

EXECUTIVE SUMMARY



INTRODUCTION

In November 2011 Portland Public Schools (PPS) initiated an update to its Long Range Facility Plan. The purpose of the plan is to evaluate the adequacy of existing educational facilities, plan for future capital facilities spending and address how the student population will be housed over the next 10 years. This Long Range Facility Plan also meets the requirements of ORS 195.110, School Facility Plan for Large School Districts.

PPS staff worked closely with the Long Range Facility Plan Advisory Committee (Advisory Committee) to develop the plan. The Advisory Committee, established in November 2011, provided a community voice for the planning process. Their role was to represent the interests of the overall community, consider the long-term facility needs of the District, develop and give feedback on plan options and make a recommendation to the Superintendent.

The Advisory Committee met nine times and held five sub-committee meetings over the course of five months to review background information, draft guiding principles and respond to various planning alternatives. The Advisory Committee provided valuable insight to the planning process and reflected the diversity of opinions that exist within the District. The Advisory Committee learned about PPS facilities through a series of issue papers. The issue papers are contained in their entirety in the appendix of this document.

PORTLAND PUBLIC SCHOOLS' STRATEGY

Modernizing infrastructure for learning is one foundational element of Superintendent Carole Smith's Portland Public Schools Strategic Framework 2011-12. *At the heart of this framework is one goal: Every student succeeds, regardless of race or class.*

To ensure that the values of the public will guide capital projects, the Advisory Committee developed three over-arching goals and four guiding principles. The full text of the goals and guiding principles is included in Chapter II of this document.

Facility Goals

- Goal One: Every PPS school shall provide an equitable and effective learning environment that maximizes the achievement of every student.
- Goal Two: Every PPS school shall be safe, healthy, accessible and designed to meet students' essential needs.
- Goal Three: PPS shall optimize utilization of all schools while taking the academic program needs of each school into account.

Guiding Principles

In every facilities planning and capital investment decision, PPS will:

- A: Develop partnerships
- B: Embrace sustainability
- C: Demonstrate fiscal responsibility
- D: Practice inclusivity

MODERN LEARNING ENVIRONMENTS

The Long Range Facility Plan Advisory Committee held two sessions concerning modern learning environments during the planning process. Many also attended a full-day symposium in February 2012 hosted by PPS for teachers that explored this topic. The Long Range Facility Plan addresses changing needs for educational program delivery and how facilities can support these requirements.

EXISTING CONDITIONS

The District is made up of 28 PK-5 schools, 30 PK-8 schools, 10 middle schools, nine high schools, and 11 selective focus/community based schools. All but two schools were constructed prior to 1975. The average age of PPS buildings is over 65 years.

Decades of deferred maintenance and lack of stable capital funding for school facilities have created a \$1.6 billion deferred maintenance backlog. This creates classroom and other learning environments with inadequate air flow and temperature control, leaky roofs, noisy and archaic mechanical and plumbing systems, and inadequate electrical systems to support current-day technology.

ENROLLMENT FORECASTS & BALANCING; AND SCHOOL & SITE UTILIZATION

Districtwide enrollment forecasts depict three scenarios for potential enrollment in PPS. The most likely growth scenario (medium growth) shows PK-12 enrollment increasing to 50,159 students in the 2021-22 school year, adding 2,871 more students to the current enrollment. Additional students are expected across every region and every grade of the District, with highest rates of change anticipated within the current boundaries of the Cleveland and Lincoln clusters.

PPS will utilize the *instructional model* to estimate the student capacity for PK-12 schools. The instructional model allows for a determination of design capacity and a functional capacity for each school. Annual updates of student capacity using the instructional model should be conducted to note changes in school programs and space utilization.

Discrepancies among school enrollments, program sizes and school capacities will initially be addressed by the District's enrollment balancing process.

The District owns an adequate number of sites and facilities to accommodate the projected enrollment over the next 10 years and beyond. However, a number of individual school facilities may require capital investment simply to provide additional space to accommodate current and/or future enrollment.

REGULATION, POLICY AND CAPITAL FINANCING OPTIONS

The regulatory context for the Long Range Facility Plan is set primarily in Oregon State Statutes in addition to City, County and Metro ordinances. The policy context is primarily defined by Board of Education policy, which not only impacts facility priorities but directs capital resources to maintain and/or rehabilitate the physical plant.

PLAN OPTIONS

Several models were developed and utilized during the Plan Options Phase of the Long Range Facility Plan process. The intention of developing options was for the committee to develop and prioritize overall strategies for the plan. The entire committee agreed that capital bonds would be required in order to renovate/replace facilities and meet enrollment requirements in the next 10 years. The options developed were an attempt to develop and begin prioritizing an overall strategy.

Recommendations

The Advisory Committee identified a set of capital and non-capital recommendations:

Capital

- Express a **bold vision** for the master plan and especially the first phase. The plan should inspire the public to rally behind the District while maximizing student success.
- Use a **strategic approach** that fully renovates/replaces schools to reduce the deferred maintenance backlog. Use the bulk of the money from each capital phase to modernize schools.
- Demonstrate that PPS can do the work successfully. The **first phase of the master plan is critical** in building public trust. It is needed to build credibility.
- Allocate some money to **fix the worst facility needs**. This needs to occur in each phase. These funds would focus on fixing the building shell first to minimize further building deterioration.
- Plan for a "**robust program**" capacity for each rebuilt or fully renovated facility.
- Endeavor to **significantly rebuild/fully renovate** the portfolio over a 24- to 40-year time frame.
- Priority should be given to capital projects that **reduce future operational costs** in order to make more operational funds available for the classroom.
- Screen all future capital projects through the guiding principles.
- Address capacity and create modern learning environments by providing facilities that are **flexible**.
- **Consider replacing** existing schools that require major renovation.
- Invest prudently in schools identified for future replacement.
- Upgrade strategically selected school facilities to act as **emergency shelters** immediately following a major earthquake.

Non-Capital

- Create school facilities that support and enhance **evidence-based and emerging best practices** in terms of school size and educational program.

- **Pursue partnerships** to leverage community support and innovation.
- Actively **manage existing properties** to allow future flexibility with regard to changing demographic needs and best practices in teaching, and to maximize value to the district and community.
- Consider **“options other than new”** (non-capital options) to meet capacity demands (including limiting transfers, etc.)

Capital Improvement Plan Options

The Advisory Committee considered a number of potential capital improvement plan options to address the District’s facility needs. Scenarios ranged from minimal impact scenarios to comprehensive solutions.

Option A: Be Bold—Complete Renovation/Replacement in 24 Years

This option endeavors to update facilities as quickly as possible. Targeted capital expenditure options allocated \$155 million in two phases of complete modernizations plus building system funding to correct the worst deficiencies. Tax rate would be about \$2.40/\$1,000 of assessed value.

10-Year Plan = \$1.1 billion

Option B: Balanced Approach—Complete Renovation/Replacement in 32 Years

This option endeavors to update facilities over a 32 year time frame. It distributes the work evenly over school configuration (HS, 6-8, PK-8 and PK-5) to facilitate consistent design and construction workload phasing as well as use of swing space. Targeted capital expenditure options allocated \$103 million in three phases to correct the worst facility deficiencies. Tax rate would be about \$1.99/\$1,000 of assessed value.

10-Year Plan = \$880 million

Option C: Start Conservative—Build Positive Momentum in the First Phase, Complete in 32 Years

This option limits the first phase to just under \$400 million and fixes \$60 million of highest priority facility deficiencies. Success would be demonstrated in the first phase, building community trust. Future phases would be larger capital investments. This option includes a 32-year time frame to update facilities but assumes that some buildings/sites may not be required in the future (through consolidation and accommodating robust program size with full renovation/modernization). First phase tax rate may be able to be as low as \$1.08/\$1,000 of assessed value. (Note: Future bonds would be more).

10-Year Plan = \$575 million

Option D: Repair and Renew—Focus on Infrastructure First, Complete in 40 Years

This option requires a 40-year time frame and would make improvements first to the infrastructure so that community assets do not further deteriorate. This option completes all seismic work over a 24-year time frame. It makes all facilities accessible and makes improvements to the exterior of the buildings in the first phase. It focuses on modernizing high schools first, then addresses other facility needs. This option also assumes that some buildings/sites may not be required in the future (through consolidation and accommodating robust program size with full renovation/modernization). Tax rate would be about \$1.76/\$1,000 of assessed value.

10-Year Plan = \$780 million

FUTURE STEPS

1. Utilize Guiding Principles as a filter for all planning decisions.
2. Inventory community assets to fully understand partnership opportunities.
3. Develop an educational specification to serve as a District standard.
4. Study the impacts of House Bill 3141 (physical education requirements) on existing school facilities.
5. Identify school sites where buildings can be expanded and alternatively those sites that are constrained due to site size (See page V-8).
6. Determine whether additional land acquisition is required to augment existing sites.
7. Review procurement process to encourage the use of local products/services.
8. Establish a formal community engagement process to provide a mechanism for updating the Long Range Facility Plan over time.
9. Adopt a student capacity model Districtwide and implement on an annual basis
10. Future decisions on Reserves by Metro should be tracked by staff to determine the long-term impact on enrollment.
11. Conduct a rigorous cost benefit analysis on all projects.
12. Include teacher and student voices. Take the plan to the public for comment and review.
13. When modernizing, consider structural upgrades to gymnasiums at selected schools to act as emergency shelters.
14. Study/confirm the number of schools that will ultimately be required. All 85 facilities may not be required in the future.

A table of future steps referencing chapters of the Plan is included in Appendix A.