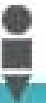


# Long-Range Facilities Plan Update:

Community growth projections  
and  
Understanding value through  
community engagement

Operations Work Group

July 18, 2016



# Today's Agenda

1. Review **purpose of long-range enrollment projections**
2. Long-range projection **findings**
3. Review a few long-range projection **case studies**
4. Highlights of **recent community input** and engagement sessions
5. Outlining future **plans for community input** and engagement
6. Long-range **implications for facility planning**



# Long Range Facility Plan Components

*Community engagement informs the entire working process and plan*

## Understanding Values through Community Engagement

### Attendance Areas Review

- Review policy
- Review boundaries
- Feeder Patterns
- Neighborhood schools
- Paired Schools
- Grade Configurations
- Transportation

### Community Growth Projections

- School capacities
- Enrollment History
- Future projections
- Demographic changes
- Open enrollment
- Private/Parochial
- Charter schools
- Vouchers

### Building Assessments

- Facility Condition
- Accessibility
- Safety & Security
- Air Conditioning & Energy efficiency
- Athletic facilities
- Community Use

### Instructional Design

- HS Pathways
- Locations (DLI, 4K) & Alternative School Sites
- Schedule and Calendar
- Technology Readiness
- Personalized Learning

### Long-range Facility Plan

# Big Takeaways

## 1. District-wide enrollments will go up slightly and gradually over 20 years

- Increase by about **1,670 (or 6.2%)**
- Without more annexations, MMSD will reach **build-out after 20 years**

## 2. Memorial attendance area will gain about 1,120 students over the next 20 years

- La Follette area will gain about 460 students
- West area will gain about a 35 students,
- East area will decline slightly by about 20 students

## 3. A few elementary schools will see large increases over 20 years

- **Olson (+482), Kennedy (+130), Stephens (+125), Elvehjem (+83)**
- Others are stable with declining household size offsetting gains through new development
- No elementary schools will see major enrollment losses

# Big Takeaways

## 4. Some student demographics will change over 20 years

- Based on five most recent years of actual change...
- **Students of color** will increase from **57% today to 62% in 2036-37**
- Most of this growth will be among Hispanic students (from 20.5% to 29.8%)
- **ELLs** will decrease slightly from **23% today to 19% in 2036-37**
- Low income students will remain steady around 48%
- While percentages may decrease or remain steady, the **number of students in these groups will increase**

## 5. Unknowns can have big impacts

- **Isthmus neighborhoods** could get hot and market shift could cause young families to stay in or close to infill development
- Big **neighborhood turnover** is possible as older families are replaced by younger ones
- Student **generation rates of new peripheral neighborhoods may be higher** and generate more students than projected

# Projections: Overall and by Attendance Area

Area	2015-16 Baseline	2021-22	2026-27	2031-32	2036-37
East	6065	6121	6095	6078	6043
La Follette	5438	5637	5705	5744	5899
Memorial	6947	7153	7396	7677	8067
West	7357	7381	7423	7384	7394
Alternatives	1305	1328	1343	1355	1379
<b>TOTALS</b>	<b>27,112</b>	<b>27,620</b>	<b>27,962</b>	<b>28,238</b>	<b>28,782</b>



# Implications for MMSD Facilities

- We need to **sustain our 50+ schools**
- We need to **maintain them**
- We likely will **not be scaling down** locations
- Some **pressure points** over the long haul
- A few **expansions and new construction** will be likely
- Only MMSD-owned property currently available is on **Sprecher Road**
- **Need to engage** community, city planners, developers, land owners



# Purpose of long-range enrollment projections

How will Madison **change in the next 5-10-15-20 years?**

Seeking the **clearest possible picture** of what is likely to be built, who will live there, and when

What might that mean for:

- Facility Needs
- Financial Modeling
- Instructional Design
- Operational Planning

Seven key questions:

1. Why is enrollment **stable**?
2. Will it **remain stable**?
3. When and where will **new development** occur?
4. When will we reach **build-out**?
5. What is the impact of **redevelopment**?
6. How will our **demographics change**?
7. Which **schools will be impacted** the most?





# Purpose of long-range enrollment projection tool

## New Enrollment Projection Tool

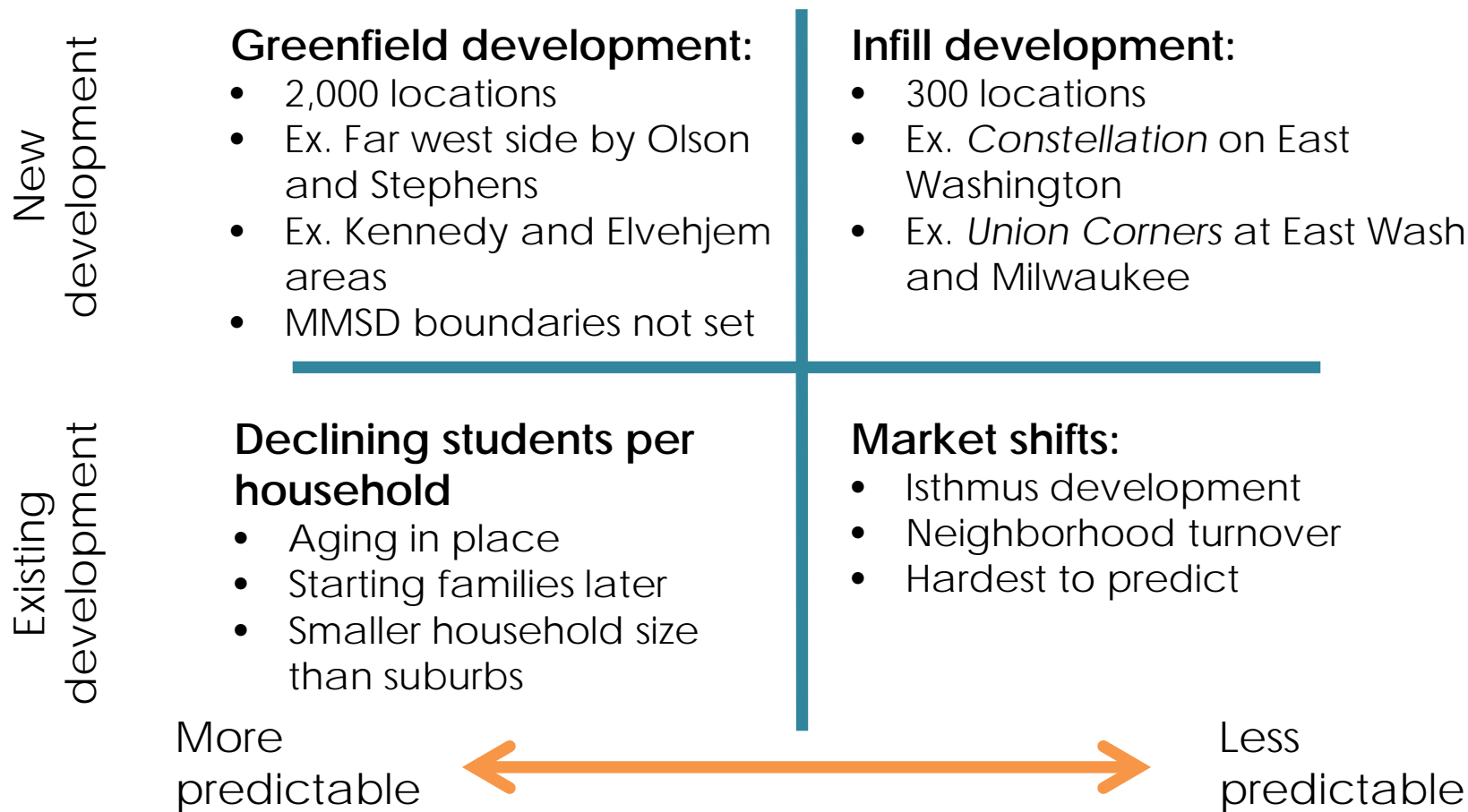
- Beyond annual five-year **cohort survival ratio** projections
- **External party** to help build
- **Parcel-by-parcel review** of location, density, timing
- **Maintain/update every 3-5 years** to adjust sequencing

## No decisions today

- Future **scenario building** for annexation, boundary changes, land acquisition, construction projects
- Prepares **MMSD for proactive role in area development**

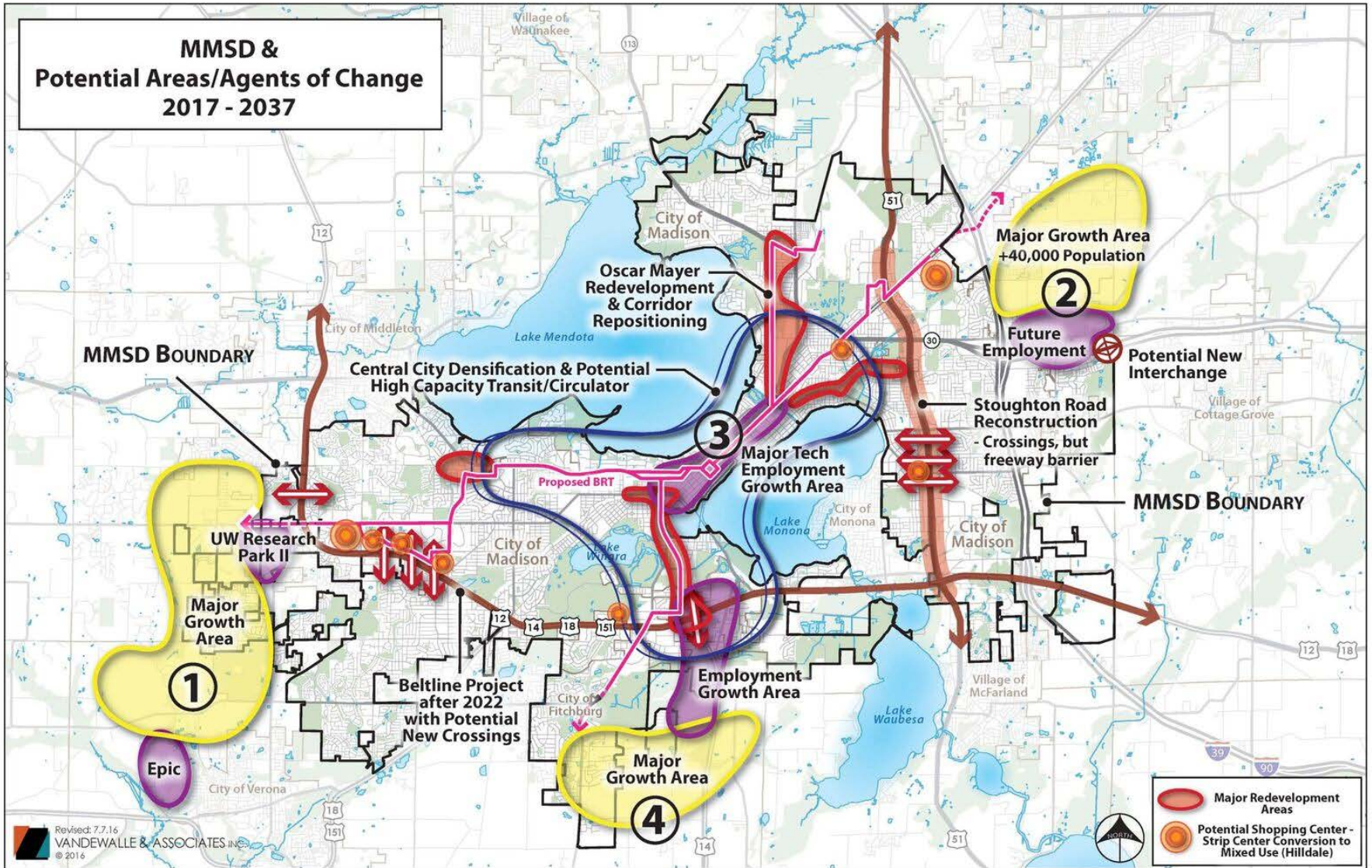


# Major Levers for Enrollment Changes

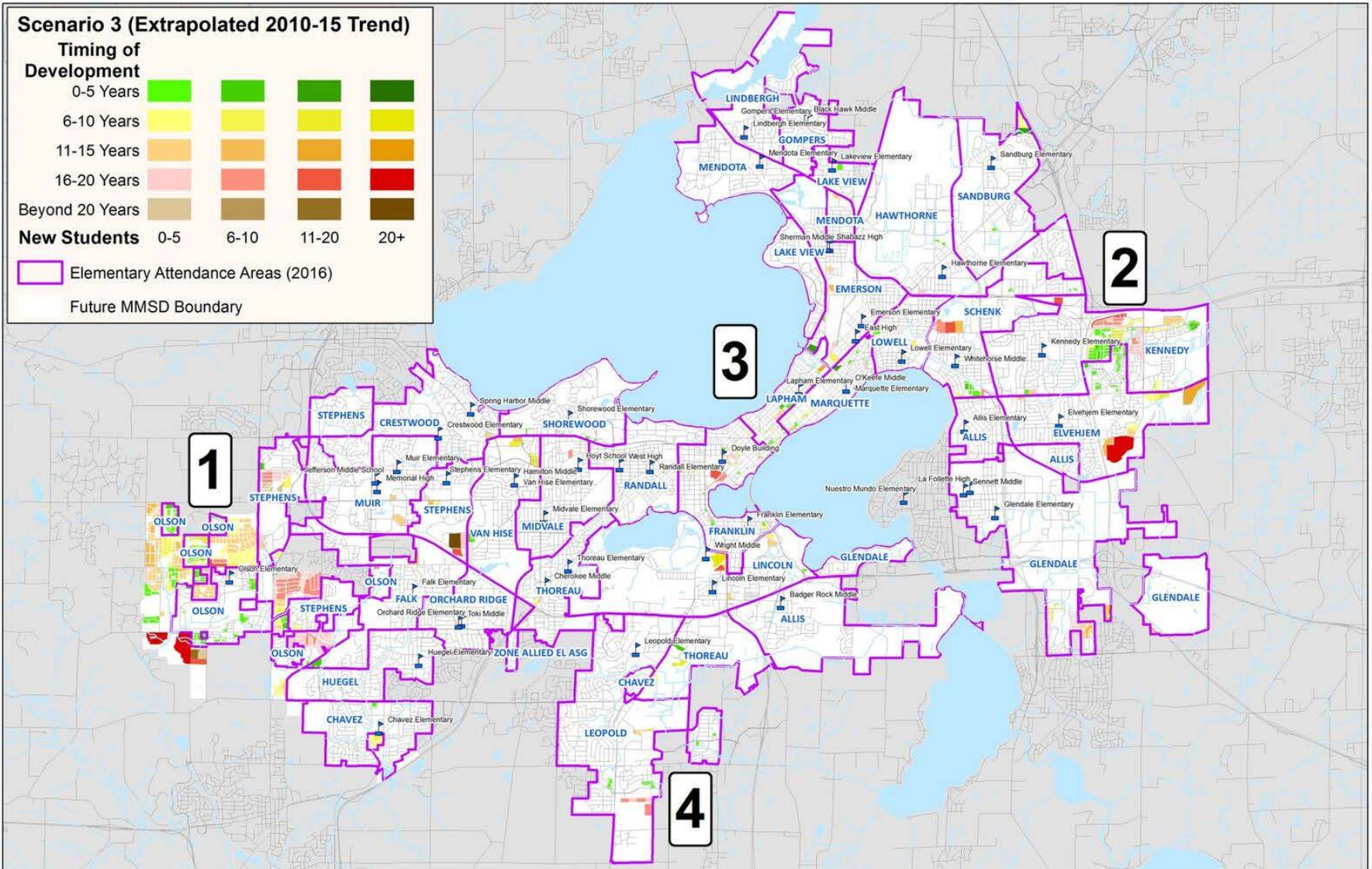


1. **Greenfield** development will have **greatest impact** on enrollments over next 20 years, but at only a few schools
2. **Market changes and household size** will have greatest impact after 20 years (after build-out)
3. **Declining students per household will offset** additional students coming from **infill** development

# Potential Areas of Change



# Parcel Map of Change



# School-by-School Growth



Projected Enrollment by School at Extended 2010-2015 Rate of Household Growth (Scenario Three)

School/Program	2015.14 Current PK-12 Enrollment	Enrollment Change within Existing Development, 2011-2017	Enrollment Change from New Development, 2011-2017	2017 Total Projected Enrollment	Enrollment Change within Existing Development, 2018-2027	Enrollment Change from New Development, 2018-2027	2027 Total Projected Enrollment	Enrollment Change within Existing Development, 2028-2037	Enrollment Change from New Development, 2028-2037	2037 Total Projected Enrollment	Enrollment Change within Existing Development, 2038-2047	Enrollment Change from New Development, 2038-2047	2047 Total Projected Enrollment	Enrollment Change within Existing Development, Beyond 2047	Enrollment Change from New Development, Beyond 2047	Beyond 2047 Total Projected Enrollment
<b>East Attendance Area Totals</b>	6885	-39	85	6931	-48	43	6925	-57	60	6867	-58	31	6809	-48	0	6761
Alex Elementary	510	-2	0	508	-6	0	502	-5	0	497	-5	0	492	-4	0	488
Barkley Elementary	304	-2	43	344	-6	14	352	-5	21	368	-5	24	387	-5	0	382
Bentley Elementary	492	-2	1	491	-5	20	505	-5	8	509	-5	11	515	-4	0	511
Bentley Middle	331	-3	60	388	-6	32	414	-6	4	412	-6	35	446	-5	0	441
Bentley Middle	314	-2	3	314	-3	0	311	-3	0	308	-3	0	305	-3	0	302
Bentley Middle	429	-2	18	445	-5	0	440	-4	6	443	-4	3	444	-4	0	440
Berger Road Middle	72	0	0	72	-1	1	72	-1	1	72	-1	1	72	-1	1	72
Berrett Middle	647	-3	16	660	-7	12	665	-6	18	678	-6	12	684	-5	0	679
Whitaker Middle	434	-2	20	452	-5	12	469	-4	7	472	-4	21	499	-4	0	495
La Follette High	1304	-7	55	1352	-17	24	1359	-15	25	1379	-15	24	1418	-13	0	1405
<b>La Follette Attendance Area Totals</b>	5418	-36	235	5617	-42	129	5705	-33	83	5744	-33	296	5999	-47	3	5952
Chambers Elementary	478	-3	4	479	-7	15	485	-6	0	478	-6	0	472	-5	0	467
Creswood Elementary	392	-2	0	390	-4	0	386	-4	0	382	-4	0	378	-3	0	374
Dali Elementary	351	-2	4	353	-4	9	358	-3	0	355	-3	1	352	-3	0	349
Harper Elementary	463	-2	0	461	-5	0	456	-4	0	451	-4	0	447	-4	0	444
Har Elementary	430	-2	0	428	-3	0	425	-4	1	421	-4	0	418	-3	0	415
Olson Elementary	432	-2	105	535	-6	126	655	-6	140	789	-7	133	914	-7	14	921
Orchard Ridge Elementary	366	-2	0	364	-4	0	360	-4	0	357	-3	0	354	-3	0	351
Rapides Elementary	555	-3	15	567	-6	19	580	-5	10	584	-5	10	589	-5	30	594
Jefferson Middle	522	-3	6	525	-6	12	532	-6	9	536	-5	44	575	-5	11	582
Spring Harbor Middle	350	-1	1	350	-3	3	350	-2	3	350	-2	3	350	-2	3	350
Trill Middle	385	-3	29	411	-7	49	443	-6	66	514	-7	42	559	-7	4	555
Renovet High	1963	-9	67	1961	-22	89	1928	-19	121	2131	-20	136	2347	-18	20	2329
<b>Memorial Attendance Area Totals</b>	6947	-43	249	7153	-79	222	7296	-69	251	7477	-71	469	8067	-64	81	8003
Franklin Elementary	399	-2	7	404	-7	10	407	-4	7	412	-4	7	415	-3	0	412
Lugoff Elementary	667	-3	11	675	-7	0	667	-6	0	661	-6	13	671	-5	0	666
Shook Elementary	400	-2	0	398	-4	34	428	-4	1	425	-4	7	432	-4	0	428
Whitaker Elementary	508	-2	0	506	-5	0	501	-5	0	495	-5	5	496	-4	0	492
Handel Elementary	394	-2	1	393	-4	0	389	-4	0	385	-4	0	379	-3	0	376
Bronwood Elementary	437	-2	4	439	-5	0	434	-4	0	429	-4	0	425	-4	0	421
Thomas Elementary	454	-2	6	458	-5	10	463	-4	0	459	-4	0	455	-4	0	451
Wal Hill Elementary	395	-2	0	394	-4	16	405	-4	0	401	-4	0	398	-3	0	394
Charis Middle	447	-2	6	451	-5	13	459	-4	2	457	-4	10	462	-4	0	458
Harbison Middle	869	-4	7	872	-10	11	873	-8	7	872	-8	12	876	-7	0	869
Wright Middle	356	-1	1	356	-3	3	356	-2	3	356	-2	3	356	-2	3	356
West High	3111	-10	16	3117	-23	25	3119	-20	29	3108	-19	21	3109	-17	0	3092
<b>West Attendance Area Totals</b>	7267	-35	69	7291	-61	122	7423	-52	31	7384	-52	78	7504	-49	3	7455
W. PK. Off Site	83	-4	19	88	-10	19	87	-8	16	86	-8	24	92	-7	3	87
Innovative & Air Middle	8	0	0	8	0	0	8	0	0	8	0	0	8	0	0	8
Innovative & Air High	310	-1	7	316	-3	7	319	-3	6	322	-3	9	328	-3	1	326
Henry School Middle and High	18	0	0	18	0	0	19	0	0	19	0	0	19	0	0	19
Parkway High	110	-1	3	112	-1	3	113	-1	3	113	-1	3	113	-1	3	113
<b>Other School Totals</b>	1166	-4	9	1171	-18	38	1160	-18	37	1155	-18	37	1159	-18	4	1141
<b>2015-2047 Grand Totals</b>	27112	-131	639	27621	-233	540	27941	-242	540	28239	-242	672	28731	-220	90	28641
Net change per student			5.0%			3.4%		1.2%		2.7%		5.3%		-3.0%	-1.3%	-6.5%

1. Percent change in number of persons per City of Madison household per five-year lifespan, or portion thereof, interpolated from "Household Projections for Wisconsin Municipalities: 2010 - 2043," Wisconsin Department of Administration, version 2013.  
 2. Derived by "Inserting" Vandewalle & Associates and municipal staff estimates of new development by typology and anticipated growth, assuming the number of dwelling units added to the District per year through 2037 and beyond continue at the observed annual rate for the period 2010-2015.  
 3. Estimates for enrollment growth for schools and alternative programs without a defined geographic attendance area are assumed to grow at the overall pace for all new development in the four high school attendance areas.  
 4. Charter/higher schools that draw students from across the entire District are assumed to fill to capacity, with future changes in enrollment due to new development or redevelopment offsetting anticipated declines from demographic change (resulting in no net change in enrollment during the 26-year study period).

# Case Studies

## 1. Olson Elementary

- Big impact from **near-term greenfield** development

## 2. Elvehjem Elementary

- Big impact from **longer-term greenfield** development

## 3. Lapham Elementary

- Watch for **market shifts** driven by infill developments and neighborhood turnover

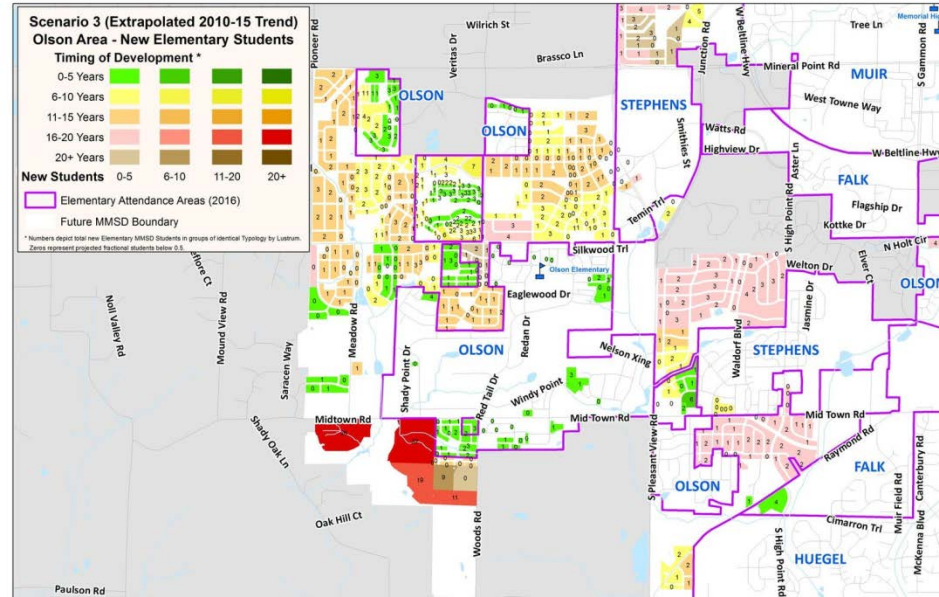
## 4. Leopold Elementary

- Watch for development **along district boundaries**



# 1. Olson Elementary

- Large and dense areas of **greenfield** development in the next 15 years
- Negligible infill development
- Students per household declining
- Negligible market shifts

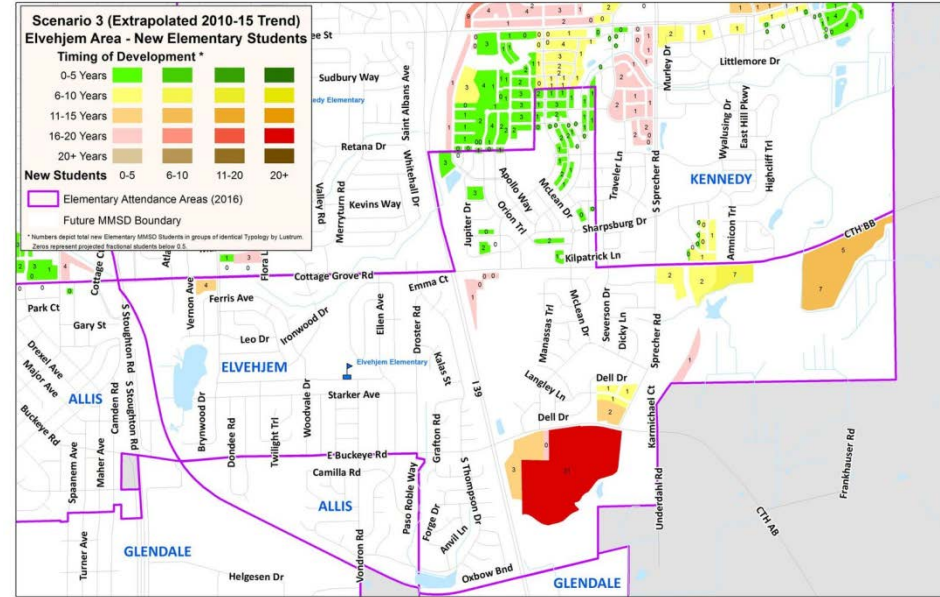


	2015-16 Baseline	2021-22	2026-27	2031-32	2036-37
Cumulative change	0	103	223	357	482
Capacity rate	64%	78%	96%	115%	134%

**Central issues:** How will we avoid crowding? How do we assign newly annexed land?

# 2. Elvehjem Elementary

- Areas of **greenfield** development in the next 10 years and again in 15 to 20 years
- Negligible infill development
- Students per household declining
- Negligible market shifts



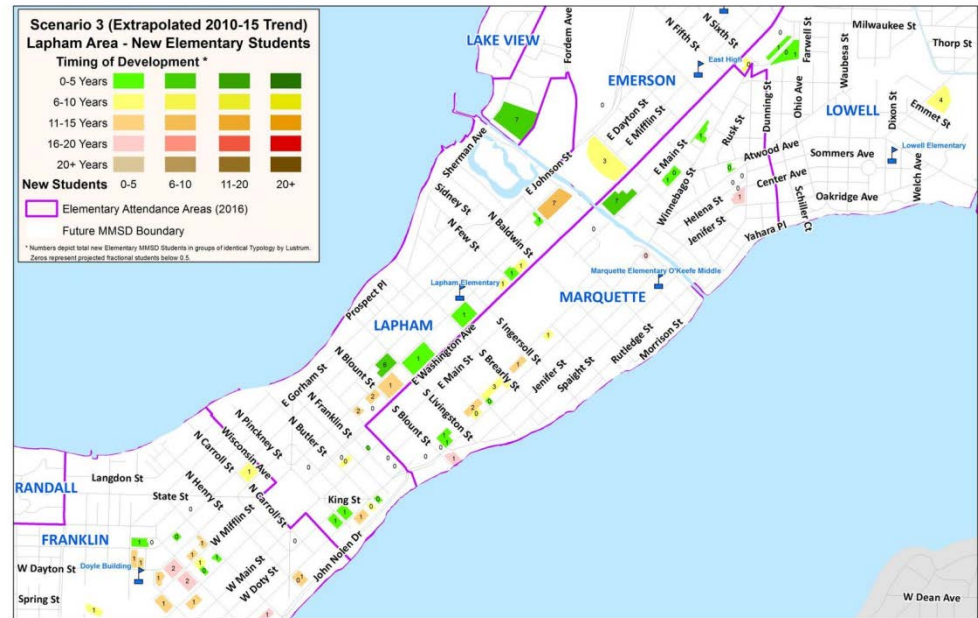
	2015-16 Baseline	2021-22	2026-27	2031-32	2036-37
Cumulative change	0	40	48	64	83
Capacity rate	95%	102%	104%	107%	110%

**Central issues:** How will we avoid crowding? When do we develop the Sprecher Road site?



# 3. Lapham Elementary

- No greenfield development
- Fair amount of **infill development**
- Students per household declining
- **Market shifts** are big unknown

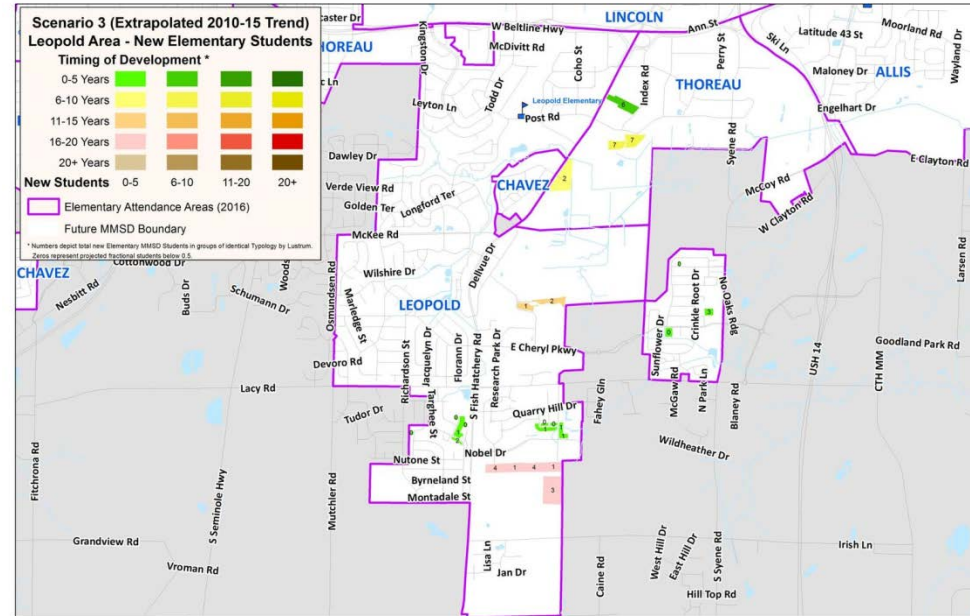


	2015-16 Baseline	2021-22	2026-27	2031-32	2036-37
Cumulative change	0	11	11	21	18
Capacity rate	81%	85%	85%	88%	87%

**Central issues:** What is the long-term impact of infill and market changes on enrollment at Lapham/Marquette?

# 4. Leopold Elementary

- No greenfields in district (but a lot of development southeast)
- Negligible infill development
- Students per household declining
- Negligible market shifts



2015-16  
Baseline

2021-22

2026-27

2031-32

2036-37

Cumulative  
change

0

8

0

-3

4

Capacity rate

87%

88%

87%

87%

88%

**Central issues:** Could a school in southern Fitchburg capture residential growth in the area and reduce open enrollment leavers? What may be our concerns with the size of Leopold as an elementary location?

# Long Range Facility Plan Components

*Community engagement informs the entire working process and plan*

## Understanding Values through Community Engagement

### Attendance Areas Review

- Review policy
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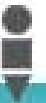
### Instructional Design

- HS Pathways
- Locations (DLI, 4K) & Alternative School Sites
- Schedule and Calendar
- Technology Readiness
- Personalized Learning

## Long-range Facility Plan

# Purpose of Engagement

- Community voice to guide decision making
  - Reflect our community's priorities and values
- Community feedback and input on other project areas; examples include:
  - Project Area C: Report on Enrollment Projections
  - Project Area B: Facility Condition Index
- More details available in *Long-Range Facilities Plan Engagement Plan* – will walk through the major components today



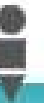
# Guiding Principles for Engagement Plan

- Keeping equity at the forefront
- Grounded in qualitative research design
- Giving voice to most affected
- Striving for representative feedback
- Providing flexibility
- Balancing quantity with quality
- Paying attention to specialized knowledge
- Asking questions that lead to actionable answers



# Structure of Engagement

- Phase 1: **Perceptions of and Vision for Facilities** (Spring-Summer 2016)
- Phase 2: **Guiding Principles and Focus Area Identification** (Fall 2016)
- Phase 3: **Focus Area Discussions and Review of Products** (Spring 2017)

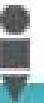


# Phase 1: Spring-Summer 2016

- Purpose
  - **Initial conversations** to help gather information and plan for future engagement
  - Compile previous facilities-related feedback
- Guiding Questions
  1. What are your **perceptions** of MMSD facilities?
  2. What is your **vision** for MMSD facilities?
- Data Collection
  - Visited **17 school sites, 11 focus groups** (high school students, staff at all levels, and LMTSS) and **13 building tours/informal conversations**
  - Creating secondary dataset; **compilation of all facilities-related feedback** over 3 years (approx. 4,500 comments)
- Products
  - *Interim Research Report: Perceptions of and Vision for MMSD Facilities (Spring 2016 Engagement)*
  - Secondary Dataset

# Early Lessons

- Those who chose to participate were **emotional, highly engaged, and appreciated** being heard.
- Students, teachers, LMTS were **understanding of the current constraints** (e.g., budget, time).
- They want a long-range facility plan that **outlines when things will happen**.
- They recognize that **issues of equity are at play**, but disagree on what that means.
- Their **perceptions of current facilities** (i.e., status and problem areas) and their vision for the future largely **fit with what we would expect/already know**.



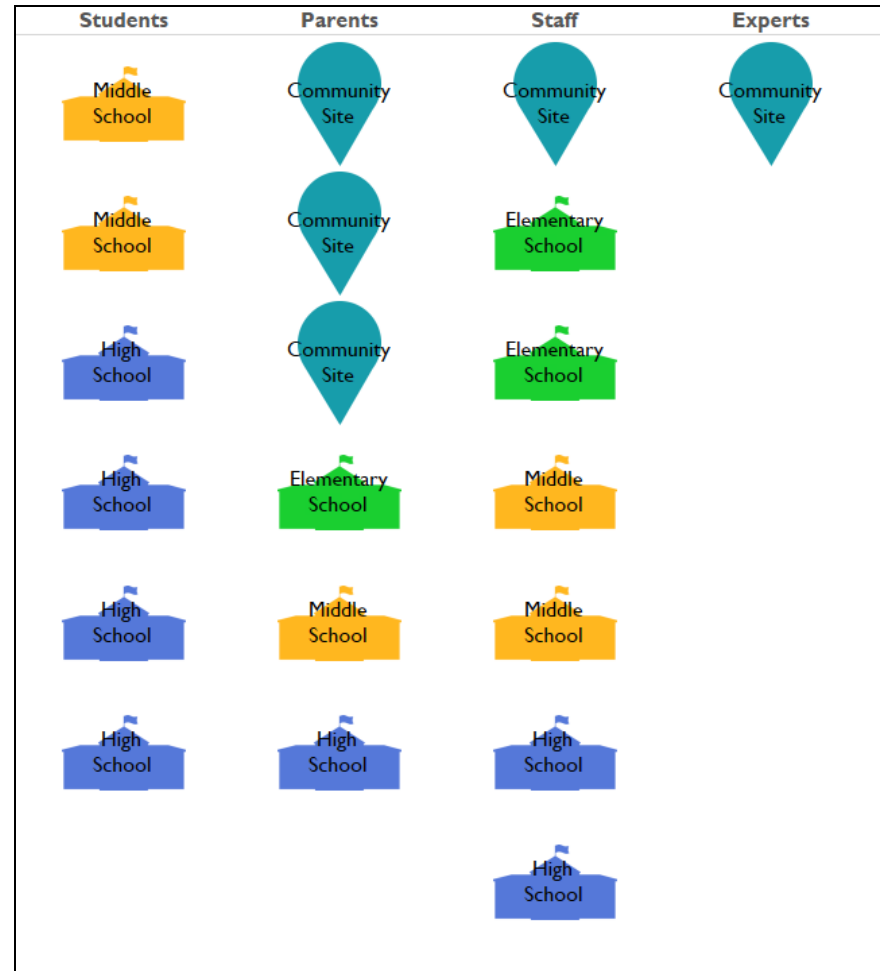


# Phase 2: Fall 2016

- Purpose
  - Create **guiding principles for facilities decision making**—conversations focused on district level
  - **Identify focus areas** to drive spring engagement
- Guiding Questions
  1. What **principles should guide our decision making** to ensure MMSD facilities support our Strategic Framework?
  2. Given what we know about our student population trends, what **policies, practices, and locations** need attention during the development of the long-range facilities plan?
- Data Collection
  - **Focus groups, interviews, and feedback form** on website
- Products
  - *Guiding Principles for MMSD Facilities Decisions*
  - List of Focus Areas for Spring Engagement
  - *Interim Research Report: Guiding Principles and LRFP Implications (Fall 2016 Engagement)*

# Highlight – Phase 2 Focus Groups

- Data Collection
  - Approximately 20 focus groups between Sept-Oct
  - Various stakeholders, including students, staff, parents, and experts
  - Organized to achieve representation across levels and locations

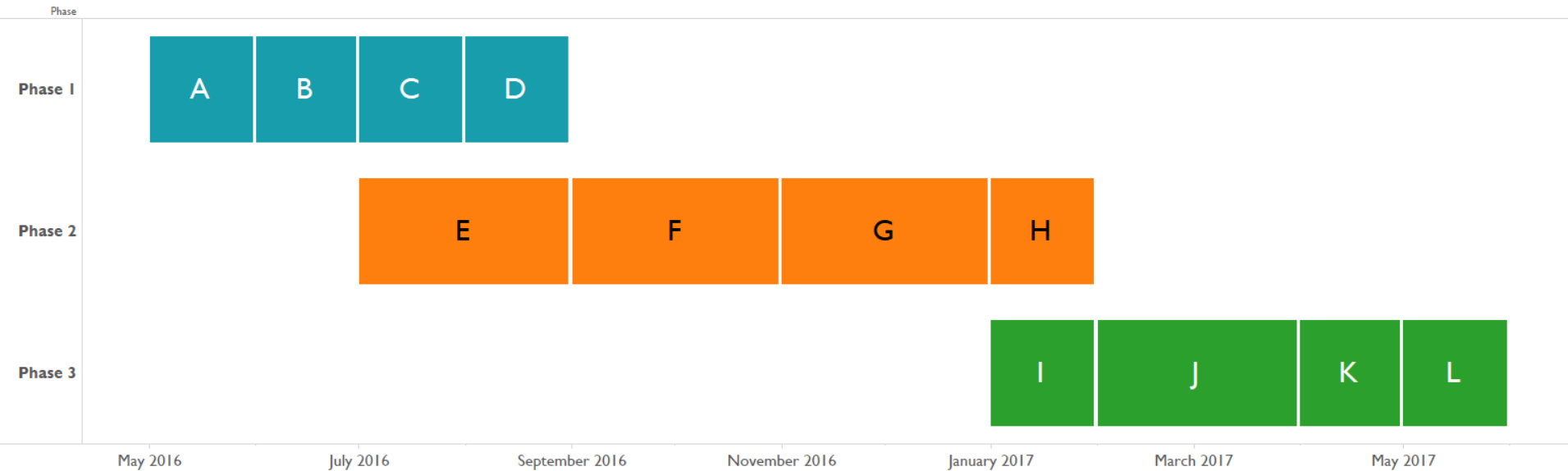


# Phase 3: Spring 2017

- Purpose:
  - Generate **short list of key focus areas** to drive facilities decision making
  - **Feedback on products** from Project Area A, B, C, and D
- Guiding Questions:
  1. What are the **key policies, practices, and locations** that the district should focus its attention on over the next 20 years?
    - Additional question(s) determined by Phase 2 analysis
- Data collection:
  - TBD, but likely will include focus groups, interviews, and feedback form on website
- Product
  - *Research Report: Engagement in the LRFP*



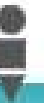
# Planned Timeline



Text Key	Item
A	Developed Phase 1 protocols; reached out to schools to set up sessions
B	Conducted Phase 1 focus groups, interviews, and building tours
C	Complete analysis of Phase 1 spring data; begin compilation of secondary data
D	Final report on Phase 1 Spring 2016 Engagement; Secondary dataset built
E	Develop Phase 2 protocols; create webform; schedule and advertise focus groups and interviews
F	Collect Phase 2 data via webform, focus groups, and interviews
G	Analyze Phase 2 data
H	Phase 2 report and supporting resources available
I	Identify locations for Phase 3 focus groups, based on fall list and other project area findings; develop Phase 3 protocols; schedule sessions; modify webform with new guiding questions
J	Collect Phase 3 data
K	Analyze Phase 3 data; provide feedback to project area leads to inform final revisions to resources
L	Create final report

# Final Thoughts

- Our approach to long-range facility plan engagement aligns with the core values and ways of working outlined in our Strategic Framework
- It will make the plan more robust and inclusive
- We will keep you informed throughout its development with what we have learned and where we are headed



# Long-Range Facility Plan: A useful fact-based resource for future facility-related decision making

This Fall:

- **A**ttendance Areas Review
- **B**uilding Conditions Report –Updated
- **E**ngagement – Ongoing Input from Stakeholders

