



LONG RANGE FACILITY PLAN
PORTLAND PUBLIC SCHOOLS
PORTLAND, OREGON

May 2012

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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.

PORTLAND PUBLIC SCHOOLS' STRATEGY

**STRATEGIC FRAMEWORK**

Modernizing infrastructure for learning is one foundational element of the 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 achieve this goal, the framework focuses work in four essential areas:

- Effective educators
- Equitable access to rigorous, relevant programs
- Supports for individual student needs
- Collaboration with families and community

Elements of Cultural Transformation

In order for academic initiatives to be successful, there is a need to transform the culture of PPS. These elements must be embodied by every school, department and employee:

- Equity in all decisions and interactions
- Service orientation
- Individual and team accountability

Foundational Elements

In order for academic initiatives to be successful, PPS needs to build Districtwide foundational support systems, structures and tools. The two elements below represent ongoing areas of focus, which need to align with, connect to and support the academic strategies identified above:

- Build a Stable Operating Model
- Modernize Our Infrastructure for Learning

The Long Range Facility Plan is one action under the foundational element to modernize our infrastructure for learning.

LONG RANGE FACILITY PLANNING PROCESS

The basis for the Long Range Facility planning effort has its roots in a planning process begun in 2007, when District staff, outside consultants and the community began the planning process for modernizing the District's schools to anticipate a capital bond program.

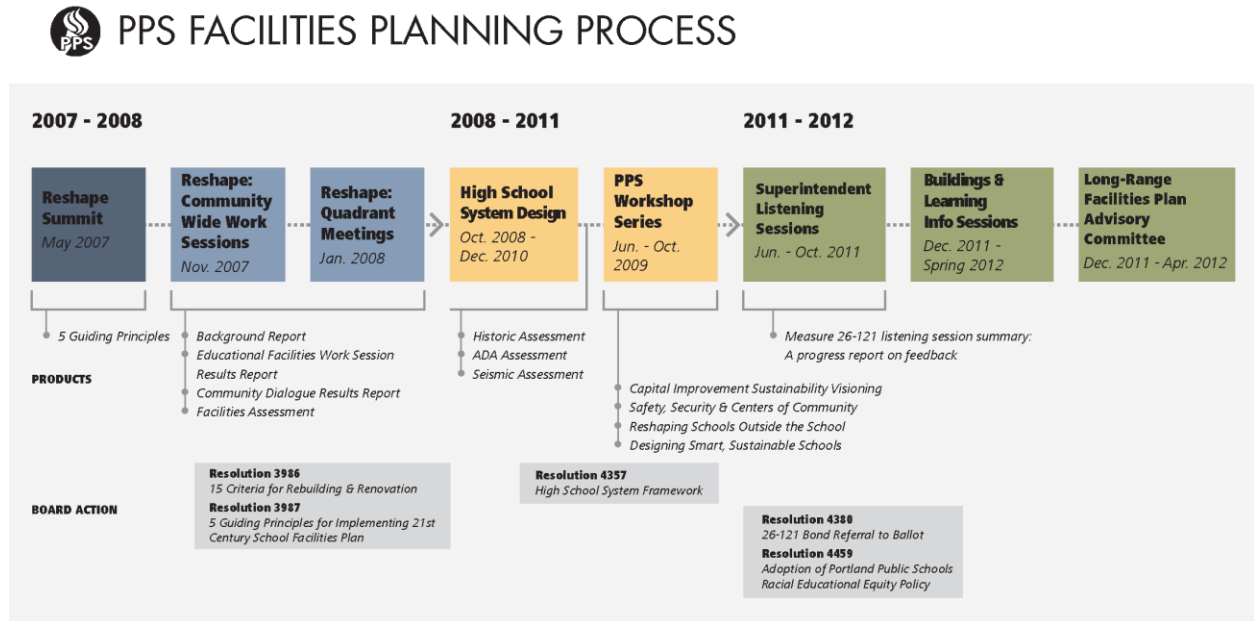
The information gathering process has included:

- Assessing and evaluating all District schools
- Evaluating lessons learned from the 1995 bond
- Working with the Board to develop next steps
- Gauging community values from public meetings to develop a common vision
- Developing procedures to prepare for the work that needs to be done

The facilities processes were undertaken to ensure buildings:

- Support student achievement
- Provide a healthy, safe, warm, dry and accessible learning environment
- Enhance the curricula developed by staff
- Integrate modern and emerging technologies
- Support 21st century teaching models and learning styles
- Serve as models of educational facilities

FIGURE 1



Public Participation

Listening Sessions

Following Measure 26-121, the school construction bond that Portland voters turned down in May 2011, Superintendent Carole Smith and members of the School Board began holding “listening sessions” with individuals and groups who had supported or opposed the bond.

Some major themes emerged from the listening sessions:

- Schools need upgrades. All of the listening session participants acknowledge that schools need to be upgraded, whether they supported the last bond or not.
- Future bond proposals need more buy-in. Participants expressed a desire to see the next bond enjoy deeper buy-in and broader support.

Parents, teachers and principals also said they wanted more input into projects proposed at their schools. PPS initiated a Long Range Facility Plan effort in Fall 2011 to address these concerns.

Long Range Facility Planning Advisory Committee

As PPS initiated the Long Range Facility Planning process, leadership requested that staff form an Advisory Committee to provide feedback to the District on long range plan elements. The Facility Advisory Committee includes parents, educators, business leaders, architects, engineers, students and other community leaders. Superintendent Smith charged the Long Range Facility Plan Advisory Committee to:

- Bring their views and the views of the organizations they represent to discuss the long-range view of school facilities.
- Achieve consensus on the priorities for investments in school facilities.
- Think big and raise expectations for the physical and learning environment of schools.

The highest priority of this work is the development of capital investment priorities that will improve student achievement.

Superintendent Smith asked the committee to complete this work by May 2012. The reason was twofold: 1) The District is in need of an update to its long range facilities plan and 2) Further development of the long range facility plan and the capital investment priorities it identifies can provide the underpinning for the development of any future capital bond proposal(s).

Buildings and Learning

PPS hosted a series of public meetings from January through May 2012 to help parents, students, neighbors and community leaders get a close-up view of PPS schools and learn more about the District's facilities. These informational sessions focused on a variety of topics including capital financing, building maintenance, accessibility, seismic safety and historic preservation.

Outreach to Neighborhoods and Parent/Teacher Associations

Early in 2012 District staff reached out to every Parent/Teacher Association, Business Association and Neighborhood Association within PPS boundaries to request time on their agenda to provide information about PPS programs, achievement and buildings. Staff also provided information about the Long Range Facility Plan process during these presentations. At the time of publication, staff has visited 22 of these organizations.

Modern Learning Environments

In February 2012 PPS held a Modern Learning Environments symposium. The purpose of this collaborative process was to engage a variety of educational stakeholders in a day of discussion, exploration, and envisioning what modern learning environments could look like. The event brought together close to 150 participants including 70 teachers/educators.

Other Outreach Tools

PPS also hosted a Long Range Facility Plan website that includes all committee materials, summaries, full meeting videos and video summaries; collected and emailed interested community members who signed up through the website; and took public testimony at each Long Range Facility Plan meeting.

Next Steps

The Long Range Facility Plan Advisory Committee presented its recommended PPS Long Range Facility Plan to the Superintendent and subsequently to the PPS Board of Education in May 2012 for their consideration and adoption.

GUIDING PRINCIPLES

The Long Range Facility Plan Advisory Committee developed goals and guiding principles that focused decision making, identified values of the group and honed their priorities. These goals and guiding principles are listed below. The methodology that accompanies the guiding principles provides examples of the principles applied in practice.

OVERARCHING GOALS

GOAL 1: Every PPS school shall provide an equitable and effective learning environment that maximizes the achievement of every student.

Facilities will support student success equitably. Portland Public Schools will create effective, accessible and inclusive learning environments that help all students achieve. School buildings and grounds will nurture and inspire learning while challenging and supporting students, teachers, parents and community who together will encourage learning beyond building walls—into the community and around the world. All students are included regardless of national origin, race, gender, economic background, sexual orientation, disabilities, first language or other distinguishing characteristics.

GOAL 2: Every PPS school shall be safe, healthy, accessible and designed to meet students' essential needs.

Facilities reflect the importance of education in the community. Portland Public Schools will provide buildings where the quality of the building environment contributes to positive relationships and productive learning. Essential needs for use of school buildings include safety and security, full access and protection from fire, seismic hazards and toxins. Essential needs for learning include reasonable building temperature and adequate light, air and water quality, sanitation and acoustics.

GOAL 3: PPS shall optimize utilization of all schools while taking the academic program needs of each school into account.

The physical size of schools should reflect the academic program needs of each school. When enrollment exceeds or falls below optimal student capacity or program size, Portland Public Schools will engage in an enrollment balancing process including but not limited to transfer limitation, attendance boundary changes and grade reconfiguration before implementing school consolidation and facility changes.

Guiding Principles

Guiding Principle A: Develop Partnerships

Schools will thrive when our entire community is invested in their success. Every citizen of Portland is a stakeholder in schools. It is critical to promote a seamless, integrated relationship among stakeholders to support schools. School facilities and grounds will be inclusive and central to the communities and neighborhoods they serve and open and accessible to *all* for community use.

Methodology

- Increase engagement by developing a sense of connection between society as a whole and schools.
- Develop partnerships and relationships to increase engagement, ownership, and student and teacher success.
- Develop community assets that support life-long learning and wellness, and help to knit our community together.
- Balance the needs of neighborhood schools and the needs of focus option schools to best serve the larger PPS student population.
- Provide program support for strong enrollment in response to the desire for small neighborhood schools.
- Encourage and support facilities solutions that enhance community use of school facilities. School spaces (gym, cafeteria, commons, library, performance) should be easily accessible to the community.
- Support enhanced community/school dual use areas and the resulting increased use and ownership of the schools by the community, including financial partnerships.
- Pursue partnerships with other public and/or private entities that leverage public resources to maximize efficiency, economies of scale and innovation.
- Work with partners to provide safe and accessible paths of travel to every school.
- PPS historic buildings help to define our communities, make them more livable and instill civic pride and a sense of place. Evaluate retaining historically significant buildings and/or their significant building features.

Guiding Principle B: Embrace Sustainability

The Portland Public Schools portfolio of facilities is the City of Portland's sustainability frontier. Opportunities abound to reduce operating expenses by saving energy, conserving water, and reducing and recycling waste while maintaining the well-built structures that have served generations of Portland students. The District will seek to implement high-performance systems to achieve cost-effective energy, water and waste solutions that provide flexible, adaptive learning environments (both indoor and outdoor) to support student achievement. In renovations of existing buildings and school grounds and in new construction, the District will aim to meet or exceed national and international sustainability performance benchmarks and to advance the state of the art in sustainability management for K-12 educational facilities.

Methodology

- Life cycle cost. More efficient building systems should be implemented during initial construction and remodeling/modernization/retrofitting efforts that have a payback in keeping with the anticipated life of the asset, rather than just considering the lowest first cost for the asset.
- Prioritize procurement of local materials, local contractors, subcontractors, sourcing and suppliers, and make every effort to encourage local manufacturing of critical components.
- Use practices such as reuse of existing buildings, construction waste management, air quality, proper recycling of building materials, and water-conserving and waste-reducing infrastructure to achieve PPS sustainability goals.
- Engage students, staff and community in ongoing responsible operation of building systems.
- Building design will maximize and integrate the surrounding natural features, natural light, air flow and other environmental factors that support wellness and conditions for optimal learning.
- Whenever feasible, incorporate space for potential community gardens, learning gardens or surface storm water facilities/rain gardens in any major renovations.
- Design facilities that are flexible, adaptable and resilient to accommodate changing needs and purposes that extend the useful and effective life of the building.

Guiding Principle C: Demonstrate Fiscal Responsibility

Fiscal prudence entails fully funding the cost of school facilities and their operations, staying current with preventive maintenance, and budgeting for the total costs of ownership. Best fiscal practices include credible forecasts, rigorous cost-benefit analysis, transparent budgets, responsible expenditures and audited financial statements.

Methodology

- Communicate the benefits that facilities investments provide to students and the community.
- Solicit input from individual school communities in determining improvement plans.

- Leverage potential partnerships that maximize resources (e.g. wraparound services, leasing, business partners, etc.).
- Whenever possible, evaluate the cost to students and families of relocation against the cost savings of phased work; accomplish the work all at one time when possible. The impacts on students, families, staff and community should be considered in the evaluation.
- Assess the physical condition of District facilities on an ongoing basis.
- Utilize best practices to ensure that significant improvements, renovations or new construction will last 50-75 years with ongoing preventive maintenance.
- Use the facility condition index (FCI) as one metric when determining the need for facility repair, improvement and/or replacement.
- Stay current on funding a Capital Asset Replacement (CAR) Plan.
- Complement normal maintenance with volunteer projects that create and maintain landscaping and facilities.

Guiding Principle D: Practice Inclusivity

Provide facilities that support effective, accessible, inclusive learning environments for all students.

Methodology

- Prioritize work based on the District's current equity policy.
- Ensure that school campus designs are inclusive and culturally relevant.
- Provide facilities that accommodate a greater degree of wraparound social services in schools with the highest needs.
- Provide students with an environment that inspires them and is joyful, unique and engaging.
- Provide flexibility for changing curriculum and changing learning needs over time.
- Provide ubiquitous technology support for learning media, networks, and District and personal devices.
- Create welcoming environments that reflect and support the racial and ethnic diversity of the student population and community.
- Renovated facilities will meet Universal Design guidelines and be fully accessible and ADA compliant.
- Provide acoustic enhancements.

MODERN LEARNING ENVIRONMENTS



The purpose of Portland Public Schools' Long Range Facility Plan is to develop a roadmap for high-quality, effective and adaptable learning environments for children. Over the last few decades education has changed dramatically to incorporate new understandings of how individuals learn. Essential to fulfilling the Plan's purpose is ensuring PPS builds modern, student-centered learning environments to accommodate the variety of ways students learn.

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.

EDUCATIONAL TRENDS

Modern learning environments are student-centered and integrate innovative teaching methods such as hands-on learning and collaborative project-based work with effective learning environments that are flexible, adaptable and technology-rich. Modern learning environments accommodate and encourage different students of varying ages, abilities and interests to learn different things from different people in different places in different ways and at different times.

Modern learning environments engage students, welcome the community and adapt to shifts in student population.

Modern learning spaces are flexible, connected, collaborative, culturally-relevant, multi-sensory and multi-purpose; with provisions for small study spaces and shared group space.

Design Patterns

Good buildings matter. School facility design contributes to creating successful learning environments. Types of teaching and learning such as independent study, peer tutoring, project-based learning, student-managed learning, mentoring and distance learning create the need for different types of space.

Partnerships

Partnerships can facilitate a rich and meaningful learning experience for students beyond the classroom. In a time of diminishing resources, partnerships can augment school programs and provide educational continuity before and after school. A growing number of projects are also financed creatively through partnerships with public and private organizations.

PPS has a number of partnerships on a Districtwide and individual school level with public partners including Multnomah County, Multnomah County Library, Multnomah County Health Department, City of Portland, Portland Parks & Recreation, Portland Community College and Portland State University as well as private partners including Nike, Intel, OMSI, Concordia University, YMCA, Panasonic, Adidas, Portland Timbers, Sherwin Williams, Starbucks, Home Depot, Office Depot, Pixelworks and many others.

Partnerships may take many forms: aligned services and programs; creating new learning opportunities; sharing facilities; and leveraging resources.

Adapt and Re-Use Existing Historic Neighborhood Schools

All of the District's old and historic schools are located in well-established neighborhoods. With creative adaptation they can support modern learning environments. Most of these buildings are well built, utilizing high-quality materials, including intricate detailing, and having a grand scale—all of which are difficult to replicate in the present due to costs of materials and construction.

DESIGN TRENDS

Environmental Responsibility

Teachers and students perform best in facilities that meet their needs. Facilities must be well-ventilated and comfortable and free of hazards and irritants, while also minimizing energy and resource use. School buildings can be designed to go beyond sustainability in terms of energy use and employ the building as a teacher of environmental stewardship and a laboratory for learning about natural processes and building technologies. There is increasing national concern about the buildings and spaces in which students learn, and how these might affect both health and achievement.

Learning for All

Some types of learning environments that affect how school facilities are built include:

Early Learning—The first few years of a child’s life lay the foundation for cognitive functioning as well as behavioral, social and physical health. Demand for early learning (pre-school, Head Start, etc.) programs is increasing. More space is needed to accommodate this increasing demand. Facilities for early learning require self-contained space for learning, napping, eating, toileting and playing.

Universal Design—There are more than six million students with disabilities in public schools across America. The vast majority have moderate impairments that are often not visible or easily diagnosed. Children with disabilities include those with learning, speech, physical, cognitive, sensory and emotional difficulties. These disabilities make it hard or impossible for students to utilize many areas of schools including playgrounds.

Universal Design goes beyond Americans with Disabilities Act (ADA) compliance by addressing these obstacles as ordinary, not special. Universal Design addresses the physical environment and Universal Design for Learning addresses the curriculum, incorporating three principles of flexibility: multiple methods of presentation, multiple options for participation and multiple means of expression.

English Language Learners (ELL)—Demand for programs for ELL continues to increase. Breakout rooms are needed to accommodate ELL curriculum. ELL programs also require classrooms that encourage small group interaction and provide for individualized testing, and which also have storage requirements for multilingual materials.

Physical Education (PE)—While PE curriculum in recent years has been reduced due to focusing limited funds on the core educational program, more emphasis is now being placed on school districts to provide this important activity. New Oregon legislation (2007 ORS 329.496) requires a minimum number of minutes per week of physical education for students in kindergarten through eighth grade. All Oregon school districts will be required to fulfill the requirements of this legislation, which takes effect in the 2017-18 school year.

Oregon schools today typically provide fewer minutes per week than those stipulated by the new law. An increase in the amount of PE instruction time and facilities to support this curriculum may be needed, requiring more or different physical activity spaces.

Wraparound Services—Supporting the whole child means providing on-site before- and after-school programs for students and their families, health centers, teen parent child care, and other services based on each school community’s needs.

SUMMARY

The PPS Long Range Facility Plan will guide the District to enhance how teaching and learning take place, help staff and the community rethink how the physical environment supports learning, and create more dynamic, flexible, inclusive and inspiring spaces for student success.

EXISTING FACILITY CONDITION



Portland Public Schools currently educates approximately 47,288 students (2011-12) utilizing nine high schools, 10 middle schools, 30 K-8 schools, 28 K-5 schools and 11 selective focus/community based programs schools. The District's inventory also includes five administrative sites and eight facilities used by other PPS focus school/special education programs. Overall, the District manages 8.7 million square feet of facilities on 693 acres. Nine buildings currently are closed, of which four are being actively marketed, three are potential interim relocation sites (see page V-10) and, two are leased to other entities outside PPS. All but two schools were built prior to 1975.

BUILDING ASSESSMENTS

Facility assessments measure the relative condition of schools and provide a framework to identify, compare and prioritize school building needs. Recent PPS assessments have included overall building conditions, health and life-safety features, level and amount of accessibility, sustainability features, available technology, historical significance and the ability of the District to accommodate a variety of instructional programs. Charts A and B on page IV-2 summarize the District's \$1.6 billion in building deficiencies broken down by system and category.

Facility Assessment

PPS completed a comprehensive assessment of its facilities in June 2008 to establish a baseline report of facility conditions. This assessment, prepared by Magellan Consulting, studied educational adequacy, building conditions, and a review of all site and building systems. It included a life-cycle capital renewal forecast that estimated the cost of remedies for the identified building deficiencies.

PPS will update these building condition assessments on a four-year rotation using trained staff with technical expertise.

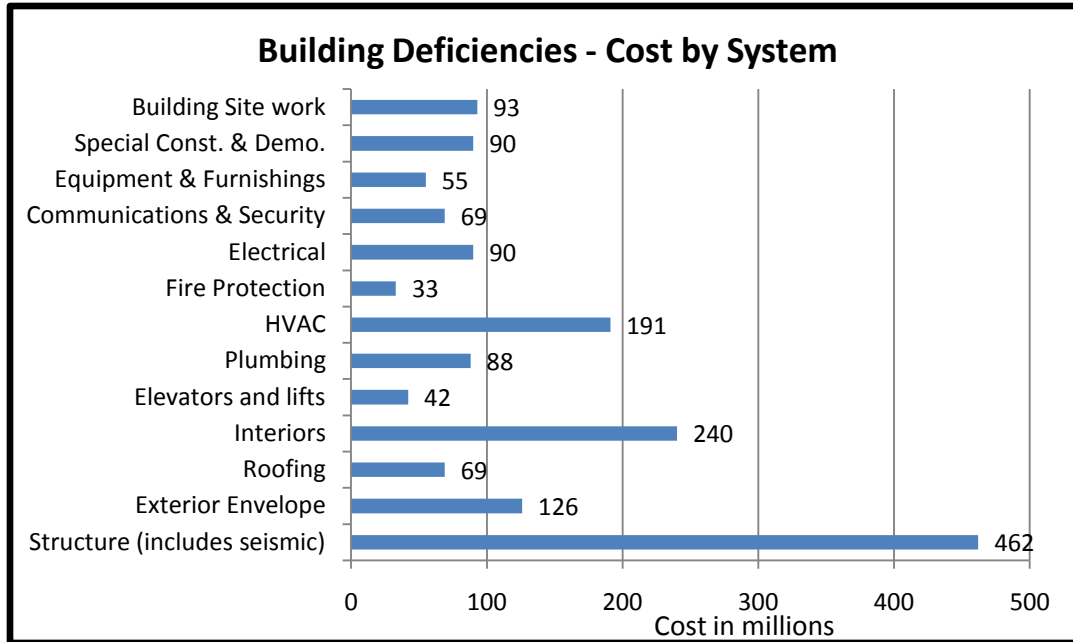


Chart A: Condition Assessment – Cost by System in 2011 dollars

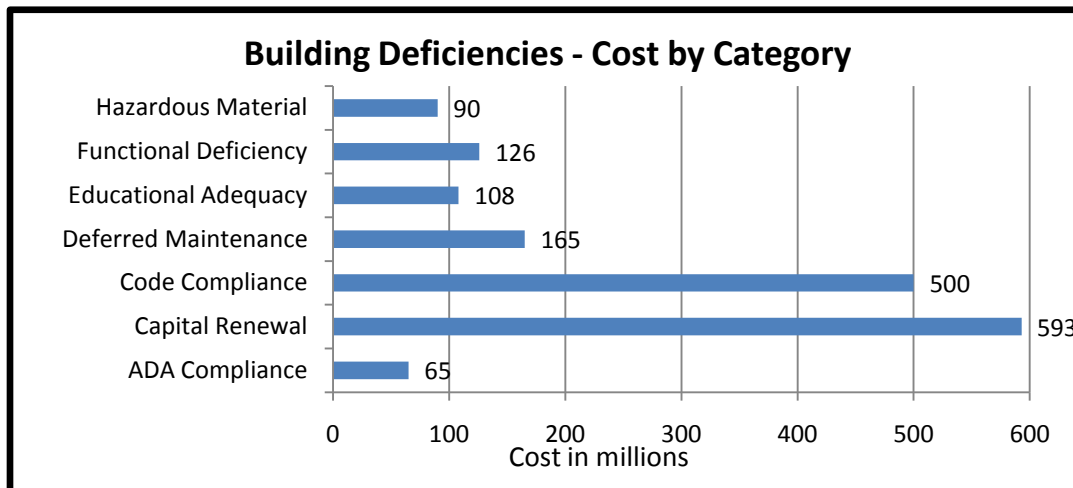


Chart B: Condition Assessment – Cost by Category in 2011 dollars

Seismic Assessment

All but two of Portland Public Schools’ buildings were constructed before building codes included current understandings of the risk of large earthquakes in our region. In 1995, PPS conducted a seismic assessment to identify risks to buildings from possible earthquakes and asked voters to pass a bond to begin to fund seismic improvements.

The 1995 Facilities Capital Bond Program paid for \$47 million in seismic strengthening at approximately 53 schools and re-roofing projects at 18 schools. This work focused on strengthening those buildings most at risk of collapse to promote safe exiting. In 2009, PPS further completed partial seismic strengthening at eight schools as part of re-roofing projects. While the seismic retrofit work associated with both the 1995 bond and the 2009 re-roofing projects provide valuable strengthening measures, they do not go far enough to ensure life safety of building occupants during a major earthquake. State law ORS 455.400, passed in 2001, requires that school buildings subjected to a major earthquake meet a life safety performance objective by year 2032 when funding is available to do so.

In 2009, the District hired structural engineering firm KPFF to complete a seismic study to update data and compare physical conditions against the latest standards embodied in American Society of Civil Engineers methodology (ASCE 31/41).

The seismic study examined 12 school campuses within the PPS facilities inventory as a representative sample of building construction types throughout the district. KPFF evaluated these buildings to identify seismic deficiencies and to develop preliminary rehabilitation options for each building. KPFF then developed construction cost estimates for these options on a per square foot basis. These cost estimates provided options for completing a stand-alone full seismic retrofit or a full retrofit as part of a larger renovation. The per-square-foot costs were applied to similar campuses based on construction type to determine order of magnitude costs per square foot for the entire inventory of PPS school facilities.

KPFF reported that stand-alone full seismic retrofits cost twice as much as doing the work in conjunction with a larger renovation. They asserted that because full seismic retrofits often require the removal of internal and external walls and finishes, considerable money could be saved by combining the seismic work with remodeling work that would include changes to those finishes.

Accessibility Assessment

The Americans with Disabilities Act (ADA) is a federal law that requires public facilities to be accessible to all. An accessibility assessment of PPS facilities was conducted in 2009 by Ankrom Moisan to identify deficiencies within PPS facilities and provide cost estimates to correct the deficiencies.

The assessment identified priorities including: providing ADA van parking, providing accessible routes to building entrances, removing barriers, and providing elevators, lifts and ramps to inaccessible floors. The assessment estimated the total cost for accessibility upgrades to all District buildings at \$45.3 million. (See page IV-5.)

Historic Assessment

Federal, state and local regulations require the preservation of historic structures. A historic assessment was conducted by Entrix in 2009 of Portland Public Schools' facilities. Research and a field study of District buildings constructed prior to 1979 identified their character-defining features, assessed their comparative levels of historical integrity and evaluated their eligibility for the National Register of Historic Places (NRHP). Of the 98 properties surveyed, three are listed in the National Register as contributing resources to NRHP Historic Districts (HD): Abernethy (Ladd's Addition HD), Couch/MLC (Alphabet HD) and Irvington (Irvington HD). Three schools (Benson, Duniway, and Woodstock) are listed as Portland Landmarks, and three schools are considered contributing resources to City of Portland Conservation Districts (Kenton, Woodlawn, and Jefferson). Refer to page IV-6 for Building Site Historic Significance map.

Roof Assessment

Because of the age of District buildings and the lack of funds for capital expenditures, numerous roofs need replacement in spite of several recent efforts in the last 10 years to address the backlog.

In 2007, PPS completed a roof assessment of all District roofs, identifying \$70 million in needed roof replacement and an additional \$5 million in roof-related seismic upgrades (in 2007 dollars).

In 2009, PPS spent nearly \$14 million and installed new roofs on nine school buildings. These projects included thin film solar installation and roof-related seismic improvements.

FACILITY CONDITION INDEX (FCI)

The facility condition index (FCI) is a widely used indicator that provides a relative scale of the overall condition of a given facility or group of facilities within a facility portfolio. FCI is one of many criteria that can be used for determining if a building should be renovated or replaced. The index is derived by dividing the total repair cost by the total replacement cost for the existing school facility. Replacement costs are based on the square footage of the existing buildings for comparison purposes and may not reflect actual replacement cost based on current facility standards.

$$\frac{\text{Total Cost to Remedy System Deficiencies}}{\text{Current Building Replacement Value}} = \text{Facility Condition Index}$$

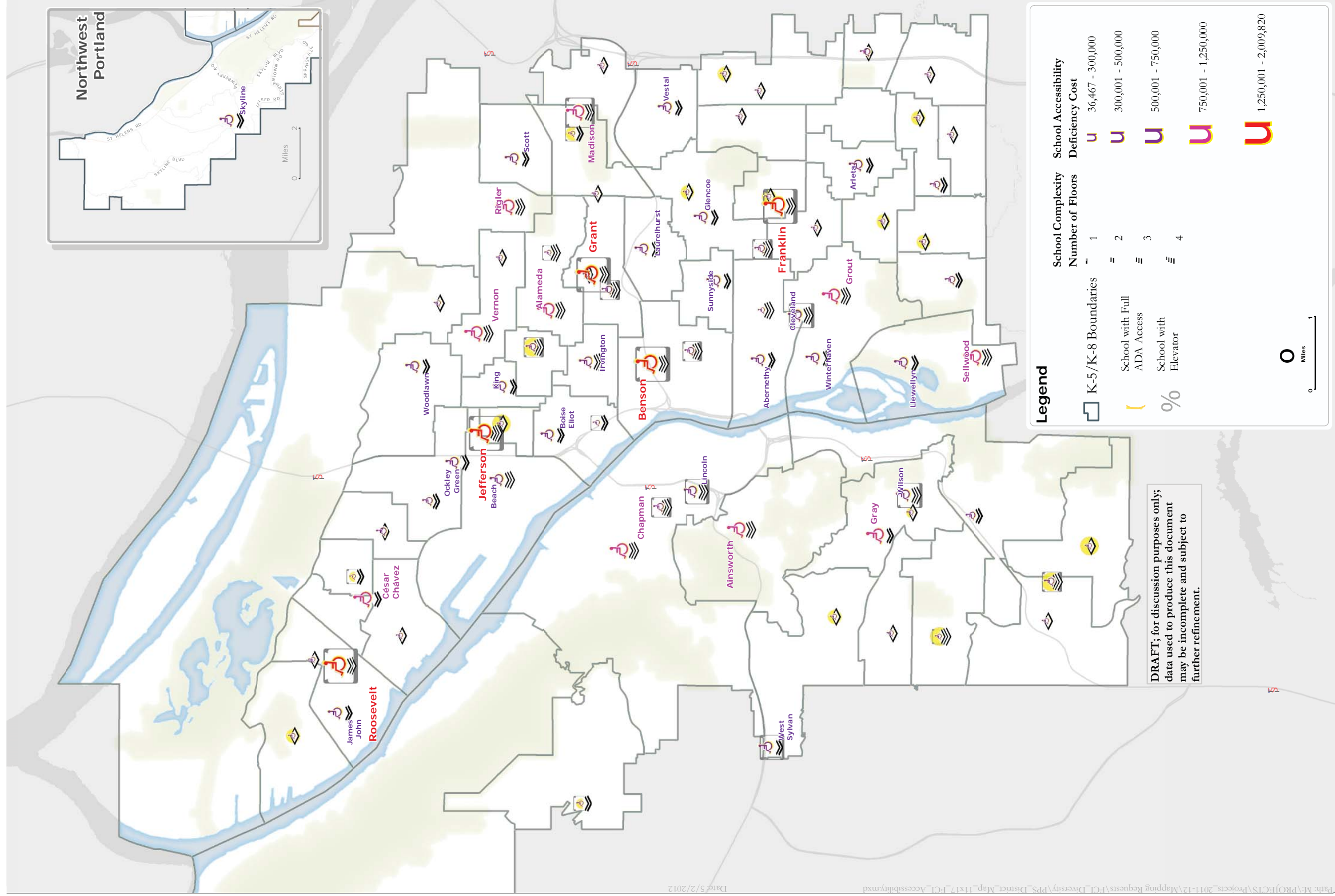
The repair cost for each facility is derived through a process of ongoing facility condition assessments. The goal at PPS is to conduct an assessment of each site every four years. These facility assessments, when combined with a reinvestment strategy, are a proactive approach that drives the FCI down and keeps facilities in optimal condition. It is often significantly less expensive to replace systems or to make large scale improvements when combined with a larger renovation. An FCI score close to 1 represents the total cost of individual building deficiencies that are close or equal to the cost of fully replacing that building.

The chart located on page IV-7 illustrate school condition by cluster.

Map A

PORTLAND PUBLIC SCHOOLS
Student Accessibility: Upgrade Costs

ADA Access, Amenities and Upgrade Costs



Map B

PORTLAND PUBLIC SCHOOLS
Building Site Historic Significance

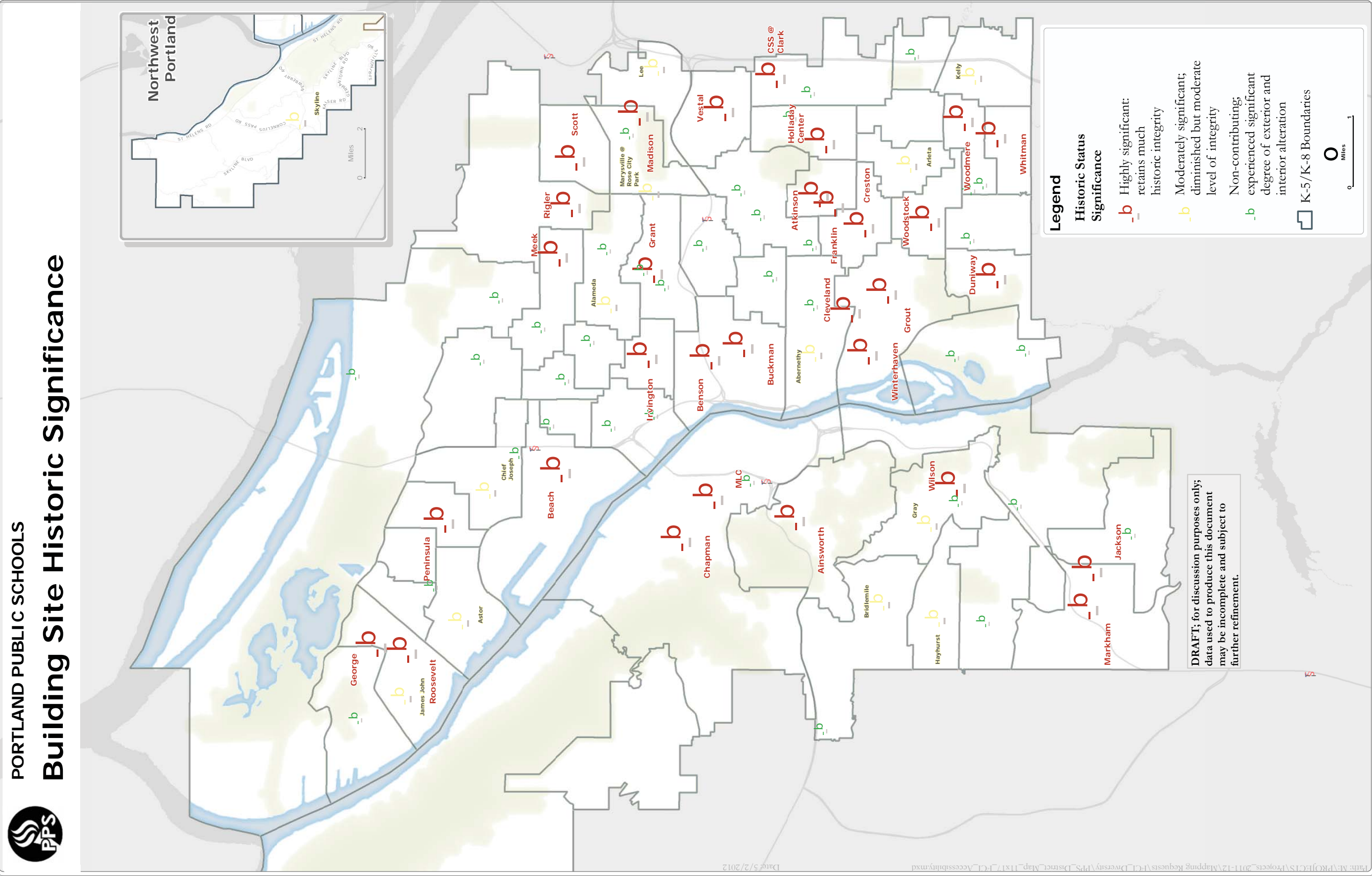
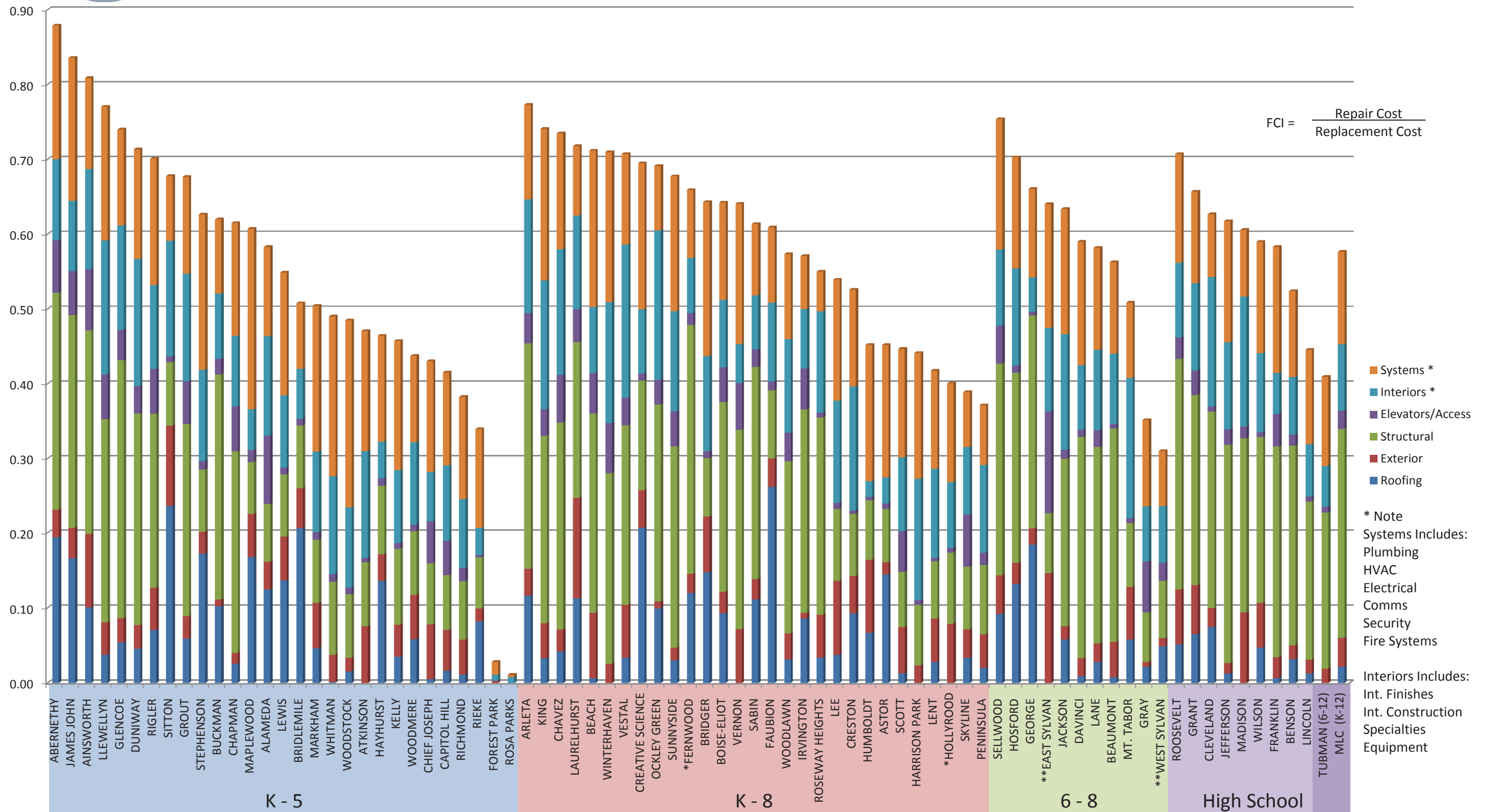




Chart C

Facility Condition Index (FCI) - By Building Improvement Category



* Beverly Cleary is shown as Fernwood and Hollyrood

ENROLLMENT FORECASTS & BALANCING

SCHOOL & SITE UTILIZATION



The success of Portland Public Schools' educational programs is fostered in part by the ability of each school to house the students, teachers and spaces needed for effective teaching and learning. Planning for fluctuations in student enrollment is an important school district activity because the state funding formula for education is allocated and teachers are assigned based on the number of students anticipated every year.

This chapter describes PPS student population and enrollment changes over the last decade, Portland State University's Population Research Center's (PRC) enrollment forecasting process and accuracy rates during that time span, and Districtwide forecasts for the next 10 years.

Enrollment forecasts are used, in part, to determine whether the District will need to add or modify facility space to meet school program or configuration needs. Student enrollment forecasts, combined with a methodology for determining student capacity in each school, provide a framework for facility needs to better serve student achievement. As such, student enrollment forecasts comprise an important component of the Facility Plan.

ENROLLMENT FORECASTING

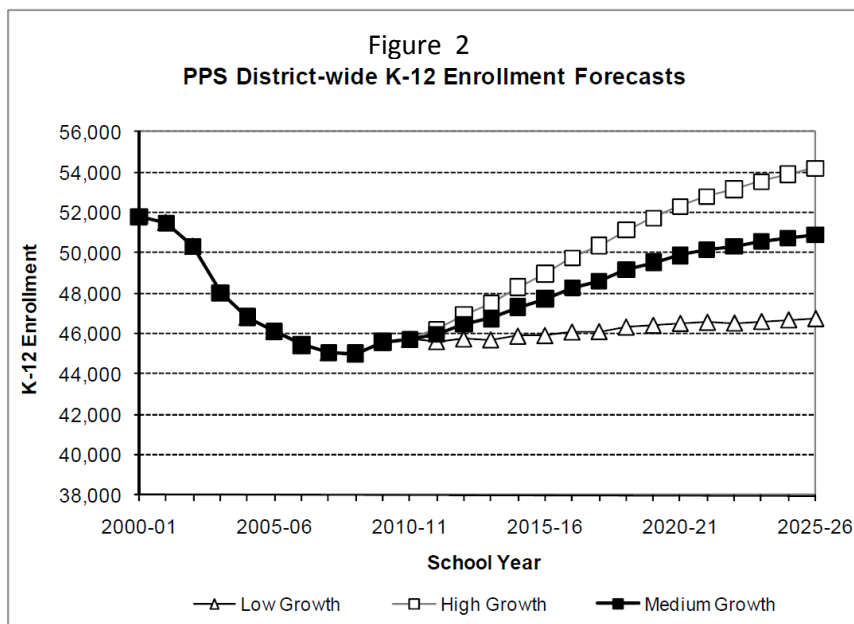
PPS relies on enrollment forecasts to predict future program and facility needs for students. After a lengthy period of declining student populations, the District has experienced three straight years of enrollment increase, which is forecast to continue through the next decade.

PPS receives enrollment forecasts from Portland State University's PRC. Student enrollment forecasts are updated annually to incorporate new enrollment data as well as newly released birth and housing data.

Forecast accuracy is measured in part by comparing past forecasts to actual enrollments. Districtwide enrollment in 2011-12 varied from the most recent medium-growth forecast by 1,309 students, or 2.8%. The actual enrollment of 47,288 exceeded the high-growth forecast of 46,233, varying by 1,055 students, or 2.3%.

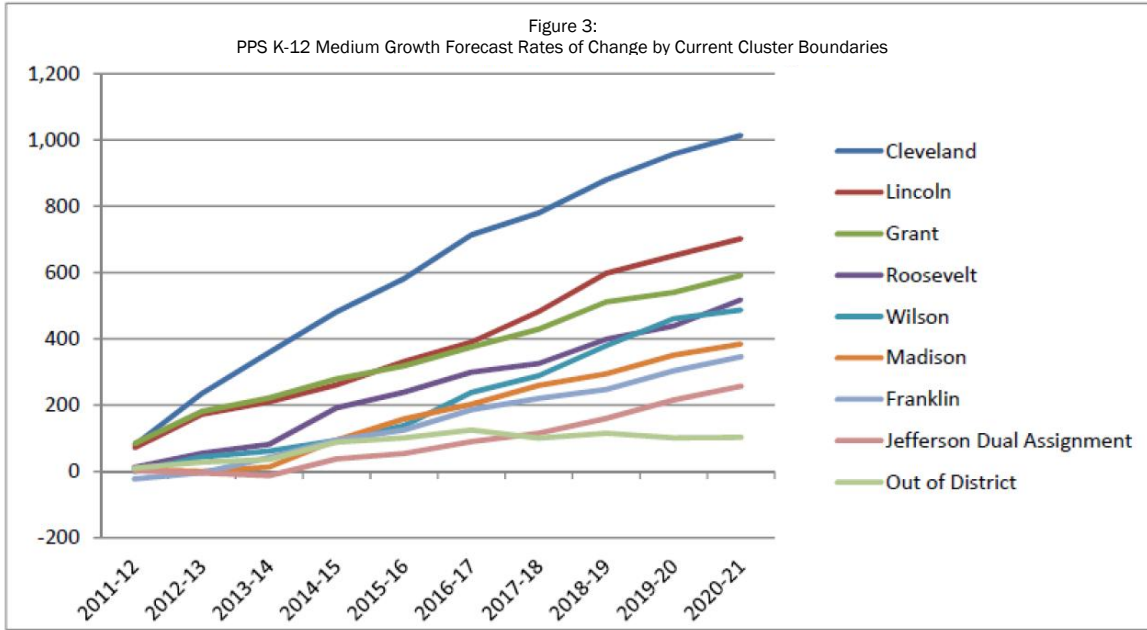
The accuracy of the PSU enrollment forecasts decreases when the District-wide number is broken down by grade level and geographic region. The current forecasts are based on 2010-11 school enrollment, and are updated annually to reflect actual enrollment growth.

Districtwide enrollment forecasts over the next 13 years are shown in Figure 2. The focus of the Facility Plan is for the 10-year period through the 2021-22 school year.



The three scenarios of the PSU enrollment forecast point to additional students enrolling in PPS over this time period. PSU does not currently produce enrollment forecasts beyond 2025-26. The most likely growth scenario (medium growth) shows K-12 enrollment increasing to 50,159 students in the 2021-22 school year, adding 2,871 more students to the current enrollment. The high growth scenario predicts that 2021-22 enrollment would reach 52,323 students, adding more than 5,000 students to the District over the next 10 years.

Under the medium growth scenario, additional students are expected across every region and every grade of the District, with highest rates of change anticipated in the current boundaries of the Cleveland and Lincoln clusters. See Figure 3.



PSU anticipates enrollment of PPS students will increase into the next decade, based on evidence collected from historic enrollment, census, new housing completion and other data sources. Long-range planning will focus on providing modern learning spaces for a growing population of students through the coming years.

Portland Public Schools, Enrollment Forecasts, 2011-12 to 2022-23

Chart D **Medium Growth Scenario, District-wide Enrollment by Grade and Year**

Grade	Historic Enrollment			---- Forecast Enrollment ----											
	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
K	3,951	4,073	3,995	4,034	4,085	4,066	4,029	4,052	4,121	4,155	4,179	4,180	4,183	4,205	4,226
1	3,825	4,007	4,091	4,037	4,101	4,160	4,141	4,092	4,128	4,182	4,228	4,252	4,243	4,246	4,268
2	3,739	3,782	3,894	4,034	3,981	4,052	4,110	4,079	4,043	4,062	4,128	4,173	4,187	4,178	4,181
3	3,598	3,730	3,727	3,833	3,971	3,926	3,996	4,041	4,022	3,971	4,001	4,066	4,105	4,119	4,110
4	3,528	3,542	3,682	3,677	3,782	3,926	3,881	3,939	3,995	3,961	3,922	3,952	4,012	4,050	4,064
5	3,412	3,496	3,479	3,624	3,619	3,730	3,871	3,816	3,884	3,924	3,902	3,864	3,889	3,948	3,986
6	3,250	3,318	3,354	3,351	3,489	3,492	3,600	3,725	3,684	3,734	3,783	3,762	3,722	3,746	3,803
7	3,295	3,254	3,299	3,306	3,302	3,446	3,448	3,544	3,678	3,623	3,683	3,731	3,712	3,673	3,696
8	3,335	3,253	3,192	3,261	3,271	3,271	3,415	3,406	3,511	3,629	3,585	3,645	3,692	3,673	3,634
9	3,147	3,349	3,176	3,200	3,268	3,287	3,285	3,421	3,420	3,512	3,641	3,597	3,653	3,700	3,682
10	3,316	3,121	3,339	3,130	3,159	3,230	3,257	3,239	3,386	3,370	3,470	3,597	3,549	3,606	3,652
11	3,244	3,165	3,026	3,211	3,002	3,047	3,111	3,140	3,120	3,257	3,246	3,340	3,459	3,412	3,467
12	3,384	3,502	3,487	3,281	3,421	3,133	3,181	3,238	3,277	3,244	3,396	3,385	3,479	3,603	3,553
Other	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	45,024	45,592	45,741	45,979	46,451	46,766	47,325	47,732	48,269	48,624	49,164	49,544	49,885	50,159	50,322
K-2	11,515	11,862	11,980	12,105	12,167	12,278	12,280	12,223	12,292	12,399	12,535	12,605	12,613	12,629	12,675
3-5	10,538	10,768	10,888	11,134	11,372	11,582	11,748	11,796	11,901	11,856	11,825	11,882	12,006	12,117	12,160
6-8	9,880	9,825	9,845	9,918	10,062	10,209	10,463	10,675	10,873	10,986	11,051	11,138	11,126	11,092	11,133
9-12	13,091	13,137	13,028	12,822	12,850	12,697	12,834	13,038	13,203	13,383	13,753	13,919	14,140	14,321	14,354
Other	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	45,024	45,592	45,741	45,979	46,451	46,766	47,325	47,732	48,269	48,624	49,164	49,544	49,885	50,159	50,322
K-12	45,024	45,592	45,741	45,979	46,451	46,766	47,325	47,732	48,269	48,624	49,164	49,544	49,885	50,159	50,322

Sources: Portland Public Schools, historic enrollment; Population Research Center, PSU, enrollment forecasts.

May, 2011

SCHOOL UTILIZATION

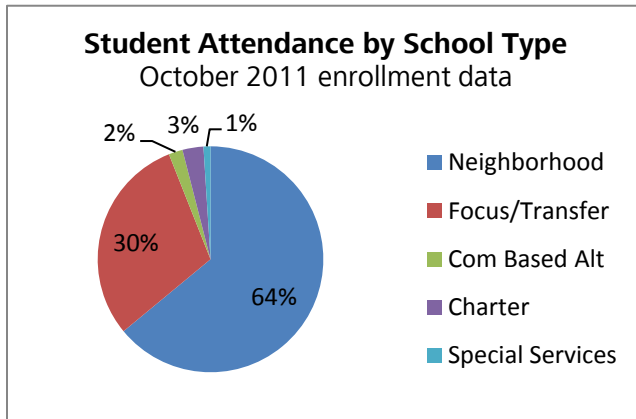
For the purposes of the Facility Plan, school utilization is defined as the portion of the building assigned to students or, more specifically, the number of students enrolled in a school divided by the student capacity of the school. Analysis of school utilization in this plan uses the medium growth scenario of the PSU enrollment forecast.

Understanding school utilization is necessary to provide effective learning environments for all students. Planning for the effective utilization of schools requires an understanding of space needs for the range of academic programs offered in a school, as well as classroom and common spaces available for current and projected student use.

Student Assignment Procedures

Portland Public Schools provides a guaranteed school for every grade K-12 student based upon home address. PPS also provides a number of options for students to attend other schools, including other District neighborhood and focus schools, independently operated charter and alternative schools, and schools designed to meet individual students' specialized learning needs. Figure 4 shows the current distribution of K-12 students by type of school attended.

Figure 4



The Portland model of both guaranteed neighborhood schools and a robust choice portfolio is somewhat unique when compared with other similarly sized school districts. In general, suburban districts offer fewer choice options, while other urban districts are more likely to offer choices and use lotteries to assign students instead of neighborhood guarantees.

Annual enrollment changes in the District are analyzed each fall through an enrollment data analysis process that incorporates historic, current

and forecast enrollment data with demographic characteristics and transfer patterns. The results of the analysis include:

- A list of schools with projected enrollment significantly greater or less than school capacity,
- An assessment of the degree to which forecast enrollment may inhibit delivery of an adequate and effective academic program and/or cost effective use of a school, and
- Options to address identified enrollment issues, including:
 - a. enrollment changes through transfer limits or boundary adjustments,
 - b. program changes, which may include different grade configurations,
 - c. facility modifications to increase capacity, and
 - d. opening or closing schools.

As noted, PPS has recently seen increased enrollment across the District. This trend is expected to continue, and it is likely that more schools will be operating at or above current enrollment capacity. These schools will have to offer educational programs with less space per student to the extent the non-capital and capital options identified above cannot mitigate overcrowding. At the same time, some schools continue to see declining enrollment, or are operating in such small capacity buildings that they will never reach enrollment targets for educational programs. Schools in these categories would also be considered for the types of changes listed above.

SCHOOL SIZE TARGETS

While school building size is a reflection of the educational models in place at the time a school was constructed, school size targets are based on current thinking regarding the number of students needed to meet PPS' program goals. Targets are based on existing resources and staffing ratios and provide a range for planning purposes. School size targets may vary through the years, as educational program models and funding levels change. The following enrollment targets were developed for the 2011-12 school year.

Figure 5: 2011-12 PPS School Size Target Ranges*

School type	Floor	Target	Planning Capacity
Elementary	300	450	600
K-8	350	500	675
Middle	450	600	675
High	1200	1350	1,500

*Does not include focus, alternative and special schools

It is generally assumed that schools with enrollment near the target size are able to provide a full academic program. However, schools with enrollment near or below the target “floors” may not be able to offer a full program without supplemental funding. Planning capacity represents the estimated minimum school capacity when planning for replacement or full modernization. Different enrollment targets exist for District focus, alternative and special schools and are not addressed as a part of this plan. Student capacity for the purposes of school modernization or replacement planning are defined in the assumptions used in the Plan Options Chapter. (See P. VII-4)

STUDENT CAPACITY MODELS

A variety of methods can be used to estimate the student capacity for K-12 schools. The *instructional model* has been identified as the preferred method of determining capacity for PPS. (See Appendix G; Issue Paper 5.3, School Utilization, for a summary of models evaluated for this plan.)

For the purposes of its enrollment balancing process to date, the District’s assessment of space utilization has been the ratio of full-time equivalent (FTE) teachers per classroom. While this is a useful tool for districtwide assessment of space utilization, it does not account for the variation in sizes of classrooms or the frequency of the room use or use of classrooms by other special programs (e.g. Special Education or English Language Learners).

The *instructional model* allows for a determination of design capacity (all potential instructional spaces being used 100% of the school day) and a functional capacity (design capacity minus the instructional spaces being used for non-instructional purposes like office space, resource rooms, space leased to wraparound service providers). The *instructional model* also allows for a districtwide assessment of common space utilization across school types. The determination of functional capacity is best performed at the individual school level. Determining what percentage of a school day instructional spaces are being used (utilization) can be done by assigning a schoolwide utilization factor to all instructional spaces or by having building administrators identify how often instructional spaces are being used.

The utilization rate identifies how much of the functional capacity is being used. Most schools do not operate at 100 percent of the available student capacity. Teacher planning periods and specialized classrooms used by a portion of school students (e.g. science labs, art rooms) mean that not all instructional spaces are used every period of every day. However, the program needs of each school may require the use of traditional instructional spaces for non-instructional uses such as resource rooms, counselors, therapists, etc.

For the purposes of districtwide assessment of student capacity, the enrollment utilization contained in this plan presumes utilization rates based on school level (K-5: 90%; K-8: 85%; middle and high schools: 75%). School utilization rates tend to be higher in elementary schools, where the program is based on a homeroom model. Utilization in middle and high schools tends to be lower as there are more electives and specialized classrooms (e.g. science lab, industrial arts) that are not used every period of the day. School by school assessment of student capacity will be conducted during the spring of 2012 and will be incorporated into the plan.

Annual updates of student capacity using the instructional model should be conducted to note changes in school programs and space utilization. The student capacity model adopted by the District should be used for the purposes of comparing student capacity to future enrollments and any target enrollments established by the District.

The identification of enrollment and capacity disparities should signal the need to engage in the enrollment balancing process. If the right size of a school program requires the need for a school enrollment greater than the physical space allows as suggested by a capacity model, this may suggest the need for capital investment in the school to provide the space needed to accommodate the program.

OTHER PROGRAM CONSIDERATIONS

Like many urban school districts, Portland Public Schools offers programs and special services beyond K-12 general education instruction to support students whose needs are not met in traditional school settings. PPS also partners with Multnomah County, Portland Parks & Recreation, and other “wraparound” service providers to give students access to Pre-K programs, health clinics, dental services and before- and after-school care. Providing these services has shown to improve student readiness and achievement.

The District currently provides alternative education options, community based programs, charter schools and special services including Special Education, English Language Learners and online learning. The district also partners with agencies that provide Head Start, full- and half-day kindergarten, and pre-kindergarten programs. These programs typically have space and facility requirements that were not anticipated during the design/construction era of most PPS facilities. It is clear the increased success and demand for these programs fosters space needs that must be designed and integrated districtwide into the overall program delivery for each PPS school.

Estimates of student capacity using the instructional model are based on current program space requirements and are subject to change based on program needs. For example, PPS has converted kindergarten curriculum from a half-day model to a full-day program. As a result, the need for kindergarten space has doubled across the district. Other changes that affect utilization include the districtwide increase in numbers of students who receive additional services for language instruction or disabilities, and the trend of inviting partner organizations into schools to provide mentoring, counseling and other supports.

Enrollment Balancing Summary

Discrepancies among school enrollments, program sizes and school capacities will be addressed initially by the District’s enrollment balancing process. See charts on pages V-12 through V-21. Consistent use of a student capacity model based on the physical size and characteristics of each school building and site should be the basis for determining whether school buildings can accommodate the District’s desired target program size for each school.

Facility expansion should be identified as one option to accommodate District-established program size after other non-capital enrollment balancing options have been explored. Expansion of facilities should strive to provide parity of common spaces amongst school types. Expansion of classroom spaces through the use of non-permanent facilities such as modular classroom buildings should be considered to support temporary enrollment fluctuations, as they do not address larger needs such as cafeteria, gym, media center, restroom and other common space requirements.

IDENTIFYING FUTURE SCHOOL SITES

The District acquired most of its school sites during the early to mid-20th century. Based on forecasted enrollment over the next 10 years, there does not appear to be a need for additional land to build more schools. However, significant housing development in areas of the District with a low density of school sites may require the provision of additional capacity at school facilities. Currently, the District’s schools fall into the following ranges:

Figure 6: 2011-12 PPS Building and Site Size Ranges

School Level	Building Size (1,000 SF)	Site Size (acres)
K-5	15+ to 80+	>1 to <12
K-8	36+ to 110+	>2 to <10
Middle	25+ to 212+	>5 to <37
High	69+ to 391+	>4 to <22

See the “Site Size” chart on page V-22.

EFFICIENT USE OF SCHOOL SITES

In addition to estimating the student capacity of each school, the Facility Plan needs to assess current school sites to understand if there are adequate sites within the district to meet long-term enrollment needs and whether these sites are adequate in size and distribution to meet long-term forecasts. This evaluation is required to provide assurance that there is a sufficient inventory of properties relative to enrollment demands, and that they are being used effectively to address school needs. School sites must provide space for: the building, exterior instruction, play areas (hard, soft and covered), intramural/athletic activities, parking, and pedestrian and vehicular circulation. Site areas may need to meet other regulatory requirements including: property line set-backs, easements, fire separations, fire truck access and/or environmental restrictions (e.g. wetlands).

Multi-Story Buildings

Currently 53 of the District's 88 active school sites have two or more stories. As land costs increase, multi-story buildings become more cost-effective to build and operate. Land costs in the District have risen significantly in the last 20 years. Therefore, the District has made it a practice to construct multi-story buildings when new schools are built. Rosa Parks Elementary School is a good example of this.

Shared Use & Partnerships

Another effective way of maximizing the use of a school site is to share the use with other organizations. Partnerships exist between the District and Portland Parks & Recreation for the use of outdoor and indoor space. This shares not only the use of a site but the costs associated with fields and outdoor recreation space and operating the facility's indoor recreational and instructional space.

District school facilities are community assets that are used in a variety of ways by families and community groups.

There are other shared use partnerships that the District has and can enter into and develop. Some natural pairings include those with the City of Portland and other educational (e.g., Portland Community College) and community service providers (e.g., Boys & Girls Clubs, YMCA, etc.).

There may also be opportunities for District schools to share sites with other District functions and facilities. This includes schools and school programs that share buildings on a site and have their own buildings but share the site itself. A related form of schools sharing sites is the K-8 model, which effectively combines two schools—an elementary school and a middle school. The District now has 30 K-8 schools in active use.

Finally, several partnerships support career-technical education which benefits both students and the community. The District looks for opportunities to develop and enhance these relationships as part of its strategic framework.

Modular Classrooms

Modular classroom buildings are an affordable and flexible method for responding to fluctuations in school enrollment and increasing the efficient use of a school site. The modular buildings used by the District typically consist of two classrooms, which accommodate approximately 25 students per classroom.

Evaluation of the use of modular classrooms needs to consider the ability of core spaces (kitchen, cafeteria, restrooms, etc.) in the existing school building to accommodate the additional students supported by the modular buildings.

Figure 7: Modular Classrooms by High School Cluster

	Cleveland	Franklin	Grant	Jefferson	Lincoln	Madison	Roosevelt	Wilson
Number of Modular Buildings	9	9	11	10	10	11	0	6
Number of Modular Classrooms	13	17	18	19	18	15	0	11

The City of Portland requires modular classroom buildings to be placed on permanent foundations; they often function as permanent classroom space.

Portable classroom buildings look and function similarly to modular classrooms but are placed on temporary foundations or footings and are more readily moved.

The use of modular and temporary buildings must be balanced with site considerations and issues of educational quality and equity between schools. Site conditions such as environmental constraints/conditions, school features, development code, fire safety and the ability of core facilities to support larger enrollment must be considered.

The reasons behind the additional space that can be provided by additional classroom buildings should be evaluated and appropriate capital investments made based on district priorities. For example, if classroom space is needed to address a large and growing attendance boundary, that may be reason to expand or renovate a school. If the need for classroom space is the result of a temporary enrollment “bubble”, that may be the rationale for a modular classroom building.

Student & Staff Parking

Required vehicle parking standards are a local zoning code issue that can add to the need for larger school sites. The following strategies can be used to help mitigate this issue: reimbursing the local transit agency for allowing the students to ride for free; the use of transportation demand management plans; the proximity of a frequent transit line; providing better bicycle storage facilities on campus; participation in the City of Portland’s Safe Routes to School Program; and making shared parking arrangements with various organizations in the neighborhood. Shared parking arrangements most directly affect the amount of the school site being dedicated to parking. Shared parking arrangements require nearby organizations with ample parking and compatible use schedules, which may not be available near all school sites.

School Site Size

School site sizes in the District are established and are unlikely to change. The District should focus investment on larger sites whenever possible. There are also several options to reduce the space on a school site dedicated to non-educational uses, such as athletic facilities or parking. However, the following factors should be considered in making these types of decisions:

- Good walking, biking and transit access should be available to reduce the demand for vehicle parking. Sufficient parking is an issue for parents and others who volunteer at schools during the daytime. As schools have come to rely more on volunteers in times of operating budget shortfalls, this is a consideration.

- School sports and extracurricular activities have consistently been highly regarded by District families. Unless there are convenient alternatives to providing space for these activities, very careful consideration should be taken when evaluating whether to reduce this space on a school site.

Interim Relocation

Because of the extensive work required to upgrade many schools to achieve modern learning environments, entire schools will need to temporarily relocate into different facilities while construction is completed. These facilities that will temporarily house displaced students are called “interim relocation sites.” In some instances, vacant school buildings might serve this purpose.

Any school recommended for replacement or major alteration that might require student displacement will require an analysis of the site and its relationship to the neighborhood in order to determine any desirability to work on-site around the existing buildings.

Given the total number of District facilities requiring major renovation or replacement, interim relocation sites will be required for many years to complete the transformation to modern learning environments.

Ancillary Facilities

The District’s building portfolio contains ancillary facilities such as central office, warehouse, commissary, and transportation services that support District operations. While capital expenditures on these facilities is often a lower priority, capital improvements to these facilities should be considered as the need arises because they exist to support District schools and student needs.

Site Utilization Summary

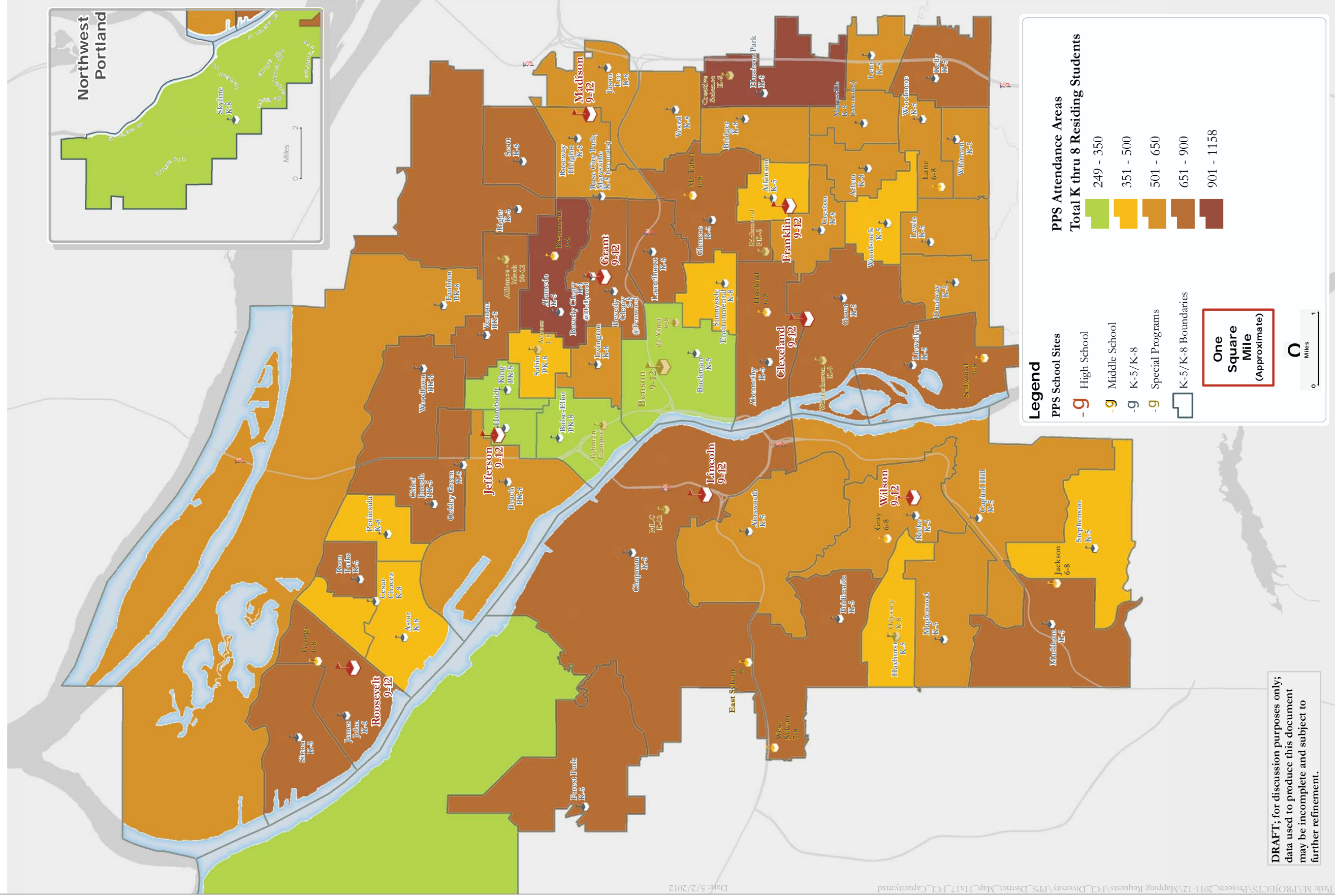
The District makes efficient use of its school sites in a variety of ways; however, the District must consider specific site conditions and the values and demands of the community when evaluating these options. Site conditions such as steep slopes, wetlands and development code regulations that establish use standards for school buildings, modular classrooms and other site improvements are also important considerations. Community values may include providing enough parking for volunteers, connected and safe walking paths, biking and transit access; and providing fields for sports, extracurricular activities and shared uses with Portland Parks & Recreation and other community service providers.

ANALYSIS OF LAND REQUIRED FOR 10-YEAR PLAN

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 to provide additional space to accommodate current and/or future enrollment. The District will need to monitor and factor the extent and location of new housing development into its enrollment balancing process.

Map C

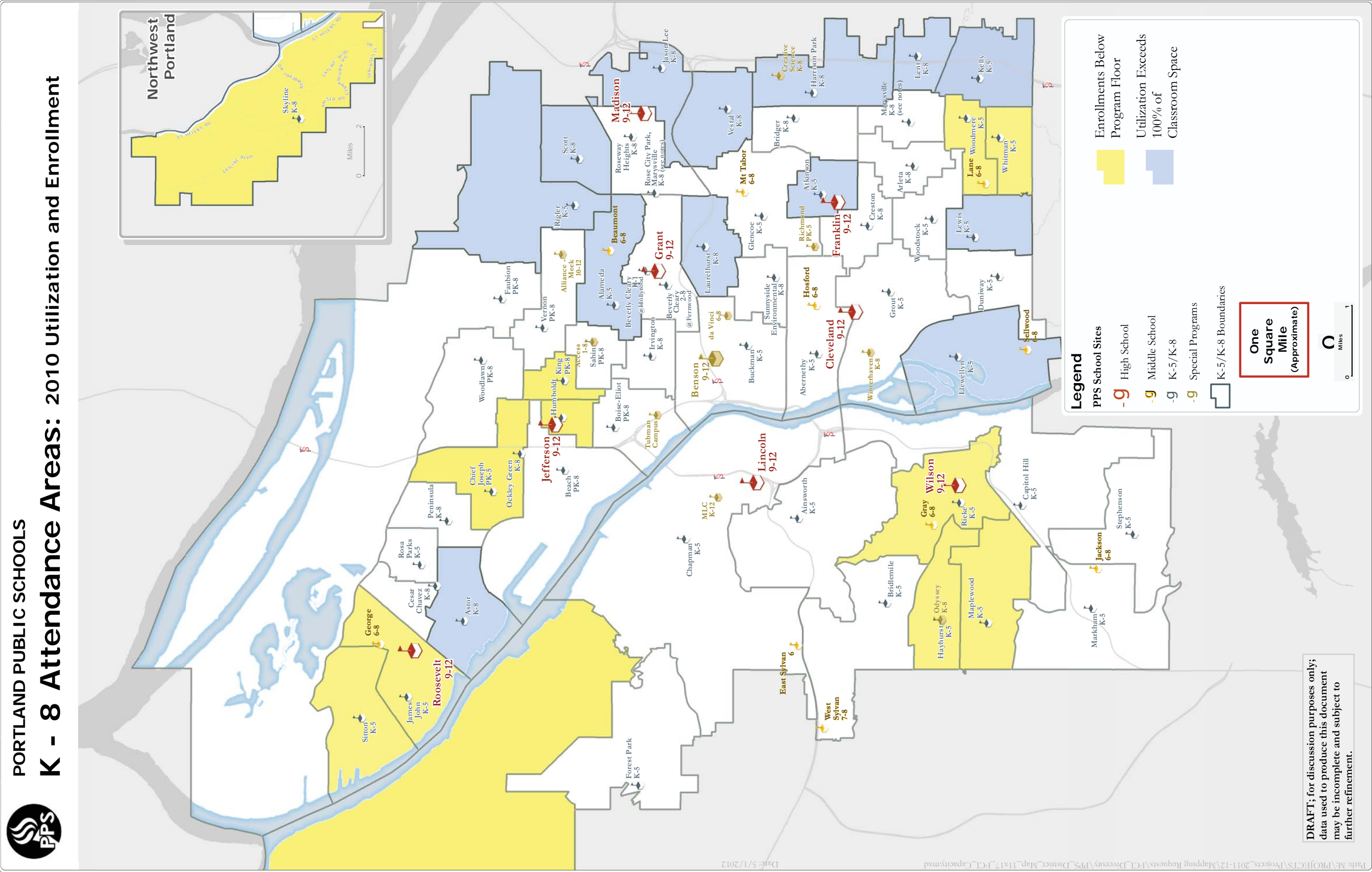
PORTLAND PUBLIC SCHOOLS
K - 8 Attendance Areas: Total K - 8 Students Population



DRAFT; for discussion purposes only; data used to produce this document may be incomplete and subject to further refinement.

Map D

PORTLAND PUBLIC SCHOOLS
K - 8 Attendance Areas: 2010 Utilization and Enrollment

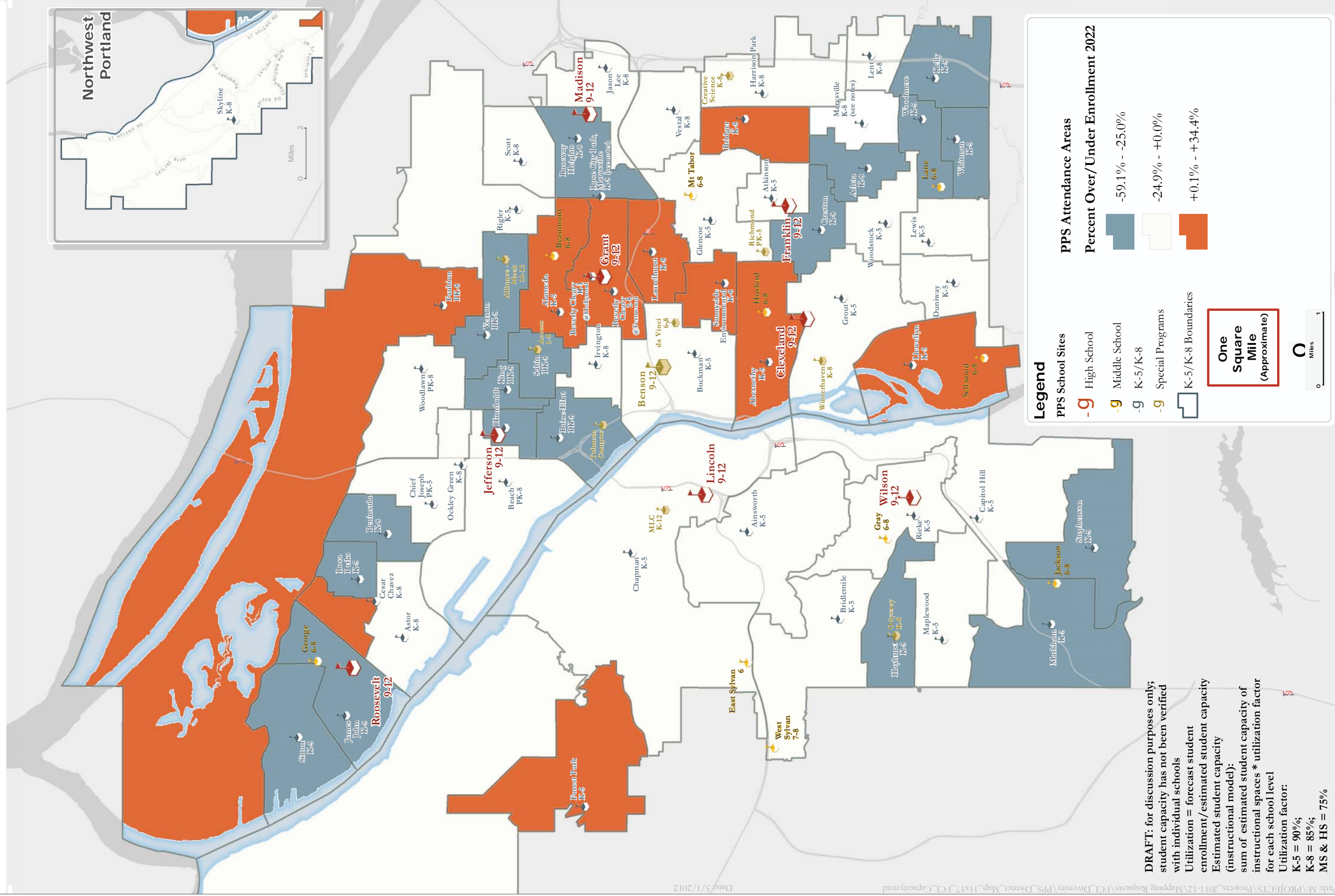


DRAFT; for discussion purposes only; data used to produce this document may be incomplete and subject to further refinement.

Map E

PORTLAND PUBLIC SCHOOLS
K - 8 Attendance Areas: and Current Boundaries

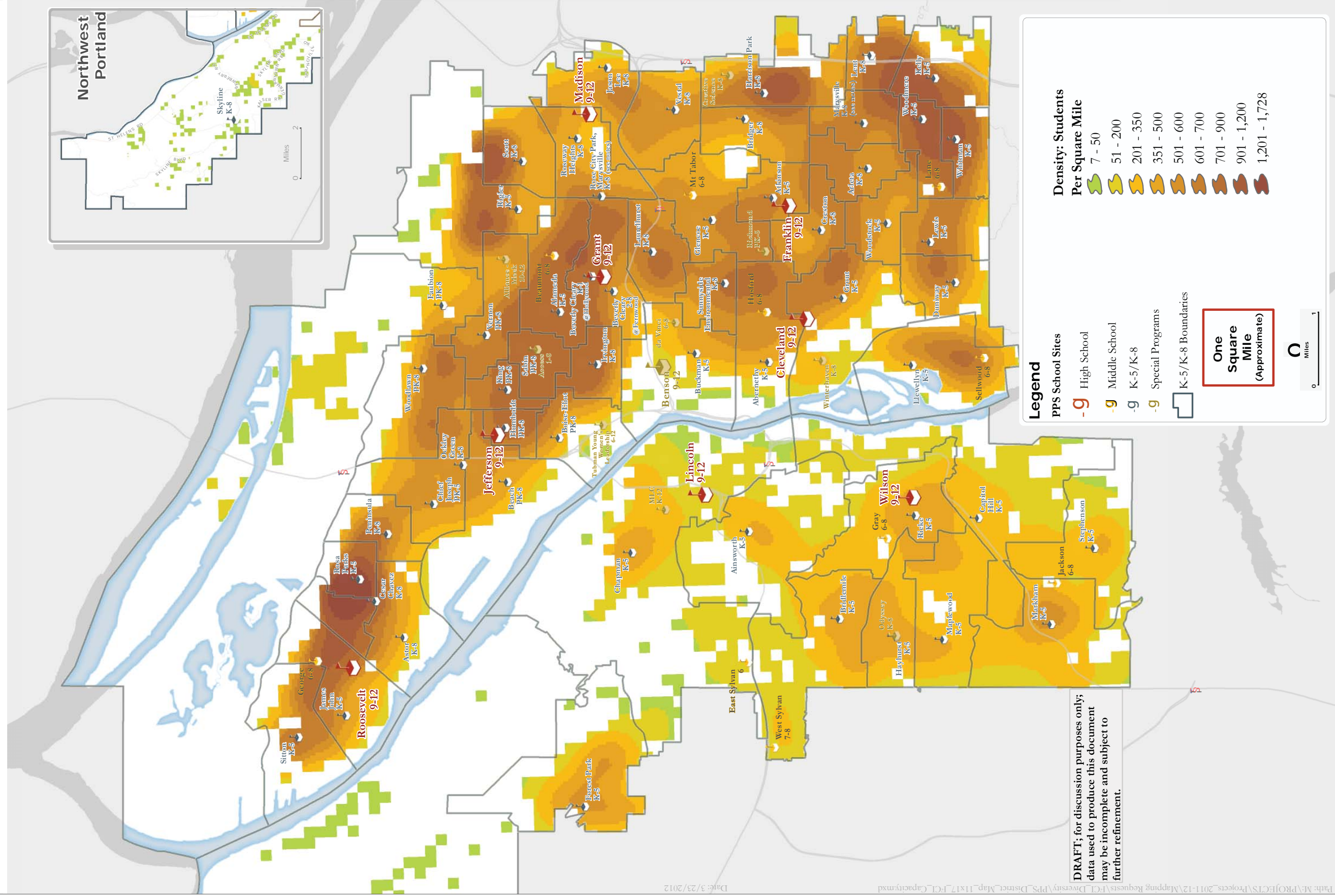
Percent Above or Below Capacity
Based on 2022-23 Forecast



DRAFT: for discussion purposes only; student capacity has not been verified with individual schools
 Utilization = forecast student enrollment/estimated student capacity (instructional model);
 sum of estimated student capacity of instructional spaces * utilization factor for each school level
 Utilization factor:
 K-5 = 90%;
 K-8 = 85%;
 MS & HS = 75%

Map F

PORTLAND PUBLIC SCHOOLS
Student Concentrations: Total K - 8 Students Per Square Mile



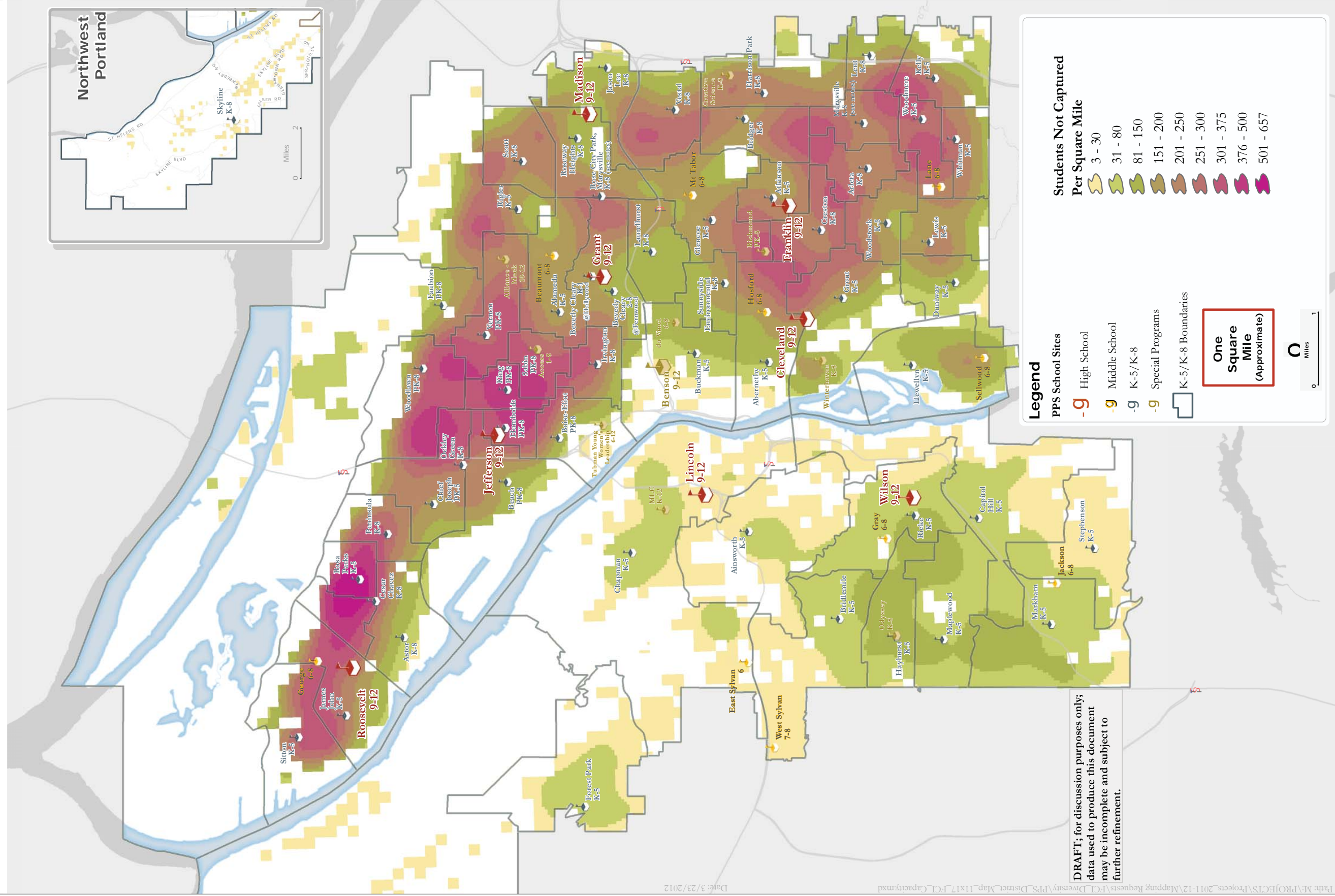
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Map G

PORTLAND PUBLIC SCHOOLS
Student Concentrations: Not At Neighborhood School

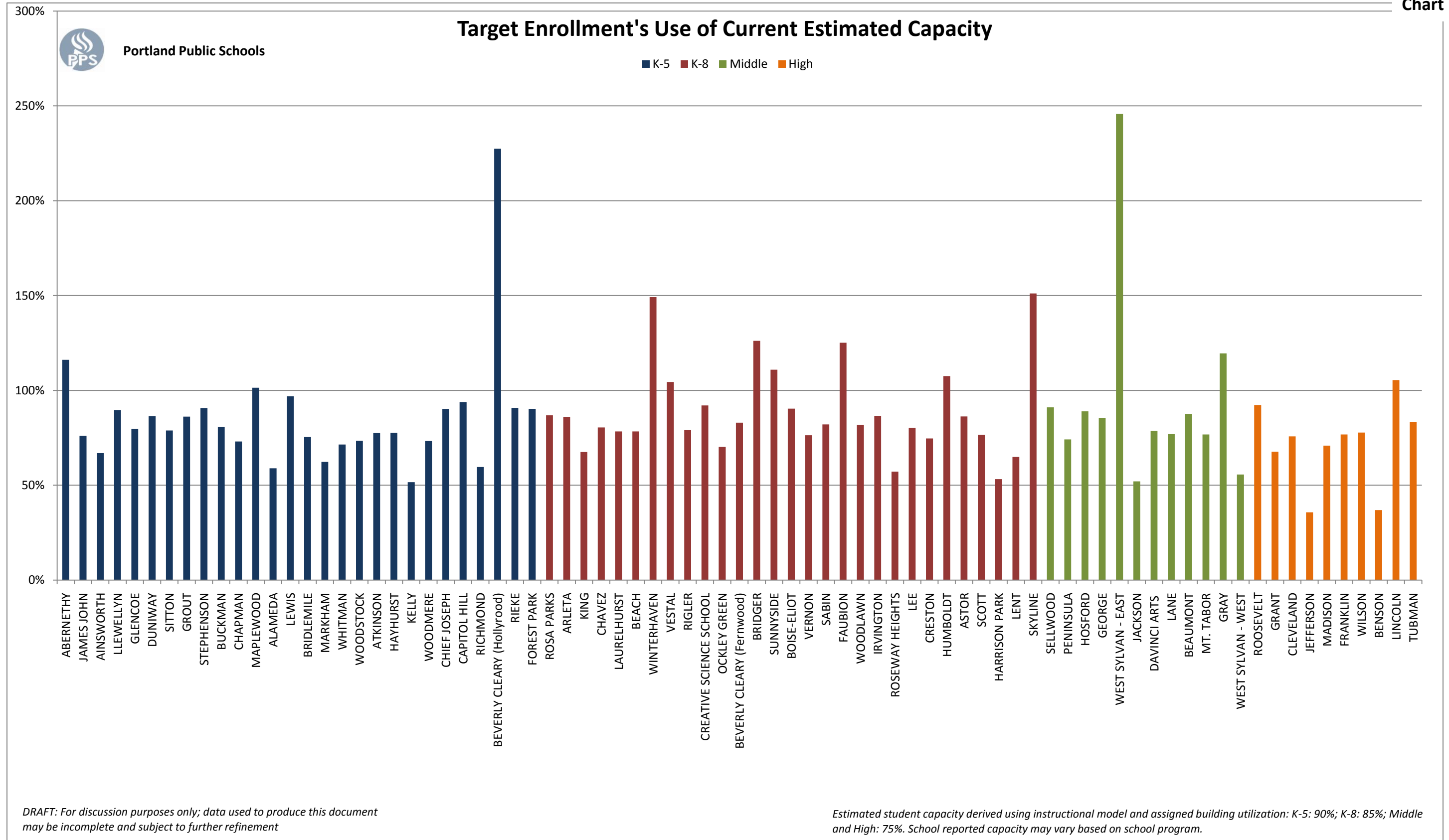
K - 8 Students Per Square Mile
Not At Neighborhood School



DRAFT; for discussion purposes only; data used to produce this document may be incomplete and subject to further refinement.

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Chart E



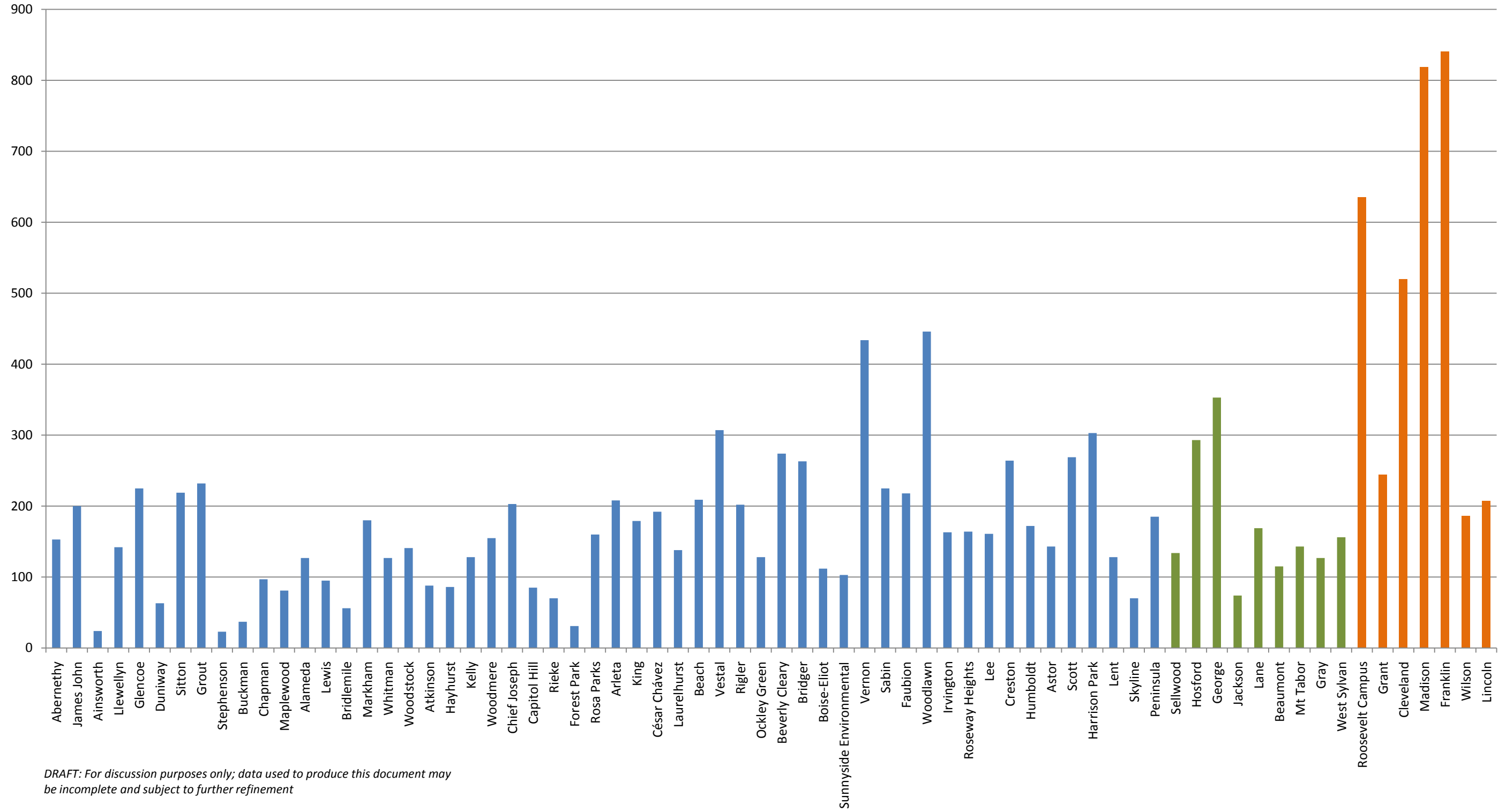


Portland Public Schools

Number of Students Not Attending Neighborhood School

Chart F

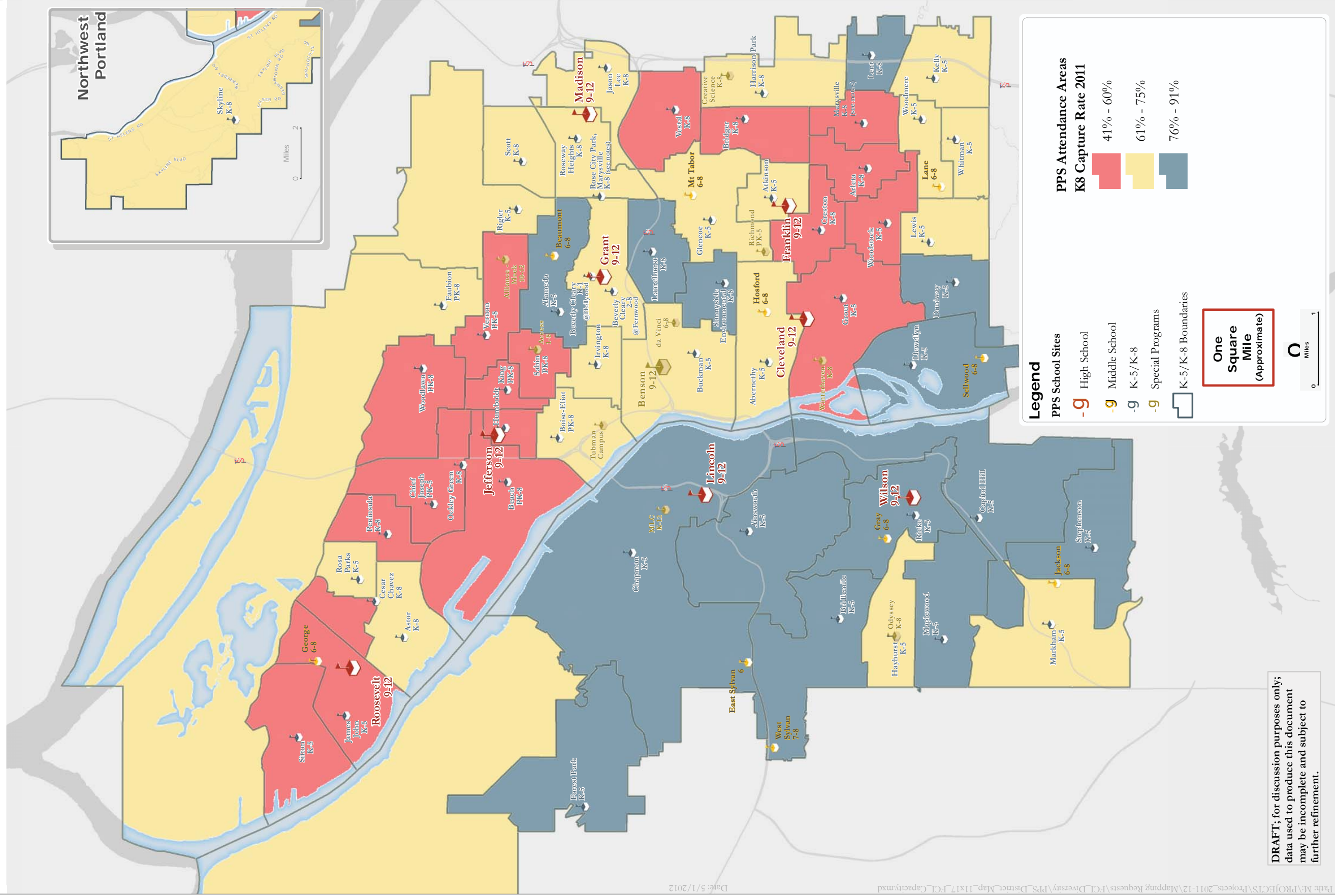
■ K-5 & K-8 ■ Middle ■ High



DRAFT: For discussion purposes only; data used to produce this document may be incomplete and subject to further refinement

Map H

PORTLAND PUBLIC SCHOOLS
K - 8 Attendance Areas: K-5/K-8 Student Capture Rate



DRAFT; for discussion purposes only; data used to produce this document may be incomplete and subject to further refinement.

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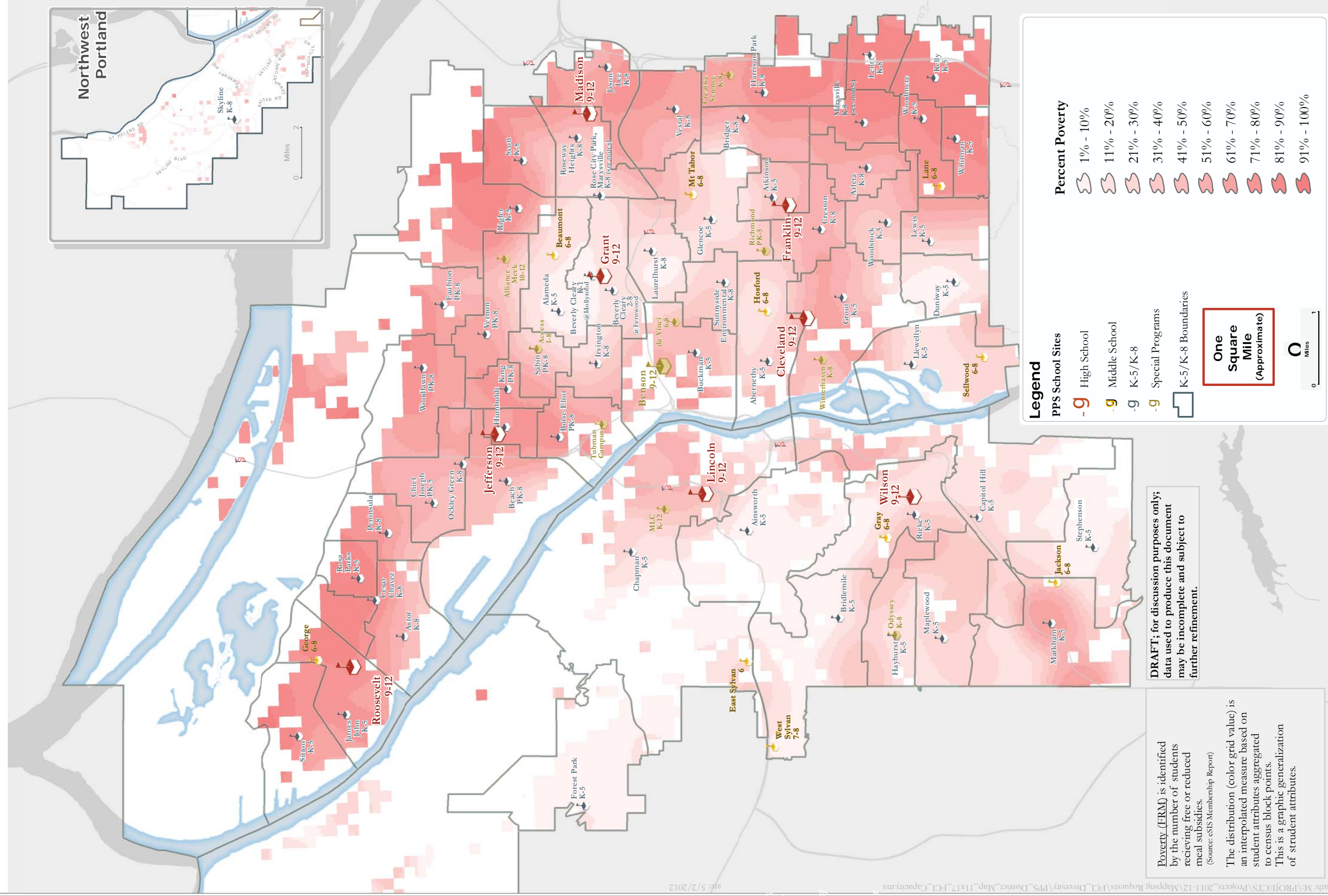
Map I



PORTLAND PUBLIC SCHOOLS

Student Concentrations:

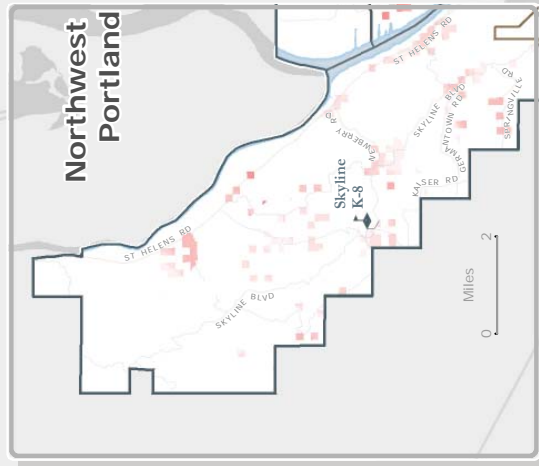
Percentage of Students Receiving Free or Reduced Meals



DRAFT; for discussion purposes only;
data used to produce this document
may be incomplete and subject to
further refinement.

Poverty (FRM) is identified by the number of students receiving free or reduced meal subsidies.
(Source: SLS Membership Report)

The distribution (color grid value) is an interpolated measure based on student attributes aggregated to census block points.
This is a graphic generalization of student attributes.



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date: 5/2/2012

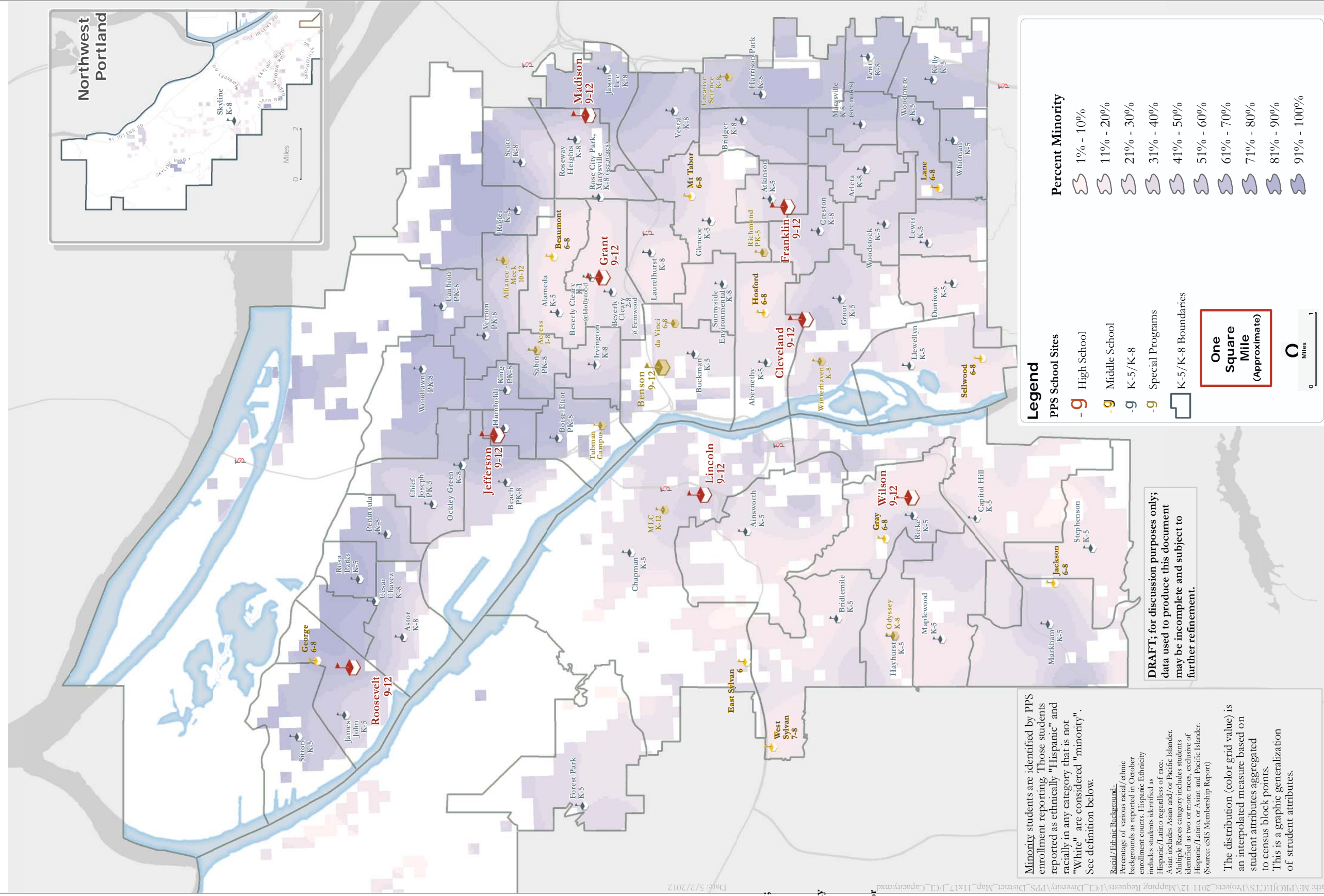
Map J



PORTLAND PUBLIC SCHOOLS

Student Concentrations:

Percentage of Students Reporting as Racial or Ethnic Minority



Minority students are identified by PPS enrollment reporting. Those students reported as ethnically "Hispanic" and racially in any category that is not "White" are considered "minority". See definition below.

Racial/Ethnic Background:
 Percentage of various racial/ethnic backgrounds as reported in October enrollment counts. Hispanic Ethnicity includes students identified as Hispanic/Latino regardless of race. Asian includes Asian and/or Pacific Islander. Multiple Races category includes students identified as two or more races, exclusive of Hispanic/Latino, or Asian and Pacific Islander. (Source: eSIS Membership Report)

The distribution (color grid value) is an interpolated measure based on student attributes aggregated to census block points. This is a graphic generalization of student attributes.

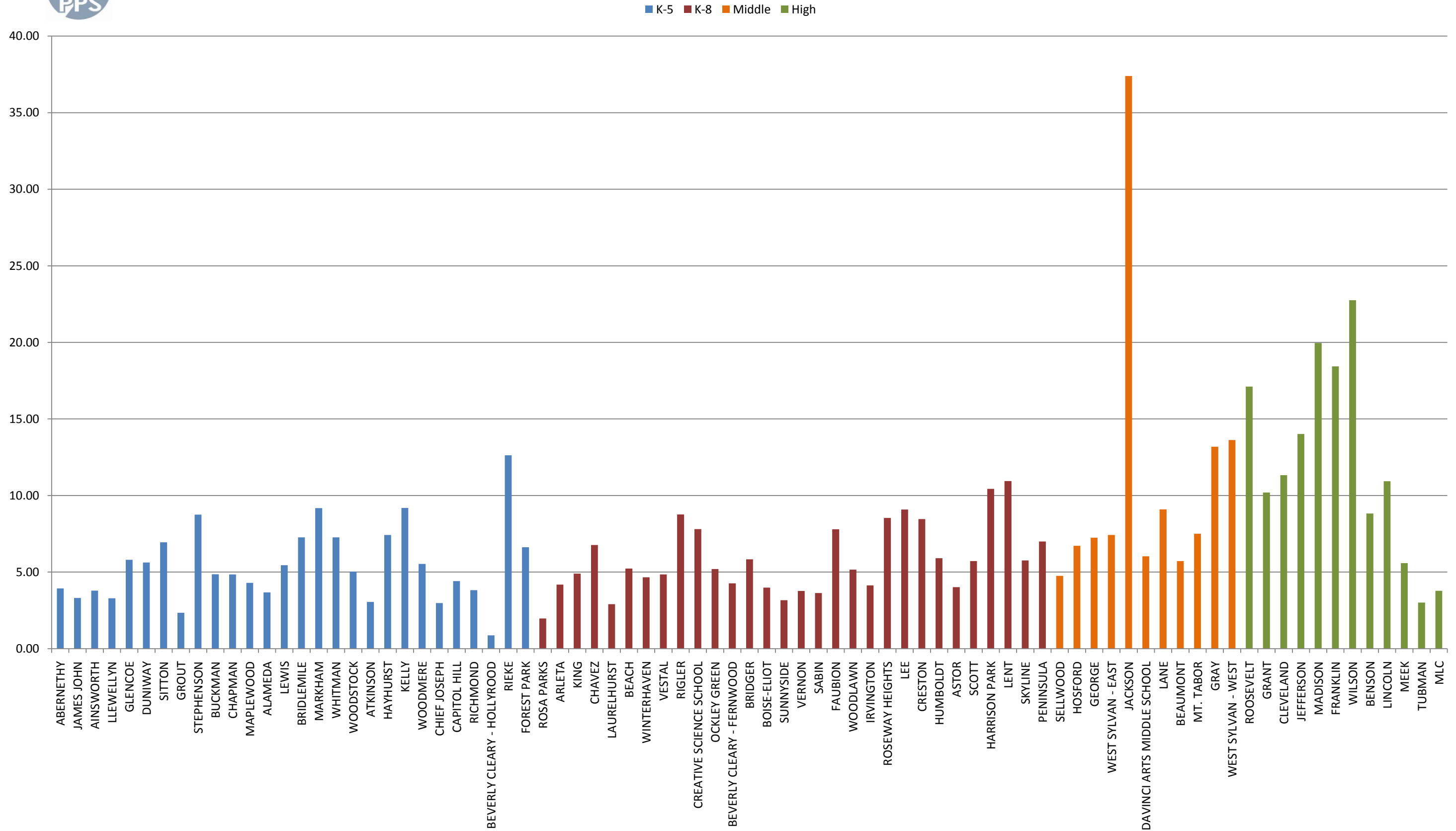
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Site Size (Acres)

Chart G



REGULATION, POLICY AND CAPITAL FINANCING OPTIONS



The regulatory context for the Long Range Facility Plan is primarily set 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 affects facility priorities but directs capital resources to maintain and/or rehabilitate the physical plant.

STATE OF OREGON AND LOCAL REGULATORY CONTEXT

Previous planning studies have addressed policies and rules, including City and County comprehensive plans and development codes, and Metro's Regional Framework Plan and Urban Growth Management Functional Plan. Most have remained unchanged in the last 10 years.

There have been some changes to the regulatory environment, including amendments to ORS 195.110, the City of Portland Zoning Code, passage of the new statewide Construction Excise Tax and physical education requirements, and adoption of regional Urban and Rural Reserves.

ORS 195.110 Amendments (2007)

Minimum plan elements required by previous versions of ORS 195.110 were not changed (see Appendix Q1-2); however, definitions concerning which districts must comply were amended. Amendments to ORS 195.110, passed in 2007 in Senate Bill (SB) 336, were comprised primarily of the following:

- Changes the definition of districts subject to facility planning requirements from "high growth school districts" to "large school districts."
- Defines "large school districts" as districts with an enrollment of 2,500 students or more.
- Adds more requirements for school facility planning coordination between the District and cities and counties with large school districts in their jurisdiction. Requires local jurisdictions containing more than 10% of students enrolled in large school districts to adopt district facility plans into their comprehensive plans.
- Extends the minimum planning period from five years to 10 years.

- Allows district boards to adopt capacity criteria that can be used by the affected local jurisdiction to evaluate whether capacity exists to accommodate projected development.
- Allows the denial of residential development applications because of insufficient school capacity based upon adopted capacity criteria. (However, school capacity still may not be used to establish a building moratorium.)

Historic Conservation

State statute (ORS 358.653) requires school districts that have buildings of historic significance in their facility portfolio to coordinate with the State Historic Preservation Office to protect buildings from inadvertently being transferred, sold, demolished, substantially altered or allowed to deteriorate by work being performed on the buildings.

Construction Excise Tax (2007)

The 2007 State Legislature passed Senate Bill 1036, which allowed school districts to impose a Construction Excise Tax (CET) on new construction or an increase in floor area in an existing structure. Portland Public Schools is collecting \$1.00 per square foot of new residential construction and \$.50 per square foot of new non-residential construction that can be used for land acquisition, construction, renovation or improvement of school facilities; costs to purchase and install equipment, furnishings and other capital; and architectural, engineering, legal or similar costs related to capital improvements. However, the CET in its current form is expected to fund only a small fraction of the total cost of new construction or major renovation. In 2012, it is expected to generate \$1,004,000. At current rates, it is estimated to fund less than 1% of capital construction needs.

City of Portland Zoning Code Update and Portland Plan

Most PPS schools are zoned residential by the City of Portland's zoning code and maps. Until recently the City's zoning code required conditional use review of enrollment changes.

In 2008 the Portland Planning Commission undertook a revision of the zoning code to address a variety of issues related to the impact of the use of school facilities to surrounding neighborhoods and the regulation of school uses through the conditional use process. The zoning code changes:

- Allow fluctuations in enrollment and staffing at schools to occur by right and require conditional use review only for physical changes to schools sites and buildings over 1,500 square feet.
- Extend the length of time school buildings may remain vacant and then reopened without conditional use review.
- Require conditional use review and notices on certain physical improvements to recreational fields.
- Limit the need for conditional use review for grade changes where any grades 9 through 12 are added to a school or the addition of any grade K through 8 to any school with high school grades.

The Portland Plan sets a framework for collaborative planning between school districts and the city to: look at greater range of community uses of school facilities; target infrastructure improvements that are supportive of schools; explore housing policy that strives to make housing more affordable for students and families; and form intergovernmental agreements to prioritize infrastructure improvements that support school communities. Development of the Portland Plan included a buildable lands analysis for the city. Adoption of the Portland Plan will be followed by an update of the City's Comprehensive Plan that will focus on policies related to school facilities. PPS staff will work with the City of Portland to incorporate this Facility Plan into the update of the City's Comprehensive Plan.

Physical Education Requirements (2007)

In 2007, the Oregon Legislature enacted House Bill 3141 (ORS 329.496) which calls for a minimum of 150 minutes of weekly physical activity for students in kindergarten through fifth grade, and 225 minutes for students in grades 6-8. School districts are required to provide students with a specified amount of physical activity starting in the 2017-18 school year. To meet this requirement, PPS will evaluate the adequacy of existing indoor and outdoor facilities capable of providing physical education instruction to meet the needs of the District's enrollment in 2017 through 2022, the 10-year capital plan horizon.

Urban and Rural Reserves (2010)

Metro made a final recommendation on Urban and Rural Reserves in the region in 2010. Adopted Urban Reserve Areas (URAs) are the most relevant to the facility plan for the potential additional student enrollment these areas may generate in the district by 2025. The decision will likely not affect PPS for the period of the plan consideration (10 years) and will have minimal impact beyond that time. Future decisions on Reserves by Metro should be tracked by staff to determine the long-term impact on enrollment.

Regulatory Context Summary

The last five years have seen modifications to State and City regulations regarding school facility planning. State regulations (ORS 195.110) have been updated to address space and land needs for large (primarily fast growing) school districts. Adoption of this plan will satisfy the requirements of ORS 195.110. State requirements for physical education will require PPS to analyze the available spaces in schools with grades K through 8 to determine if there is sufficient space for all students to perform the amount of physical education required by state statute effective in 2017. This analysis will also need to look at the availability of physical education instructors and supporting budget.

City regulations (zoning code) have been modified to remove land use requirements for enrollment fluctuations focusing regulatory oversight on school configuration changes (e.g. adding high school grades to schools) and impacts of recreational fields on surrounding neighbors.

The community, through the Portland Plan, envisions greater community uses for public schools. Many of these uses are not allowed under the current zoning code. District representation to the City's update of its Comprehensive Plan will be important to allow greater collaborative opportunities

between the District and City for investment in school facilities and their communities. Opportunities exist and should be further developed for greater coordination between the District and the City's Bureaus of Planning and Sustainability, Development Services, and the Population Research Center of PSU to estimate the potential impacts of new development within PPS school boundaries.

BOARD POLICIES AFFECTING THE LONG RANGE FACILITY PLAN

A variety of PPS Board of Education adopted policies and resolutions affect the Long Range Facility Plan. They include:

Board Policy 8.70.044-P Capital Asset Renewal (CAR) - The CAR Plan is a strategy designed to extend the useful life of District facilities, ensure capital investments are properly preserved and reduce deferred maintenance costs. In 2011, the School Board adopted a CAR policy to provide for life-cycle renewal of major building components the District has invested in over the last several years, or will invest in the future, replacing components when they come to the end of their useful life. These include Rosa Parks and Forest Park schools as well as for any newly modernized or renovated buildings in the future. Major building components include, but are not limited to, items like roof replacements; boiler upgrades; major mechanical, electrical and plumbing upgrades; and athletic facilities.

Resolution 3986 - Criteria to Determine the Order of Rebuilding and Renovation of PPS School Buildings to Create 21st Century Schools, Adopted: 10/13/2008; Facilities Condition Index (FCI) assessment identified deficiencies in all school facilities, which can be addressed by short-term actions and by a long term program of rebuilding and renovation. Fifteen criteria were developed to aid in determining the order of building and renovation beyond the Facilities Assessment. The Board directed that the FCI was the primary criterion to rank schools selected for rebuilding and renovation; other criteria are modifiers to this criterion. Renovations to accommodate Program Requirements and to address Enrollment are criteria to be heavily weighted in developing the ranking along with any major Safety and Security Improvement need in specific school facilities. *This resolution may need to be modified when this plan is adopted by the Board of Education.*

Resolution 3987 - Adopting Guiding Principles to Use for Developing and Implementing a 21st Century School Facilities Plan, Adopted: 10/13/2008; Five Principles were developed at the Reshape School Space + Place Summit to guide PPS in future decisions on instruction and facilities. These included: a) Community: True Partnership, b) Teaching and Learning: Creative Forever; c) Sustainability: Think Green, Build Green, Teach Green; d) Adapting to Change: Continuously; and e) Making This Happen: Together. *This resolution may need to be modified when this plan is adopted by the Board of Education.*

Resolution 4042 - Establish a New Fund, Fund 405, the 21st Century Capital Project Fund.

Resolution No. 4357 - High School System Framework, An in-depth analysis of PPS' high school system with the goal of improving its high schools to ensure better academic outcomes for all students. The plan includes seven community comprehensive schools: Roosevelt, Grant, Madison, Franklin, Cleveland, Lincoln and Wilson. As required by the Board, the plan takes into account student proximity, enrollment, location of community comprehensive high schools and focus option schools.

Resolution 4459 - Portland Public Schools Racial Educational Equity Policy, adopting **Policy 2.10.010-P**, June 13, 2011 - The District shall provide every student with equitable access to high quality and culturally relevant instruction, curriculum, support, facilities and other educational resources, even when this means differentiating resources to accomplish this goal.

Policy 8.80.012-P, May 21, 2001 - Governs seismic renovations to existing buildings; specifies collapse prevention and preserving routes of egress as the highest priority of seismic improvements.

Board Policy 3.30.080-P Resource Conservation

Board Policy 3.30.082-P Environmentally Sustainable Business Practices

Board Policy 8.80.010-P High Performance Facilities

OPTIONS FOR FUNDING CAPITAL IMPROVEMENTS

The majority of operating funds for public schools in Oregon are allocated by the state under a funding formula that is primarily based upon the number of students enrolled in each school district. Three-quarters of Portland Public Schools' (PPS) general fund budget comes via the state school fund (SSF), which is funded by local property taxes and by state appropriations.

Beginning Fund Balance/Reserves	\$ 31,541,461	7%
SSF - Local Property Tax	\$ 178,446,000	38%
SSF - State Appropriation	\$ 161,808,270	35%
Local - Local Option Levy	\$ 54,567,485	12%
Local - Gap	\$ 18,795,000	4%
Multnomah ESD	\$ 6,795,000	1%
Federal Funding	\$ 7,000	0%
Other	\$ 16,500,491	4%
Total	\$ 468,460,707	

General Obligation Bonds and Operating Funds

The main source of capital funding for schools in Oregon is voter-approved bonds. School districts typically borrow money to build or improve schools and repay the borrowing with special property tax money. In recent years, the federal government has provided very limited capital funds to school districts for specific purposes as part of national economic stimulus efforts.

Operating funds may be used for capital expenses. PPS may choose to use operating budget dollars to pay for unavoidable capital needs. However, that reduces the amount of funding that is available to pay for operating expenses such as teacher salaries. Currently, Portland Public Schools uses some of its operating money for urgent building needs that could be paid for with capital money if it was available. That could free operating funds for much-needed preventative maintenance.

General Obligation (GO) Bonds are a familiar school capital financing instrument. Bond debt is paid from proceeds of property taxes. The calculation for this tax is based on Assessed Value (AV) of property. In Portland, the AV grows by a statutory 3% maximum each year. This produces a relatively predictable basis. The total bond debt can be structured as long-term; twenty or twenty-five years is a common repayment period. Alternatively it can be structured to ensure that most of the debt is repaid in the short-term which has two advantages: interest costs are lower and subsequent bond issues can be proposed without increasing the annual rate to taxpayers.

Partnerships and Creative Financing

Capital improvement partnerships provide vital opportunities for PPS and should be further explored in the planning and construction of capital projects.

Partnerships must adhere to the District's mission. Numerous corporate and community partnerships are currently underway and are affording PPS the opportunity to replace aging fields and tracks, enhance libraries and collections, install high performance classrooms, provide audio and other technology, expand solar power purchase agreements and many other projects.

PPS has worked with hundreds of community, jurisdiction and corporate partners to develop small and large capital projects Districtwide. Successful partnerships may include: foundation and grant funding; blending not-for-profit, private for-profit investors, and public dollars; as well as community fund-raising to support educational and community development goals.

Identifying successful capital funding partnerships is a thoughtful process and must benefit both PPS and any potential partner.

Other sources of capital funds

In addition to capital bonds, additional sources of capital funding include Construction Excise Tax (CET), Cool Schools Funds (Senate Bill 1149) and state grants; but these are limited both in amount and in how they can be used. Last year (FYE 6/30/11) PPS received \$1.36 million in CET funds. PPS annual proceeds under SB1149 are currently around \$900,000 and can only be used for certain energy-related projects. State grants are very limited as well and may fund no more than \$500,000 to any school district in any biennium. In Oregon, unlike California, Washington and Alaska for example, the state does not provide any support or additional funding for districts that approve capital bonds beyond these limited grants. Likewise, the federal government does not have a regular program to provide capital funds for school districts; recent federal stimulus funds were a limited exception.

PPS has capital renewal and educational adequacy needs at all of its school buildings. The cost of this work is in the range of \$2.5 - \$3 billion. PPS will take advantage of every funding source that is available to accomplish its Long Range Facility Plan goals.

ALTERNATIVES TO NEW CONSTRUCTION

There are ways to accommodate programmatic growth or change that would not necessitate new construction or renovation. A variety of methods can be employed to alleviate the need for new or expanded sites. These can include: busing students around the District to increase utilization at under-enrolled schools, making boundary changes to improve student distribution, scheduling year-round school, allowing split shifts, sharing space with other districts, creating focus schools to attract students to facilities with declining enrollment, consideration of different grade configurations to alleviate pressure in overcrowded facilities, or locating modular buildings on existing overcrowded sites.

Program Changes

The District has historically reviewed program alternatives and considered a variety of changes that schools could institute to potentially increase the capacity of existing school facilities to serve projected enrollment.

Year-round school has been discussed as a potential way to reduce the need for expansion; however, analysis of this alternative did not show a significant difference in the school's capacity. In fact, it has the potential to make ordinary maintenance and repair along with capital improvements more difficult because there are few extended periods of time when the school is unoccupied.

A double-shift schedule essentially splits the students into two groups: one that attends during the morning shift and one during the afternoon shift. Of these programming options, the double shift has the potential to free up the greatest amount of school capacity; theoretically, this could make 50% more capacity available during each shift. However, this schedule may create challenges for working parents coordinating care as well as interfere with extracurricular and "after-school" activities.

Given the current PPS school building portfolio along with projected 10-year enrollments, it is not necessary at this time for the District to consider altering the existing nine month school schedule based on facility needs.

Vacant & Leased Buildings

The District maintains a portfolio that includes former schools that are currently being leased, used as interim relocation sites or vacant. Given the projected growth of the District's student enrollment, these "underutilized" school facilities can be considered for "reactivation" to serve students again. Activation of these sites is often seen as improving surrounding property values through increased neighborhood activity. While there are capital costs associated with improving these buildings, the financial and environmental costs are significantly less than constructing new capacity or doing a major renovation at the site.

The inventory includes five administrative sites, four of which could be used as schools. Nine facilities are currently closed, eight of which could be used as schools. Of the nine, four are being actively marketed, three are interim location sites, and two are leased to other entities outside PPS.

The current inventory of vacant and leased buildings and properties suggests an ability to accommodate anticipated increases in student enrollment over the next 10 years.

Modular Buildings

Modular classroom buildings offer solutions both for making more efficient use of a school site and providing a substitute to constructing new permanent buildings. Modular buildings offer flexibility in responding to changes in enrollment and cost less than permanent buildings to purchase and operate.

Modular classroom buildings lack some of the architectural quality and special features or amenities of permanent classrooms. These differences may make a difference in student achievement. Further, while adding to a school's enrollment, they do not expand the existing shared common areas such as cafeterias, gymnasiums, media centers and restrooms.

Public/Private Partnerships

There may be opportunities for public/private partnerships to support District programs in lieu of new construction or major renovations. In general, lease arrangements are made on a case by case basis to support educational program objectives.

The District's Career Technical Education programs have historically, and will have in the future, robust partnerships with industry both in the schools and with internships at industry partner sites.

Summary

Program changes, use of modular classrooms, vacant buildings and public/private partnerships can provide additional capacity and may influence the extent of major renovations.

Whenever possible, it is important for the District to explore options for increasing the amount of school capacity without having to make major capital investments.

PLAN OPTIONS



Several models were developed and utilized during the Plan Options Phase of this process. These models provided the Advisory Committee with an understanding of how various levels of funding might impact Portland Public Schools' facilities over time. The models also generated discussion about full renovation or replacement and the requirement for asset renewal (e.g. deferred maintenance projects) to sustain facilities until a full renovation could occur. This effort helped the Advisory Committee develop capital funding scenarios.

PLAN 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. 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 re-built or fully renovated facility.
- Endeavor to **significantly re-build or fully renovate** the portfolio over a 24-40 year timeframe.
- Priority should be given to capital projects that **reduce 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.

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, 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 PLANNING SCENARIOS

A subcommittee of the Long Range Facility Advisory Committee met on April 16th to help refine the planning options developed in meeting number eight on April 10, 2012. The subcommittee developed four scenarios for further discussion and prioritization:

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

Option A would update facilities as quickly as possible over a 24-year timeframe. Targeted capital expenditure options allocated \$155 million in the initial two phases to correct the highest priority facility deficiencies. Tax rate would be about \$2.40/\$1,000 of assessed value.

Option A Pros

- Accomplishes the work faster than other options.
- Minimizes the amount of total dollars expended (by limiting interest payments and escalation costs).
- Focuses on full renovation/replacement.
- Funds rebuilding all District schools in 24 years.

Option A Cons

- Requires a larger capital outlay in a shorter period of time.
- Higher tax rate than other options.

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

Option B would update facilities over a 32-year timeframe. It distributes the work evenly over school configuration (HS, 6-8, K-8 and K-5) and provides time to facilitate consistent design and construction workload phasing as well as use of interim relocation space. Targeted capital expenditure options allocated \$100 million in three phases (24 years) to correct the highest priority facility deficiencies. Tax rate would be about \$1.99/\$1,000 of assessed value.

Option B Pros

- Completes targeted expenditures for highest priority deficiencies in three phases (24 years).
- Funds rebuilding all District schools in 32 years.

Option B Cons

- Takes longer to accomplish than Option A.
- Spreads the work by school configuration, this may result in an increase in the number of students impacted by construction over their K-12 tenure.
- Takes longer to address seismic and accessibility concerns than Option A.

Option C: Start Conservative—Build positive momentum in the first phase, complete in 32 Years

This option limits the first capital bond to just under \$400 million and fixes \$60 million of highest priority facility deficiencies. Community trust and success would be demonstrated in the first phase. Future phases increase the amount of expenditure improvement. It plans for a 32-year timeframe 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). Tax rate would be about \$1.08/\$1,000 of assessed value. (Note: Future bonds would be more.)

Option C Pros

- Allows the District to start smaller and demonstrate success to the public.
- Lowest first phase tax rate.

Option C Cons

- Requires larger subsequent capital phases than Option D.
- Addresses facility deficiencies more slowly than other Options.

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

This option focuses on first fixing the existing infrastructure so that community assets do not further deteriorate. It requires a 40-year timeframe to update facilities. It fixes all seismic over a 24-year timeframe. It makes all facilities accessible and makes improvements to the exterior of the buildings to preclude further deterioration in the first phase. It focuses on 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.

Option D Pros

- Protects the existing investment more quickly than other identified Options.
- Provides seismic safety in all schools in 24 years.
- Provides fully accessible schools in the first phase (eight years).
- Focuses on high schools in the first and second phases.
- Takes longer to fully renovate/replace schools.

Option D Cons

- Fewer students /facilities benefit from modern learning environments in the first phase when compared with Options A and B.
- Likely to invest money in elements of the existing school buildings that might ultimately be replaced.

ASSUMPTIONS FOR ALL OPTIONS

- Each phase is an eight-year period of time.
- Fully renovated/replaced schools would be constructed to a size that supports a robust program.
- Fully renovated/replaced schools, for the purposes of this plan, utilized cost estimates of \$85M for all high schools, \$30M for middle schools, \$25M for K-8 and \$20M for K-5. These figures are approximate and need further refinement once specific projects are identified.
- The capital required for a “10-year plan” using eight-year period of time (un-escalated) = Phase 1 + 25% of phase 2 dollars.
- \$1.6 billion represents the current backlog of deficiencies Districtwide. Full renovation and capital allocation will reduce current deficiency backlog. However, new and existing schools will add to capital replacement over this 40-year timeframe. This additional amount is not reflected in the scenarios and is expected to be paid for by the Board adopted CAR Plan.
- Program fees are estimated to address bond issuance costs, swing space improvements and miscellaneous program agreements.
- The first phase of each option repays debt for Rosa Parks School, boiler burner conversions and roofing projects.
- For the purposes of capital facility planning, the following enrollment capacities are used: (K-5 = 600, K-8 =675, MS = 675, HS =1500).