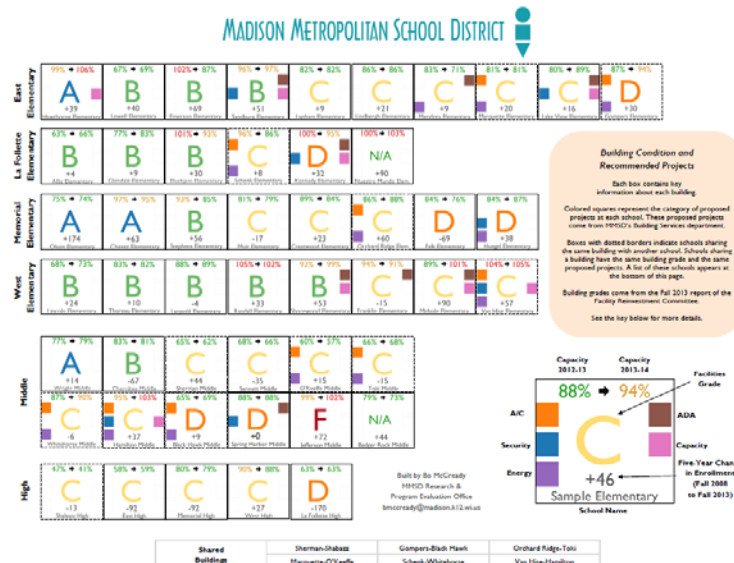




Facility Planning Update June 30, 2014





Goals For This Meeting

- ✓ **Review High Level Facility Strategy**
- ✓ **Focus on Current Aspects of Facility Planning**
- ✓ **Offer Specific Recommendations**
- ✓ **Board Discussion and Next Steps**



Review High Level Facility Strategy

A) Identify Selected Facility Needs for Action Now

- Limited in Scope and Financial Impact

- Focus on Improvements at Existing School Sites

- Create a Recurring Cycle of Improvements and Financing

- Establish Conditions for Successful Long-term Master Facility Planning

B) Create and Maintain a Long-range Master Facility Plan

- Comprehensive Planning Scope

- Driven by Instructional Planning & Demographic Projections

- Coordinated with City & County Long-range Planning

- In-Depth Evaluation of Existing Facilities & Life Cycle Cost

- Developed along with Long-term Capital and Debt Service Planning

- Create a 10-year Outlook Master Plan Updated Every Two Years

Facility Planning Calendar

- January 2014 Enrollment & Capacity Presentation
- March 2014 Quarterly Retreat – Facility Presentation
- **June BOE Update**
- August Special Meeting/Operations Workgroup



Part 1: ADA / Accessibility in All Schools

- **Ten Schools (Nine Elementary Schools and One Middle)**
- **Plan Includes All Ten Sites**
- **Installing Elevators, Ramps, Lifts in Combination**
- **Includes Related Secure Entrance Improvements at Three Schools**
- **Total Project Budget \$10.2 million**



Part 1: ADA / Accessibility in All Schools

School	Estimate	Notes
Franklin	1,150,000	Requires Two Elevators
Kennedy	1,270,000	Includes New Secure Entrance
Lakeview	530,000	Single Elevator Tower
Mendota	540,000	Single Elevator Tower
Midvale	525,000	Single Elevator Tower
Shorewood	948,000	Requires Two Elevators
Spring Harbor	1,083,000	Includes New Secure Entrance
Lowell	1,125,000	Requires Two Elevators
Randall	1,001,000	Limited Accessibility to Basement Level
Allis	1,990,000	Two Elevators, Lifts and Ramps
Total	10,162,000	Total for All 10 Sites





Part 2: Elementary Capacity Concerns

- **32 Elementary Schools**
- **12 Elementary Schools have Enrollment > 90% of Capacity in 2013-14**
- **Directed by Board to Study and Prepare Recommendations**
- **Developed and Applied Specific Evaluation Criteria**
- **Recommend Five Schools for Construction to Increase Capacity**
- **Project Cost \$11.5 million**



Attendance Related Policy Considerations

Let's Review:

- ✓ **MMSD Rules on Attendance Boundary Changes**
- ✓ **MMSD Rules on Internal Student Transfer**



Five Elementary Schools Meet These Criteria:

- Greater than 90% Capacity in 2013-14
- Projected to Maintain High Enrollment vs. Capacity
- No Viable Boundary Solution Available
- No Viable Inter-district Transfer Solution Available
- Other Factors to Consider in the Daily Operation of the School:
 - SAGE School
 - DLI School
 - 4K School
- Residential Growth Potential



Five Elementary Schools Meet Construction Criteria:

Sandburg

Hawthorne

Kennedy

Van Hise / Hamilton

Midvale



Elementary Capacity - Sandburg

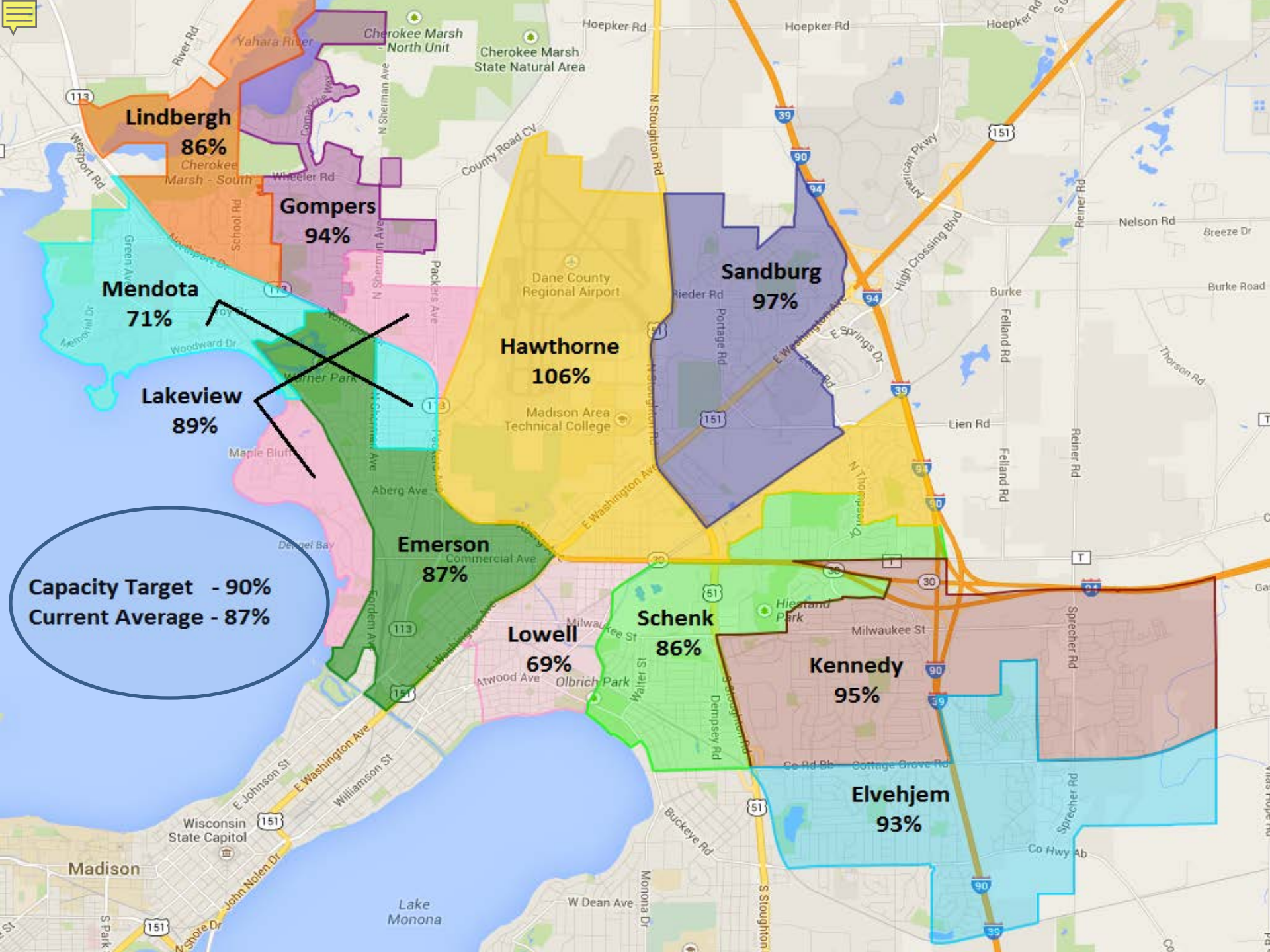
School:	Sandburg
Capacity	393
Enrollment (Ex. 4K)	381
Percent of Capacity Used	97%
Projected Enroll 2018-19	420
Projected Percent of Capacity	107%
Percent w/in Attendance Area	89%
Hosts 4K?	Yes
4K Enrollment	33
Total Enrollment w/ 4K	414
DLI Program?	Yes
SAGE?	Yes
Low Income?	71%





Attendance Boundary Example

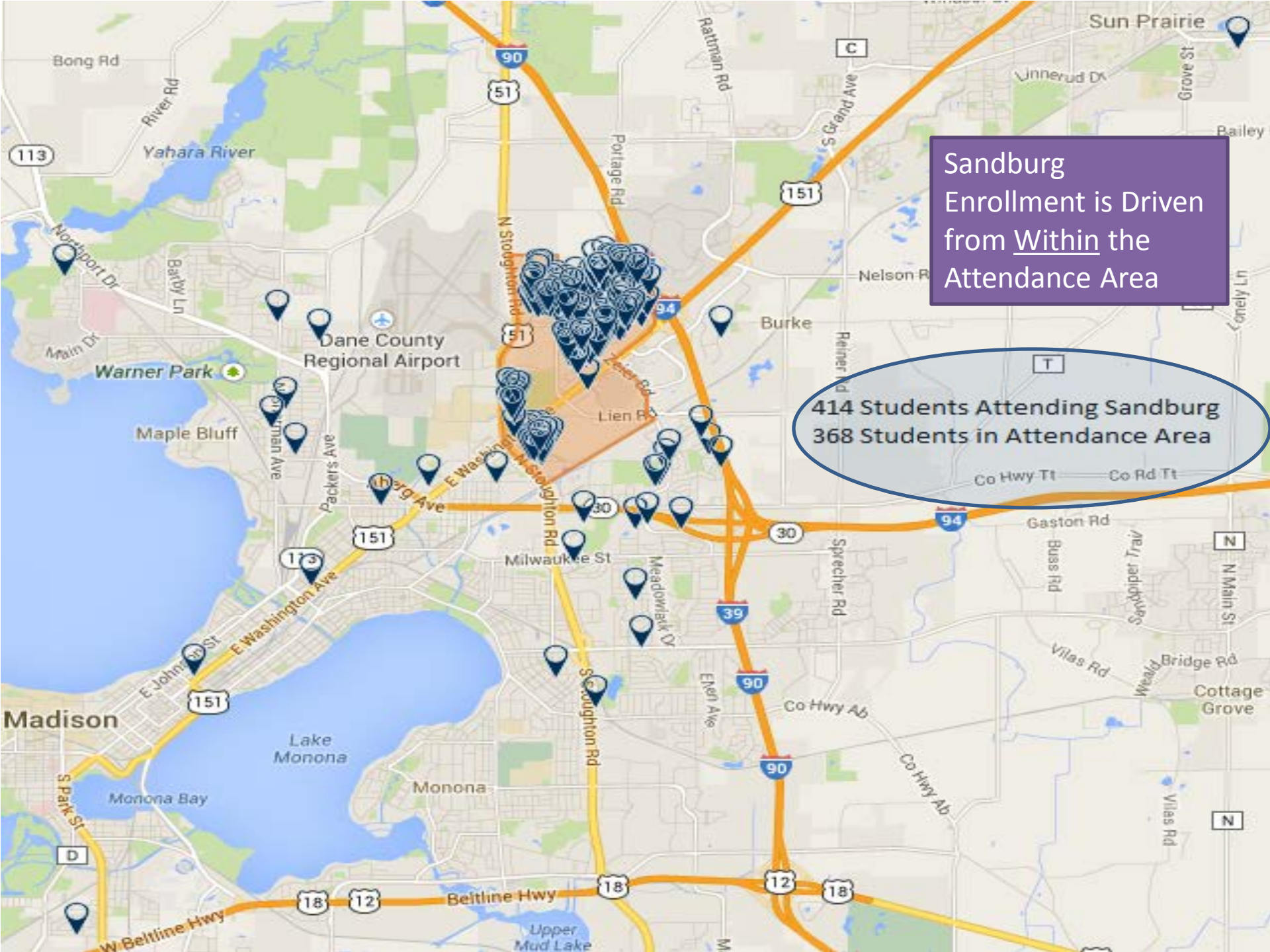
A Closer Look at Sandburg's Attendance Area & Neighboring Attendance Areas





Internal Transfer Review

A Closer Look at MMSD Internal Transfers Into Sandburg Elementary



Sandburg Enrollment is Driven from Within the Attendance Area

414 Students Attending Sandburg
368 Students in Attendance Area



Elementary Capacity - Midvale

School:	Midvale
Capacity	442
Enrollment (Ex. 4K)	445
Percent of Capacity Used	101%
Projected Enroll 2018-19	503
Projected Percent of Capacity I	114%
Percent w/in Attendance Area	82%
Hosts 4K?	Yes
4K Enrollment	64%
Total Enrollment w/ 4K	509
DLI Program?	Yes
SAGE?	Yes
Low Income	61%



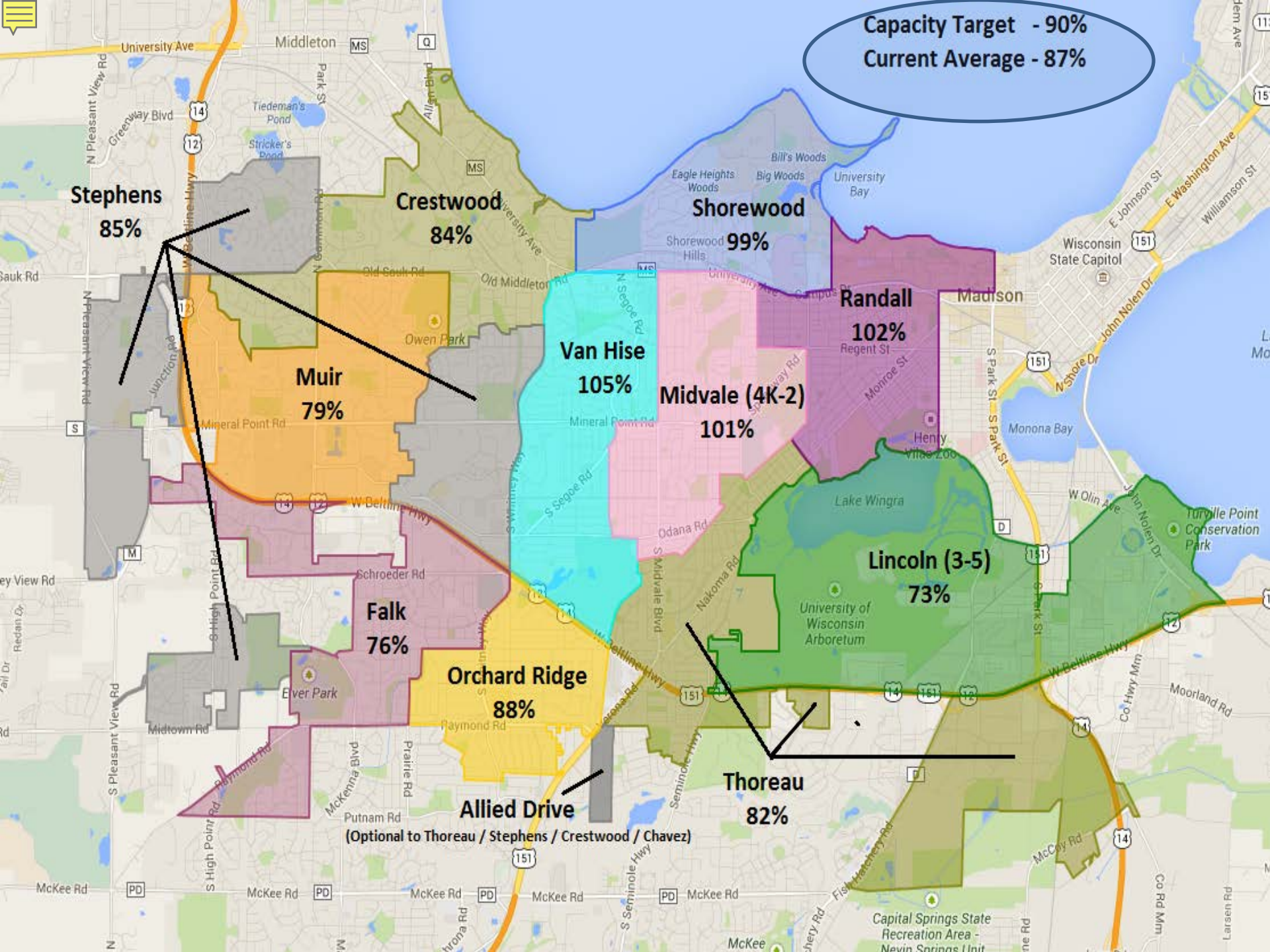


Attendance Boundary Example

A Closer Look at Midvale's Attendance Area & Neighboring Attendance Areas

(Midvale is 4K-2 and Paired w/ Lincoln 3-5)

Capacity Target - 90%
Current Average - 87%





Internal Transfer Review

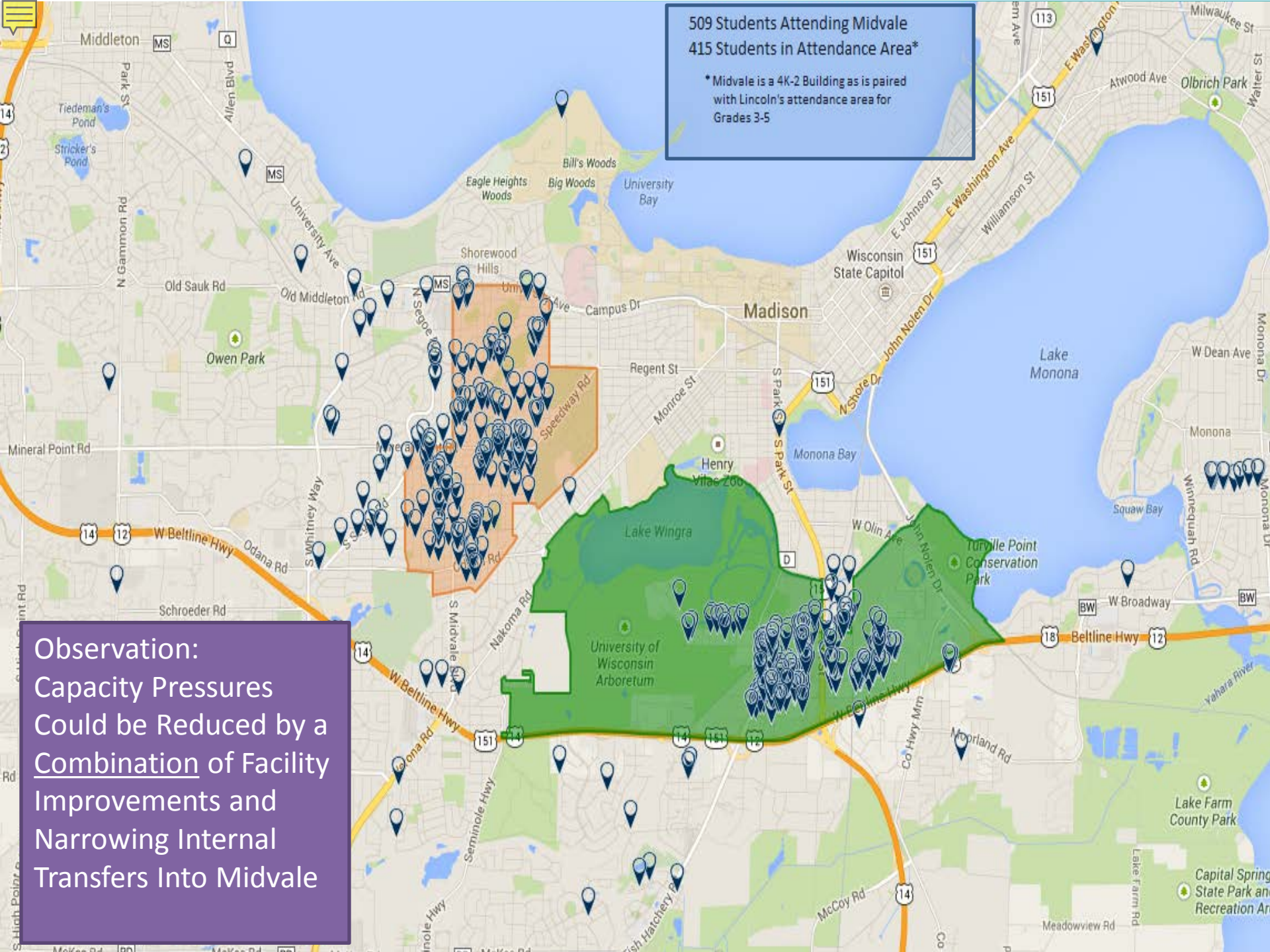
A Closer Look at MMSD Internal Transfers Into Midvale Elementary

(Midvale is 4K-2 and Paired w/ Lincoln 3-5)

509 Students Attending Midvale
415 Students in Attendance Area*

* Midvale is a 4K-2 Building as is paired
with Lincoln's attendance area for
Grades 3-5

Observation:
Capacity Pressures
Could be Reduced by a
Combination of Facility
Improvements and
Narrowing Internal
Transfers Into Midvale



Elementary Capacity - Van Hise & Hamilton

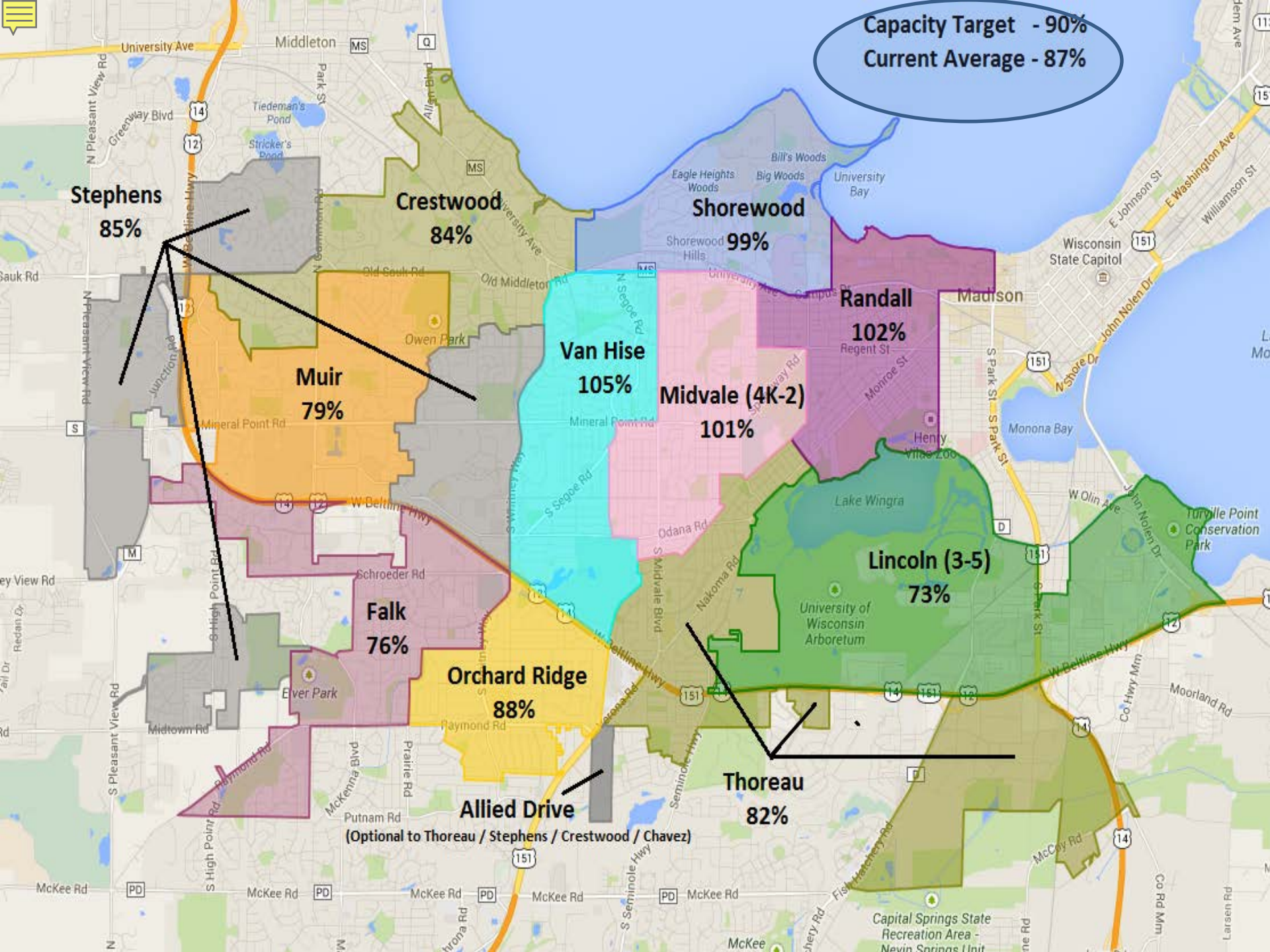
School:	Van Hise	Hamilton	Combined
Capacity	380	774	1,154
Enrollment (Ex. 4K)	398	794	1,192
Percent of Capacity Used	105%	103%	103%
Projected Enroll 2018-19	364	827	1,191
Projected Percent of Capacity Used	96%	107%	103%
Percent w/in Attendance Area	90%	82%	85%
Hosts 4K?	No	-	-
4K Enrollment	0	-	-
Total Enrollment w/ 4K	398	794	
DLI Program?	No		-
SAGE?	No		-
Low Income	20%	19%	19%



Attendance Boundary Example

A Closer Look at Van Hise Attendance Area & Neighboring Attendance Areas

Capacity Target - 90%
Current Average - 87%



Stephens
85%

Crestwood
84%

Shorewood
99%

Randall
102%

Van Hise
105%

Midvale (4K-2)
101%

Muir
79%

Falk
76%

Orchard Ridge
88%

Lincoln (3-5)
73%

Allied Drive

(Optional to Thoreau / Stephens / Crestwood / Chavez)

Thoreau
82%

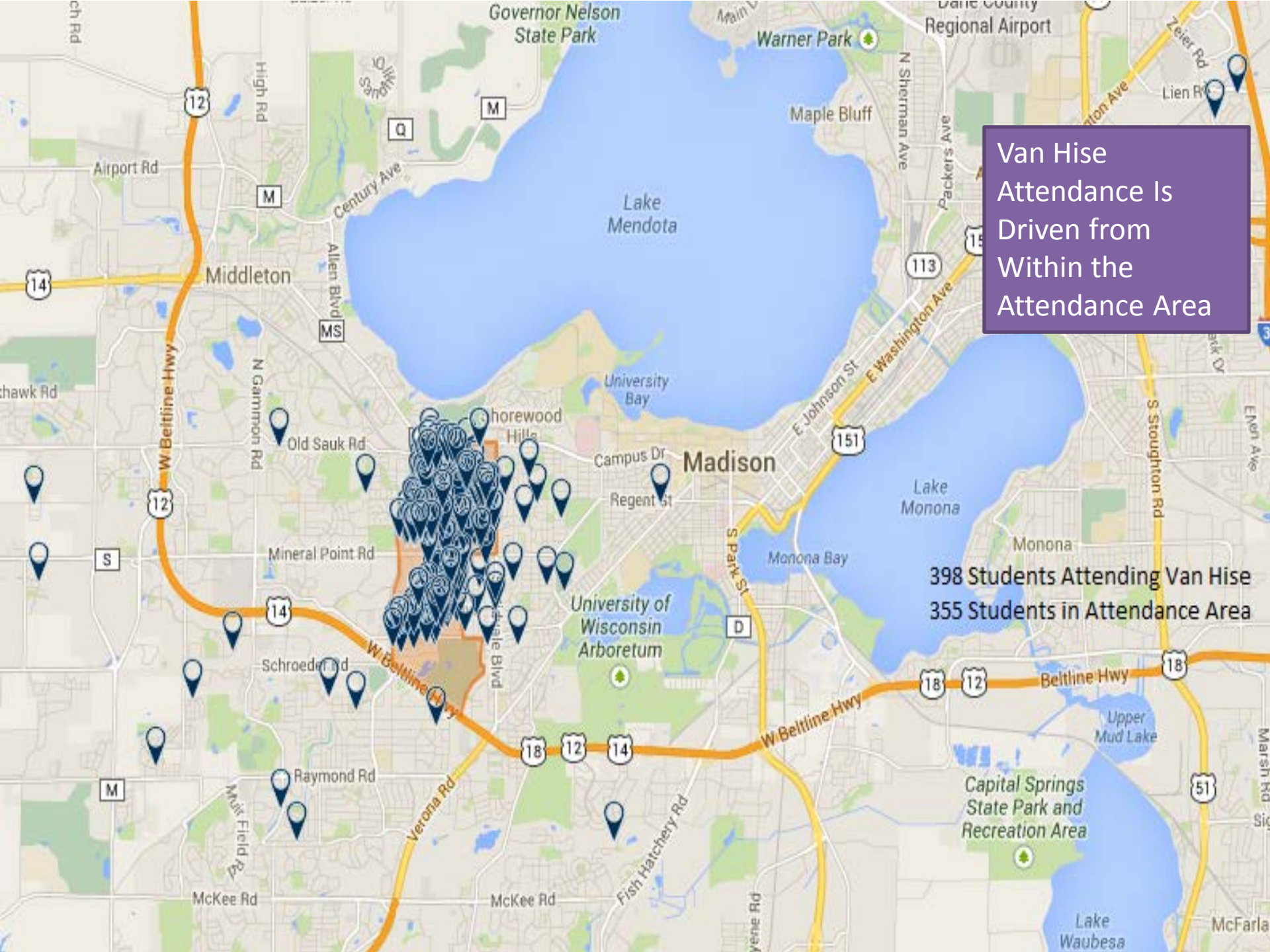


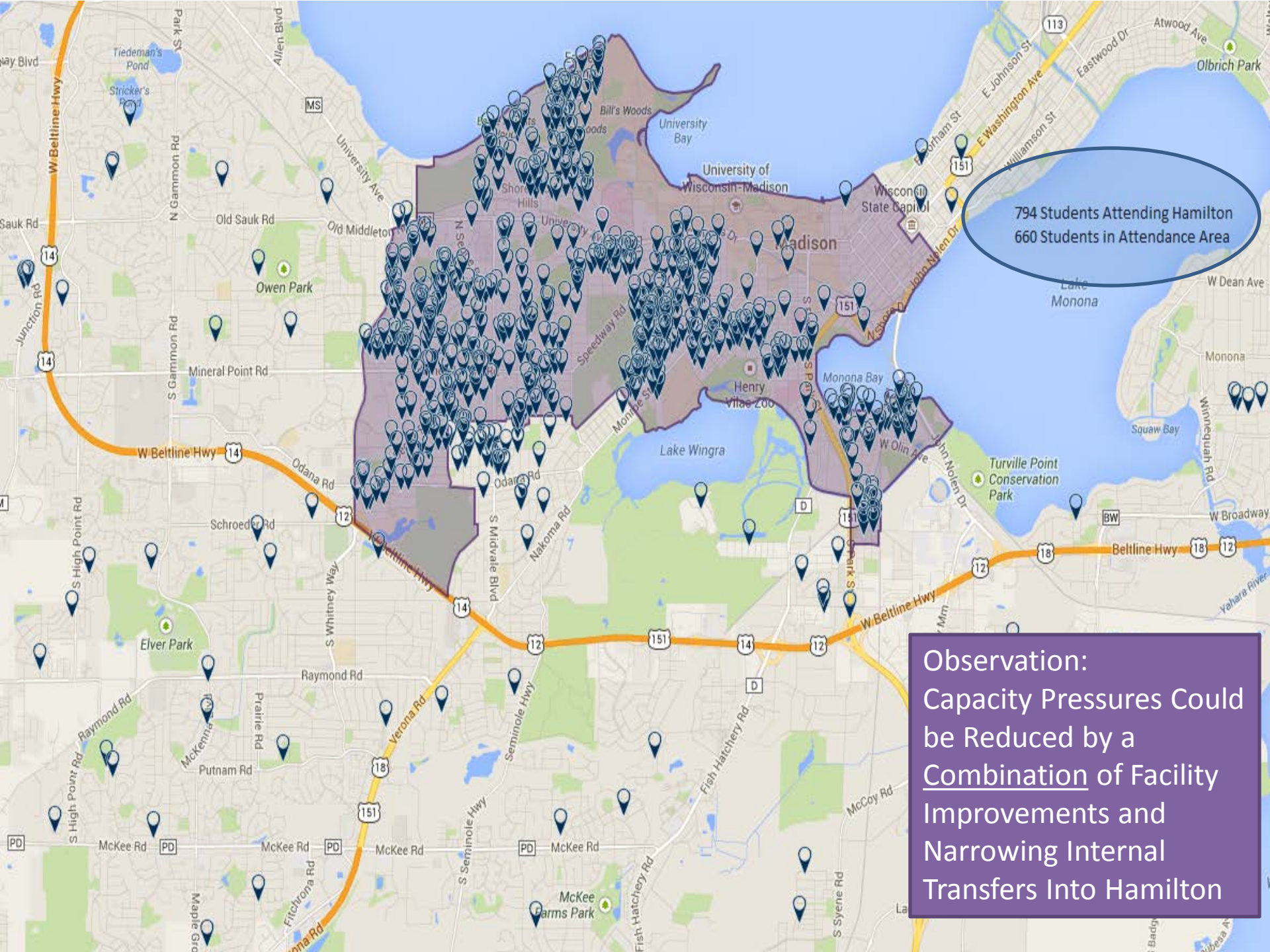
Internal Transfer Review

**A Closer Look at MMSD Internal Transfers Into
Van Hise Elementary & Hamilton Middle School**

**Van Hise is a 'Combo' School with Hamilton
Middle School**

Van Hise
Attendance Is
Driven from
Within the
Attendance Area





794 Students Attending Hamilton
660 Students in Attendance Area

Observation:
Capacity Pressures Could
be Reduced by a
Combination of Facility
Improvements and
Narrowing Internal
Transfers Into Hamilton



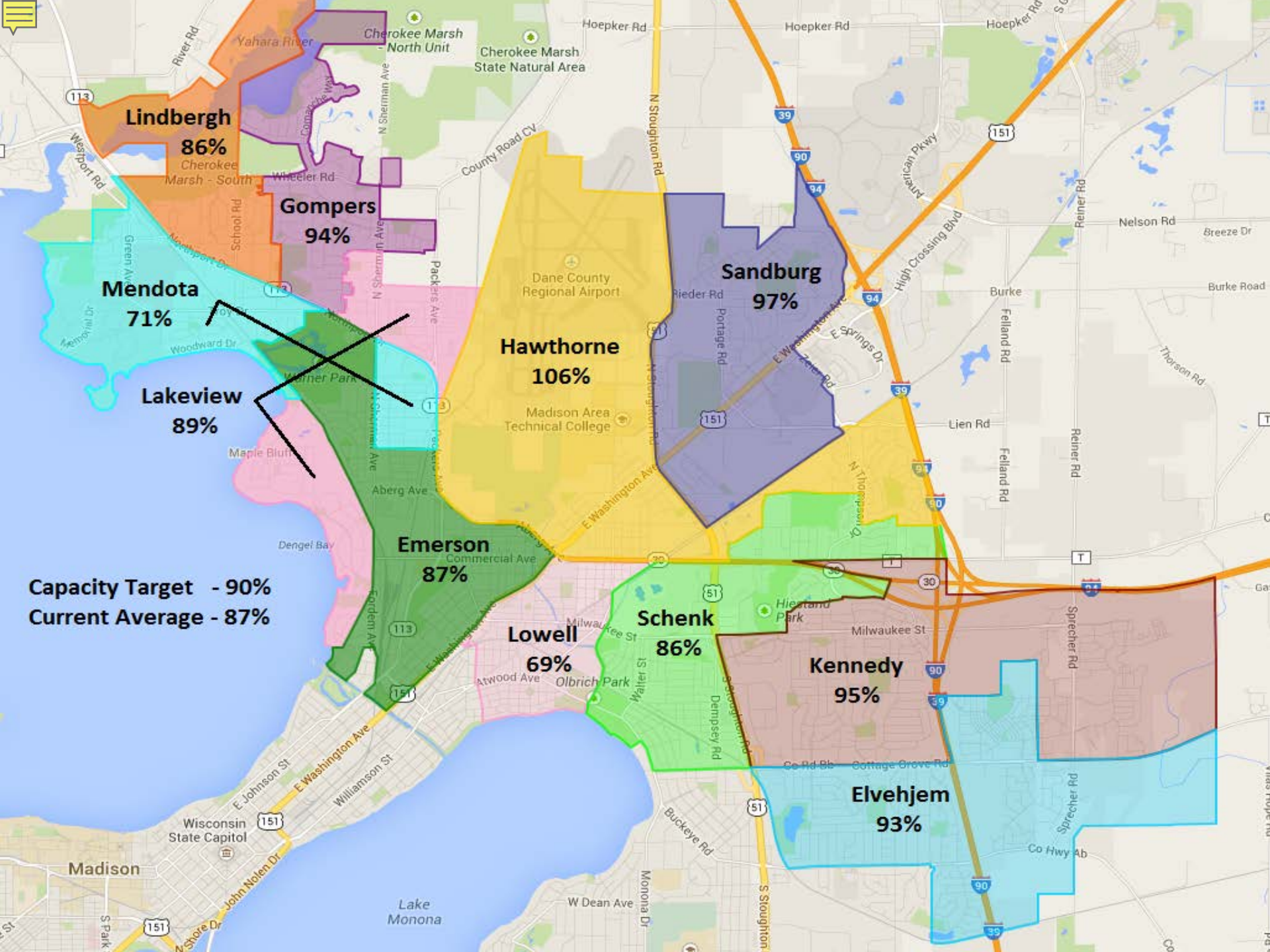
Elementary Capacity - Hawthorne

School:	Hawthorne
Capacity	354
Enrollment (Ex. 4K)	375
Percent of Capacity	106%
Projected Enroll 2018-19	442
Projected Percent of Capacity	125%
Percent w/in Attendance Area	81%
Hosts 4K?	Yes
4K Enrollment	58
Total Enrollment w/ 4K	433
DLI Program?	No
SAGE?	Yes
Low Income	74%



Attendance Boundary Example

A Closer Look at Hawthorne Attendance Area & Neighboring Attendance Areas



Capacity Target - 90%
Current Average - 87%



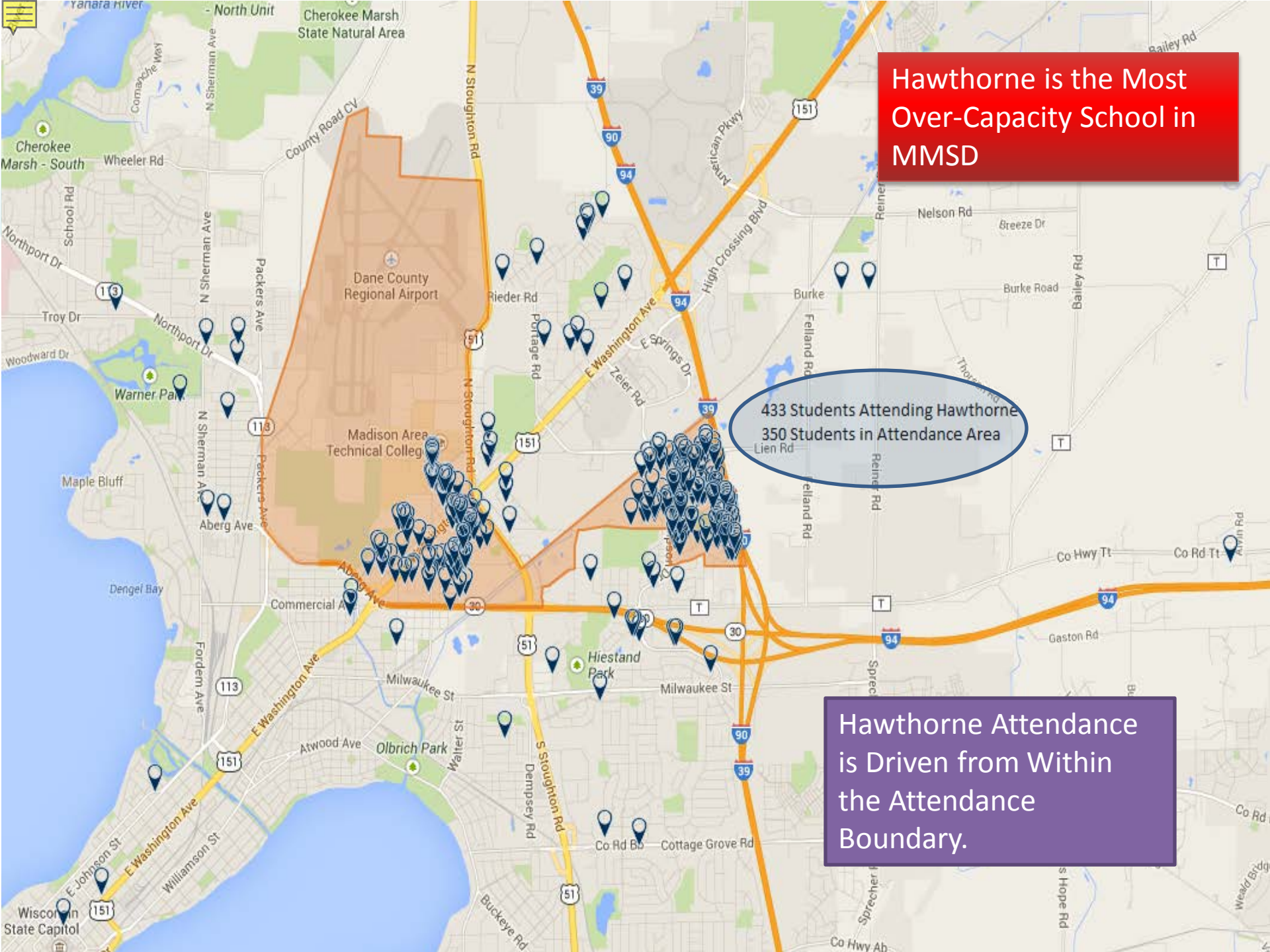
Internal Transfer Review

A Closer Look at MMSD Internal Transfers Into Hawthorne Elementary

Hawthorne is the Most Over-Capacity School in MMSD

433 Students Attending Hawthorne
350 Students in Attendance Area

Hawthorne Attendance
is Driven from Within
the Attendance
Boundary.

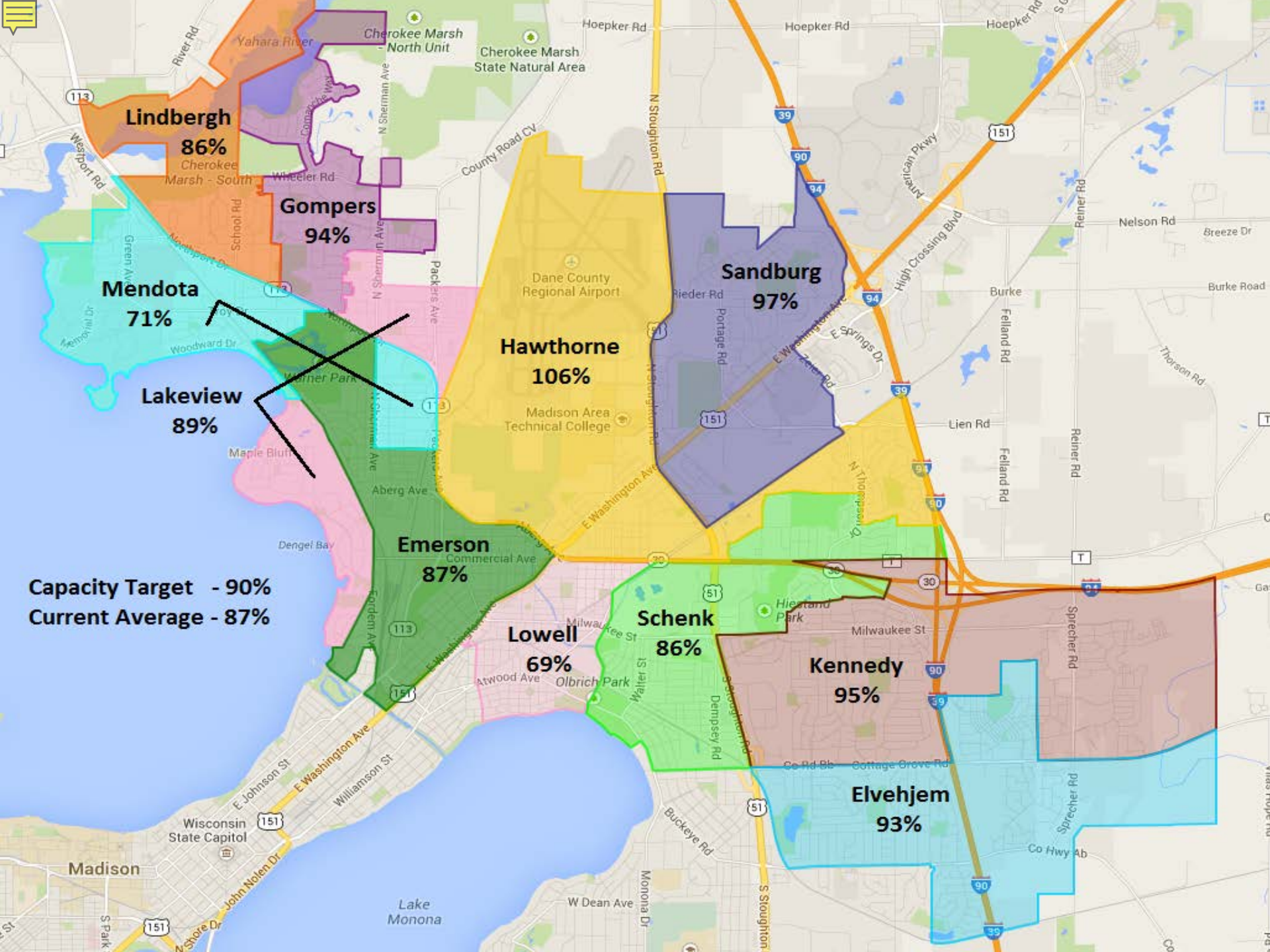




Elementary Capacity - Kennedy

<u>School:</u>	<u>Kennedy</u>
Capacity	603
Enrollment (Ex. 4K)	573
Percent of Capacity	95%
Projected Enroll 2018-19	537
Projected Percent of Capacity	89%
Percent w/in Attendance Area	90%
Hosts 4K?	No
4K Enrollment	0%
Total Enrollment w/ 4K	573
DLI Program?	No
SAGE?	No
Low Income	40%

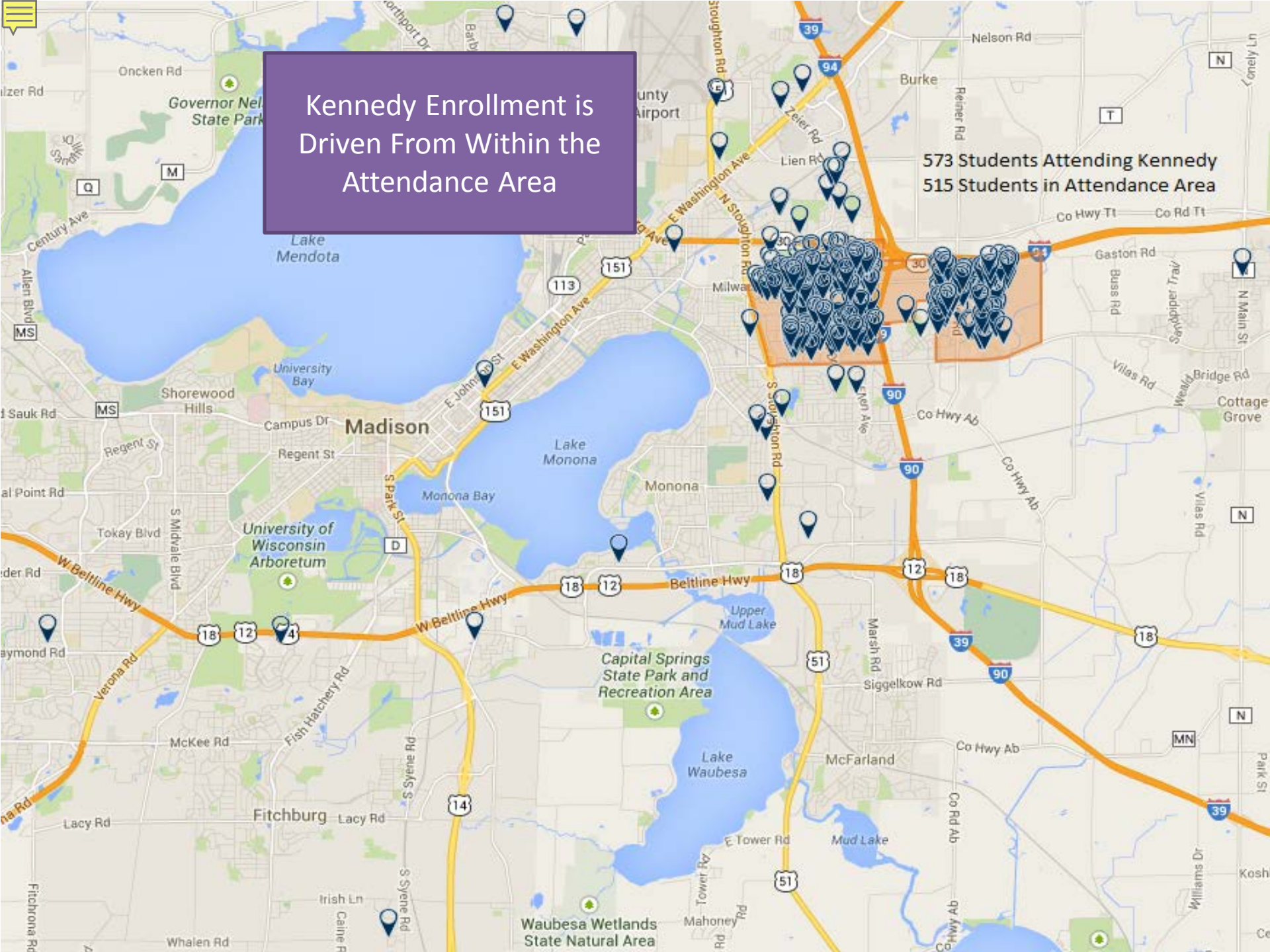




Capacity Target - 90%
Current Average - 87%

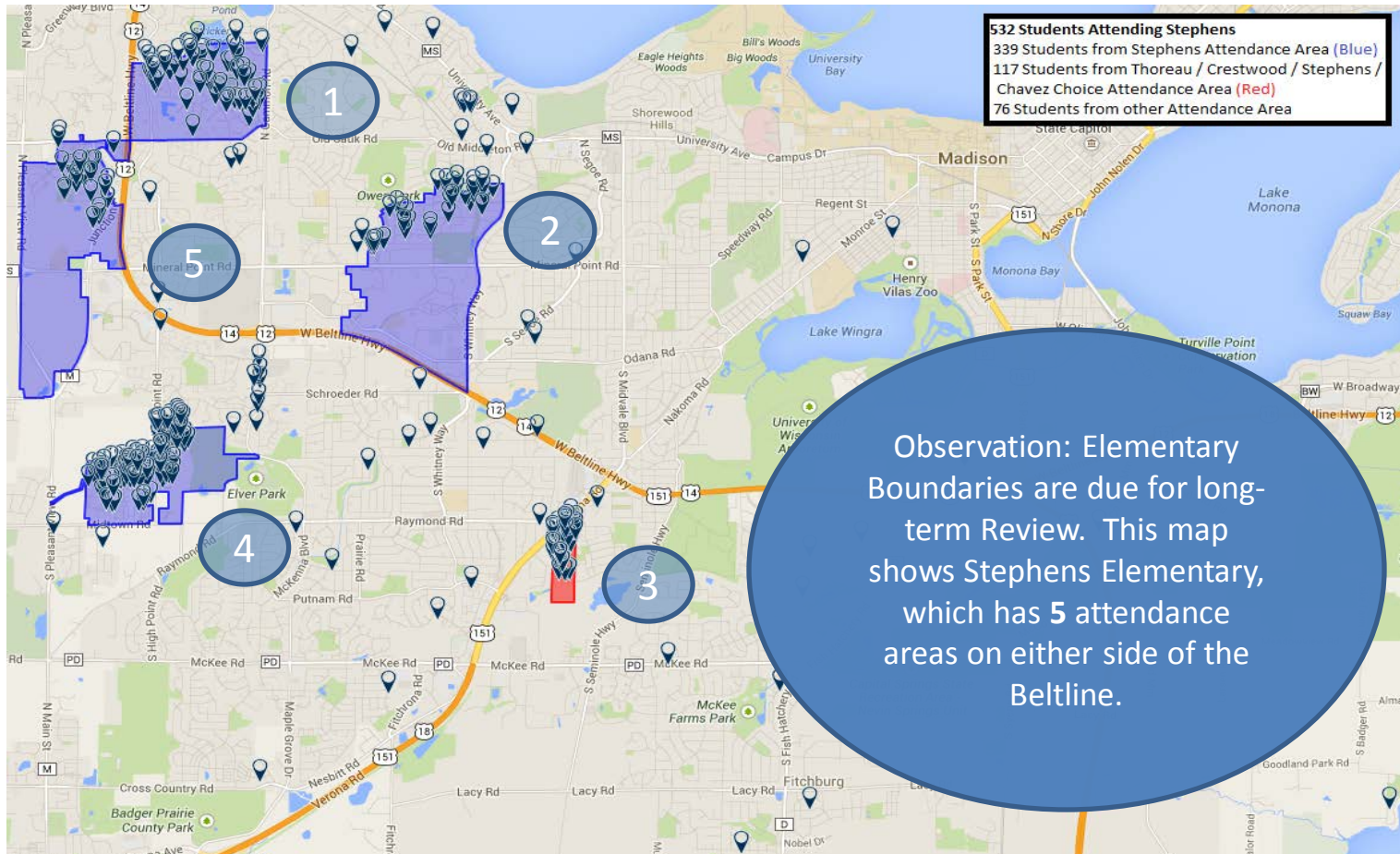
Kennedy Enrollment is
Driven From Within the
Attendance Area

573 Students Attending Kennedy
515 Students in Attendance Area



All Elementary Boundaries are Due for Long-Term Review

“The Stephens Example”





Seven Elementary Schools That Did Not Meet Construction Criteria:

- **Nuestro is a leased facility**
- **Randall is designated as a historical building**
- **Chavez has 703 students – reaching max elementary size**
- **Leopold has 715 students – reaching max elementary size**
- **Elvehjem is 21% inter-district transfers into the school**
- **Shorewood has manageable flexibility, No SAGE or DLI, has 4K**
- **Franklin has manageable flexibility, No SAGE or DLI, has 4K**





Part 3: School Renovations and the Facility Condition Index

The Facility Condition Index was created in 2012 (Facility Reinvestment Committee) to help prioritize major facility renovations. Through this process, school-wide renovations at Elvehjem and Hawthorne were completed in 2013.

Following the FCI model, Huegel and Mendota renovations are recommended for the summer of 2015. Looking ahead, there are six schools with a 'D' grade and one school with an 'F' grade.



Part 3:

Continue School Renovations Based on Facility Condition Index Mendota and Huegel Elementary Schools

Mendota Elementary:

FCI Composite Grade: C*

Built: 1948-1956-1960-1963

Plan: Mechanicals, Ceilings, Lights, Site Work, Exteriors

Cost: \$3 million



Huegel Elementary

FCI Composite Grade: D

Built: 1965-1991

Plan: Ceilings, Lights, Boilers, Mechanicals, Misc.

Cost: \$2.5 million



**Age and condition of mechanical system make this site a priority*





Project Financial Summary

Financing Strategy: Total project cost is \$27 million

**\$3 million from the capital maintenance operating budget
(\$1.5 million from 2014-15 and \$1.5 million from 2015-16)**

\$24 million from a bond issue with rapid five-year repayment cycle.

Tax levy impact of Facility Project = 1.86% or \$51.04 for average Madison home



Recommendation and Next Steps

We Recommend Conceptual Approval of the Plan

- and -

Further Development of Specific Costs and Plan Specifications

Further Development of Detailed Capital and Debt Structure

Final Action by August 18

