

# Facilities Long-Range Plan

Eugene School District 4J  
2013-14



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## **Building 4J's Future**

Excellent public schools play a critical role in the success of children and in the economic viability of a community. The Eugene 4J School District strives to provide a world-class education to help attain better education results for the students in the our area, including improving graduation rates and ensuring students' college and career readiness. To do so, we need to invest in our people, our technology and educational materials and especially, in our facilities.

Currently, many of the District's buildings are in poor condition and are expensive to maintain with obsolete infrastructure and systems. Many of 4J's schools are not adequate to support the types of educational opportunities our students need to be ready for the jobs in the current economy.

With these needs in mind, this Long-Term Facilities Plan seeks to chart a path for the future of our district and our community. The implementation of this plan will help the Eugene School district build a world-class educational system that strengthens our community and provides students an education that will support their college and career success.

### **I. Facility Planning Goals**

The goals of this plan are as follows:

- Ensure school buildings enhance learning and support today's instructional strategies;
- Create safe, secure school environments that meet students' accessibility needs and help increase the education outcomes for our children;
- Prioritize improvements to school buildings that are in the poorest condition or are the most expensive to maintain;
- Achieve long-term cost efficiencies by reducing building-related expenses thereby allowing more funds to be spent on instruction;
- Provide space for early learning programs and full-day kindergarten in all elementary schools;
- Address opportunities to partner with and co-locate other community facilities with our schools;
- Strengthen our four school regions and create equitable and appealing school facilities;
- Continue to operate two middle schools per high school region;
- Provide space for a world language program in each of the district's four school regions; and
- Identify school district properties that are no longer needed and could be sold or repurposed for a non-school use.

## II. Planning Context and Process

The Eugene School District 4J owns and maintains 29 open school buildings serving more than 16,000 students (not including six closed elementary school buildings - Bailey Hill, Coburg, Crest Drive, Dunn, Parker, and Willard). Most of these schools were built in the 1940s to 1960s and many are reaching the end of their useful life. (Figure 1: School building age) For an inventory of district buildings, see Appendix B.

In 2002, the district adopted a long-range facilities plan that set forth a new vision for improving school facilities. The plan called for the replacement or complete renovation of aging school buildings, funded by four bond measures over a 24-year period, and the sale of several surplus properties.

As of 2012, the district has completed many of the improvements called for in the first phase of the 2002 long-range plan, including:

- **Passing a \$116 bond measure in 2002 to build four new schools**  
In 2002, the community strongly supported a \$116 million bond measure that built four new school buildings—two elementary schools and two middle schools—on existing school sites. Construction of Bertha Holt and César Chávez Elementary Schools allowed the district to close and consolidate four small elementary schools as well as improve the quality and life expectancy of school buildings. Cal Young and Madison Middle Schools were also replaced. Remodeling projects and capital upgrades occurred at many schools throughout the district, including each of the four high schools.
- **Disposing of several surplus properties**  
The district sold several surplus properties, as called for in the 2002 plan. The Laurel Hill, Santa Clara, Whiteaker, Westmoreland and Willakenzie elementary school sites were sold as well as the Ironwood residential lots. The Civic Stadium property is currently in the disposal process.
- **Passing a \$70 million bond measure in 2011 for critical facility improvements**  
The 2007-09 economic recession caused the district to take a more financially conservative approach with its next bond measure and to temporarily postpone additional school replacements. A \$70 million bond measure was referred to voters in 2011 to pay for critical capital improvements, while holding steady the tax rate for bonded indebtedness. The bond measure won voter approval and funded improvements including roof replacements, heating and ventilation systems, restroom upgrades and some small remodel projects at several schools. The bond also allowed the district to complete the phased renovation of Willagillespie Elementary School.

In 2012, the district began work to update the 2002 Long-Range Facilities Plan. The district began by seeking an outside firm to provide an independent assessment of school building conditions and to provide recommendations for improvement. MGT of America, Inc., a firm with extensive national experience in school facility assessments and planning, was engaged to evaluate the condition of all school buildings. MGT's report and recommendations to the district were provided in May 2012.

In fall 2012, the board gathered community input on the concepts outlined in the MGT

recommendations. Community meetings in each school region, a web feedback form and individual communication such as email provided avenues for input to the board. The board then held a series of work sessions to gain more information and further discuss and shape the consultant's recommended projects and board priorities.

In February 2013, the Superintendent provided a final recommendation outlining the major school replacement and renovation projects envisioned over the next 10 years. The plan recommended referring two bond measures to voters to fund the improvements: the first in 2013 and a subsequent bond measure in 2017 or 2018.

The board approved the long-range facilities planning recommendations on February 20, 2013 and referred a \$170 million bond measure to voters in May 2013. Voters approved the measure, launching the next phase of school replacements and renovations.

The \$170 million bond measure, approved by voters in May 2013, will allow the district to replace and repair buildings, and improve security, technology and instructional materials across the district. Improvements include:

- Build new replacement schools for Howard and River Road Elementary Schools and Roosevelt Middle School.
- Add a new wing and renovate some of the existing building at the Jefferson/Arts and Technology Academy middle school site.
- Install a new track and field at Kelly Middle School.
- Remodel and add space at Gilham Elementary school.
- Upgrade technology at all schools.
- Update instructional materials at all schools.
- Make safety and security improvements.
- Repairs buildings and upgrade building systems, replace roofs and make other repairs and improvements.
- Purchase new school buses.

All Oregon school districts with an enrollment of more than 2,500 students must have a school facility plan that covers a period of at least 10 years. This plan meets the requirements stated in ORS 195.110, with the exception of required coordination with the City of Eugene and Lane County which appears to be a City/County responsibility to facilitate.

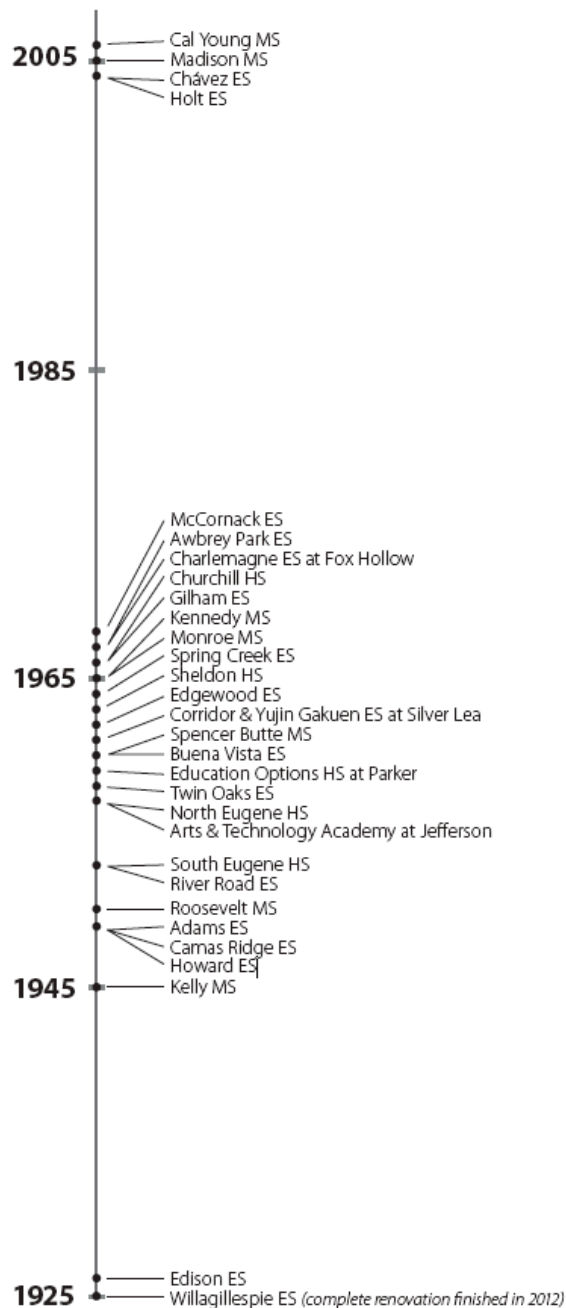
# Building 4J's future School building age



## Our school buildings are aging.

Most of 4J's school buildings were built in the 1940s to 1960s, and some are even older.

This chart shows the original construction date of every school building currently in use. Some schools have had additions or renovations since their original construction.



### III. Enrollment Projections

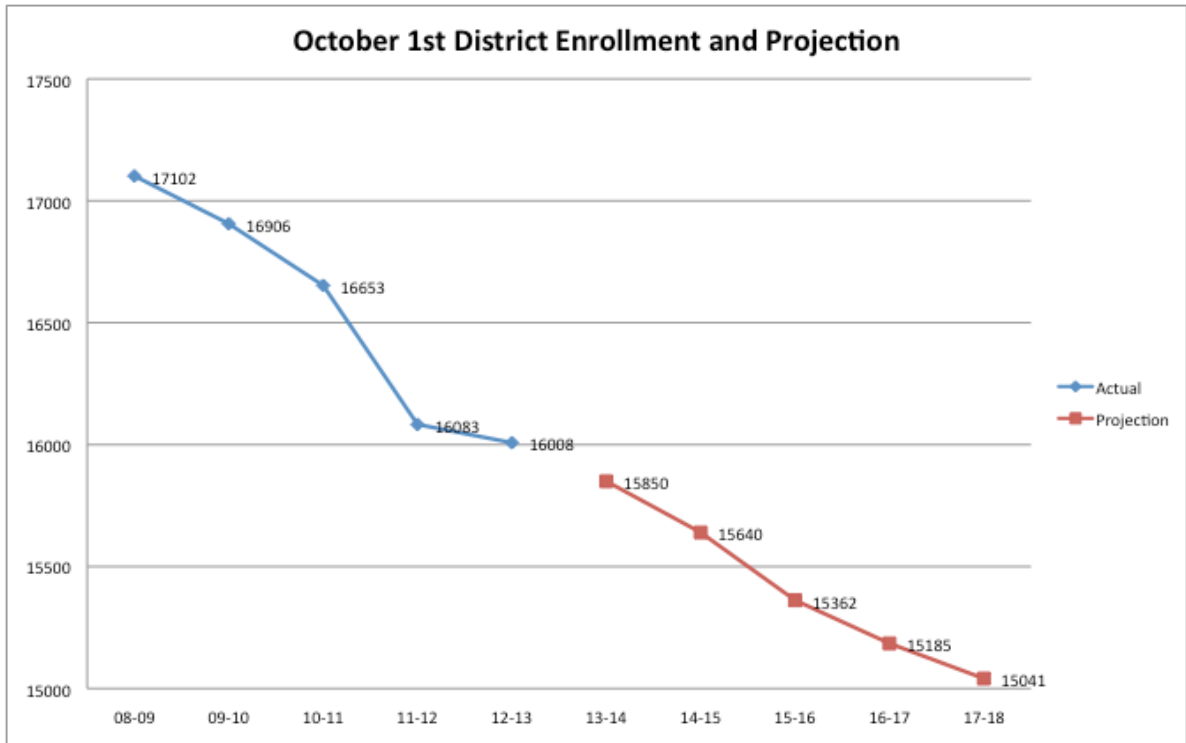
Enrollment in 4J has been declining for more than three decades. Enrollment peaked in the late 1960s with enrollment at nearly 22,000 students. Since that time, the Eugene community has grown, however there are fewer households with school-aged children as the population ages and birth rates decline.

In 2012-13, enrollment was 17,012 (or 16,395.5 with kindergartners counted as 0.5.)

Factors that are expected to impact 4J school facility needs in future are:

- **Full-day kindergarten and early learning programs**  
Oregon will provide state school funding reimbursement for full-day kindergarten programs beginning in September 2015. In addition, the state has identified expansion of early learning programs as a key education initiative. The district has long valued full-day kindergarten and early education programs to prepare students for higher levels of learning. Implementation of full-day kindergarten will increase the number of elementary classrooms needed to serve kindergarten students. Generally, a single classroom now accommodates a morning kindergarten class and a second kindergarten class in the afternoon. There are also advantages of locating early education programs within elementary school buildings to align programs and build early connections for students and families.
- **Inter-district open enrollment**  
In 2011, new legislation went into effect, allowing students to enroll in a school district other than that in which they reside, without gaining approval of their home school district. These “open enrollment” provisions are in effect through 2017. In 2012-13, the first year that open enrollment was in effect, 4J had a net gain of 135 out-of-district students (312 out-of-district students enrolled under open enrollment provisions and 177 4J students enrolled in other districts.)
- **Integration and alignment of Oregon’s zero-age 20 education system**  
The Oregon Education Investment Board, chaired by the Governor, is overseeing an effort to create a seamless, unified system for investing in and delivering public education from early childhood through high school and college. Early childhood services are a key strategy to preparing children for success in their K-12 years and beyond. As 4J plans builds replacement elementary schools, providing capacity for early learning programs within our elementary schools aligns with this new direction and would be advantageous for preschool students and families.

The district’s 5-year enrollment projections show that enrollment will continue to decline. The following table shows the district’s 5-year enrollment projection.



The district's 20-year enrollment history is attached in Appendix A.



## IV. School Facilities Assessment and Capacity Analysis

The district engaged MGT of America, Inc., a firm with extensive national experience in school facility assessments and planning, to evaluate the condition of all school buildings. MGT provided a report and recommendations to the district in May 2012. The full report is included as Appendix C.

### School Facilities Assessment

In early 2012, MGT of America, Inc. conducted an assessment of all district school buildings. Four types of assessments for each school building were conducted:

- *Building condition*  
Evaluating roofing, windows, mechanical and electrical systems, etc.
- *Site condition*  
Evaluating paving, exterior lighting, utilities, fencing, etc.
- *Education suitability*  
Evaluating how well the facility supports the educational program, such as if the building has the appropriate kinds of spaces and if the spaces are of appropriate size.
- *Technology readiness*  
Evaluating how well the building’s infrastructure supports information technology.

The scores for each of these four elements were combined into one score for each school to assist in prioritizing projects. The building condition score was weighted 40 percent, the educational suitability score was weighted 40 percent, the site condition score was weighted 10 percent, and the technology readiness score was weighted 10 percent.

The following table presents all the scores for each facility and the combined score using this weighting formula.

#### Eugene School District 4J

#### Combined Scores – by Site

Site Name	Weighted Building Condition Score *	Suitability Score	Grounds Condition Score	Tech. Readiness Score	Combined Score 40/40/10/10
<b>Elementary Schools</b>					
Adam ES	69.63	66.23	85.29	76.75	70.55
Awbrey Park ES	76.85	61.56	81.41	82.44	71.75
Bertha Holt ES	90	88.44	90	100	90.38
Buena Vista ES	65.67	69.64	85.56	63.3	69.01
Camas Ridge ES	63.51	63.79	83.33	65	65.75
César Chávez ES	90	87.81	80.09	95	88.63
Charlemagne at Fox Hollow ES	77.3	59.44	72.83	68.3	68.81
Edgewood ES	70.33	66.5	79.52	90	71.69
Edison ES	63.36	62.71	53.64	61.7	61.96

Eugene School District 4J

Combined Scores – by Site

Site Name	Weighted Building Condition Score *	Suitability Score	Grounds Condition Score	Tech. Readiness Score	Combined Score 40/40/10/10
<b>Elementary Schools</b>					
Gilham ES	81.91	86.32	75.66	91.7	84.03
Howard ES	69.65	64.64	79.67	70	68.68
McCornack ES	73.92	66.89	62.11	81.7	70.71
River Road ES	66.23	63.5	71.83	63.3	65.41
Silver Lea ES	66.47	58.47	66.38	70	63.61
Spring Creek ES	73.27	63.06	83.25	73.3	70.19
Twin Oaks ES	72.29	82.93	81.44	71.6	77.39
Willagillespie ES	73.35	69.72	78.61	81.7	73.26
<b>Elementary School Average</b>	<b>73.16</b>	<b>69.51</b>	<b>77.09</b>	<b>76.81</b>	<b>72.46</b>
<b>Middle Schools</b>					
Arts & Technology Academy	72.06	63.15	85.32	71.7	69.79
Cal Young MS	88.74	96.39	90	100	93.05
Kelly MS	78.28	74.67	82.41	70	76.42
Kennedy MS	62.7	80.41	78.73	60	71.12
Madison MS	82.25	87.83	90	100	87.03
Monroe MS	69.86	75.07	75.55	85	74.03
Roosevelt MS	40.08	63.11	47.67	63.3	52.37
Spencer Butte MS	64.87	73	77.78	70	69.93
<b>Middle School Average</b>	<b>69.86</b>	<b>76.7</b>	<b>78.43</b>	<b>77.5</b>	<b>74.22</b>
<b>High Schools</b>					
Churchill HS	64.85	80.12	73.8	75	72.87
North Eugene HS	64.3	68.6	78.2	75	68.48
Sheldon HS	72.34	73.37	70.88	63.3	71.7
South Eugene HS	71.8	84.36	81.76	85	79.14
<b>High School Average</b>	<b>68.32</b>	<b>76.61</b>	<b>76.16</b>	<b>74.58</b>	<b>73.05</b>
<b>Other Facilities</b>					
Coburg ES	76.37	69.87	65.62	60	71.06
Crest Drive ES	76.29	61.5	79.31	42	67.25
Parker ES (Ed Options)	67.46	58.92	79.81	67.5	65.28
<b>Other Facilities Average</b>	<b>73.37</b>	<b>63.43</b>	<b>74.91</b>	<b>56.5</b>	<b>67.86</b>
<b>District Average</b>	<b>71.75</b>	<b>71.63</b>	<b>77.11</b>	<b>74.8</b>	<b>72.54</b>

Source: MGT of America, Inc., 2012

\*Excludes portables

## Capacity and Utilization

The district provided functional capacities for each school and projected enrollments by school. These capacities and enrollment projections were used to calculate utilization rates for each school, and thereby determine if the district had excess space or needed additional space.

Capacity calculations allowed for full day kindergarten, and class sizes of 25 students at the elementary level, 25 at the middle school level, and 28 at the high school level.

Utilization rates are listed on page 5 of the MGT Report.

After analyzing capacity and utilization, MGT concluded:

- *Elementary Schools* – The district has sufficient capacity, however, consolidating some of the small schools into new, larger buildings will increase instructional effectiveness and operational efficiency.
- *Middle Schools* – The district is operating the appropriate number of middle schools given the current enrollments, school size, and geographic conditions. However, reduction in building capacity should be considered.
- *High Schools* – The district is operating the appropriate number of high schools given the current enrollment, school size, and geographic distribution.

MGT recommended that the district continue to replace aging school buildings over the next 10 years and consider disposing of several surplus properties. These recommendations were a starting point for community conversation in fall 2012 and were later revised and refined by the superintendent and board.

## VI. 10-Year Facilities Plan

Replacing, renovating and remodeling aging school buildings enhances the learning environment for 4J students. This Long-Range Facilities Plan identifies major school building improvement projects for the next 10 years and calls for the district to submit a bond measure requests to voters in 2013 with a second bond measure request in 2017 or 2018.

In preparing this long-range plan and planning for the 2013 bond measure, the district relied upon two analysis prepared by PIVOT Architecture: a Cost and Schedule Verification Study and a Comparison of Renovation and New Construction. These studies are included as Appendix D and Appendix E.

### Phase 1: May 2013 Bond Measure - \$170 million

#### ***School replacements and renovations:***

- *Roosevelt Middle School:* Construct a new building on the current site
- *Jefferson/ATA Middle School:* Build new classroom areas and renovate parts of the existing building
- *Howard Elementary School:* Construct a new building, with space for full-day kindergarten and early childhood programs or services, on the current site.
- *River Road/El Camino del Rio Elementary School:* Construct a new building, with space for full-day kindergarten and early childhood programs or services, on the current site.

#### ***Additions and remodels:***

- *Gilham Elementary School:* Add classroom space for full-day kindergarten and early childhood programs, add restrooms, enclose exterior breezeways and make other improvements.
- *Kelly Middle School track:* Construct new synthetic track and field in conjunction with the replacement of Howard Elementary school.

#### ***Other improvements:***

- *Technology districtwide:* Improve classroom technology to better support learning at all schools. Upgrade technology infrastructure and equipment.
- *Instructional materials districtwide:* Purchase new science curriculum and lab equipment and new writing, reading and social studies curriculum.
- *Building repairs, improvements and equipment:* Upgrade building systems, replace roofs, provide improvements to accommodate special education programs and make other repairs and improvements to district facilities.
- *Buses:* Purchase new school buses.
- *School and security upgrades:* Improve student security across the district.
- *Safe routes to schools improvements*

Because the district is paying down older bonds, a financial analysis prepared for the district shows that the district can issue additional bonds without exceeding a property tax rate of \$1.60 per \$1000 assessed value for bonded indebtedness. A chart showing an

example of the impact of issuing \$170 million in new bonds to finance the projects in Phase 1 of the Long-Range Facilities Plan is included in Appendix F.

## **Phase 2: Bond Measure in 2017 or 2018**

### ***School replacements and renovations:***

- *North Eugene High School:* Replace or completely renovate.
- *Camas Ridge Elementary School:* New building with space for full-day kindergarten and early childhood programs or services.
- *Edison Elementary School:* Determine how to make improvements after master planning process is completed.
- *One additional elementary school:* Replace one additional elementary school building, to be determined.

### ***Additions and remodels:***

- *Sheldon High School:* Expand or remodel areas to enhance the learning environment and better accommodate student enrollment.

### ***Other improvements:***

- *Technology districtwide*
- *Instructional materials districtwide*
- *Building system upgrades, roofing and other improvements*

## **VII. Reserve and Surplus Properties**

### **Surplus Properties**

The district has the opportunity, in light of enrollment trends, to dispose of surplus property. Properties that are currently classified as surplus and that could be considered for disposition are:

- Civic Stadium (disposition process initiated in 2013 and currently underway.)
- Bailey Hill,
- Dunn, and
- Coburg farm property.

The Coburg farm property currently generates a small amount of revenue with no holding costs, therefore the district may wish to continue ownership of the property.

### **Reserve Properties**

Reserve properties are those that may be needed in the future for school or district use. Properties currently classified as in reserve are:

- Admiral Street in the North region,
- Kinney Loop site in the Sheldon region
- Willard site in the South region,
- First Place Center acreage adjacent to South Eugene High School in the South

region, and

- Coburg school site in the Sheldon region.

Two other properties are to be held reserve, pending future decisions. These are:

- The Crest Drive site in the Churchill region will be held in reserve, until proposals for expanding the urban growth boundary are resolved.
- The Parker site, which will be held in reserve as the district considers whether it might be used in the future for special education and alternative school programs.

### **Roosevelt Middle School Property**

While developing this long-range facilities plan, the district saw the opportunity to consider allowing the Eugene Family YMCA to acquire part of the 15-acre Roosevelt Middle property for the purpose of constructing new recreation facilities adjacent to the new middle school building. The board recognized that, as available property for development becomes increasingly limited, there may be a significant benefit in the selling, trading or leasing a portion of an existing school site to an entity that provides services to children and/or families such as early childhood learning centers or health clinics as well as recreation facilities. The board expanded the criteria it would use in making property disposition decisions to allow such proposals to be considered.

In March 2014, the superintendent initiated the district's land use disposition process and presented a proposal to consider selling up to seven acres of the Roosevelt Middle School Property to the Eugene Family YMCA for purposes of constructing new recreation facilities. In June 2014, the board approved Findings of Fact supporting the proposal and directed the superintendent to inform the Eugene Family YMCA that the board is willing to consider a purchase offer. The board retained the right to approve any purchase and sale agreement with the YMCA and directed that a permanent deed restriction be attached to the property, if sold, requiring that the property continue to be zoned PL Public Lands and used only for purposes allowed within the Public Lands zoning.

## Appendices

- a. 20-Year Enrollment History
- b. Building inventory: spreadsheet from Jon with construction date, last addition, square footage, acreage
- c. MGT of America: Master Plan Update & Facilities Assessment, May 9, 2012
- d. PIVOT Architecture: Cost & Schedule Verification Study, October 30, 2012 –
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