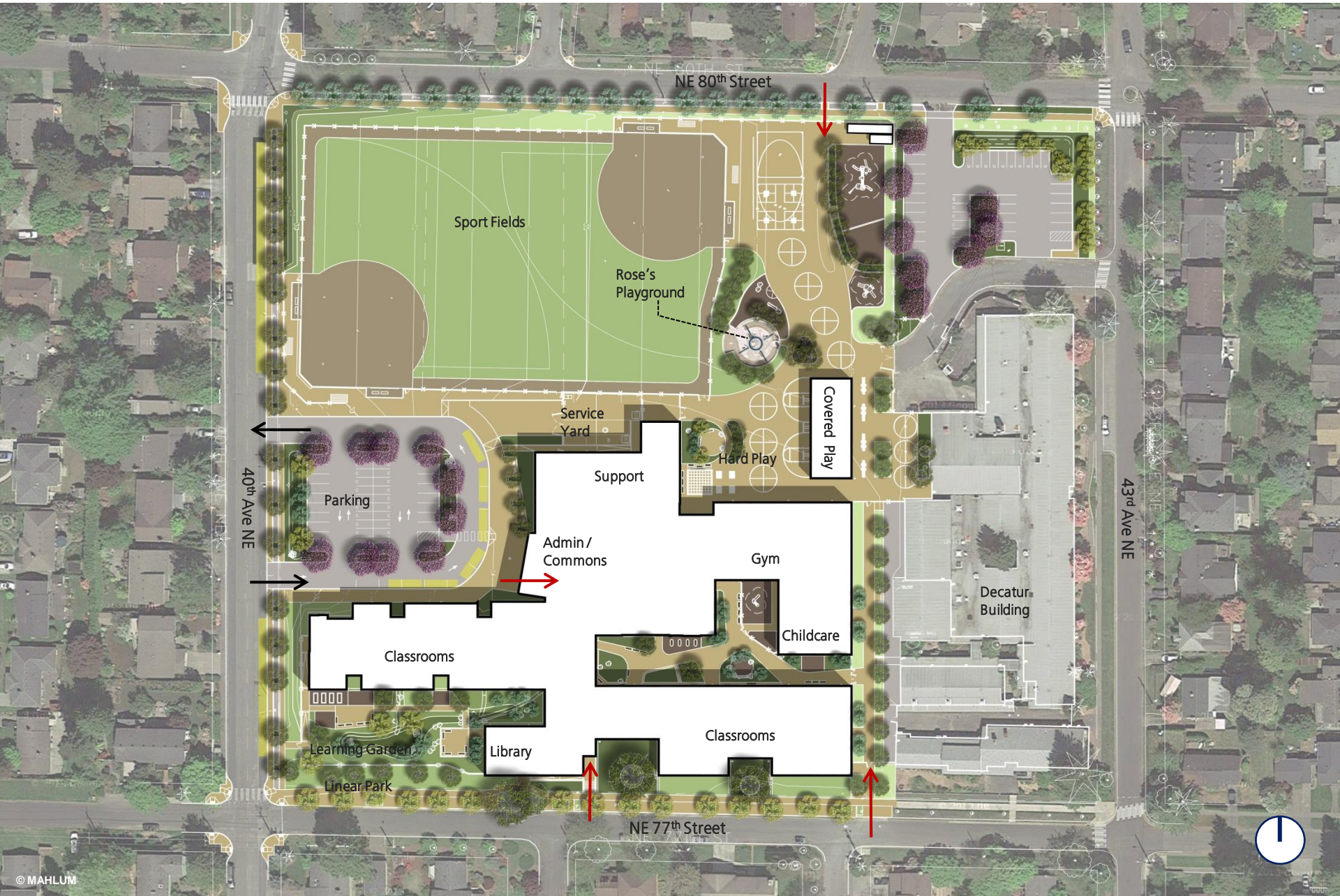
:: Special considerations

- Size of space
- Special equipment/heights
- Dedicated play
- Location in the building
- Lunch

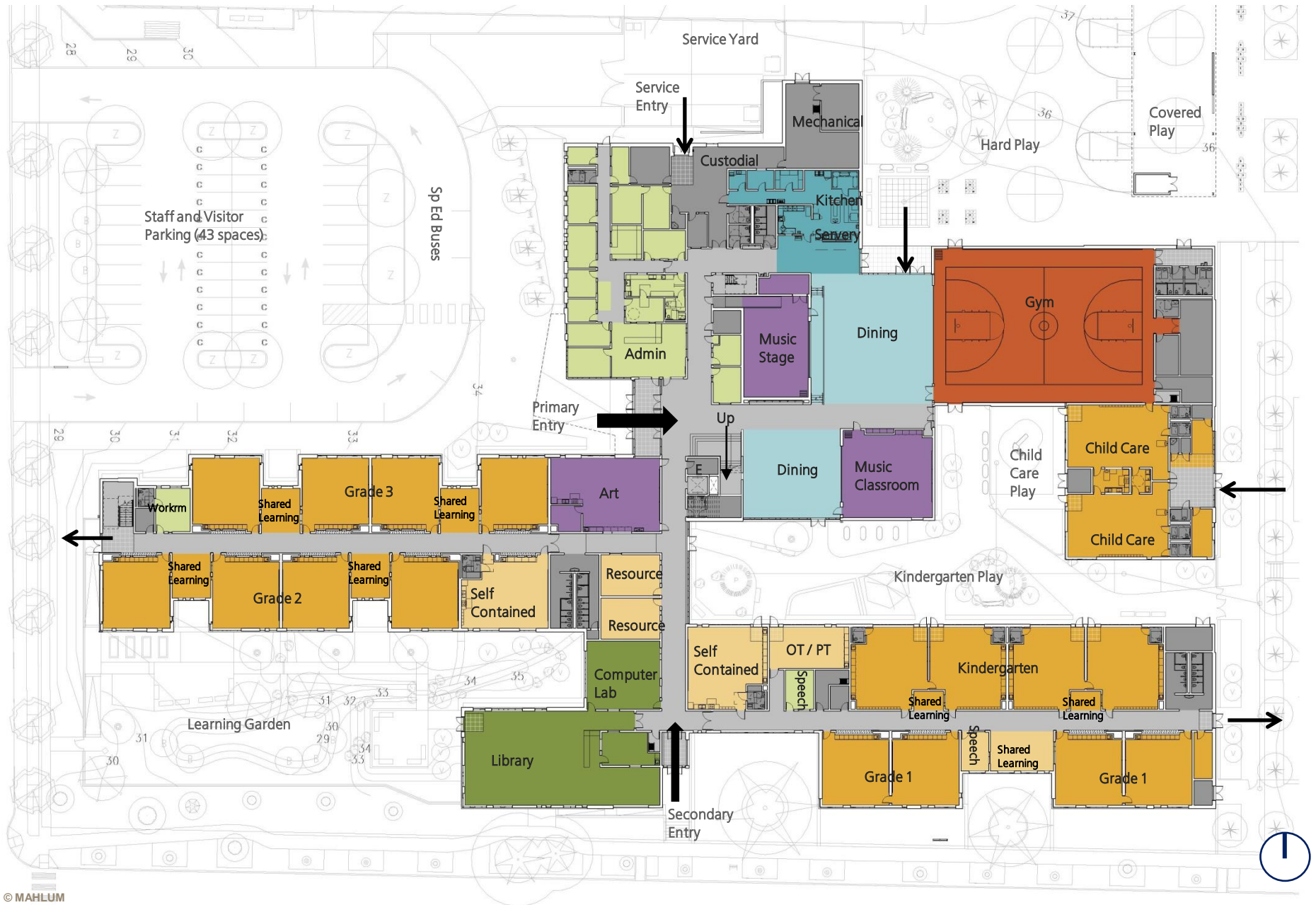
:: Options

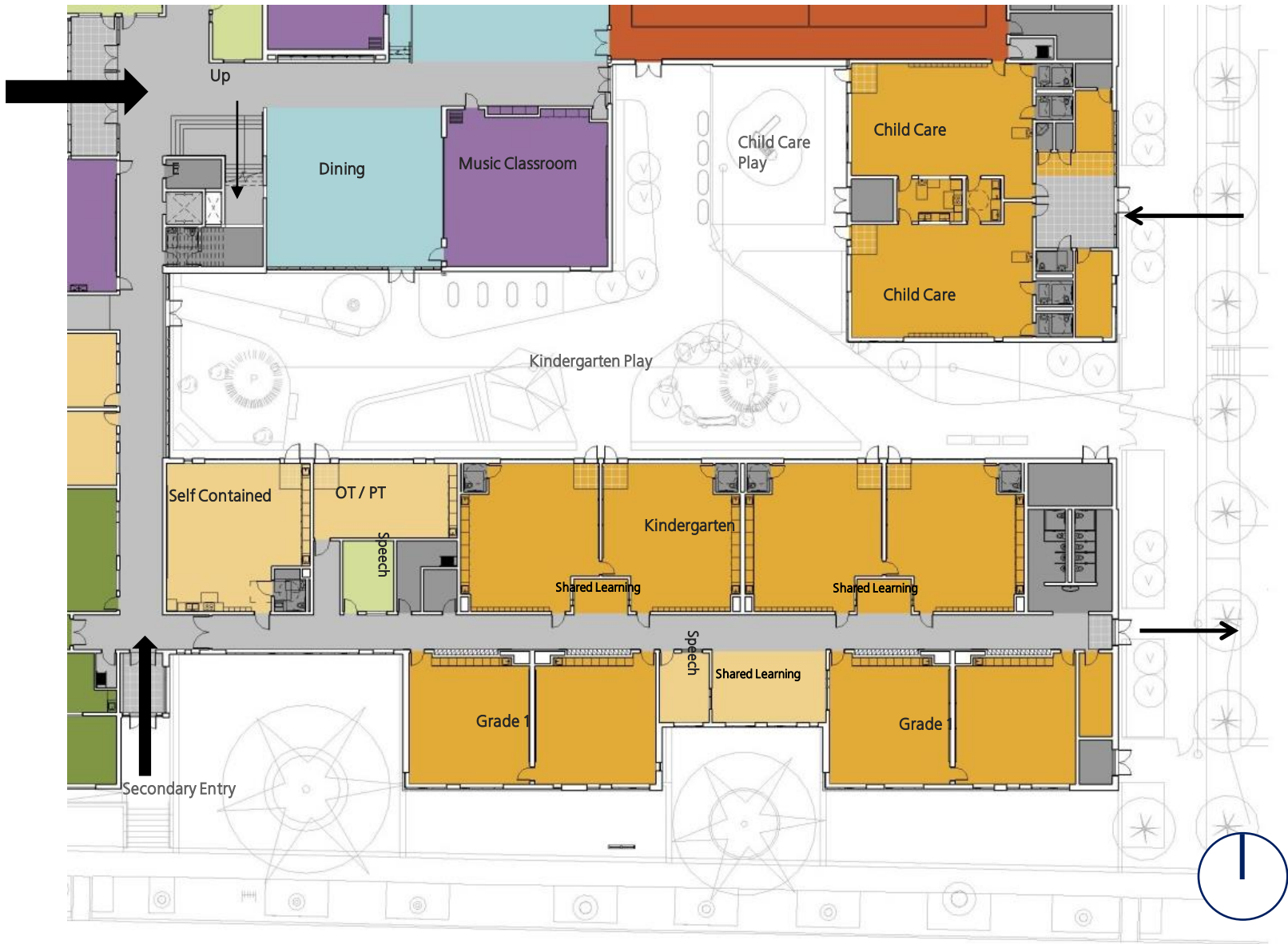
- Add to existing building? (pro's and con's)
- Displace students to new school?
- Portables?

Thorton Creek Site Plan

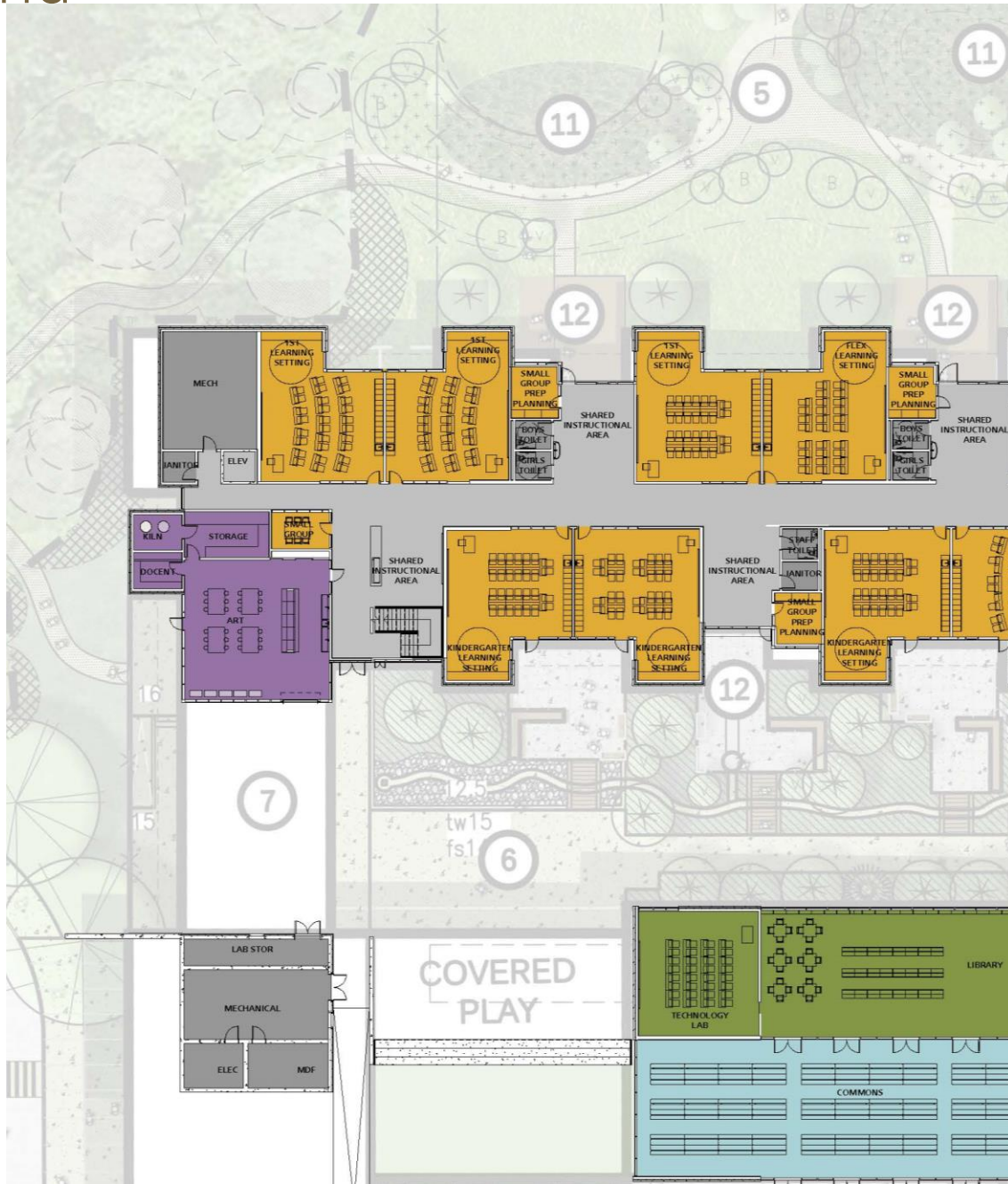


Thorton Creek

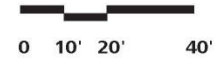
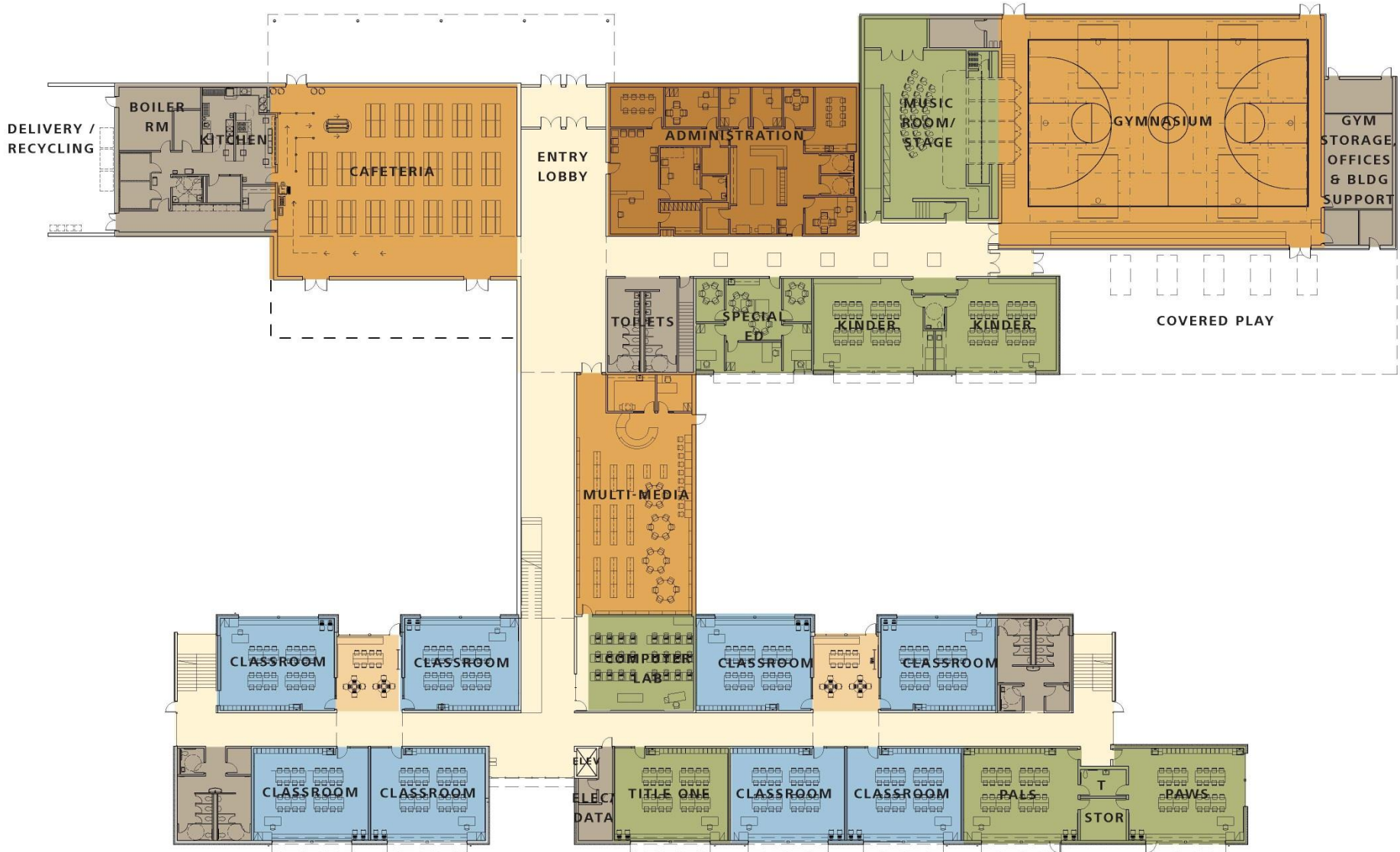




Mercer Island



Forest Grove



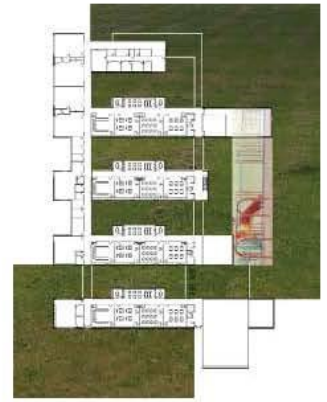
Forest Grove



Forest Grove



Wilkes



SITE PLAN

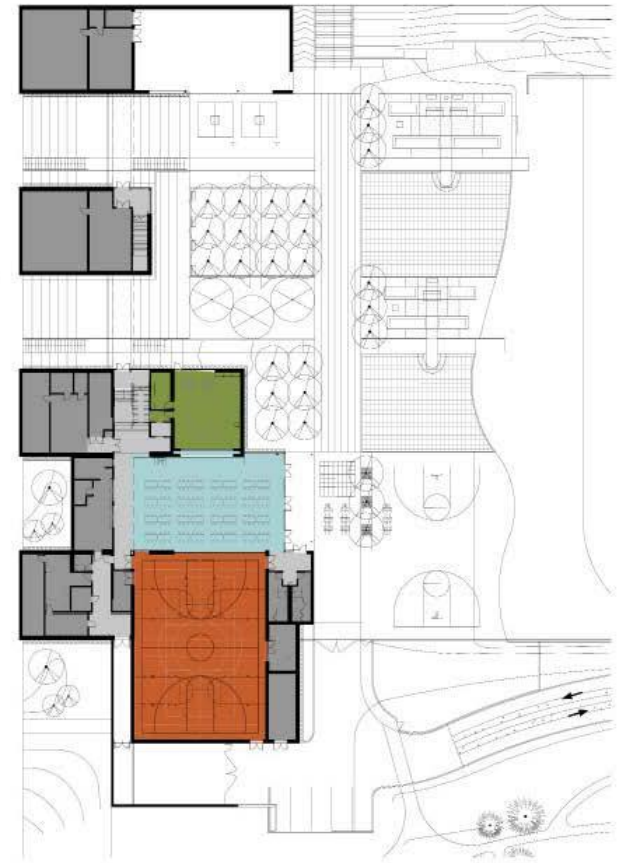
1. Bus Loop
2. Parking
3. Entry Plaza
4. Field
5. Garden
6. Service Road
7. Wetland Buffer
8. Service Area
9. Fire Lane
10. Pre-K - K Play Area
11. Play Area
12. Administration
13. Pre-K - Kindergarten Classrooms
14. Classrooms
15. Special Education
16. Art
17. Library
18. Music
19. Commons
20. Gym

Wilkes



UPPER LEVEL FLOOR PLAN

- | | |
|-------------------|---------------------|
| Administration | Gym |
| Classroom | Cafeteria / Commons |
| Special Education | Circulation |
| Library | Special Education |
| Music / Art | |



LOWER LEVEL FLOOR PLAN

Wilkes



Wilkes



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The End

