

***Long Range
Facilities
Plan***



May 15, 2012 Update

Medford School District 549C
LONG RANGE FACILITY PLAN 2012 UPDATE

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Mission Statement
Medford School District 549C

We are a high quality teaching and learning organization dedicated to preparing all students to graduate with a sound educational foundation, ready to succeed in post-secondary education, and to be contributing community members.

INTRODUCTION

This plan is an update to the Medford School District's long-range facility plan and follows the completion of the work from the District-wide facility improvements made possible by the funding from the community's approval of the 2006 Facilities Bond. The results of that community work effort are now catalogued in this facility plan update. The timing also coincides with the publication of updated U.S. Census Decennial Data and local jurisdictional updates to comprehensive land use plans. The updated census data and local land use plans provided the basis for a 20-year Demographic and Enrollment Forecast to be prepared in conjunction with the District's facility plan update.

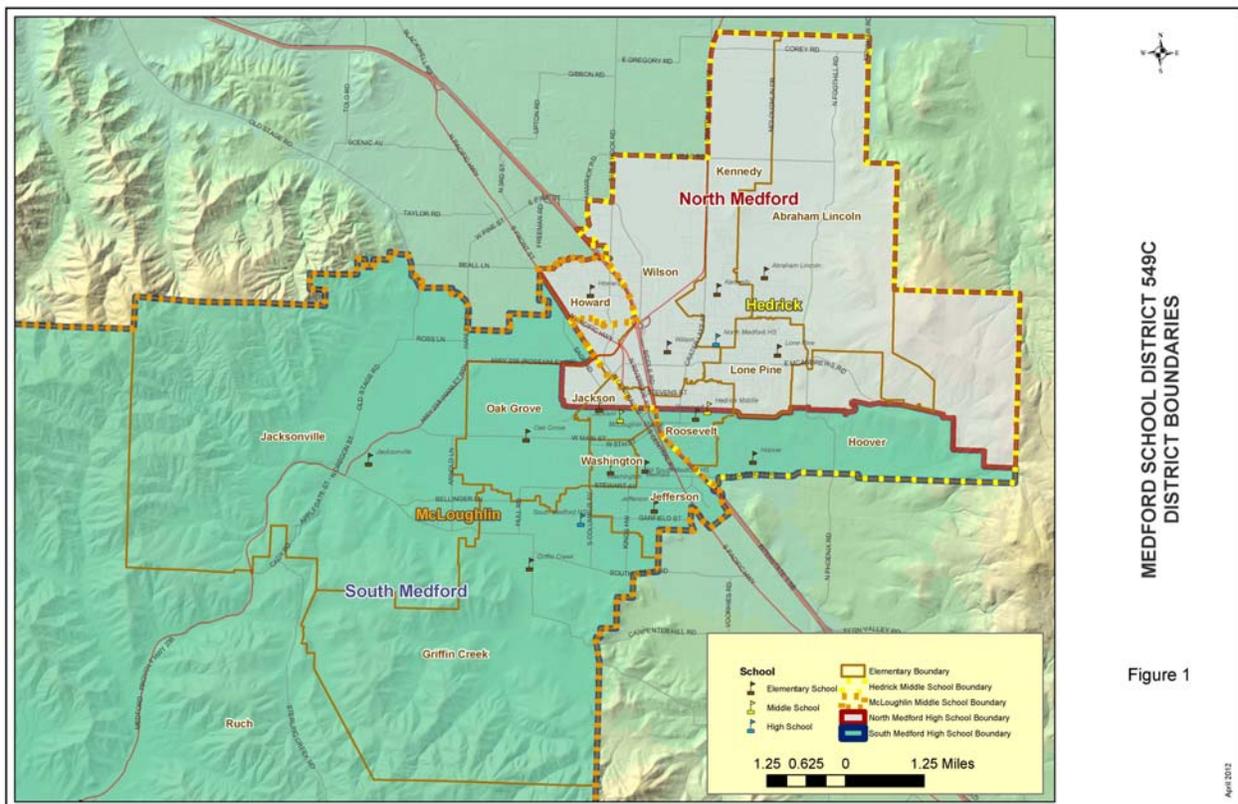
The facility plan update assesses the state of the existing facilities in relation to the District's Educational Program Standards, enrollment trends and forecast, capital maintenance and improvement financing, and projected facility demands for the next 20 years. The primary goal of the long range facility plan is to ensure that the Community support and investments in the District's facilities are honored, protected, and utilized in ways that best achieve the District's Mission to prepare its students to be successful contributing community members with a sound educational foundation. A well considered facility plan also will also ensure that facilities are maintained and developed in a manner that contribute to the identity and well being of community neighborhoods and general population. This is to be accomplished over a 20-year period in which enrollment is forecasted to increase by 7,400 students.

Finally, the plan includes conclusions and recommendations to provide for good stewardship of the existing capital facilities, ongoing monitoring for changes in population and educational needs, and strategies to respond to population growth and distribution through both program flexibility and facility readiness. The District will coordinate its long range facility plan with the City of Medford, Jacksonville, Central Point, and County, and other agencies in order to succeed in its Mission.

CHAPTER I- DISTRICT PLANNING

A. District Overview

The Medford School District is the largest school district in Jackson County. The district includes 41% of Jackson County's overall population and enrolled 11,779 students in the 2011-12 school year. The district's geographic area includes approximately 370 square miles extending from southwest corner of the county to approximately three miles northeast of the City of Medford. Communities within the district include unincorporated Ruch, all of the City of Jacksonville, most of the City of Medford, a portion of the City of Central Point, and the rural areas in between. (See, Figure 1). In all, the district owns and operates 14 elementary schools, two middle schools, three high schools, and support facilities. The oldest facility was originally constructed in 1891, and the newest in 2010.



B. Bond Facilities Planning Process: 2005 to 2007

The Medford School District commissioned a Long-Range Facilities Committee in 2005 to study facility conditions and make recommendations to the Board of Education regarding asset management, planning, and financing. The process included extensive community involvement to identify the most urgent facility issues at each campus and to determine what improvements were needed to support education services. Committee members toured every school, consulted with citizens, parents, teachers, and administrators; looked at enrollment trends; and worked with facilities experts. The Committee also held public forums about building needs in every one of the District's 18 schools plus one community level forum.

The data gathered through teacher, administration, and public input was refined to form a recommendation which was presented to the School Board on May 2, 2006. On June 6 of that year,

the School Board – by unanimous vote – passed a motion to bring the facility bond to the community for a vote in the amount of \$188,979,485 based on the Committee’s proposal with some changes as approved by the Board. In November 2006, voters approved Measure 15-73 to authorize the issuance of \$188.98 million to renovate, improve, and expand district school facilities. See, Appendix E for the complete project list.

The bond measure was based upon a facility plan which the District had determined to be the most cost-effective way to expand capacity district-wide, within the context of the selected projects. The plan included a strategy to decrease future over-crowding by shifting 6th graders from all elementary schools (except Ruch) to the Middle Schools and to renovate the old South High School to function as a third middle school. The proposal, later called Option A, included:

Option A (17 campuses, change grade configuration)¹

- 2 High Schools
- 3 Middle Schools (6-8)
- 1 K-8 School (Ruch), and
- 11 Elementary Schools (K-5)

Approach proposed to:

- Build New South Medford High on a different, larger site
- Significantly renovate and expand North Medford High
- Move the 6th grade to the middle schools
- Do not reopen Jackson and Roosevelt facilities
- Convert, upgrade, improve current South Medford High to Middle School (6-8)
- Significantly renovate Oak Grove Elementary (K-5)
- Build New (and renovate portions of) Lone Pine Elementary (K-5)
- Protect, renovate and improve all other campuses

As the proposed projects moved through the design process, in response to escalating market cost for materials occurring at that time, the district had to reduce the scope of some of the proposed projects in order to keep the construction costs within the amount available from the bond. As the budget issues were worked through, there was a strong reaction from the public in response to some of the proposed system changes, especially the proposal to close Jackson and Roosevelt Elementary Schools. In August, 2007 a Task Force was created to provide a forum for public input regarding which elements of the school improvements program were most important and should be given the highest priority for the use of the remaining bond funds. The members were tasked with reviewing the progress to date, issues that had arisen, and reprioritization of the remaining project list to fit within the remaining budget.

From this effort a revised list of projects was produced. Four options were presented to the School Board. See, Appendix F — Building Improvement Task Force Report. After extensive public testimony which strongly opposed closing Jackson and Roosevelt elementary schools, the Board approved rebuilding Jackson and Roosevelt Elementary Schools and other projects as outlined in a modified version of the Task Force’s Option D, shown below with modification noted:

Option D (keep current grade configuration, 18 campuses)²

- 2 High Schools
- 2 Middle Schools (7-8)
- 14 Elementary Schools (K-6)

¹ Medford School District; Building Improvement Task Force, Options for Board Consideration; 9/28/07

² Medford School District; Building Improvement Task Force, Options for Board Consideration; 9/28/07

Approach proposed to:

- Significantly renovate North Medford High
- [~~Protect, upgrade and improve current South High to remain SMHS~~]³ Build New South Medford High on a new, larger site
- Significantly renovate (rebuild portions of) Jackson, Oak Grove and Roosevelt Elementary Schools (K-6)
- Build new (and renovate portions of) Lone Pine Elementary School
- Protect, renovate and improve all other campuses

The School Board also elected to co-locate the alternative high school, special education programs, and the District's administration and support services at the old South Medford High site. After interest and premiums were added, the actual amount spent on bond-funded construction was just over \$200 million.

C. Impetus for the 2012 Plan Update

While the 2006 Bond Issue review provided an extensive internal update for the School Facilities Plan, it was never formally adopted by the City of Medford into its Comprehensive Plan. In 2011 the School District undertook a study to review the status of its facilities following the 2006 bond school improvement construction. A new long-range plan based on these updated conditions and projected population growth. The economics firm Johnson Reid, LLC was hired to forecast future increases in city and student populations to assist in identifying projected enrollment growth rates across the district. The purpose of this 2012 effort is to develop a long range facilities plan that reflects the current condition of the schools and facilities and identifies future needs for improvements and expansion. In addition, the district will coordinate its planning with the cities and Jackson County to include the long range facility plan within their respective comprehensive land use plans.

³ Changed by School Board after public hearings and deliberation of options

CHAPTER 2- FACILITIES INVENTORY

The facilities inventory establishes the baseline to determine the existing capacity and the need for additional capacity to serve future growth. This section provides an inventory of capital facilities owned and operated by the Medford School District 549C including schools and support facilities. Further detailed information is provided in Appendix A.

A. SCHOOL PROPERTY INVENTORY

The District maintains fourteen elementary schools, two middle schools and three high schools. The elementary schools accommodate K-6, the middle schools serve grades 7-8, and the high schools accommodate grades 9-12. The exception is Ruch School which serves grades K-8. The following tables show the current capacity in relation to permanent capacity⁴ of existing schools.

**Table I
Elementary Schools Inventory**

Elementary Schools	Location	Building Area sq. ft.	Teaching Stations	Permanent Capacity*	Oct 2011 Enrollment	Available Capacity
Abraham Lincoln	3101 McLoughlin Drive	63,438	26	564	449	115
Griffin Creek	2430 Griffin Creek Road	54,930	26	564	580	- 16
Hoover	2323 Siskiyou Boulevard	53,611	28	607	603	4
Howard	286 Mace Road	59,530	28	607	501	106
Jackson	713 Summit Avenue	55,804	18	390	394	- 4
Jacksonville	655 Heuners Lane (J-ville)	57,561	22	477	400	77
Jefferson	333 Holmes Drive	52,943	24	520	505	15
Kennedy	2860 Keene Way	54,788	30	650	519	131
Lone Pine	3158 Lone Pine Road	73,458	24	520	564	- 44
Oak Grove	2838 West Main Street	59,355	24	520	492	28
Roosevelt	1212 Queen Anne Ave.	51,002	18	390	406	-16
Ruch	156 Upper Applegate Rd	34,590	15	325	176	149
Washington	610 Peach Street	58,146	26	564	443	121
Wilson	1400 Johnson Street	49,972	25	542	485	57
Total Available Capacity						723

⁴ Permanent capacity is calculated by multiplying the number of teaching stations times the students per classroom as defined in the educational standards times an 85% utilization factor. The utilization factor is based on the amount of time during the day a regular classroom is not occupied by students and the balance of students at grade levels.

**Table 2
Middle Schools Inventory**

Middle Schools	Location	Building Area sq ft	Teaching Stations	Permanent Capacity*	Oct 2011 Enrollment	Available Capacity
Hedrick	1501 E. Jackson St.	158,990	44	1,085	894	191
McLoughlin	320 W. 2 nd St.	161,072	42	1,035	789	246
Total Available Capacity						437

**Table 3
High Schools Inventory**

Middle Schools	Location	Building Area sq ft	Teaching Stations	Permanent Capacity *	Oct 2011 Enrollment	Available Capacity
North	1900 N. Keene Way.	234,121	82	2,021	1,734	287
South	1551 Cunningham Ave	255,000	90	2,218	1,821	397
Central	8115 Oakdale Ave..	44,215	15	334	224	110
Total Available Capacity						794

**Table 4
Chartered Schools* Inventory**

Middle Schools	Location	Building Area sq ft	Sept 2011 Enrollment	Available Capacity
Madrone Trail	3700 Ross Lane.	17,121	176	N/A
LOGOS	1551 Cunningham Ave	10,000	557	N/A
Total Available Capacity				<i>These Facilities do not effect District Facility Capacity</i>

* Medford School District does not own or manage Charter School Facilities

B. SUPPORT FACILITY INVENTORY

Tables 5 and 6 identify space allocations for support services located at the Medford School District Education Center

**Table 5
 Medford School District Education Center – Main Building Inventory**

Space Use	Occupied Area (Square Feet)	Site Location
Central Medford High School	44,215	Main Building, First Floor
Administration	42,395	Main Building, Second Floor
Board Room / Conf. Rooms	12,641	Main Building, First Floor
Auditorium / Lobby	14,400	Main Building, First Floor
Leased / Rental Space	56,814	Main Building
<i>Total Main Building</i>	170,465	

**Table 6
 Medford School District Education Center – Annex / Gym Inventory**

Space Use	Occupied Area (Square Feet)	Site Location
Maintenance	12,414	Annex
Distribution Center	8,839	Annex
Network Telecom Services	6,221	Annex
Instructional Media Center	5,100	Annex
Publications	1,200	Annex
Sodexo-Food Service	5,225	Annex
RCC / Central (Wood Shop)	2,525	Annex
<i>Total Annex</i>	41,524	
Gymnasiums	16,241	Gym

C. SURPLUS PROPERTIES

Previous support service facilities have become excess property. Excess properties are not located or sized properly for any future school needs and have been chose for liquidation. These are identified in Table 7. The District will retain the Monroe property that is currently being leased by the Maslow Project.

Table 7
Surplus Property Inventory

Building	Location	Building Area (Square Feet)	Site Acres
Administration Annex	600 Whitman Place	7,234	.5
Maintenance and NTS	2801 Merriman Road	31,170	2.85
Distribution Center	750 N. Columbus Ave.	18,083	1

D. LAND INVENTORY

In addition to the surplus properties noted above, the District has secured through a land donation as a desired site of 20 acres from property formerly owned by the District between Hull Road and the west side of Medford's urban growth boundary with an option to purchase an additional 20.77 acres adjacent to the donated site within the next 25 years. The site is well located to relieve capacity limitations of Griffin Creek, Oak Grove, and Jefferson Elementary schools as projected within the next ten years by the Johnson Reid forecast. The site is also adequately sized and situated to accommodate co-location of other school facilities such as a future middle school. See, Site 5 in Appendix D.

The City of Medford has also designated a future elementary school site on the Southeast Area Plan Map in a planned residential area to the east of North Phoenix Road and north of East Barnett Road. Although the site has not yet been acquired by the District, the Southeast Plan provides for notification to and coordination with the District through a required Planned Unit Development review process as the area is built out.

CHAPTER 3- DISTRICT EDUCATIONAL PROGRAM STANDARDS

The educational program standards establish the types of space needed at each school facility. The following educational standards have been adopted by the Medford School District.

A. DISTRICT EDUCATIONAL STANDARDS

- Core classroom space for all curriculum areas which includes space for group learning, directed instruction, and individual student work to meet the rigors set forth in state standards.
- High school and middle school science lab space that supports advanced coursework including water, sinks, gas, hoods, and safety equipment. Students must achieve rigorous state mandated science standards.
- Physical education space is needed for students to meet health and fitness standards. This includes covered areas, fields, tracks, gymnasiums, and other multi-use spaces.
- Technological competency is expected for all students. Spaces must be allocated for technological equipment and applications in classrooms and specialty spaces.
- Art, music, and theatre arts spaces are necessary to adequately meet the requirements of these programs.
- Library/media services (research, technology, collaboration) space for students to achieve the rigors in the core program. In an information-driven environment, student access to information through appropriately sized library/media spaces is essential.
- Extra-curricular activities need adequate space in order to safely support programs.

B. SPECIAL EDUCATION SERVICES

- Special Education Services are delivered at each of the schools within the district. Program standards and services vary in response to the requirements of students' individual education plans (IEP). Implementing each student's IEP often requires large and small specialty spaces provided by the district. Program standards change as a result of various external or internal influences. External influences include federal mandates and funding changes, and the introduction of new technological applications which meet the needs of students. Internal influences include increase in numbers of high needs IEP students, modifications to the program year, class size, grade configurations, and facility changes.
- Special populations receive additional support. Federal and State programs, including Title I, ELL, and Special Education provide limited funding for facility space.
- Supplementary services in core academic areas (tutoring, on-line learning) and providing multiple pathways to prepare students for a broader range of post-secondary learning opportunities require additional spaces that have not been calculated in square footage allowance formulas.

C. SUPPORT SERVICES

- Support services are often overlooked as core services. They are, however, essential to a quality educational program. Food service delivery, storage, preparation, and service require specialized space. As student populations increase, calculating space needs for this core service is crucial to the overall planning of the facility. Adequacy in planning for this space has significant impacts on the overall learning environment for students if not done appropriately.

Facilities are required for administrative support services including:

- Superintendent, Human Resources, Business Office, Information Technology, Education Services and Student Services departments. Meeting and storage space is also required for administration.
- Maintenance, Distribution Center, Publications, Network Telecom Services (NTS), Instructional Media Center (IMC) and administration space for Sodexo Food Service.

D. ELEMENTARY EDUCATIONAL PROGRAM STANDARDS

The district's educational program standards affected by elementary school capacity include:

- Grades K-3 class size standard is not to exceed an average of 22 students per class, but will be impacted by budget constraints.
- Grades 4-6 class size standard is not to exceed 28 students per class, but will be impacted by budget constraints.
- Music will be provided in separate classrooms and performance areas.
- Space must be available to provide physical education instruction indoors during inclement weather.
- Special education services are provided in a self-contained classroom for some children, while others need highly specialized spaces to address their specific conditions.
- Specialty programs require instructional areas similar to regular classrooms. All elementary schools will have a media center, which includes space for the literature collection and technology.
- Computer labs will be available for all students at all schools and space for technology in the classroom will also be provided.
- Full day kindergarten is expected to be mandated in 2014.

E. MIDDLE AND HIGH SCHOOL PROGRAM STANDARDS

The district's educational programs affected middle school and high school capacity include:

- Grades 7-8 class sizes strive not to exceed 29 students per class, with the exception of physical education, band, and choir.
- High school grades 9-12 class sizes have various targets depending on a variety of program and safety needs. However, the district strives to meet an average of 29 students in the core classrooms with the exception of physical education, band, and choir.
- The middle and high school classroom utilization standard is set at a factor of 85% (based on a regular school day).
- Special education services are provided in a self-contained classroom for some children, while others need highly specialized spaces to address their specific conditions.
- Students will also be provided other programs in classroom designated as follows:
- Specialty rooms (computer labs, individual and large group study rooms, practice labs, production rooms, and art areas).
- Media Center
- A specialized science lab for grades 6-12 will be available.
- Vocational education requires specialized spaces suited to the curriculum.
- Space for physical education instruction must be provided for both indoor and outdoor instruction.

CHAPTER 4- ENROLLMENT PROJECTIONS

A. DISTRICT DEMOGRAPHICS

I. Johnson Reid- Demographic and Enrollment Forecasts

In 2011 the District engaged Johnson Reid, LLC, a land use economics firm, to develop population projections by school age group from 2011 through 2030. The study, attached as Appendix C, concludes as follows:

“Over the 20- year period, we forecast roughly 35,000 new residents in the district, an average annual rate of 1.9% growth. These findings and this rate of growth is consistent with Medford's adopted 1.9% rate in its Comprehensive Plan. The student age population is expected to grow at slightly slower rate, while adding over 5,500 new student age residents.”

“In ...[our] analysis, we identified the likely pattern of growth for the district over both a 10-year and 20-year planning horizon. Because we expect labor driven net-migration to the principal contributor to population growth, we document how net-migrants have a higher propensity to be in more mobile age segments, who are also disproportionately parents.

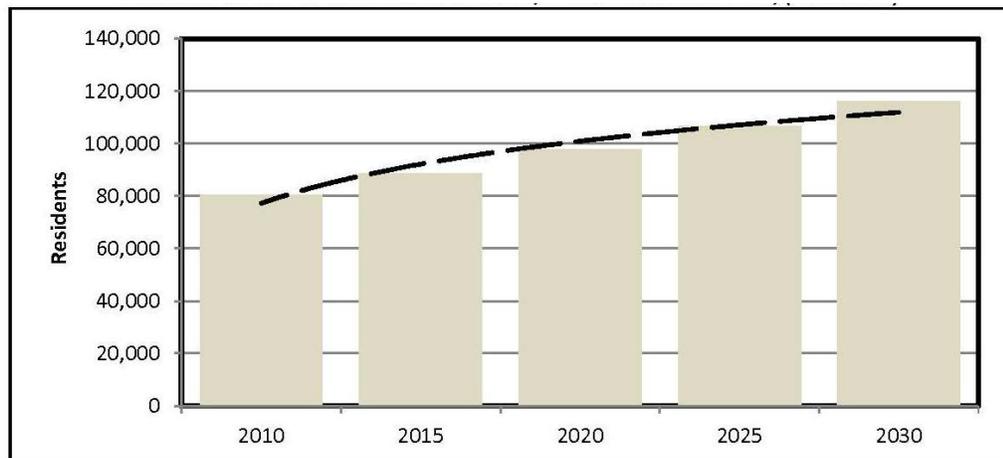
In addition to planned migratory impacts, we have observed a measurable rebound in fertility rates throughout the district. This has in part been driven by a 65% increase in district's Hispanic population. For example, between 2005 and 2010 we observe an average annual number of births 19% higher than the 2000 level, indicating a mini-baby boom on the horizon of the early school enrollment.”⁵

Note that the 1.9% growth rate cited above is the projected rate of growth for the general population district-wide, and that the 5,500 new student age residents are the total projected including those that may not attend a District school facility (e.g., some will attend private or charter schools). The Johnson-Reid analysis then converts general population projection to a District enrollment projection as summarized in Table 10 later in this report.

Table 8

District-wide Population Growth Medford School District (2010 – 2030)

From Figure 17, Demographic and Enrollment Forecasts Johnson Reid, LLC (December 2011)



⁵ See Appendix C: at page 17, Demographic and Enrollment Forecasts; Medford School District; Johnson Reid LLC, December 2011.

2. City of Medford Population Projections

The City of Medford adopted population projections as part of the Medford Comprehensive Plan in September 2007. In the City of Medford's projections, a growth rate of 2.2% per year is estimated for the general population.⁶ The Medford Comprehensive Plan states that growth will continue to include larger than previous numbers of retired or soon-to-be retired residents, however, Medford will also continue to experience growth in the under 18 age group.

In 2009, the City of Medford updated the Economic Element of its Comprehensive Plan for the 2010-2030 planning period. This process involved the development of an economic opportunities analysis and adoption of an employment growth forecast over a 20-year planning horizon. The City's adopted economic forecast calls for an average annual growth rate of 2.0% - adding 33,000 new jobs through 2030.

3. Student Distribution

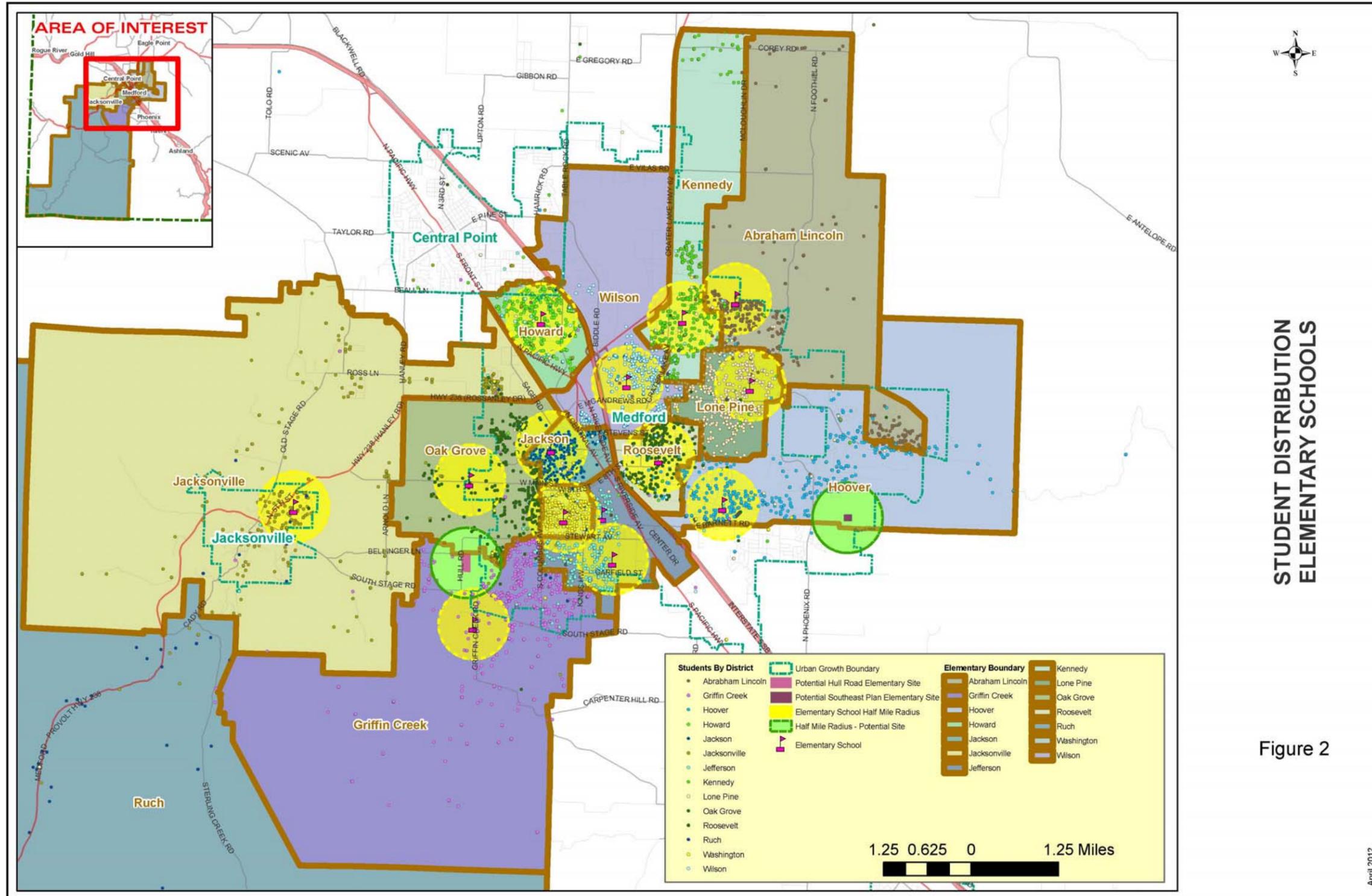
Mapping the distribution of the existing student population provides a snapshot of where students are drawn for each school. Existing elementary schools near the center of Medford with small district size typically have dense concentrations of student population. Schools near the outer boundary of the district typically have small concentrated student populations near the school with the remaining students living from 1 to 5 miles away from the school campus. See, Figure 2: Student Distribution Elementary Schools.

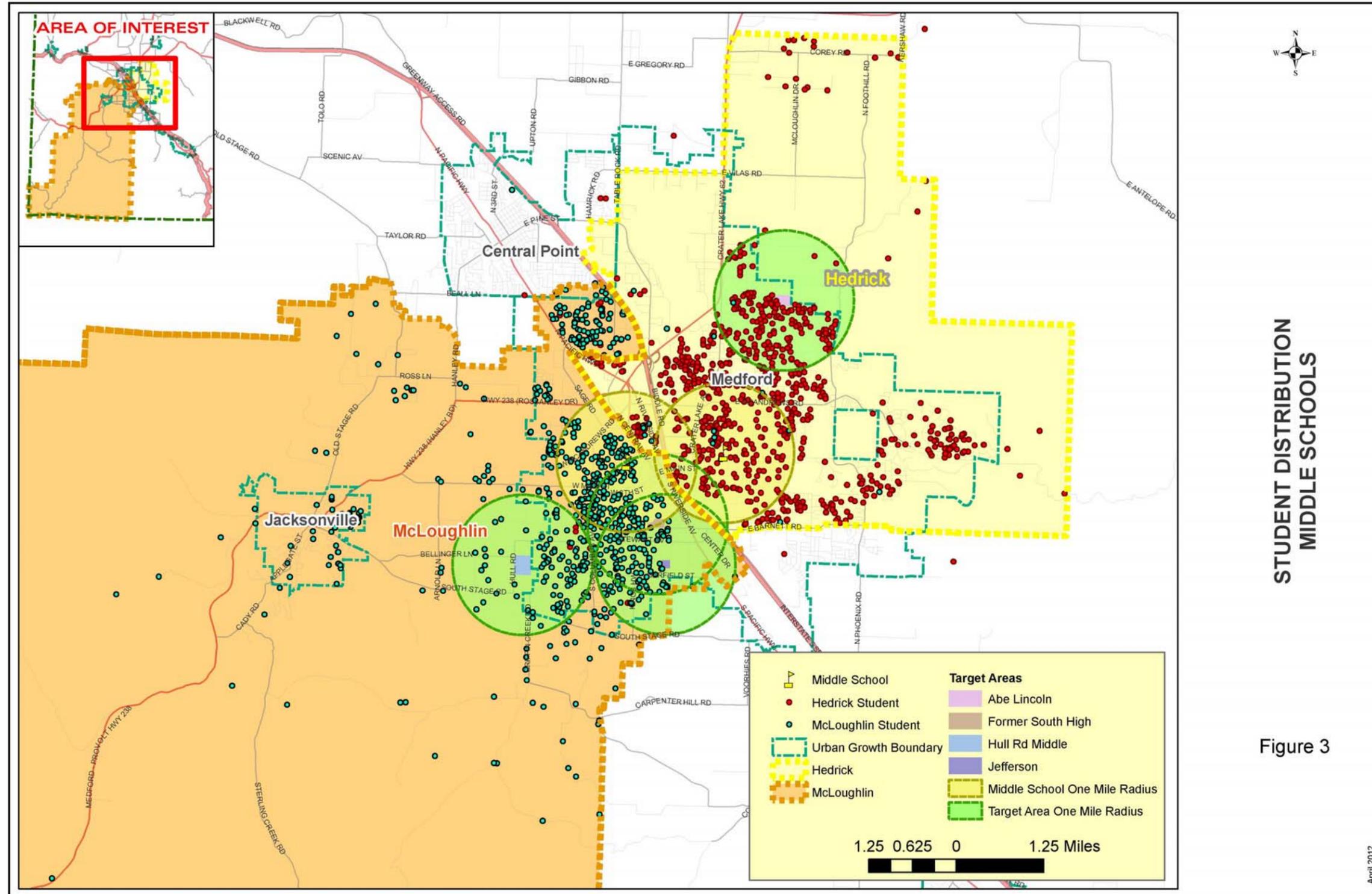
Existing Middle Schools are located near the center of the city on either side of the I-5 viaduct. The highway provides the primary boundary between the two middle school boundaries. The location of the middle schools draws students from across the district to the more dense urban area of Medford. See, Figure 3: School Student Distribution Middle Schools.

In 2010 South Medford High School was relocated to a new campus in a residential area in southwest Medford. North Medford High School is located in the northeast part of Medford. Each draws students from a wide area surrounding the school. See, Figure 4: Student Distribution High Schools.

The spatial distribution of students by school enrollment, as depicted on the maps, is summarized in Table 9 below in terms of students who live within ½-mile, one mile, five miles, and twenty miles of the schools they attend.

⁶ As the primary urban population center, the projected growth rate for the City of Medford's urbanizable area will be higher than the District-wide growth rate which extends into remote rural areas.





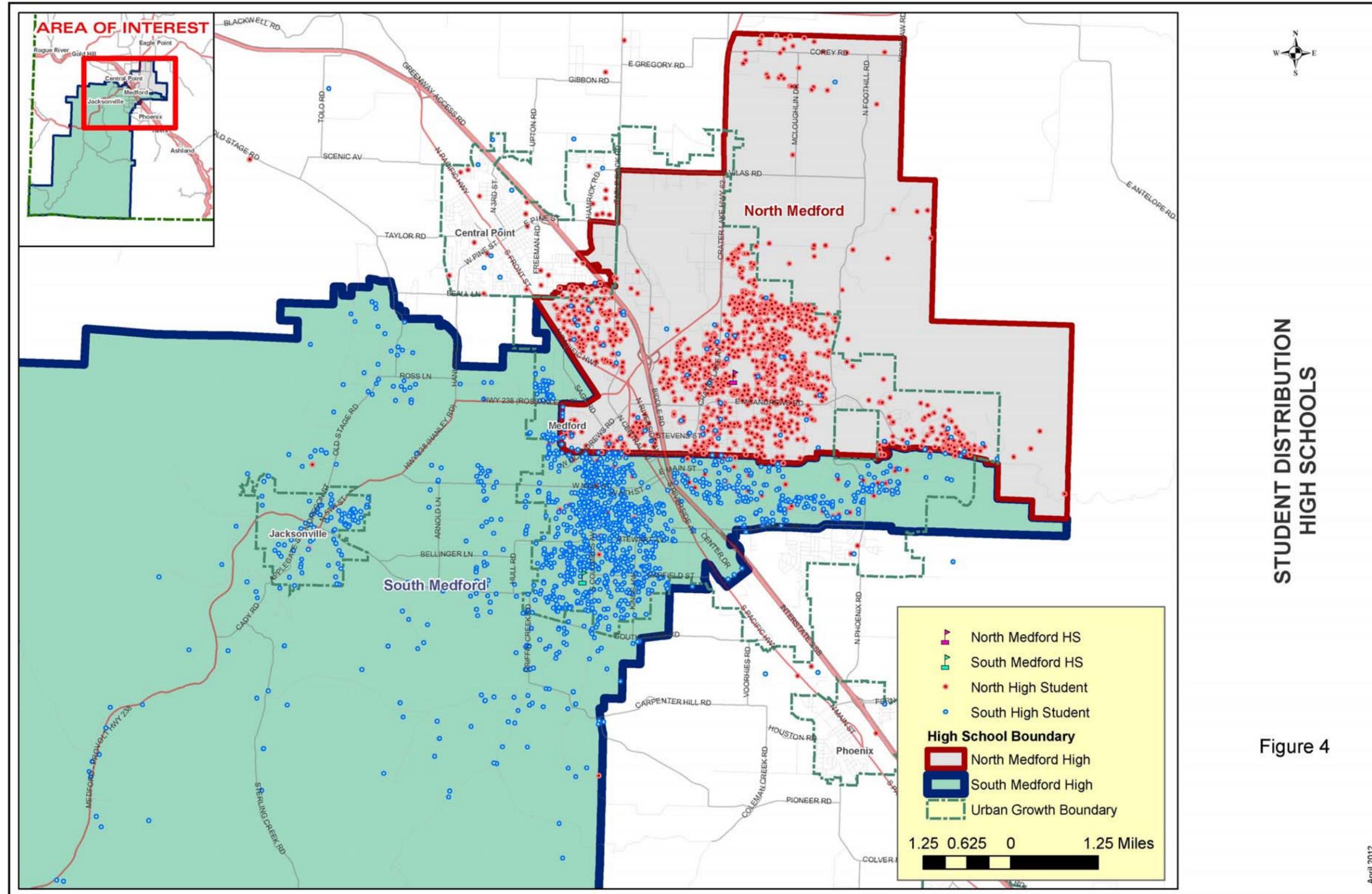
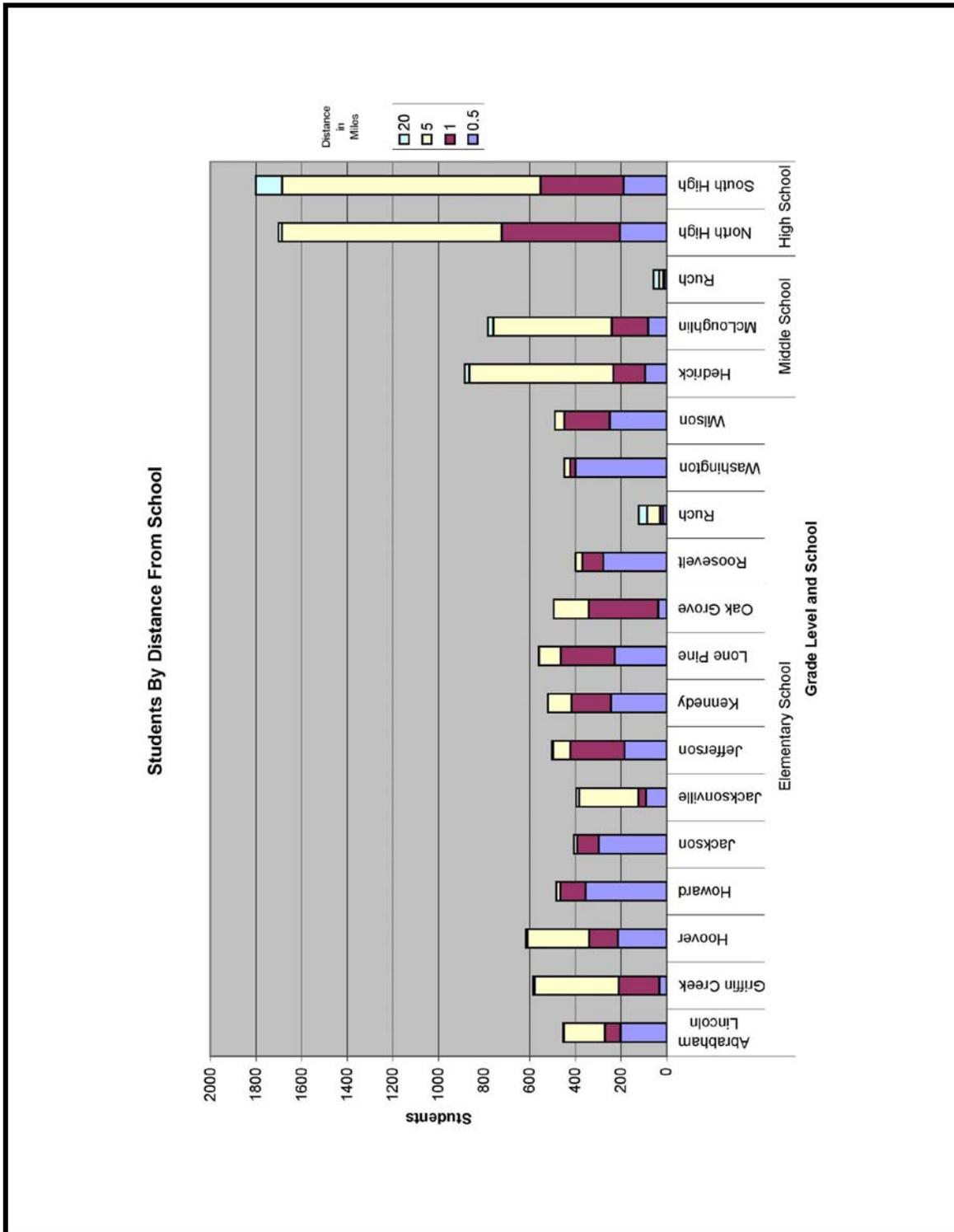


Table 9



B. District Enrollment Forecast

I. District-wide Forecast

The Johnson Reid Study, Appendix C, projects an average of 2.3% district-wide annual enrollment growth over the first 10 years and a growth in student enrollment of 1.4% over the following 10 years through the end of the planning horizon, with an overall average of 1.8% over the entire forecast period, adding approximately 4,800 students through 2030. This translates to 2,670 more elementary students, 802 more middle school students, and 1,323 more high school students under the current grade distribution. However, these increases are not forecast to distribute evenly across the district. Schools near vacant residential zoned land are forecast to have the largest marginal increases in population and will exceed the existing capacity soonest. Growth rates also vary by K-6, 7-8, and 9-12 over time. (See, Table 10 below)

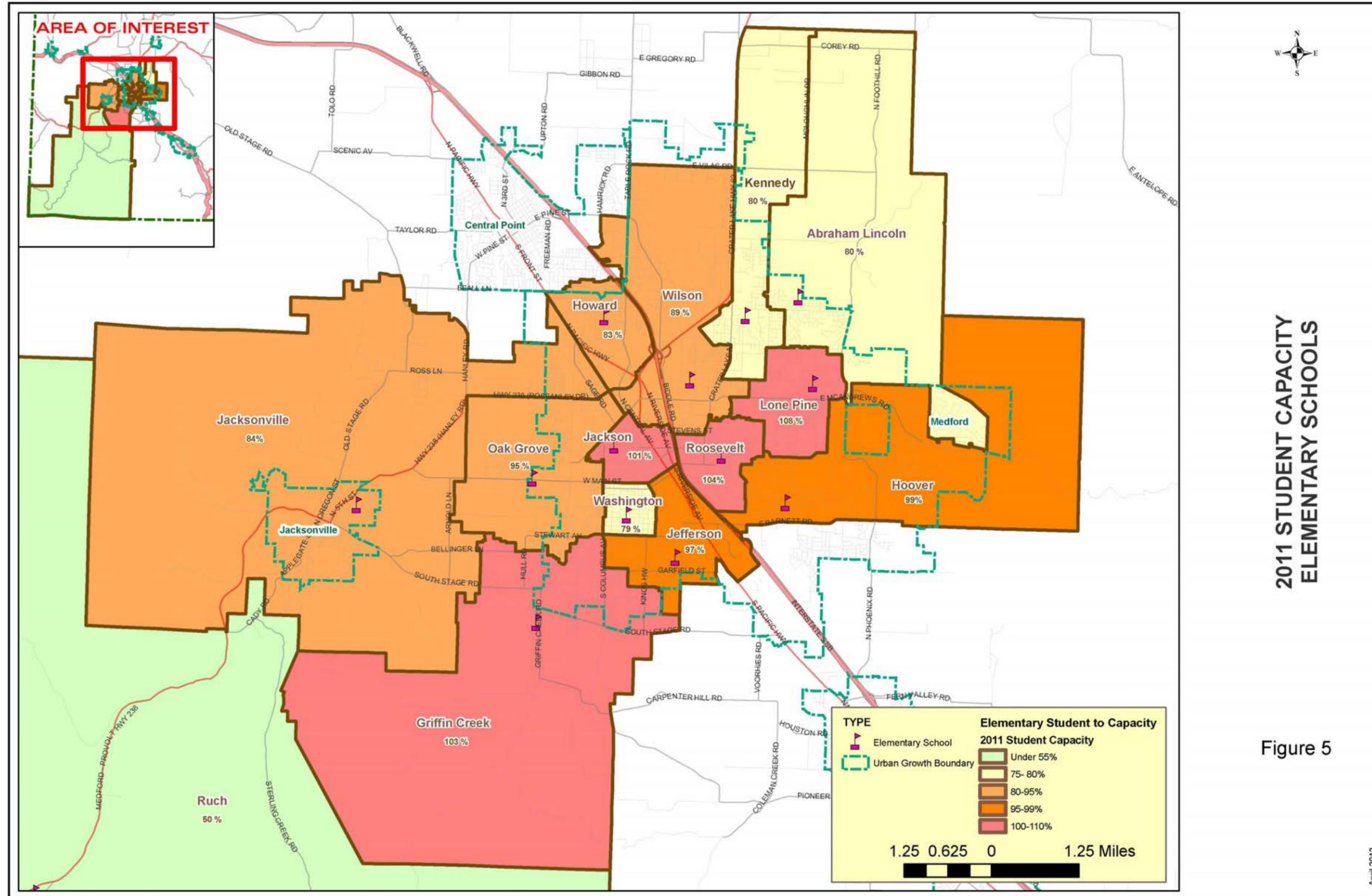
2. Enrollment Forecast by School

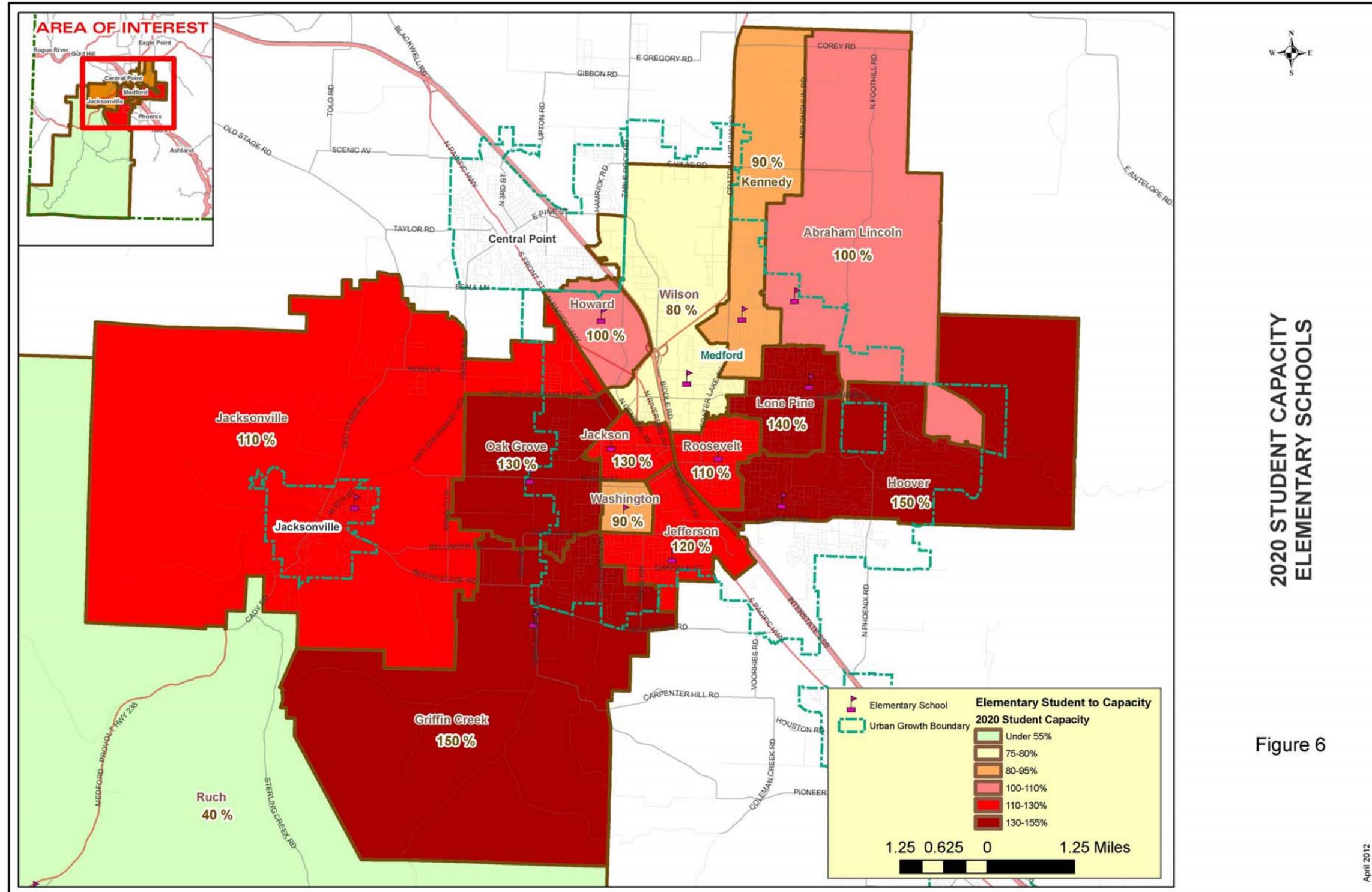
Table 10 details the forecasted growth of each school except that projection do not capture the enrollment for Central High School (additional 224 students as of October, 2011 would translate to 291 in 2030 based on continued 6.04% share of high school enrollment). Graphic representations of the 10 and 20 year trends by school are provided in a series of charts at the end of the Johnson Reid study. The study data for the forecast are also depicted geo-spatially for elementary, middle and high schools on maps included as Figures 5 through 10 in this 2012 update of the District's Long Range Facility Plan.

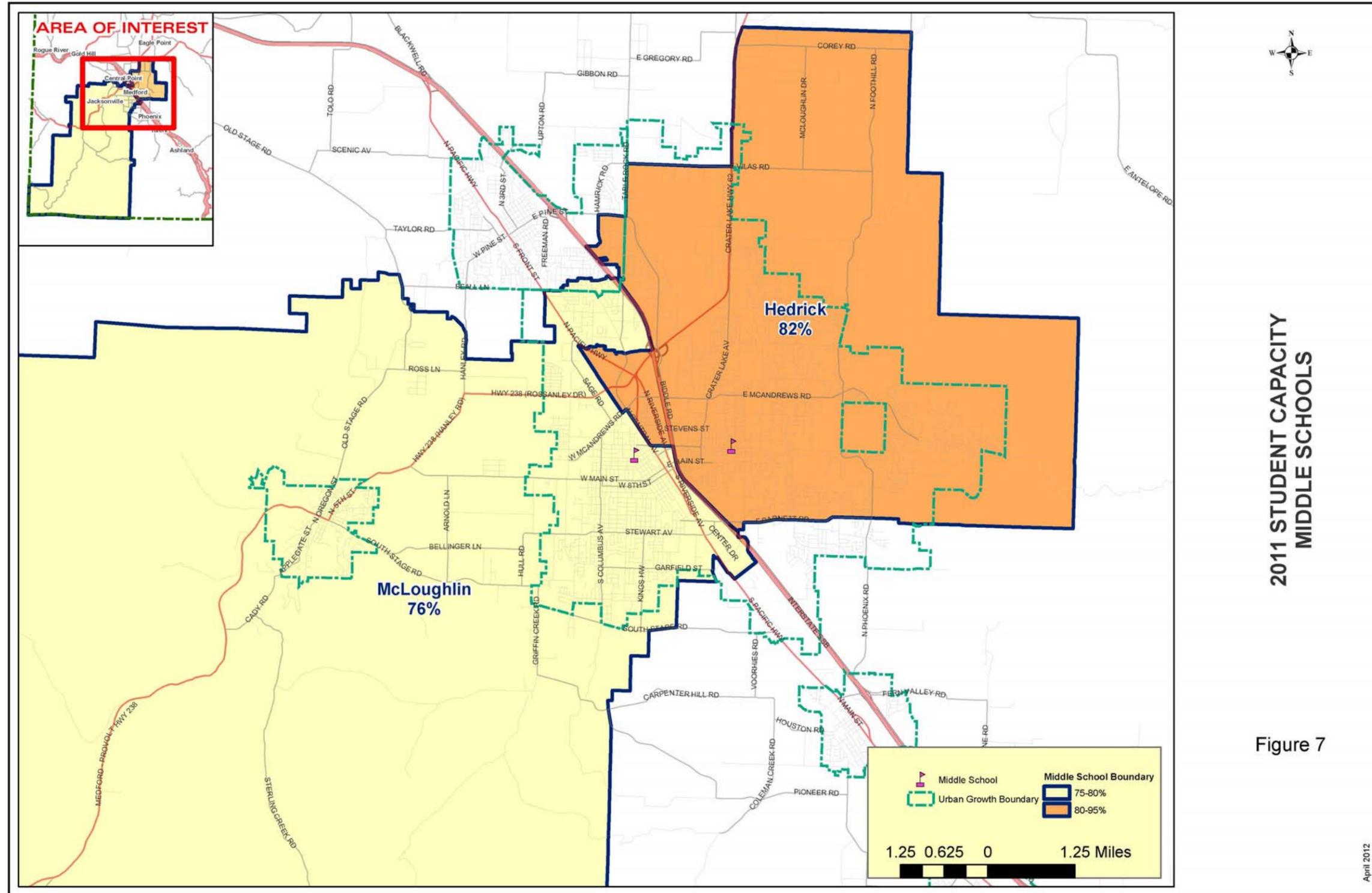
Table 10
Enrollment Forecast by School, Medford School District
From Demographic and Enrollment Forecasts Johnson Reid., December 2011.

School	ACTUAL ENROLLMENT							FORECAST ENROLLMENT				2011-2020		2020-2030		2011-2030	
	2005	2006	2007	2008	2009	2010	2011	2015	2020	2025	2030	Δ	AAGR	Δ	AAGR	Δ	AAGR
<u>NORTH SCHOOLS</u>																	
Wilson	572	540	547	559	565	485	485	447	417	433	442	-68	-1.7%	25	0.6%	-43	-0.5%
Hoover	484	487	468	521	560	638	603	782	935	1,056	1,115	332	4.3%	179	1.8%	512	3.0%
Lone Pine	558	547	569	547	532	537	564	650	706	743	759	142	3.1%	52	0.7%	195	1.8%
Kennedy	547	547	587	561	555	515	519	566	624	658	673	105	2.2%	49	0.8%	154	1.4%
Roosevelt	385	404	354	372	368	407	406	416	435	458	469	29	0.7%	34	0.8%	63	0.7%
Lincoln	525	543	524	510	475	466	449	510	581	652	689	132	2.5%	107	1.7%	240	2.1%
Hedrick	956	930	922	935	894	908	894	917	1,109	1,153	1,249	215	2.2%	139	1.2%	355	1.7%
North Medford	1,941	1,877	1,890	1,759	1,757	1,775	1,734	1,884	2,039	2,224	2,431	305	1.6%	392	1.8%	697	1.7%
<u>SOUTH SCHOOLS</u>																	
Griffin Creek	560	550	538	599	562	593	580	704	835	951	1,008	255	3.9%	174	1.9%	428	2.8%
Oak Grove	455	538	514	500	474	471	492	571	693	820	877	201	4.4%	185	2.4%	385	3.3%
Jacksonville	401	366	361	361	325	391	400	459	528	597	630	128	3.4%	103	1.8%	230	2.5%
Jefferson	543	526	549	542	542	495	505	580	617	631	637	112	2.5%	20	0.3%	132	1.3%
Jackson	380	373	320	309	317	388	394	445	489	519	532	95	2.6%	43	0.9%	138	1.7%
Washington	443	421	439	413	405	420	443	488	515	527	534	72	2.3%	19	0.4%	91	1.3%
Howard	549	544	531	535	501	547	501	563	637	682	701	136	1.7%	64	1.0%	200	1.3%
Ruch	191	199	214	174	197	171	176	147	120	132	139	-56	-3.9%	19	1.5%	-37	-1.1%
McLoughlin	882	837	866	919	895	837	789	864	1,071	1,123	1,236	282	2.8%	165	1.4%	447	2.1%
South Medford	1,887	1,920	1,920	1,833	1,777	1,804	1,821	1,838	2,019	2,221	2,447	198	1.3%	428	1.9%	626	1.6%
K-6	6,593	6,585	6,515	6,503	6,378	6,524	6,517	7,329	8,131	8,859	9,206	1,614	2.5%	1,075	1.2%	2,689	1.8%
7-8	1,838	1,767	1,788	1,854	1,789	1,745	1,683	1,782	2,180	2,277	2,485	497	2.9%	305	1.3%	802	1.9%
9-12	3,828	3,797	3,810	3,592	3,534	3,579	3,555	3,722	4,058	4,445	4,878	503	1.5%	820	1.9%	1,323	1.6%
TOTAL:	12,259	12,149	12,113	11,949	11,701	11,848	11,755	12,833	14,369	15,581	16,569	2,614	2.3%	2,200	1.4%	4,814	1.8%

Note: The Johnson-Reid analysis did not include enrollment for Central High School which draws students from the entire district. With the addition of the Central High School students, the year 2011 enrollment for grades 9-12 was 3,779. Also, for presentation purposes the growth rates indicated in the table have been rounded to one decimal point from the modeled rates of many decimal points. Resulting projected enrollment numbers were produced by use of the actual rates and not the rounded rates in the table. AAGRs for 2011-2020 for this table vary slightly from other Johnson-Reid tables where the full ten-year interval 2010-2020 was utilized.

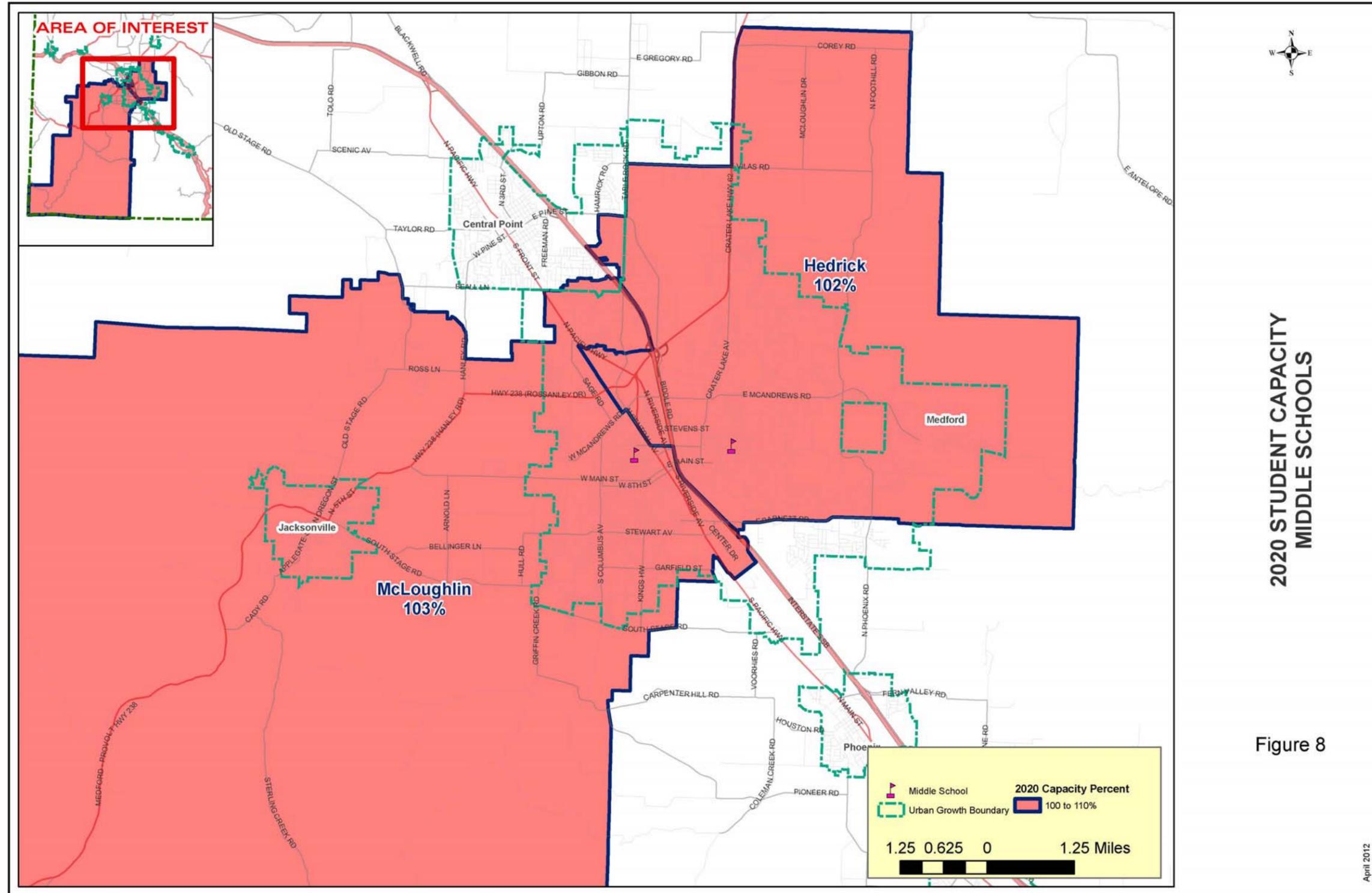






2011 STUDENT CAPACITY
MIDDLE SCHOOLS

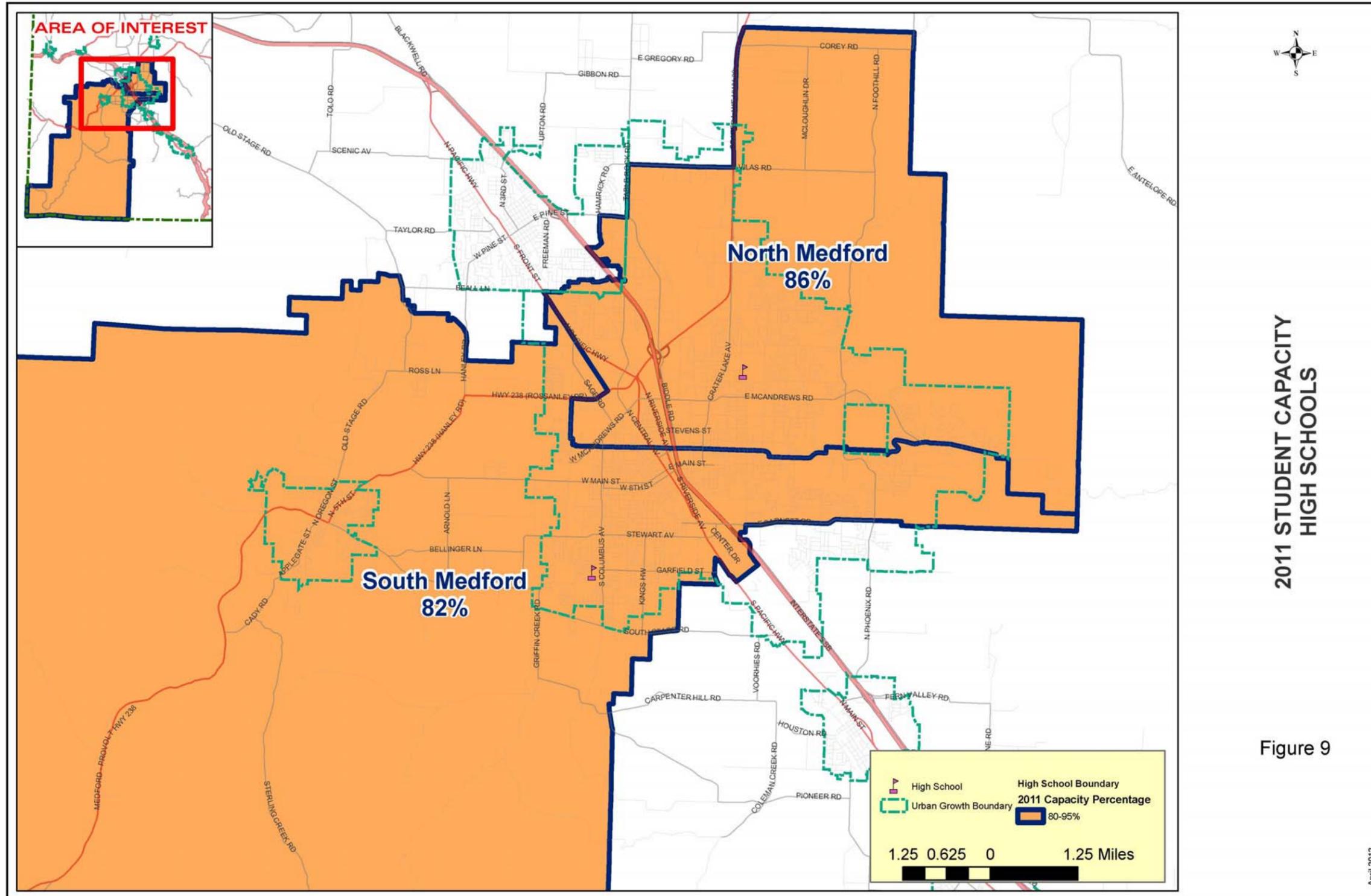
Figure 7

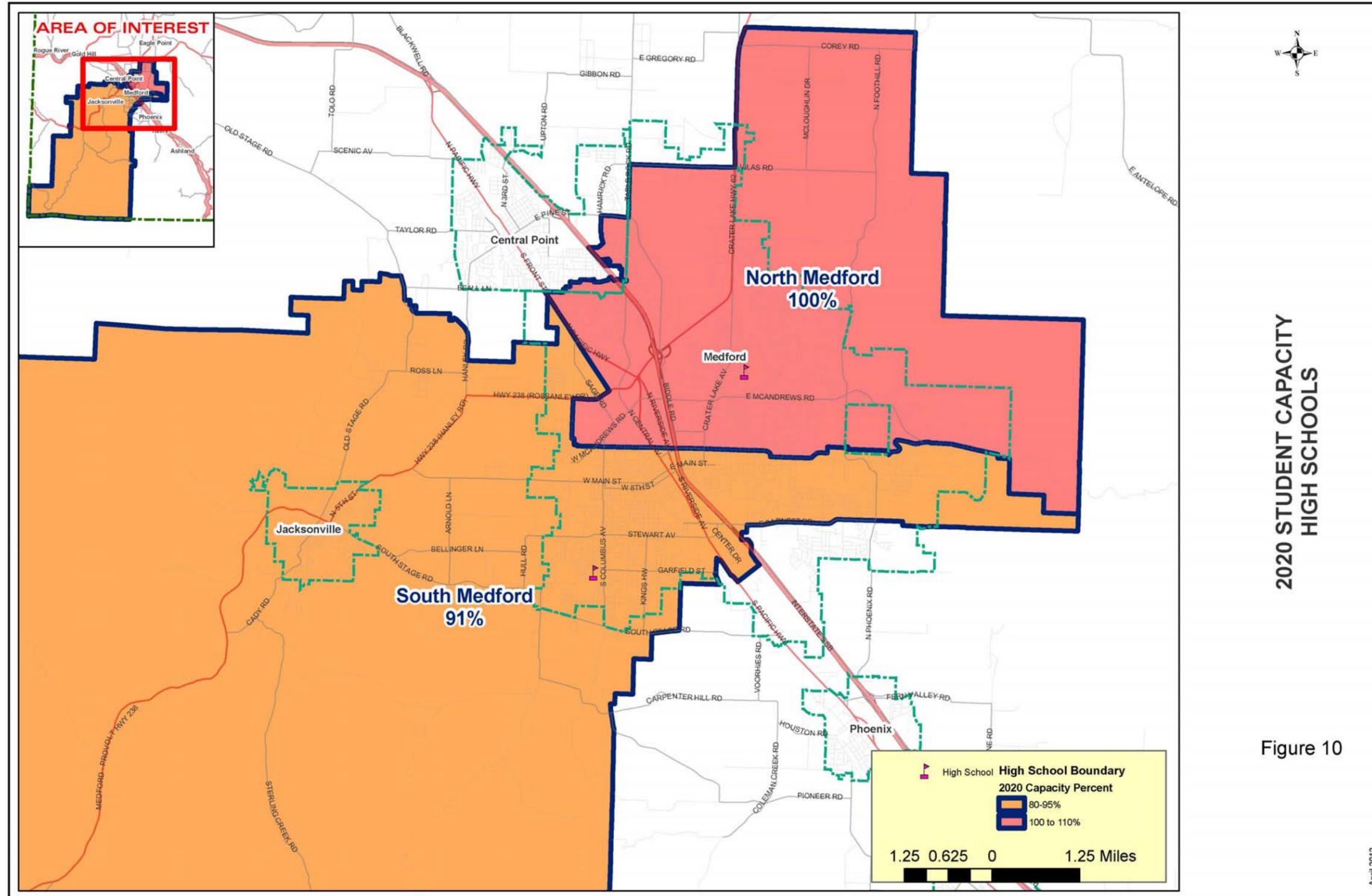


2020 STUDENT CAPACITY
MIDDLE SCHOOLS

Figure 8

April 2012





CHAPTER 5- FACILITY PLANNING

A. DETERMINATION OF NEEDS

I. School Site Standards for Enrollment and Size

School sites must be adequate to accommodate the District's educational standards which are outlined in Chapter 3. The education program standards which typically drive needs for educational space for students include grade configuration, optimum facility size, class size, educational programs, supplemental programs, specialty spaces, classroom utilization, and scheduling requirements.

To accommodate the educational standards, the Medford School District has developed and adopted the following base school site standards for each educational level. The site standards provide the basis for evaluating existing and potential new school sites. Not all current sites meet these standards; however these standards will be applied in the selection of new sites for future growth needs. Table I I specifies district school site size standards for enrollment, square feet per student, and acreage by school facility type.

Table I I
District School Site Size Standards

Level	Enrollment	Sq. Ft/ Student	Acres
Elementary	450 – 600	110	8 - 10
Middle	800 – 1,000	120	12 - 15
High	1,500 – 2,000	130	35 - 50

2. Evaluating Potential School Sites

Upon determining that there is a need for a new facility within a general vicinity (See, Chapter 5 – Section D), a review of potential sites within the vicinity must consider many factors including health and safety, location, accessibility, environment, physical characteristics (soil and topography), acquisition and development costs (including utilities), and coordination with the local comprehensive plans. The criteria outlined in Table 12 below are designed to select sites that provide for both a safe and supportive environment for the instructional program and the learning process.⁷

⁷ The State of Oregon has not adopted new school siting criteria or guidelines. However, the site selection as set forth herein are based on recommendations of the Environmental Protection Agency's voluntary School Siting Guidelines (*Desirable Attributes of Candidate Locations; Environmental Siting Criteria Considerations*), the School Site Selection and Approval Guide (1989, as revised) prepared by the California Department of Education, the Active School Neighborhood Checklist (2010) published by the Arizona Department of Transportation, Planning School Grounds for Outdoor Learning (2010) by the National Clearinghouse for Educational Facilities at the National Institute of Building Sciences, and the School Site Planner – Land for Learning (2010) published by the North Carolina State Board of Education. Distance to school recommendations of ½ mile for elementary schools, one-mile for middle schools, and 1.5 miles for high school appear as far back as 1952 in the American Society of Planning Officials Information Report No. 36 – Planning for School Capacities and Locations – and further back in the education field (Cooper, 1925).

Table 12
Schools Site Selection Criteria

Medford 549C Schools Site Selection Criteria	
Safety	<ul style="list-style-type: none"> ▪ If adjacent to or near arterial roadways, elementary school site must have adequate room on property to maintain sufficient setback conducive to good learning environment <p>These factors must be avoided:</p> <ul style="list-style-type: none"> ▪ Within 1,500 feet of railroad tracks ▪ Within airport approach overlay ▪ Crossed by high-voltage (500 KV) power lines ▪ Close to high-pressure lines, for example natural gas, gasoline sewer or water lines ▪ Contaminants/toxics in the soil or groundwater, such as from landfills, chemical plants, refineries, fuel tanks, nuclear plants, or agricultural use of pesticides or fertilizer, etc. ▪ Close to high decibel noise sources ▪ Close to open-pit mining ▪ On or near a fault zone or active fault ▪ In a dam inundation area or 100-year flood plain ▪ Social hazards in the neighborhood, such as high incidence of crime and drug or alcohol abuse
Location	<ul style="list-style-type: none"> ▪ Location conducive to allow for efficient and logical school area boundaries (promotes boundaries where students within the enrollment area live within half mile of elementary schools, one mile of middle schools, and 1.5 miles of high schools) ▪ Proximate to residential neighborhoods ▪ Safe walking areas can be provided ▪ Multiple street approaches available (3 frontages ideal) ▪ Ability to maintain at least a 200-foot set back of nearby farm and forest practices ▪ Favorable orientation
Environment	<ul style="list-style-type: none"> ▪ Desirable features include a variety of trees and plants or a wooded area for use in education programs such as biology or outdoor learning ▪ Free from sources of noise that may impede the instructional process ▪ Free from air, water and soil pollution ▪ Provides aesthetic view from and of the site ▪ Compatible with the educational program
Soils	<ul style="list-style-type: none"> ▪ Proximity to faults or fault traces ▪ Stable subsurface and bearing capacity ▪ Danger of slides or liquefaction ▪ Positive drainage

Medford 549C Schools Site Selection Criteria	
Topography	<ul style="list-style-type: none"> ▪ Generally level ▪ Flat sites preferred; If flat site unavailable, choose site with minimum need for major excavation ▪ Rock ledges or outcroppings ▪ Surface and subsurface drainage ▪ Level area for playfields
Size and Shape	<ul style="list-style-type: none"> ▪ Length-to-width ratio does not exceed 2:1 ▪ Sufficient open play area and open space ▪ Potential for expansion for future needs ▪ Area for adequate and separate bus loading and parking
Accessibility	<ul style="list-style-type: none"> ▪ Obstacles such as crossings on major streets and intersections, narrow or winding streets, heavy traffic patterns ▪ Access and dispersal roads ▪ Natural obstacles such as grades or gullies ▪ Access for bus transportation ▪ Routing patterns for foot traffic ▪ Remote areas (with no sidewalks) where students walk to and from school ▪ Easily reachable by emergency response vehicles
Public Services	<ul style="list-style-type: none"> ▪ Available and feasible at time of construction ▪ Fire and police protection, including fire water lines
Cost	<ul style="list-style-type: none"> ▪ Reasonable costs for purchase of property, severance damages, relocation of residents and businesses, and legal fees ▪ Reasonable costs for site preparation including, but not limited to, drainage, parking, driveways, removal of existing buildings, and grading ▪ Environmental mitigation ▪ Reasonable maintenance costs
Availability	<ul style="list-style-type: none"> ▪ On the market for sale or likely to be available ▪ Title clearance - unencumbered ▪ Condemnation of buildings and relocation of residents to be avoided

3. Grade Configuration

With a potential of needing to house approximately 4,800 new students in the next 20 years, the District has decided that at this time it will remain in the K-6, 7-8, 9-12 configuration.

With this grade configuration, the District will need to add one to two elementary schools in the next 10 years. Potentially, in the next 20 years, a new middle school and expansions at the high schools may be needed as well.

B. EXISTING SCHOOL CAPACITY

The existing school conditions and capacity were inventoried as part of this plan process. Then, combined with the population forecasts, a forecast was developed projecting what year each existing school population might exceed the capacity of that school.

In addition to student population, other factors such as collective bargaining agreements, government mandates, and community expectations affect classroom space requirements. Space is necessary for regular classrooms, the fine and performing arts, physical education, special education, Title I, tutorial support, technological applications, and computer labs. Space must be provided for common areas such as media centers, cafeterias, kitchens, and auditoriums. Space is needed for groups of students/staff to work together. These programs can have a significant impact on the available capacity within school facilities. Further, the community expects all spaces to be well utilized during the school day and available after the school day for school and community use.

I. Determining Capacity

With all campuses, except Medford School District Education Center, having completed their renovations, the total capacity at each school can be utilized. Available capacity varies across the district. The District uses the following formula to determine facility capacity:

$$\# \text{ teaching stations} \times \text{class size} \times 85\% \text{ utilization factor} = \text{Total Capacity.}$$

The utilization factor is based on the amount of time during the day a regular classroom is not occupied by students and the balance of students at grade level. The number of students per teaching station is approximately 25 for elementary and 29 for secondary.

Table 13
Overall School Facility Capacity

Schools	Teaching Stations	Permanent Capacity	Oct 2011 Enrollment	Available Capacity
Elementary Schools	334	7,240	6,517	723
Middle Schools	86	2,120	1,683	437
High Schools	187	4,573	3,779*	794
Total Available Capacity	607	13,993	11,979	1,954

* Total enrollment does not include chartered schools because Medford School District does not provide or manage the facilities for these schools.

** Includes Central High School enrollment

2. Enrollment Demands Exceed Existing Capacity

The Johnson Reid Study, as summarized in Figure 23 therein, projects an average of 2.3% enrollment growth over the first 10 years in the forecast and an average of 1.8% over the following 10 years, through the end of the planning horizon. Chapter VII of the report (Conclusions) states, on page 25, that the projected enrollment numbers for several schools would exceed the existing capacity in less than 10 years for several facilities:

“Taken together, planned demographic growth translates into notable capacity concerns for the district. Outlined in Figure 24,⁸ several schools in the district are already at or near capacity. Specifically, Griffin Creek, Hoover, and Lone Pine elementary Schools are over capacity, with five additional schools within 10% of their cap.’

‘Over the next ten years, elementary school growth of over 1,600 students will create a need for at least one additional elementary school in the district. However, a look at growth on a geographic level compounds the issue. Specifically, the two schools currently exceeding capacity, Griffin Creek and Hoover, are expected to capture a significant share of growth on the horizon. All told, 10 of 14 elementary schools in the district are expected to at least approach capacity in the next 10-years under existing conditions. The largest deficiencies over a ten-year period are in Hoover (+328 students), Griffin Creek (+272 students), Lone Pine (+186 students), and Oak Grove (+173 students). (See, Table 10 and Figures 2 and 3)

At the 7-8 grade level, Hedrick and McLoughlin Middle Schools are 16% and 19% below capacity, respectively. These current low enrollment levels are a function of the elementary school enrollment trough exhibited in the mid-2000s. However, the early grade enrollment bump underway since 2009 is likely to continue given recent birth and anticipated migration trends. Middle school enrollment growth is likely to trigger the need for an additional middle school by the end of the decade, as both schools exceed capacity. (See, Table 10 and Figures 4 and 5)

Finally, at the high school level, the combination of currently low enrollment levels and existing low enrollment at the middle school level is likely to keep high school enrollment below capacity over the 10- year horizon. Between 2005 and 2011, high school enrollment at North and South Medford fell by 7%. In recent years high school enrollment growth at Central Medford and Logos Public Charter has relieved pressure from the district's high school system considerably. Through 2010, high school enrollment is expected to grow by 503 students. At the forecasted trend, North and South Medford High Schools reach capacity in 2020 and 2024, respectively.” (See, Table 10 and Figures 6 and 7)

Over the next 10 years the facilities capacity needs continue to increase, as shown in Table 14 below:

⁸ See Appendix C: at page 25, Demographic and Enrollment Forecasts: Medford School District; Johnson Reid LLC, December 2011 which is also reproduced as Table 10 in this facility plan.

Table 14
Projected School Facility Capacity 2020
 K-6, 7-8, 9-12 Configuration

Schools	Teaching Stations	Permanent Capacity	Projected 2020 Enrollment	Student Capacity Short/Excess
Elementary Schools	334	7,240	8,131	-891
Middle Schools	86	2,120	2,180	-60
High Schools	187	4,573	4,058	+515
Total Available Capacity 2020	607	13,993	13,958	-436

From Demographic and Enrollment Forecasts. Table23. Johnson Reid., December 2011.

3. New Schools will be Needed

To summarize, the enrollment forecast with the current grade configuration identifies the need for at least one elementary school, with a likelihood of needing two within the next ten years. One will be needed on the west side to prevent overcrowding at Oak Grove and Griffin Creek and another on the east side to relieve overcrowding at Hoover and Lone Pine. The reasons for these enrollment increases are different. In the west, the existing schools are already near their maximum capacity and this area is anticipated to have a high level of population increase through infilling the existing housing stock and increases in household size. In the east there is a large supply of un-built residential land which, when built out and occupied, will greatly increase the number of students living on the east side.

C. MEETING INCREASED SPACE DEMANDS

1. Existing Facilities

All 14 elementary schools, two middle schools, and three high schools were upgraded through renovation or new construction projects. All school projects were completed by the fall of 2010. Following the completion of the school projects, the renovation began on the old South High School, now called the Medford School District Education Center (MSDEC). The first phase of the MSDEC project was completed in the summer of 2011 to consolidate administrative support at one location including the Superintendent, Human Resources, Business Office, Student Services, Elementary Education, and Information Technology. The final bond funded project was the MSDEC Annex renovation which consolidated Maintenance, Purchasing, Network Telecom Services, Instructional Media Center, and Publications to the MSDEC Site. These upgraded facilities are expected to provide quality space for the next 20 years with proper maintenance.

In evaluating all school campus properties owned by the school district for their potential to expand, it has been concluded that they are either already fully built out for their site, or are located in areas of the city that will not see much growth and therefore expansion will not relieve overcrowding without bussing students substantial distances. Once the capacity in these existing facilities is filled, the District will need to find other means to meet the demand.

2. Efficient Use of School Sites

The District has evaluated short-term and long-term options for providing the needed additional space. The approach taken will depend on whether the need is seen as a short-term increase, a “bubble”, or the district is anticipating that the population increase will continue for the long-term.

a. Short-Term

With the existing elementary and middle school campuses being built out, the District has decided that the best means for dealing with short-term space shortages will be to place modulars at the impacted school site. The District has had success using both temporary and permanent modulars in the past to supply additional classroom space at several of the schools.

b. Long-Term: Existing Site Expansion options

1) High Schools

The Strategic Plan investigated options for expansion on the existing North and South sites. Both High Schools have been found to have sufficient available land on campus to provide needed expansion space for the forecasted population growth over the next 20 years.

2) Middle Schools

In 2006 it was proposed to reconfigure the grades across the district in order to optimize the capacity currently available in the district. The proposal included renovating and adapting the old South Medford High School building for use as a third middle school. However, in 2007, it was decided that the former high school building would best serve the District as the new Medford School District Education Center (MSDEC). This center consolidated the District’s special programs, administration and maintenance facilities. With these functions using the existing buildings, refitting this facility for a middle school is no longer feasible or cost-effective.

One open sports field remains at the site of approximately three acres in area which potentially could hold a new building. However, this would result in a reduction of useable outdoor area available to Central High School for physical education and other needs – which would then need to be shared with the new middle school. The resulting outdoor space would primarily be within the Spiegelberg Stadium, a unique multi-purpose sports stadium that is also used by North and South Medford High Schools, St. Mary’s High School (private), and other community organizations. Also, a middle school at this location would be only 0.85 miles from McLoughlin Middle School and 1.2 miles from Hedrick Middle School. Each of the three middle schools, under this option, would consequently be within one-mile of the center point between the facilities.

3) Elementary Schools

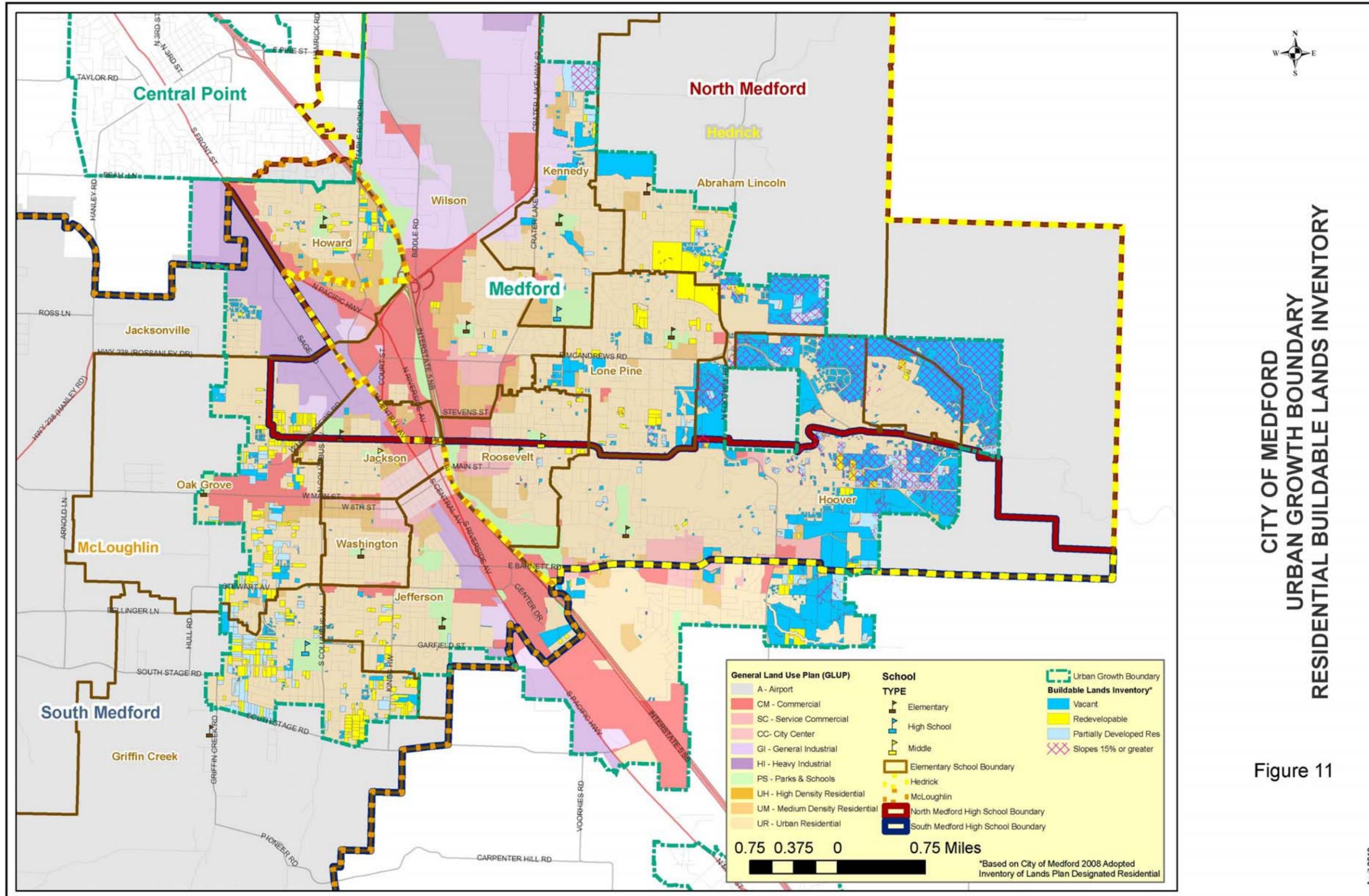
While there is some available capacity at a few of the elementary schools, all of the existing elementary schools are considered to be built out completely in relationship to their site and acres available. Therefore, the District has been investigating options for siting additional elementary schools for construction as the student population growth warrants.

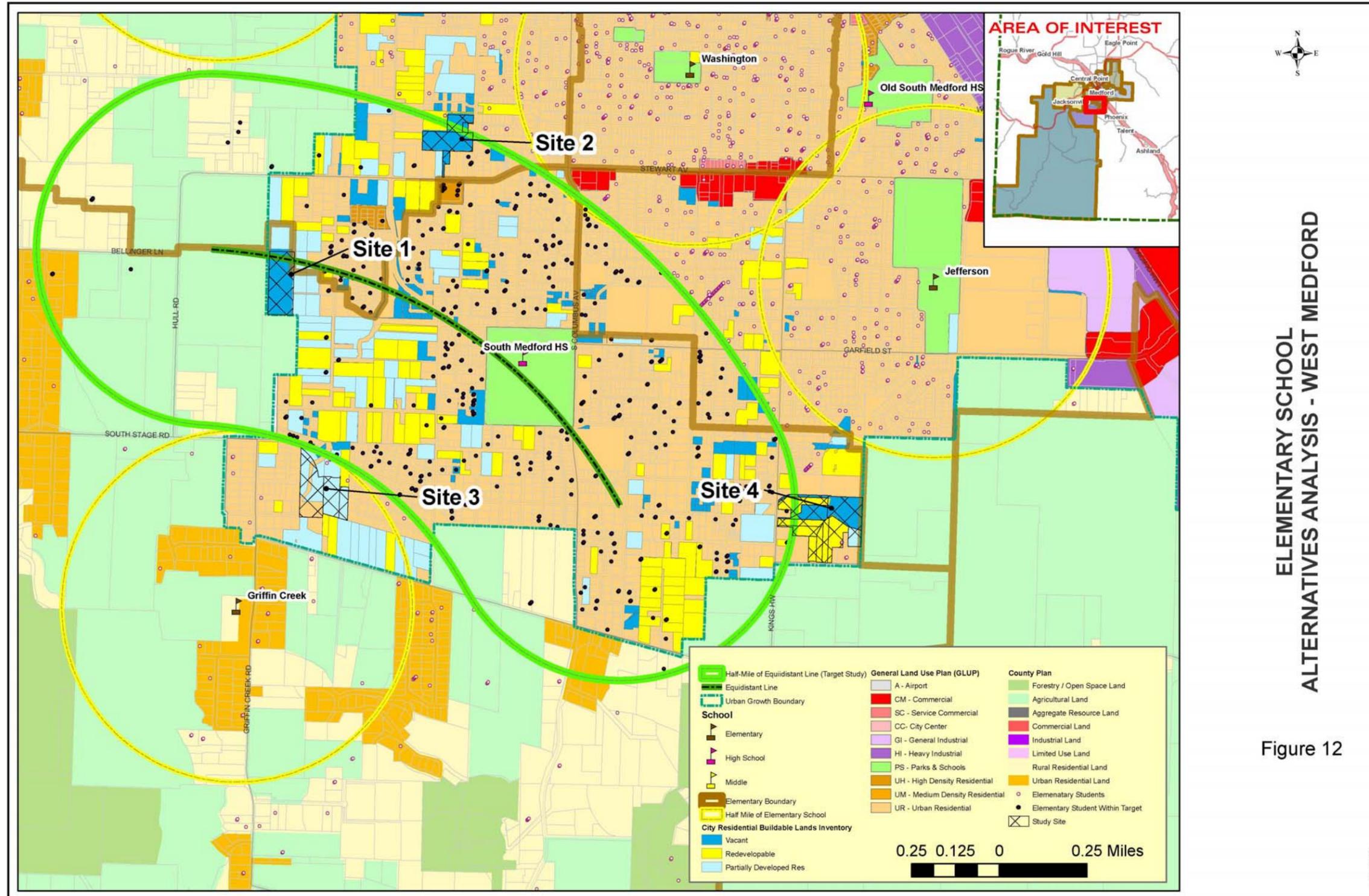
4) Expansion on other District-owned properties

The other properties owned by the district were evaluated as potential sites for new schools. The Merriman and Columbus facilities are not of adequate size for an elementary school. These sites are also located adjacent to existing elementary schools.

c. Long-Term: New Sites

The School District has determined that there is an inadequate supply of land under school district ownership to meet the identified long-term needs. There is a projected need for two additional elementary schools within the next 10 years (one to relieve Hoover and one to relieve Griffin Creek/Oak Grove). An east side site for the City of Medford has been reserved on the Southeast Plan Map, a refinement plan to the General Land Use Plan Map in the Medford Comprehensive Plan. A west side site in the City of Medford will need to be located in the general vicinity between Griffin Creek and Oak Grove elementary schools to accommodate projected growth enrollment population in that area. Figure 6 shows that all the schools surrounding that general vicinity, by 2020, will be well over capacity such that an adjustment to adjacent school service boundaries will not be a viable solution for the overcrowding. On Figure 11, the District's current school service boundaries are shown in relation to the City of Medford's adopted residential Buildable Lands Inventory and areas designated for commercial and industrial uses. Figure 12 combines that information with half-mile radius walkable school service area boundaries shown around the existing elementary schools. A new school site should be located close to the interior axis (labeled "equidistant line" on the map) between the ½ mile boundaries around the existing schools. A site so located would service the centroid of the projected enrollment growth in west Medford with a ½ mile walkable area that would not encroach within ½ mile of any existing school. A school site within this target area would also be well placed for adaptation to (or co-location of) a middle school with a one-mile service boundary that would be adjacent and west to the one-mile area around the existing McLoughlin Middle School facility. (See, Figure 3)





ELEMENTARY SCHOOL ALTERNATIVES ANALYSIS - WEST MEDFORD

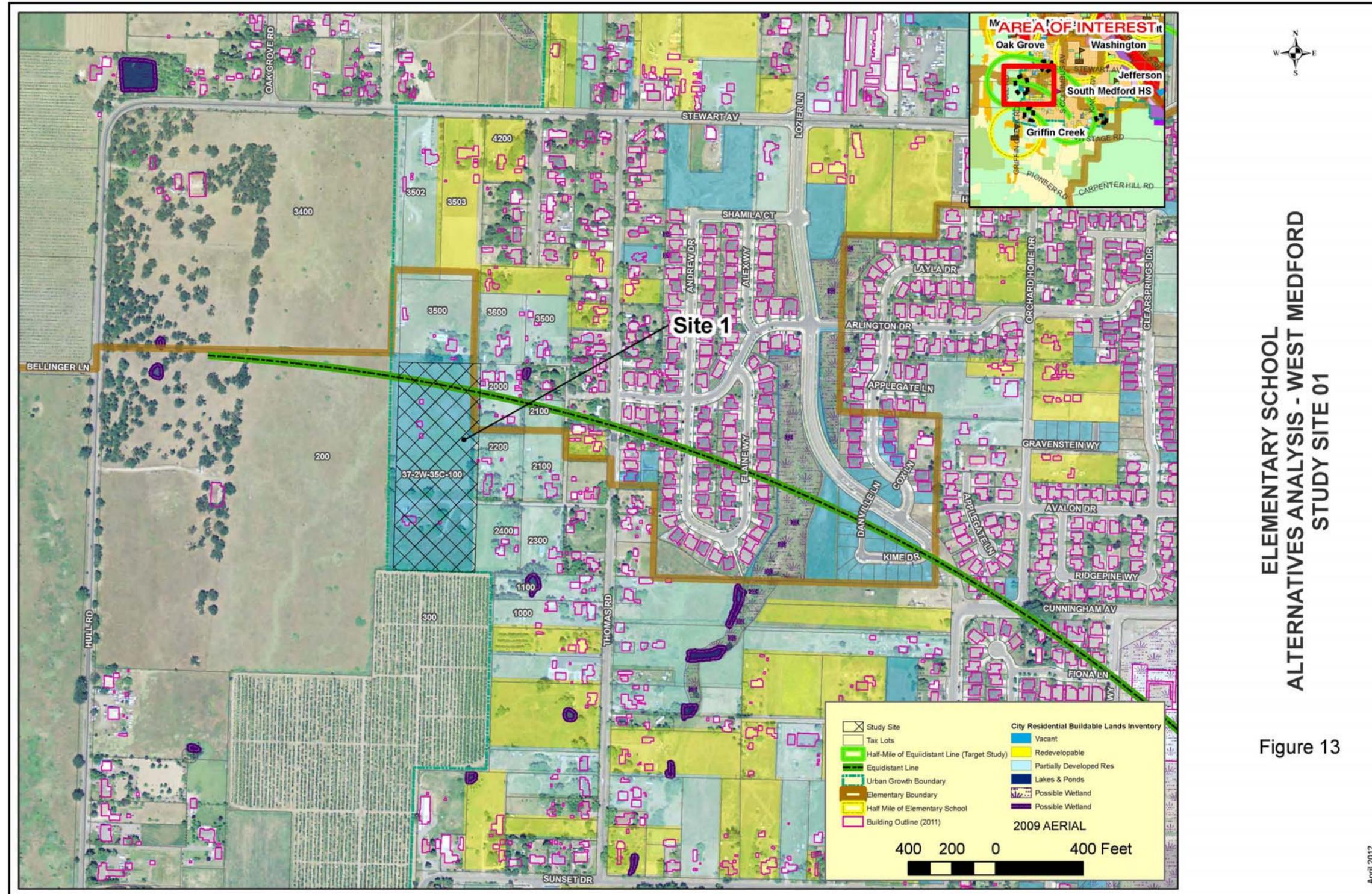
Figure 12

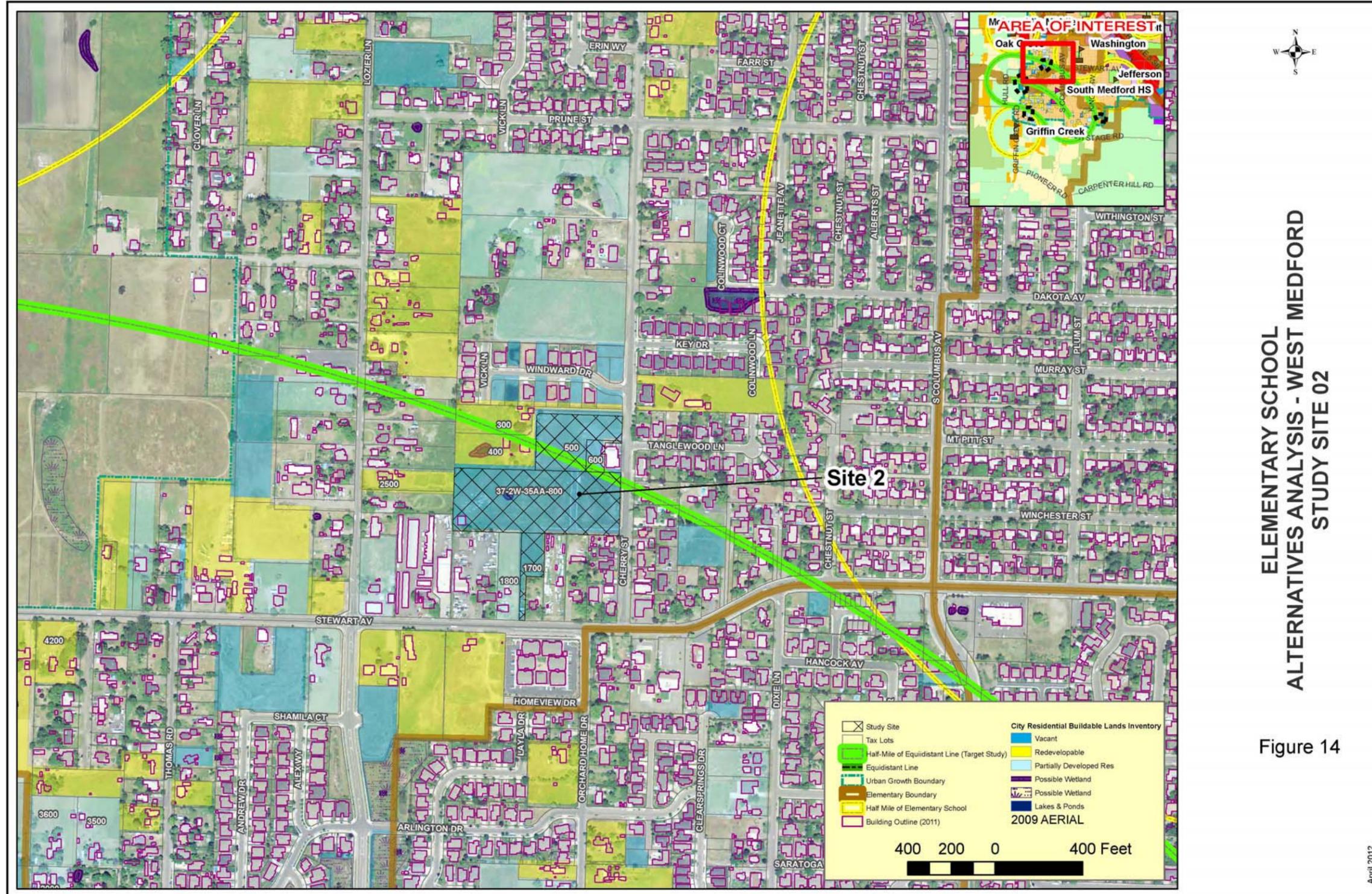
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D. NEW SCHOOL SITE SELECTION

I. Sites Evaluated Located in West Medford within the Urban Growth Boundary

The West Medford Target Study Area as shown on Figure 12 was delineated as explained in subsection (c) above for Long Term New Sites. Beyond the boundaries of the target study area, a new elementary school would be located too close to existing elementary schools to be logistically sound. A site within the target study area would serve the heart of the projected west side enrollment increase in a manner that would result in logical service boundaries around the new and existing facilities wherein each school would be within ½ mile of most of its respective student population. Sites within the target area found to meet the District's base sizing criteria were further studied to determine suitability based on the site selection criteria established in Table 12 herein above. Four vacant or re-developable sites were found within the Medford Urban Growth Boundary (UGB) through a review of the most recent Buildable Lands Index that have at least 8 acres, either as a single parcel or as an agglomeration of several parcels, as needed for a new elementary school. Those are identified on Figure 12 as Sites 1 through 4. Initial School Site Evaluation Reports for each site are located at Appendix D. Figures 13 through 16, below, are the respective maps for each site within the urban growth boundary target area as included in the evaluation reports. Following the maps below is Table 15 which provides a summary of each site and the conclusion of each respective site evaluation.

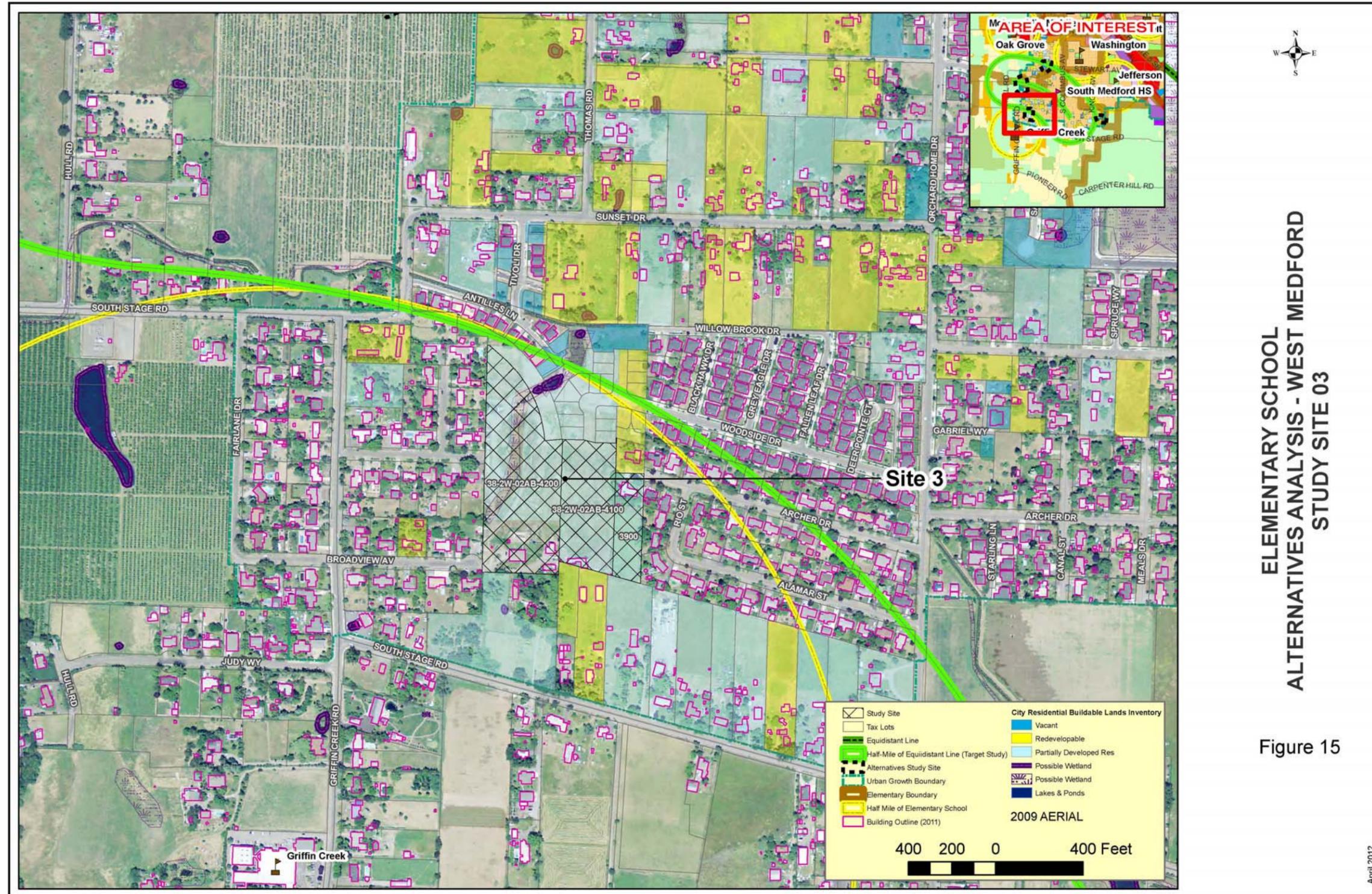




ELEMENTARY SCHOOL ALTERNATIVES ANALYSIS - WEST MEDFORD STUDY SITE 02

Figure 14

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ELEMENTARY SCHOOL
ALTERNATIVES ANALYSIS - WEST MEDFORD
STUDY SITE 03

Figure 15

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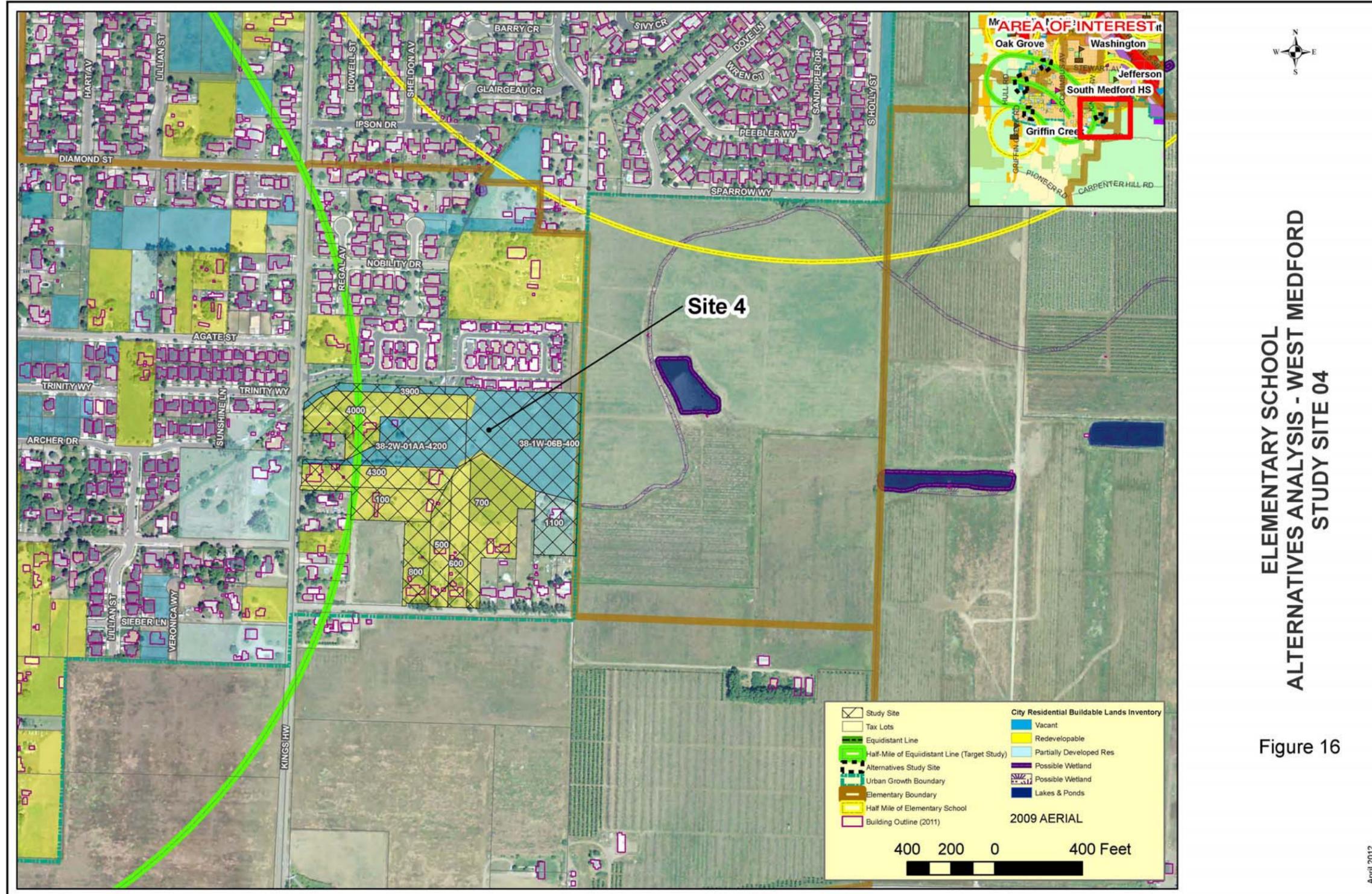


Table 15
Summary of Evaluated School Sites located inside of
UGB in West Medford

No.	Address	Total Acres	Usable Acres	Site Evaluation Conclusion
01	2693 Willow Way	8.14	3-4	Unsuitable
<p>Conclusion: Site No. 1 is located on the half-mile equidistant line of the West Medford Target Study Area and on the present boundary line between Oak Grove and Griffin Creek Elementary Schools, and is approximately two-thirds of a mile from the present boundaries for the Washington and Jefferson Elementary Schools. Access is a major issue for this site. There is only one very substandard access approach presently available by Willow Way which itself extends from Thomas Road – a local order street. Although this road will someday be replaced by the planned extension of Cunningham Avenue as a minor arterial, that future remedy will split the site into two separate parcels that will be too small and ill-configured for public school use. Unless Cunningham Avenue can be extended further west to connect through to Hull Road, access to the site will continue to be limited to a single public approach from only one direction. Further consideration of the site is not warranted given the critical access limitations. Site No. 1 is unsuitable for use as a school site.</p>				
02	1032 Cherry Street	10	10	Unsuitable
<p>Conclusion: Site No. 2 is located away from the half-mile equidistant line of the West Medford Target Study Area at the northern periphery. It is fully within the existing boundary for Oak Grove Elementary School and approximately one-quarter mile west of the Washington Elementary School service are. Acquisition cost would be high given need to assemble various ownerships and the relatively high cost basis for the existing owners. Demolition and/or condemnation may be necessary to acquire all the pieces. Existing adjacent and nearby commercial/industrial uses, environmental legacy issues, crime incidence, and high-traffic major arterial and designated truck/freight route at Stewart and Lozier Avenues further combine with the marginal site juxtaposition relative to existing schools to render Site No. 2 unsuitable.</p>				
03	2175 Archer Drive	10.03	3-4	Unsuitable
<p>Conclusion: Site No. 3 is poorly located primarily beyond the southern extent of the West Medford Target Study Area and within ½ mile of Griffin Creek Elementary. The site is encumbered by a PUD and planned community association and covenants. Significant wetlands would reduce the available acreage even if available, and the realignment of South Stage Road – a major arterial – will render the site unsuitable as to size, shape, and inability to maintain an adequate setback from the roadway. Site No. 3 is unsuitable for use as a school site.</p>				
04	2145 Kings Highway	10.34	8	Unsuitable
<p>Conclusion: Site No. 4 is poorly located beyond the southeast extent of the West Medford Target Study Area and would result in substantial overlap of ½ mile service areas with Jefferson Elementary. The site is encumbered by the 100-year floodplain for Crooked Creek and the City's adopted riparian setback of 75' from bank (fish bearing stream). Access is limited to the single street frontage along a minor arterial (King's Highway). Improving local connectivity to the east of King's Highway will be difficult and will have severe impacts to the local residents. Even then, the student population will reside primarily in areas to the west given the site location at the edge of the district boundary. East side connectivity improvement, which will be difficult to accomplish, will have marginal effect on the overall traffic pattern as a result. Site No.4 is unsuitable for use as a school site.</p>				

Based on an examination of all vacant, re-developable, and partially developed tracts within the urban growth boundary of at least eight acres sited in areas that could logically provide for a reasonable redistribution of forecasted student population for projected over-capacity schools on the west side of Medford, the District has determined that there is an inadequate supply of suitable land within the urban growth boundary. See, Figure 12 and related alternatives analysis

2. Desirable Sites outside of Urban Growth Boundary

Finding no sites suitable for a new elementary school within the Urban Growth Boundary on the west side of Medford, the search for a suitable site evaluated potential sites adjacent to the growth boundary. Because the southerly extent of the target study area beyond Medford's urban growth boundary is at the edge of District 549C's boundary and encroaches the Phoenix-Talent School District, and because the identified need is to meet the growth demand for west Medford, the review of sites external to the existing urban growth boundary is properly delimited to properties west and adjacent to the Medford urban growth boundary. Only one property, identified below in Table 16 at Hull Road and Bellinger Lane,, is located adjacent to the existing urban growth boundary and located along the central axis for the target area so as not to encroach upon the service areas for the existing elementary school facilities to the north and south. A site suitability evaluation of the site is included in Appendix D of this report. The site evaluation map from the report appears below at Figure 17. The site suitability conclusion from the evaluation is set forth in Table 16, which follows.

The area from west Medford to the City of Jacksonville is projected to have substantial increases in school population over the next 20 years. The existing Oak Grove and Griffin Creek elementary schools are forecast to be among the first to exceed their capacity within the next 5 years. Locating a new middle or elementary school in this location on the west side of Medford will relieve the impact of the projected population increases in that area on the existing facilities.

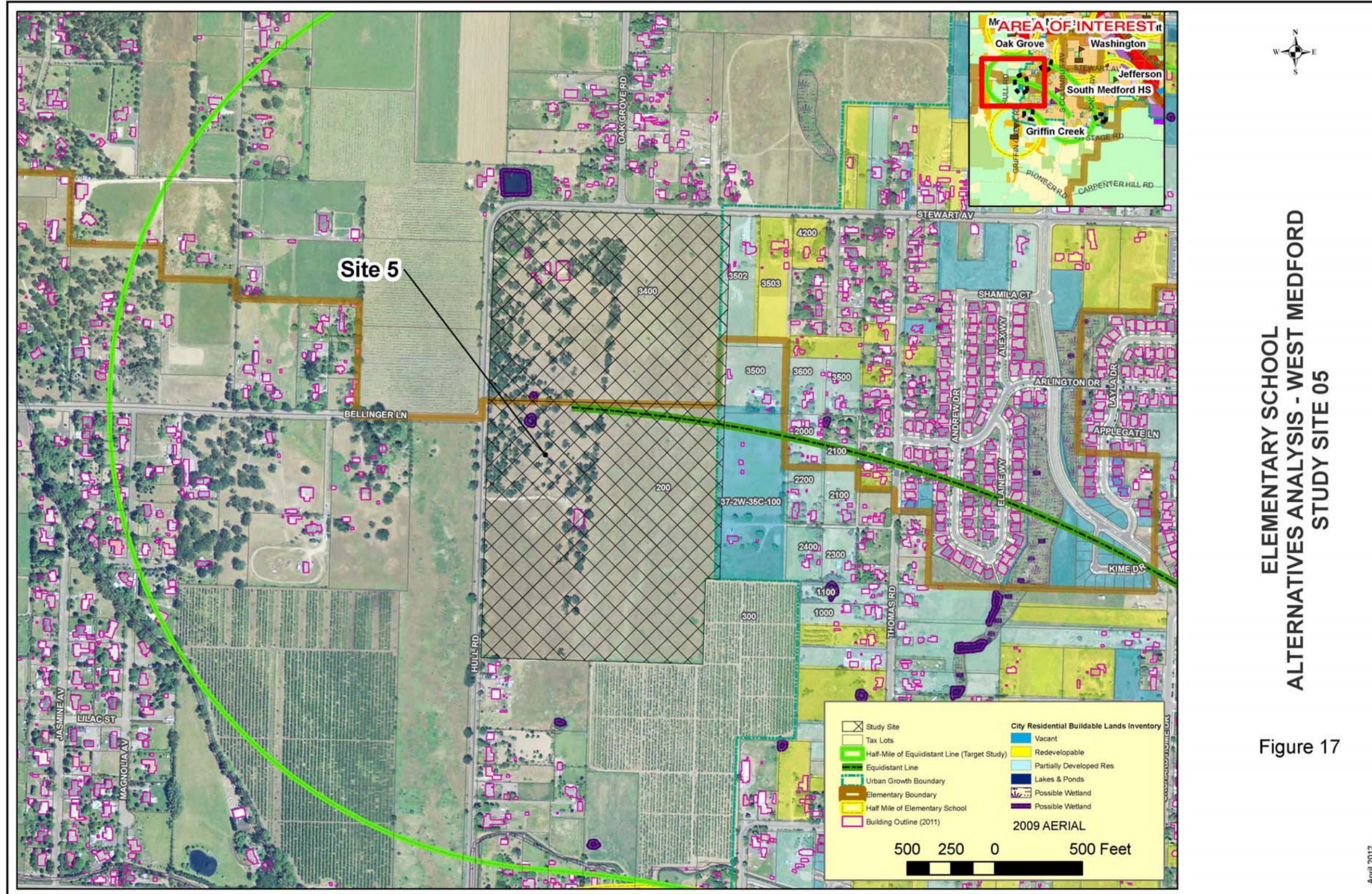


Table 16
Summary of Evaluated School Sites located adjacent
to the UGB in West Medford

No.	Address	Total Acres	Usable Acres	Site Evaluation Conclusion
05	Hull Road at Bellinger Lane	79	79	Suitable; Desirable School Site per ORS 195.110
<p>Conclusion: Site No. 5 is located on the half-mile equidistant line of the West Medford Target Study Area and on the present boundary line between Oak Grove and Griffin Creek Elementary Schools. A school at this site would provide for a ½ mile walkable service area that would touch but not overlap those for Oak Grove or Griffin Creek Schools. Close-in rural residential areas include neighborhoods more than 100 years old along Bellinger, Arnold, and Madrona Lanes and Oak Grove Road that would be well served by the site.</p> <p>The site is also well located to serve the existing and projected urban population for West Medford to complement Oak Grove Elementary and Griffin Creek Elementary which are due north and south respectively.</p> <p>Direct access is currently available to the site which fronts on Hull Road at its junction with Bellinger Lane. These roads connect to South Stage Road to the south and west, and Stewart Avenue to the north, to accommodate approach from several major travel corridors. Public utilities are present adjacent and nearby. The site is level, stable, and of sufficient size and composition to meet the District's educational program and siting standards. The site is also suitably sized, configured, and located to provide for flexibility to construct a middle school facility with a one-mile service area that would nearly touch but not encroach the one-mile area around McLoughlin Middle School.</p> <p>The parcel is also well situated to provide for a community park for southwest Medford identified as a need in the Public Facility Element of the Medford Comprehensive Plan [Parks and Leisure Services Plan, Table 3 - CP-20 "Sunset Park"]. Development of a community park facility in close proximity to a school site is consistent with the City's comprehensive plan policies related to park and school planning.</p> <p>Given the location on the axis of the target study area, sufficient buildable area without cost or need for land condemnation or building demolition, ability to provide for collocation of a middle school site and a community park, existing and planned street networks, Site 5 is a desirable and suitable site for school facilities. However, municipal water and public sewer utilities - while physically available - may not be extended to a site located outside the urban growth boundary. Inclusion of this site within the urban growth boundary will require consideration and approval by the City of Medford, Jackson County, and the State of Oregon.</p>				

The property owner has pledged a gift of a 20 acre school site on the southwest quarter of the property to District 549C, and the District has further negotiated an option right to purchase the southeast quarter of the parcel (20 acres, more or less) that may be exercised at any time through December 31, 2030. The location of the gift and option areas are shown

on a map included in Appendix D for Site 5. The District's school site size standard for an elementary school is 8 to 10 acres for a middle school is 12 to 15 acres. The parcel is also sufficiently sized and appropriately located to accommodate the City of Medford's identified need for a community park for southwest residents. The sizing and configuration requirements for a community park, under the City's standards, are quite similar to the District's standards for a middle school facility. The City faces the same land constraints on availability of buildable or re-developable sites for a community park in this area that the school district faces with locating a school site. Site 5 would provide an excellent area to collocate a community park and provide for sharing of costs for infrastructure improvements.

The District therefore desires to cooperate with the City and landowner to add the property to the urban growth boundary to provide for these specific needs. An amendment to the existing urban growth boundary must be mutually reviewed and approved by the City and County and acknowledged by the State. The procedure would include a comprehensive plan amendment and zone change so that the site will be appropriately zoned.

CHAPTER 6- CAPITAL FACILITIES FINANCING

A. CAPITAL IMPROVEMENTS FOR EXISTING FACILITIES

Scheduled capital improvement projects include large projects that cannot be funded from the maintenance operating budget. These projects would include roof replacements, mechanical and electrical system upgrades, parking lot and sidewalk replacements, floor finish replacements, painting, sports fields and track replacements and minor space renovations.

Scheduled capital improvement requirements for every district site from 2012 through the 2032-2033 school year are provided in Appendix B of the Long Range Facilities Plan. It shows that the average annual capital improvements cost over the next five years to be \$707,600. Over the next twenty years the average is projected to be \$746,575. When furniture, computers and vehicle replacement is figured in the average expenditure is projected to be \$1,274,505 (in 2011 dollars) over the next ten years. Assuming an average 2% annual inflation over the next twenty years, the projected average annual expenditure rises to \$1,609,454. This amount does not include any new construction or major renovation projects.

Table 17
20-year Capitol Improvement Plan Summary

Medford School District 549C

No. of Years	Average Capital Expenditures	Average Annual Replacement Costs	Total
5	\$ 707,600	\$ 482,120	\$1,189,720
10	\$ 709,000	\$ 536,660	\$1,245,660
20	\$ 746,575	\$ 571,640	\$1,318,215

B. CAPITAL IMPROVEMENT FUNDING

The District has four primary sources of the necessary funding for anticipated capital improvements:

1. Construction Excise Tax: On November 21, 2011, the School Board voted to implement a construction excise tax. The funds collected from this tax can be applied to the annual capital improvement plan.
2. Project Reserves: An annual amount is transferred from the general fund into a facilities reserve account to fund the capital improvement plan.
3. Established Revenue from Energy Incentive Grants: The Oregon Department of Energy administers the SB 1149 program. This program will provide the Medford School District an annual revenue stream of approximately \$180,000 for the next 12 years to reimburse the district for energy efficient projects that were funded from the 2006 Bond.
4. Liquidation of Surplus Properties: Three district properties are available for liquidation. With approval, the liquidation of the available properties can contribute to the capital improvement plan.

C. NEW CONSTRUCTION FUNDING

With the forecasted need for a new elementary school within ten years, the Capital Improvement Plan includes \$18 million in year 8 of this plan. The money to support this can come from a new bond or other sources. Bonds are typically used to fund construction of new schools or other capital improvement projects. The district passed a \$188.9 million bond in November 2006 that funded recent renovations and new construction at all 19 sites and created the centralized support facility.

A bond is usually necessary for the purchase of land and subsequent construction of new schools which is needed to serve future growth in enrollment. The rate of enrollment growth will control future facility demands. In the case of potential construction on the Hull Road site, the land is being donated eliminating the cost of purchasing the land. Land costs will need to be considered for construction of a middle school if the land option is exercised. This will provide a great savings for the district.

D. SITE ACQUISITION SCHEDULE AND PROGRAMS

The Johnson-Reid study reports that by 2020 ten of the fourteen elementary schools in the District are projected to be at or exceed permanent capacity, that Washington Elementary and Kennedy Elementary schools will be at 90% capacity, and that Wilson Elementary will be at 80%. The only remaining elementary school (Ruch Elementary) is located in the Applegate Valley. The Johnson-Reid report also projects that both of the existing middle schools will exceed capacity by 2020.

The projected enrollment growth will require a site acquisition strategy due to the physical and logistical limitations of the existing facilities.

One strategy the District may employ would be to move the 6th graders to the middle schools along with 7th and 8th graders. A third middle school facility would be needed to accommodate the increased middle school enrollment from such a shift as the total enrollment of 6th graders now exceeds 1,000 students. (See, Appendix C – Johnson-Reid, Figure 19 Enrollment Forecast by Grade Level, Cohort Migration Model). This option would delay the point at which the elementary schools will reach capacity. However, the forecast by grade level at Figure 19 in the Johnson-Reid report indicates that by 2015 the combined projected enrollment for grades 6-8 by the year 2015 will be 3,042 students – or 1,014 students averaged over three middle school facilities. By the year 2020, the combined enrollment is projected to be 3,511 students and by the year 2030 that will increase to 3,762 students – or 1,170 and 1,254 students on average per middle school facility. The District's adopted enrollment standard for middle schools is 800 to 1,000 students. (See, Table 11 – District School Site Size Standards).

Another strategy would be to retain the current K-6, 7-8, and 9-12 grade configuration and construct one elementary schools on the east side of Medford and one on the west side of Medford to meet projected demand over the next ten years. This strategy has the benefit of retaining the existing grade configuration to which the community has grown accustomed and which allows 6th graders to attend schools more locally oriented to their own neighborhoods.

Another benefit of this strategy is that the City of Medford has already designated an elementary school site in its comprehensive plan on its adopted Southeast Plan Map. The designation assures that the land will be preserved for elementary school use to accommodate projected enrollment increases and capacity constraints for that area. The District will need to coordinate acquisition and development of the site with the property owner, who is the primary residential developer for that area. Development within the Southeast Plan Area is controlled through the City's Planned Unit Development procedure.

The District has also acquired the rights to secure the Hull Road property as a donation on the west side of Medford to accommodate projected enrollment increases and to relieve projected overcrowding at Oak Grove and Griffin Creek Elementary Schools. An option to acquire additional land adjacent to the donation site has also been secured to provide for a middle school and other future west side facility needs.

The District could also employ a strategy to initiate the elementary school addition strategy to be augmented by the additional middle school strategy over a longer period of time to prepare for the projected overall enrollment growth.

CHAPTER 7- CONCLUSIONS AND RECOMMENDATIONS

A. Future Capital Improvements for Existing Facilities

Medford's existing facilities are in very good condition thanks to the bond funded construction of the past several years. The focus now is on maintaining the facilities and performing timely preventive maintenance to preserve these assets. For this, an ongoing budget needs to be available for necessary capital expenditures such as reproofing, painting, upgrading HVAC, etc. This will be key to keeping these facilities ready to support future students.

B. Site Acquisition Recommendations

Within the next ten years the District will need to acquire sites for an additional elementary school on both the east and west sides of Medford. A site on the east side of Medford has been designated on its adopted land use plans, and the District has analyzed options for suitable sites on the west side and has secured the rights to acquire the identified suitable site.

To meet projected long term facility needs, the Districts should adopt the following site acquisition program:

1. Efficiency: The District has recently completed major renovation and new construction projects and has re-adapted its existing facilities in substantive ways. There is limited remaining space within existing facilities or on existing sites that could provide additional capacity in ways that would not be overly disruptive to the educational programs and the surrounding neighborhood. Operational logistics must be considered in the evaluation of efficiency as well. For example, Table 9 indicates that middle school students overwhelmingly reside more than one mile from the District's existing two middle schools, thereby increasing costs to the District for busing and to families for private transport.
2. Siting Criteria: Adopt site selection criteria to provide critical guidance in advance of future needs.
3. East Side: Coordinate with the owner of the elementary school site, as designated on Medford's Southeast Area Plan Map, to secure acquisition of the property and to assure the site is adequately accommodated in the design plans for that neighborhood.
4. West Side: Upon adoption of the Long Range Facility Plan, enter into an intergovernmental agreement with the City of Medford and Jackson County to incorporate the adopted plan as an element or into an existing element of the City of Medford's and Jackson County's comprehensive plans, and to amend the urban growth boundary to include the Hull Ranch property into the urbanizable area.
5. Middle School: Identify suitable candidate sites for a third middle school that will not have overlapping one-mile service areas (i.e., located approximately two-miles or more away from the existing middle schools) and close to a concentration of projected enrollment population.

APPENDIX A – SITE INFORMATION

NORTH MEDFORD HIGH SCHOOL

1900 N. Keene Way, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1967
Major Renovation	2007-2011
Site Size (acres)	61.31
Building Size (square feet)	234,121
Teaching Stations	82
Grades	9-12
Enrollment	1,782
Capacity	2,021



CAMPUS ASSESSMENT

Major renovations have occurred from 2007 to 2011. The campus condition has improved significantly. The renovation projects at the North campus have contributed to improved student safety and facility durability. The campus should not need any further major upgrades for at least 20 years.

CAMPUS IMPROVEMENTS

North campus renovations included: Revised space layouts, structural seismic upgrades, new siding, new roofing, mechanical system replacement, security upgrades, asbestos removal, parking lot upgrade, landscape upgrade, new flooring, and new interior finishes. New windows and skylights were added to increase natural light for the interior space.

New construction on campus consists of a new media center and three new classrooms. The previous media center was turned into a student commons area.

The final bond project on the North campus replaced the main gym wood floor in the summer of 2011.

CAMPUS INVESTMENT

Budget: \$33.5 Million

Source: General Obligation Bond Proceeds and General Fund

Major Completion: Fall 2010

SOUTH MEDFORD HIGH SCHOOL

1551 Cunningham Ln, Medford, OR

CAMPUS INFORMATION

Construction Completion	2010
Site Size (acres)	38
Building Size (square feet)	255,000
Teaching Stations	90
Grades	9-12
Enrollment	1,812
Capacity	2,218



CAMPUS ASSESSMENT

New construction, the campus should not need any major upgrades for the next 20 years.

CAMPUS IMPROVEMENTS

The new campus construction project includes a 255,000 sq. ft. building with a competition gym, auxiliary gym and a theater. The project also includes athletic fields with a track, tennis courts, baseball field, two softball fields, soccer field, and artificial turf at the football field. The campus is designed to be energy efficient with natural lighting and efficient mechanical systems. The campus is designed to be safe for students and has been constructed with durable materials.

CAMPUS INVESTMENT

Budget: \$79,800,000
Source: General Obligation Bond Proceeds
Completion: Fall 2010

HEDRICK MIDDLE SCHOOL

1501 E. Jackson Street, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1955
Site Size (acres)	11.00
Building Size (square feet)	158,990
Teaching Stations	44
Grades	7-8
Enrollment	908
Capacity	1,085



CAMPUS ASSESSMENT

Facility is a two-story structure built more than 57 years ago. The building is structurally sound and received a major upgrade in 1996. Heating, ventilating and cooling systems are operational, but aging. Asbestos material exists in the facility, but is well contained. The building requires better general access to become compliant with the Americans with Disabilities Act (ADA). The campus does not provide adequate parking.

CAMPUS IMPROVEMENTS

This facility received minor upgrades in the summer of 2009. Improvements included: mechanical duct system, lighting, floor finishes, roofing, new bleachers, and painting. Asbestos was removed in open areas. Asbestos still does exist in the facility but limited to non-exposed areas where the material can be safely contained.

CAMPUS INVESTMENT

Budget: \$1.8 Million
Source: General Obligation Bond Proceeds
Completion: Fall 2009

MCLOUGHLIN MIDDLE SCHOOL
320 W. Second Street, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1926
Site Size (acres)	9.80
Building Size (square feet)	161,072
Teaching Stations	42
Grades	7-8
Enrollment	841
Capacity	1,035



CAMPUS ASSESSMENT

Facility is a multi-story structure built more than 80 years ago. The building is structurally sound and received major system improvements with minor seismic upgrades in 1996. Heating, ventilating and cooling (HVAC) systems are aging but functional. Asbestos material exists throughout the facility, but is contained. The campus does not provide adequate parking. The building and site are small but adequate for current sizing standards.

CAMPUS IMPROVEMENTS

This facility received minor upgrades in the summer of 2009. Improvements included: mechanical duct system, lighting, floor finishes, roofing, new bleachers, and painting. Asbestos was removed in open areas. Asbestos still does exist in the facility but limited to non exposed areas where the material can be safely contained. Due to its extremely poor condition and the costs for renovations, the annex was removed in the summer of 2011.

CAMPUS INVESTMENT

Budget: \$1.4 Million
Source: General Obligation Bond Proceeds
Completion: 2009

ABRAHAM LINCOLN SCHOOL

3101 McLoughlin Dr., Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1996
Site Size (acres)	19.98
Building Size (square feet)	63,438
Available Teaching Stations	26
Grades	K-6
Enrollment	449
Capacity	564



CAMPUS ASSESSMENT

Facility is a single-story structure built in 1996. The building is structurally sound and requires only minimal improvements. Flooring and interior finishes are beginning to show wear and will need replaced within the next three years.

CAMPUS IMPROVEMENTS

The exterior was painted in the summer of 2007 as part of the district bond building improvement plan. Site fencing was added in 2009 to improve campus security.

CAMPUS INVESTMENT

Budget: \$120,000 for painting and site fencing
Source: General Obligation Bond Proceeds
Completion: 2009

GRIFFIN CREEK SCHOOL

2430 Griffin Creek Road, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1902
Site Size (acres)	8.98
Building Size (square feet)	54,930
Available Teaching Stations	26
Grades	K-6
Enrollment	580
Capacity	564



CAMPUS ASSESSMENT

Facility is a single story structure with the original building constructed over 105 years ago. The building was recently renovated in 2007. The staff parking lot surface is gravel.

CAMPUS IMPROVEMENTS

This facility was significantly renovated in 2007. It received new HVAC systems and controls to improve efficiency and comfort for learning. Flooring was replaced with easy-to-maintain durable material, the interior was refurbished and exterior was painted. The campus was connected to city water. The roof was also replaced.

In the summer of 2009, additional fencing was added to improve school security. In the summer of 2010, an additional parking lot was added to improve safety.

CAMPUS INVESTMENT

Budget: \$2.47 Million

Source: General Obligation Bond Proceeds and General Fund

Completion: 2009

HOOVER SCHOOL

2323 Siskiyou Blv, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1958
Site Size (acres)	7.00
Building Size (square feet)	53,611
Available Teaching Stations	28
Grades	K-6
Enrollment	603
Capacity	607



CAMPUS ASSESSMENT

Facility is a single story structure built 54 years ago. The building was recently renovated in 2007.

CAMPUS IMPROVEMENTS

This facility was significantly renovated in 2007. It received new HVAC systems and controls to improve efficiency and comfort for learning. Flooring was replaced with easy-to-maintain durable material, the interior was refurbished and exterior was painted. Additional parking was added in 2008. Windows were replaced in 2009.

CAMPUS INVESTMENT

Budget: \$3.3 Million

Source: General Obligation Bond Proceeds and General Fund

Completion: 2009

HOWARD SCHOOL

286 Mace Road, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1972
Site Size (acres)	3.03
Building Size (square feet)	59,530
Available Teaching Stations	28
Grades	K-6
Enrollment	501
Capacity	607



CAMPUS ASSESSMENT

Facility is a single story structure built 40 years ago. The building is in good condition. The school site is limited in size. Grounds are available at the adjacent City Park. The site needs further security fencing added.

CAMPUS IMPROVEMENTS

In the summer of 2008, the building was renovated with new floor finishes and paint. In 2009, the boiler was replaced and the roof was replaced on the main building. In the summer of 2011, a fence was added on City property to secure the playground area.

CAMPUS INVESTMENT

Budget: \$1.11 Million

Source: General Obligation Bond Proceeds and General Fund

Completion: 2009

JACKSON SCHOOL

713 Summit Ave, Medford, OR

CAMPUS INFORMATION

Year of Construction/Renovations	2009
Site Size (acres)	4.52
Building Size (square feet)	55,804
Available Teaching Stations	18
Grades	K-6
Enrollment	394
Capacity	390



CAMPUS ASSESSMENT

The main building and gym are newly constructed in 2009. The 1949 addition, media center and cafeteria were newly renovated. The site has limited available parking.

CAMPUS IMPROVEMENTS

The new construction and renovation project provides students with a learning environment with air conditioning, natural light and durable materials.

CAMPUS INVESTMENT

Budget: \$12.96 Million
Source: General Obligation Bond Proceeds
Completion: January 2010

JACKSONVILLE SCHOOL

655 Hueners Lane, Jacksonville, OR

CAMPUS INFORMATION

Year of Original Construction	1954
Site Size (acres)	10.25
Building Size (square feet)	57,561
Available Teaching Stations	22
Grades	K-6
Enrollment	400
Capacity	477



CAMPUS ASSESSMENT

Facility is a single story structure built over 58 years ago. The building is in good condition.

CAMPUS IMPROVEMENTS

In the summer of 2007, a sidewalk was added at the school exit road to provide students a safe route to school. This facility was renovated in the summer of 2008. Current HVAC systems had minor upgrades. Asbestos and other hazardous materials were removed or properly contained. Flooring was replaced and the building interior and exterior was repainted. In 2009, security fencing was added to the campus.

CAMPUS INVESTMENT

Budget: \$ 915,000

Source: General Obligation Bond Proceeds and General Fund

Completion: 2009

JEFFERSON SCHOOL

333 Holmes Avenue, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1955
Site Size (acres)	13.14
Building Size (square feet)	52,943
Available Teaching Stations	24
Grades	K-6
Enrollment	505
Capacity	520



CAMPUS ASSESSMENT

Facility is a single story structure built over 57 years ago. The building was renovated in 2007. Additional classroom space will still need to be assessed in the future.

The City of Medford plans to extend Holly Street to Garfield in the summer of 2012.

CAMPUS IMPROVEMENTS

This facility was significantly renovated in 2007. It received new HVAC systems and controls to improve efficiency and comfort for learning. Flooring was replaced with easy-to-maintain durable material, the interior was refurbished. To improve site security corridors were added to connect campus buildings. Site fencing was added in 2009 to improve campus security.

CAMPUS INVESTMENT

Budget: \$4.64 Million

Source: General Obligation Bond Proceeds and General Fund

Completion: 2007

KENNEDY SCHOOL

2860 N. Keene Way Drive, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1977
Site Size (acres)	10.12
Building Size (square feet)	54,788
Available Teaching Stations	30
Grades	K-6
Enrollment	519
Capacity	650



CAMPUS ASSESSMENT

Facility is a single story structure built over 35 years ago. The building was recently renovated in 2007.

CAMPUS IMPROVEMENTS

This facility was significantly renovated in 2007. It received new HVAC systems and controls to improve efficiency and comfort for learning. Flooring was replaced with easy-to-maintain durable materials. Site fencing was added in 2009 to improve campus security.

CAMPUS INVESTMENT

Budget: \$2.37 Million

Source: General Obligation Bond Proceeds and General Fund

Completion: 2007

LONE PINE SCHOOL

3158 Lone Pine Road, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1926
Site Size (acres)	9.22
Building Size (square feet)	73,458
Available Teaching Stations	24
Grades	K-6
Enrollment	564
Capacity	520



CAMPUS ASSESSMENT

The campus is in very good condition with the new construction and full renovation of existing buildings.

CAMPUS IMPROVEMENTS

Two newly constructed building were completed in 2009. Two classroom wings with the media center were fully renovated. The new construction and renovated buildings will provide students with a learning environment with natural day lighting, air conditioning and durable materials.

CAMPUS INVESTMENT

Budget: \$15 Million
Source: General Obligation Bond Proceeds
Completion: 2009

OAK GROVE SCHOOL

2838 Jacksonville Highway, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1891
Site Size (acres)	12.50
Building Size (square feet)	59,355
Available Teaching Stations	24
Grades	K-6
Enrollment	492
Capacity	520



CAMPUS ASSESSMENT

The original building was built in 1891 with an addition of eight class rooms in 1996. The campus is in very good condition with the new construction and full renovation of existing buildings.

CAMPUS IMPROVEMENTS

New construction replaced the existing gym and administration space. All remaining classrooms, cafeteria, and media center were fully renovated with new mechanical and electrical systems, windows, flooring, interior finishes, casework, and roofing. The new construction and renovation provides students with a learning environment with air conditioning and durable materials.

CAMPUS INVESTMENT

Budget: \$10.1 Million
Source: General Obligation Bond Proceeds
Completion: 2009

ROOSEVELT SCHOOL

1212 Queen Anne Ave., Medford, OR

CAMPUS INFORMATION

Year of Construction/Renovations	2009
Site Size (acres)	4.50
Building Size (square feet)	51,002
Available Teaching Stations	18
Grades	K-6
Enrollment	406
Capacity	390



CAMPUS ASSESSMENT

The main building and gym are newly constructed. The 1949 addition, media center and cafeteria are newly renovated. The site has no off street parking available.

CAMPUS IMPROVEMENTS

The new construction and renovation project provides students with a learning environment with air conditioning, natural light and durable materials.

CAMPUS INVESTMENT

Budget: \$13.15 Million
Source: General Obligation Bond Proceeds
Completion: January 2010

RUCH SCHOOL

156 Upper Applegate Road, Jacksonville, OR

CAMPUS INFORMATION

Year of Original Construction	1913
Site Size (acres)	11.86
Building Size (square feet)	34,590
Available Teaching Stations	15
Grades	K-6
Enrollment	176
Capacity	325



CAMPUS ASSESSMENT

Facility is a single story structure. The original building is 99 years old. The buildings are in good condition. A modular building was recently added to replace to structures that were in poor condition.

CAMPUS IMPROVEMENTS

This facility was renovated in the summer of 2008. Current HVAC systems had minor upgrades. Asbestos and other hazardous materials were removed or properly contained. Flooring and other interior surfaces were replaced and renewed. The office was also reconfigured to improve security and day lighting.

In 2006, seismic upgrades were completed to the gym truss system.

CAMPUS INVESTMENT

Budget: \$1.24 Million

Source: General Obligation Bond Proceeds and General Fund

Completion: 2009

WASHINGTON SCHOOL

610 South Peach Street, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1931
Site Size (acres)	6.42
Building Size (square feet)	58,146
Available Teaching Stations	26
Grades	K-6
Enrollment	443
Capacity	564



CAMPUS ASSESSMENT

Facility is a multi-story structure built more than 81 years ago. This building was renovated in 2007 which included the construction of a new cafeteria.

CAMPUS IMPROVEMENTS

This facility was significantly renovated in 2007. It received new HVAC systems and controls to improve efficiency and comfort for learning. Flooring was replaced with easy-to-maintain durable materials; the interior was refurbished and painted. An elevator, front ramp and restroom upgrades have improved school accessibility. Additional parking and security fencing was added to the school in the summer of 2008.

There will be a seismic upgrade to the main building in the summer of 2011. This project of \$270,000 is funded through a state grant.

CAMPUS INVESTMENT

Budget: \$7.02 Million
Source: General Obligation Bond Proceeds
Completion: 2009

WILSON SCHOOL

1400 Johnson Street, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1958
Site Size (acres)	10.56
Building Size (square feet)	49,972
Available Teaching Stations	25
Grades	K-6
Enrollment	485
Capacity	542



CAMPUS ASSESSMENT

The facility is a single-story structure built more than 54 years ago. The building is in good condition and is structurally sound. The cafeteria space is not adequate.

CAMPUS IMPROVEMENTS

This facility was significantly renovated in 2008. It received new HVAC systems and controls to improve efficiency and comfort for learning. Flooring was replaced with easy-to-maintain durable material, the interior was refurbished and exterior was painted.

CAMPUS INVESTMENT

Budget: \$3.5 Million
Source: General Obligation Bond Proceeds and General Fund
Completion: 2008

EXISTING
MEDFORD SCHOOL DISTRICT EDUCATION CENTER

815 S. Oakdale, Medford, OR

CAMPUS INFORMATION

Year of Original Construction	1931
Site Size (acres)	19.20
Building Size (square feet)	251,721
Classrooms	78
Grades -MOHS	9-12
Enrollment	235
Capacity	334



CAMPUS ASSESSMENT

Facility is a multi-story structure built 81 years ago. It previously served this community as Medford High School (1931-1967), Medford Mid High School (1967-1986), and South Medford High School (1986-2010). Campus contains asbestos and lead throughout. All hazardous material is contained to prevent exposure. Interior finishes, flooring and painting are in fair to good condition.

CAMPUS IMPROVEMENTS

The 2006 Bond Measure 15-73 anticipated the opportunity to preserve this community asset and to consolidate district support services on this campus. The main building and annex have been renovated.

The athletic stadium, gym and athletic fields will be used for district and community events. The main building renovation was completed in 2011 and the annex renovation was completed in 2012.

CAMPUS INVESTMENT

Budget: \$5.7 million

Source: General Obligation Bond Proceeds and from the liquidation of surplus properties.

Completion: Spring 2012

ADMINISTRATION

500 Monroe St., Medford, OR

SITE INFORMATION

Year of Original Construction	1952
Site Size (acres)	.5
Building Size (square feet)	6,081
Office rooms	7
MSD employees	16
Capacity	20



SITE ASSESSMENT

Single story structure built more than 60 years ago. Asbestos material exists throughout the facility, but is contained. The building requires better general access to become compliant with the Americans with Disabilities Act (ADA). The back open parking lot is gravel and would need paved.

SITE IMPROVEMENTS

The site can be used for future district parking.

SITE INVESTMENT

Minimal investment while building remains occupied.

This site is currently being leased by Maslow Project. Tenant improvements to the building included exterior painting, HVAC upgrades, and interior finishes.

ADMINISTRATION ANNEX

600 whitman place, Medford, OR

SITE INFORMATION

Year of Original Construction	Unknown-
Remodeled	1975-
Site Size (acres)	.5
Building Size (square feet)	7,234
Offices	23
Current Occupancy	50
Capacity	40



SITE ASSESSMENT

Building converted from apartment building into office space around 1975. Heating, ventilating and cooling (HVAC) systems are aging and inefficient. Asbestos material exists throughout the facility, but is contained. Flooring is worn and needs replaced. The building requires better general access to become compliant with the Americans with Disabilities Act (ADA). Space layout is not efficient for operations. The site does not have adequate parking.

SITE IMPROVEMENTS

This site is available to liquidate.

SITE INVESTMENT

No future investment needed.

MAINTENANCE / NTS (OLD HOWARD SCHOOL)

2801 Merriman Rd., Medford, OR

SITE INFORMATION

Year of Original Construction	1912
Site Size (acres)	2.85
Building Size (square feet)	31,170
Office rooms	7
MSD employees	40
Sodexo employees	8
Capacity	45



SITE ASSESSMENT

Facility is a multi-story structure built more than 100 years ago. Heating, ventilating and air conditioning (HVAC) systems are aging and inefficient. Asbestos material exists throughout the facility, but is contained. Flooring is worn and needs replaced. The building requires better general access to become compliant with the Americans with Disabilities Act (ADA). Space layout and location is not efficient for operations. There is a large open parking area for employees and equipment that is graveled.

SITE IMPROVEMENTS

This site is available to liquidate.

SITE INVESTMENT

No future investment needed.

DISTRIBUTION CENTER

750 N. Columbus Ave., Medford, OR

SITE INFORMATION

Year of Original Construction	1959
Site Size (acres)	1
Building Size (square feet)	18,083
Office rooms	7
Employees	6
Capacity	10



SITE ASSESSMENT

Main building is a single story warehouse. A refrigeration building is located 4 ft behind warehouse; a storage building is attached to the side of the warehouse. Two Additional buildings are carports one with concrete floors & rear walls the other open on two ends. Large gravel parking and open area for outdoor storage.

SITE IMPROVEMENTS

This site is available to liquidate.

SITE INVESTMENT

If the property is not liquidated soon, roofing will be required.

APPENDIX B – CAPITAL IMPROVEMENT PLAN

**Medford School District 549C
2012 ANNUAL CAPITAL IMPROVEMENT PLAN**

Schools and District Facilities	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	20 year total by site
Abraham Lincoln	\$28,000	\$60,000	\$45,000	\$20,000	\$0	\$0	\$105,000	\$0	\$80,000	\$80,000	\$0	\$0	\$0	\$20,000	\$0	\$45,000	\$0	\$0	\$0	\$80,000	\$65,000	\$628,000
Griffin Creek	\$160,000	\$42,000	\$120,000	\$44,000	\$0	\$0	\$30,000	\$0	\$0	\$0	\$0	\$0	\$0	\$36,000	\$50,000	\$0	\$0	\$0	\$120,000	\$0	\$0	\$602,000
Hedrick	\$49,000	\$0	\$90,000	\$120,000	\$400,000	\$0	\$80,000	\$0	\$0	\$0	\$240,000	\$15,000	\$45,000	\$0	\$180,000	\$0	\$0	\$0	\$15,000	\$0	\$20,000	\$1,254,000
Hoover	\$20,000	\$39,000	\$0	\$0	\$0	\$110,000	\$30,000	\$20,000	\$42,000	\$50,000	\$0	\$0	\$0	\$0	\$0	\$0	\$30,000	\$20,000	\$0	\$120,000	\$0	\$481,000
Howard	\$141,000	\$12,000	\$12,000	\$0	\$0	\$50,000	\$110,000	\$140,000	\$40,000	\$30,000	\$12,000	\$0	\$0	\$0	\$0	\$60,000	\$0	\$0	\$12,000	\$0	\$60,000	\$679,000
Jackson	\$0	\$0	\$0	\$0	\$20,000	\$0	\$15,000	\$60,000	\$0	\$0	\$30,000	\$0	\$0	\$20,000	\$0	\$0	\$15,000	\$60,000	\$0	\$0	\$20,000	\$240,000
Jacksonville	\$40,000	\$175,000	\$20,000	\$55,000	\$0	\$0	\$0	\$60,000	\$0	\$0	\$20,000	\$0	\$0	\$0	\$0	\$35,000	\$135,000	\$0	\$0	\$0	\$0	\$540,000
Jefferson	\$25,000	\$32,000	\$80,000	\$0	\$0	\$0	\$0	\$0	\$65,000	\$0	\$0	\$0	\$20,000	\$0	\$60,000	\$0	\$0	\$36,500	\$0	\$120,000	\$0	\$438,500
Kennedy	\$0	\$20,000	\$0	\$0	\$120,000	\$15,000	\$10,000	\$50,000	\$45,000	\$55,000	\$0	\$0	\$0	\$0	\$60,000	\$0	\$160,000	\$0	\$0	\$0	\$0	\$535,000
Lone Pine	\$0	\$0	\$0	\$0	\$0	\$65,000	\$0	\$60,000	\$40,000	\$20,000	\$0	\$60,000	\$0	\$65,000	\$0	\$0	\$0	\$60,000	\$20,000	\$0	\$0	\$390,000
North High School	\$25,000	\$20,000	\$35,000	\$65,000	\$0	\$0	\$20,000	\$0	\$50,000	\$60,000	\$210,000	\$240,000	\$200,000	\$195,000	\$0	\$0	\$200,000	\$0	\$60,000	\$270,000	\$0	\$1,650,000
McLoughlin	\$24,000	\$15,000	\$0	\$160,000	\$0	\$230,000	\$0	\$0	\$135,000	\$240,000	\$0	\$0	\$0	\$0	\$140,000	\$15,000	\$3,000	\$60,000	\$0	\$0	\$0	\$1,022,000
Oak Grove	\$30,000	\$0	\$100,000	\$35,000	\$0	\$0	\$30,000	\$0	\$0	\$80,000	\$0	\$0	\$0	\$0	\$0	\$35,000	\$20,000	\$0	\$60,000	\$0	\$0	\$390,000
Roosevelt	\$0	\$10,000	\$0	\$0	\$0	\$0	\$15,000	\$40,000	\$0	\$0	\$30,000	\$10,000	\$0	\$0	\$0	\$0	\$15,000	\$60,000	\$0	\$0	\$0	\$180,000
Ruch	\$20,000	\$45,000	\$20,000	\$0	\$0	\$0	\$35,000	\$35,000	\$25,000	\$0	\$0	\$0	\$20,000	\$0	\$60,000	\$0	\$0	\$0	\$160,000	\$37,000	\$0	\$457,000
South High	\$30,000	\$0	\$0	\$20,000	\$0	\$0	\$80,000	\$0	\$20,000	\$0	\$0	\$0	\$350,000	\$180,000	\$0	\$80,000	\$0	\$0	\$20,000	\$140,000	\$0	\$920,000
Washington	\$25,000	\$0	\$0	\$0	\$0	\$0	\$60,000	\$25,000	\$60,000	\$0	\$145,000	\$0	\$0	\$0	\$60,000	\$60,000	\$0	\$85,000	\$0	\$0	\$0	\$520,000
Wilson	\$0	\$0	\$20,000	\$55,000	\$0	\$70,000	\$25,000	\$0	\$60,000	\$0	\$0	\$0	\$20,000	\$0	\$0	\$0	\$85,000	\$340,000	\$0	\$0	\$0	\$675,000
MSD Education Center/Annex	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$160,000	\$0	\$20,000	\$0	\$0	\$0	\$0	\$80,000	\$0	\$20,000	\$0	\$0	\$0	\$40,000	\$320,000
MSD Education Center	\$80,000	\$180,000	\$90,000	\$0	\$140,000	\$0	\$0	\$0	\$0	\$120,000	\$0	\$360,000	\$0	\$140,000	\$0	\$240,000	\$0	\$0	\$0	\$0	\$120,000	\$1,470,000
MSD Ed Center-Gym	\$0	\$0	\$70,000	\$0	\$0	\$20,000	\$30,000	\$40,000	\$0	\$0	\$0	\$0	\$20,000	\$0	\$160,000	\$0	\$0	\$0	\$0	\$0	\$60,000	\$400,000
MSD ED Center-Stadium/Track	\$0	\$0	\$0	\$220,000	\$15,000	\$140,000	\$25,000	\$30,000	\$0	\$15,000	\$0	\$100,000	\$0	\$0	\$0	\$15,000	\$0	\$140,000	\$220,000	\$220,000	\$0	\$1,140,000
New School Facilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$18,000,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$18,000,000
TOTAL ALL SITES PER YEAR	\$697,000	\$650,000	\$702,000	\$794,000	\$695,000	\$700,000	\$700,000	\$18,720,000	\$662,000	\$770,000	\$687,000	\$785,000	\$675,000	\$656,000	\$850,000	\$585,000	\$683,000	\$861,500	\$687,000	\$987,000	\$385,000	\$32,931,500
5 year Average Annual Capital	\$707,600																					
10 year Average Annual Capital	\$709,000																					
20 year Average Annual Capital	\$727,325																					

Replacement Expenses	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	
Furniture Replacement	\$ 36,600	\$ 36,600	\$ 36,600	\$ 36,600	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	\$ 114,200	
Computer Replacement	\$ 525,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 525,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 525,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 375,000	
Vehicle Replacement	\$ 25,000	\$ 25,000	\$ 25,000	\$ -	\$ 50,000	\$ 50,000	\$ 50,000	\$ 75,000	\$ 75,000	\$ 110,000	\$ 100,000	\$ 70,000	\$ 55,000	\$ 60,000	\$ 25,000	\$ -	\$ 50,000	\$ 50,000	\$ 25,000	\$ 100,000	\$ -	
TOTAL ALL SITES PER YEAR	\$586,600	\$436,600	\$436,600	\$411,600	\$539,200	\$539,200	\$539,200	\$564,200	\$714,200	\$599,200	\$589,200	\$559,200	\$544,200	\$549,200	\$514,200	\$489,200	\$689,200	\$539,200	\$514,200	\$589,200	\$489,200	
5 year Average Annual Capital	\$482,120																					
10 year Average Annual Capital	\$536,660																					
20 year Average Annual Capital	\$571,640																					
New school construction	\$0	\$18,000,000	\$0	\$0																		

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	
TOTAL CAPITAL PER YEAR	\$1,283,600	\$1,086,600	\$1,138,600	\$1,205,600	\$1,234,200	\$1,239,200	\$1,239,200	\$19,284,200	\$1,376,200	\$1,369,200	\$1,276,200	\$1,344,200	\$1,219,200	\$1,205,200	\$1,364,200	\$1,074,200	\$1,372,200	\$1,400,700	\$1,201,200	\$1,576,200	\$874,200	
5 yr Total Average Annual Capital	\$1,189,720																					
10 year Average Annual Capital	\$3,045,660																					
20 yr Total Average Annual Capital	\$2,218,215																					

INFLATION ADJUSTMENT																					
2% Inflation Projection	\$ 1,309,272	\$ 1,130,064	\$ 1,206,916	\$ 1,302,048	\$ 1,357,620	\$ 1,387,904	\$ 1,412,688	#####	\$ 1,623,916	\$ 1,643,040	\$ 1,556,964	\$ 1,666,808	\$ 1,536,192	\$ 1,542,656	\$ 1,773,460	\$ 1,417,944	\$ 1,838,748	\$ 1,904,952	\$ 1,657,656	\$ 2,206,680	\$ 1,223,880

5 yr Total Average Annual Capital	\$ 1,261,184
10 year Average Annual Capital	\$3,474,314
20 yr Total Average Annual Capital	\$ 2,653,454

CAPITAL IMPROVEMENT PLAN

ABRAHAM LINCOLN																							
<i>Scope of Work</i>	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
ROOF REPLACEMENTS																							
MAIN BUILDING METAL																			eval		\$80,000		
Cafeteria							eval		\$30,000														
Gym							eval		\$50,000														
PAINTING																							
Exterior (New 2008)					eval		\$45,000							eval		\$45,000							
FLOORING																							
Carpet		\$60,000																					
VCT-Linoleum			\$45,000																				
Gym																							
DOORS/ DOOR HARDWARE																							
WINDOWS																							
MECHANICAL																							
HVAC Systems																						\$65,000	
Boilers																							
Chillers																							
Piping Systems																							
Kitchen Equipment																							
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom	\$28,000						\$60,000																
GROUNDS																							
Track																							
Fields				\$20,000										\$20,000									
Fences/Gates																							
Playground Equipment																							Site Funded
PARKING LOTS																							
Lighting																							
Overlay Repair										\$80,000													
Sidewalk / Concrete																							
	\$28,000	\$60,000	\$45,000	\$20,000	\$0	\$0	\$105,000	\$0	\$80,000	\$80,000	\$0	\$0	\$0	\$20,000	\$0	\$45,000	\$0	\$0	\$0	\$80,000	\$65,000		

CAPITAL IMPROVEMENT PLAN

GRIFFIN CREEK																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
Glass walls around MC		\$26,000																					
ROOF REPLACEMENTS																							
Main bld --- single ply																	eval		\$120,000				
Classroom blds BUR	\$110,000																						
Gym																							
PAINTING																							
Exterior		\$16,000										eval		\$16,000									
FLOORING																							
Carpet					eval		\$30,000																
Linoleum																							
GYM-Tarkett																							
DOORS/ DOOR HARDWARE																							
WINDOWS			\$120,000																				Energy Grants may help with funding
MECHANICAL																							
HVAC Systems																							
Boilers																							
Chillers																							
Piping Systems																							
Kitchen Equipment				\$14,000																			Dishwasher
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Camera/Phone	\$50,000																						
GROUNDS																							
Track				\$10,000																			
Fields				\$20,000										\$20,000									
Fences/Gates																							
Playground Equipment																							Site Funded
PARKING LOT																							
Lighting																							
Overlay Upgrade														eval	\$50,000								Gravel staff parking is not scheduled to surface
Sidewalk / Concrete																							
	\$160,000	\$42,000	\$120,000	\$44,000	\$0	\$0	\$30,000	\$0	\$0	\$0	\$0	\$0	\$0	\$36,000	\$50,000	\$0	\$0	\$0	\$0	\$120,000	\$0	\$0	

CAPITAL IMPROVEMENT PLAN

HEDRICK																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
ROOF REPLACEMENTS																							
Keenway wing													eval		\$180,000								
Main Building	\$25,000		eval		\$180,000																		
Gym		eval	\$90,000																				Aux. gym 2011 and main gym 2015
PAINTING																							
Exterior			eval		\$45,000						eval	\$45,000											
FLOORING																							
Carpet												\$180,000											
VCT - Linoleum	\$24,000											\$60,000											
Gym Wood floors																							
DOORS/ DOOR HARDWARE																							
WINDOWS																							
MECHANICAL																							
HVAC Systems																							\$20,000
Boilers				\$100,000																			
Chillers																							
Piping System				\$20,000																			
Kitchen Equipment																							
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom																							
GROUNDS																							
Track				eval	\$160,000																		
Fields					\$15,000							\$15,000											\$15,000
Fences/Gates																							
PARKING LOTS																							
Overlay upgrade							\$80,000																
Lighting																							
Sidewalk / Concrete																							
	\$49,000	\$0	\$90,000	\$120,000	\$400,000	\$0	\$80,000	\$0	\$0	\$0	\$240,000	\$15,000	\$45,000	\$0	\$180,000	\$0	\$0	\$0	\$15,000	\$0	\$20,000		

CAPITAL IMPROVEMENT PLAN

HOOVER																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
ROOF																							
Main buildings &walkways																		eval		\$120,000			
Office Area		\$15,000																					
Media Center																							
Rms 55-56	eval	\$24,000																					
Gym and Cafeteria				eval		\$110,000																	
FLOORING																							
Carpet					eval		\$30,000								eval		\$30,000						
Linoleum																							
PAINTING																							
Exterior							eval		\$42,000														
DOORS/ DOOR HARDWARE																							
WINDOWS																							
MECHANICAL																							
HVAC Systems																							
Boilers																							
Chillers																							
Piping System																							
Kitchen Equipment																							
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom	\$20,000																						
PARKING LOTS																							
Lighting																							
Overlay Upgrades										\$35,000													
GROUNDS																							
Track																							
Fields								\$20,000										\$20,000					
Fences/Gates																							
Playground Equipment																							Site Funded
Sidewalk / Concrete										\$15,000													
	\$20,000	\$39,000	\$0	\$0	\$0	\$110,000	\$30,000	\$20,000	\$42,000	\$50,000	\$0	\$0	\$0	\$0	\$0	\$0	\$30,000	\$20,000	\$0	\$120,000	\$0		

CAPITAL IMPROVEMENT PLAN

HOWARD																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
ROOF																							
Main Building 1					eval		\$110,000																
Classrooms 24-26																							
Classrooms 27-32																							
Gym & Cafeteria						eval		\$140,000															
PAINTING																							
Exterior			\$12,000						eval		\$12,000						eval		\$12,000				
FLOORING																							
Carpet							eval		\$40,000														
Linoleum																							
Gym Floor																							
DOORS/DOOR HARDWARE																							
WINDOWS-Skylights	\$26,000																						
MECHANICAL																							
HVAC Systems	\$95,000									\$30,000												\$60,000	
Boilers																							
Chillers																							
Piping System																							
Kitchen Equipment		\$12,000																					Oven
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom	\$20,000																\$60,000						
GROUNDS																							
Track																							
Fields																							Howard Fields are on City Property
Fences/Gates																							
Playground Equipment																							Site Funded
PARKING LOTS																							
Lighting																							
Overlay upgrade							\$40,000																
Sidewalk / Concrete							\$10,000																
	\$141,000	\$12,000	\$12,000	\$0	\$0	\$50,000	\$110,000	\$140,000	\$40,000	\$30,000	\$12,000	\$0	\$0	\$0	\$0	\$60,000	\$0	\$0	\$12,000	\$0	\$60,000		

CAPITAL IMPROVEMENT PLAN

JACKSON																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
ROOF REPLACEMENT																							
Main Building																							
1949 addition (existing 08)																					eval		
Cafeteria							eval	\$40,000													eval		
GYM																						eval	
PAINTING																							
Exterior						eval	\$15,000									eval	\$15,000						
FLOORING																							
Carpet										eval	\$30,000												
Linoleum																							
DOORS/ DOOR HARDWARE																							
WINDOWS																							
MECHANICAL																							\$20,000
HVAC System																							
Boilers																							
Chillers																							
Piping Systems																							
Kitchen Equipment																							
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom																						\$60,000	
Parking lots																							
Overlay								\$20,000															
Lighting																							
GROUNDS																							
Track																							
Fields					\$20,000									\$20,000									
Fences/Gates																							
Playground Equipment																							Site Funded
Sidewalk / Concrete																							
TOTAL PER YEAR	\$0	\$0	\$0	\$0	\$20,000	\$0	\$15,000	\$60,000	\$0	\$0	\$30,000	\$0	\$0	\$20,000	\$0	\$0	\$15,000	\$60,000	\$0	\$0	\$20,000		

CAPITAL IMPROVEMENT PLAN

JEFFERSON																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
ROOF REPLACEMENTS																							
MAIN BUILDING BUR																							
SINGLE PLY		eval	\$60,000															eval		\$120,000			
PAINTING																							
Exterior							eval		\$35,000							eval		\$36,500					
FLOORING																							
Carpet							eval		\$30,000														
Linoleum																							
DOORS/DOOR HARDWARE																							
WINDOWS																							
MECHANICAL																							
HVAC System	\$25,000																						
Boilers																							
Chillers																							
Piping Systems																							
Kitchen Equipment		\$12,000																					Ovens
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom		\$20,000														\$60,000							
GROUNDS																							
Track																							
Fields			\$20,000										\$20,000										
Fences/Gates																							
Playground																							
PARKING LOT																							
Lighting																							Maintain existing
Overlay upgrade																							
Sidewalk / Concrete																							
	\$25,000	\$32,000	\$80,000	\$0	\$0	\$0	\$0	\$0	\$65,000	\$0	\$0	\$0	\$20,000	\$0	\$60,000	\$0	\$0	\$36,500	\$0	\$120,000	\$0		

CAPITAL IMPROVEMENT PLAN

KENNEDY																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
ROOF REPLACEMENT																							
MAIN BLD BUR			eval		\$120,000																		
Cafeteria building															eval		\$80,000						
Gym Building															eval		\$80,000						
PAINTING																							
Exterior								eval		\$55,000													
FLOORING																							
Carpet								eval		\$45,000													
Linoleum																							Cafeteria
Gym existing Tarkett																							
DOORS/DOOR HARDWARE																							
WINDOWS																							
MECHANICAL																							
Boilers																							
Chillers																							
Piping System																							
Duct System																							
HVAC System								\$15,000															
Plumbing Fixtures																							
Kitchen Equipment																							
ELECTRICAL																							
GFIC Upgrades																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom			\$20,000													\$60,000							
GROUNDS																							
Tracks																							
Fields								\$10,000															
Fences/Gates																							
Playground																							
PARKING LOT / ASPHALT																							
Lighting																							
Overlay Upgrade								\$50,000															
Sidewalk / Concrete																							
	\$0	\$20,000	\$0	\$0	\$120,000	\$15,000	\$10,000	\$50,000	\$45,000	\$55,000	\$0	\$0	\$0	\$0	\$60,000	\$0	\$160,000	\$0	\$0	\$0	\$0		

CAPITAL IMPROVEMENT PLAN

LONE PINE																						
<i>Scope of Work</i>	<i>2012-13</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>	<i>2018-19</i>	<i>2019-20</i>	<i>2020-21</i>	<i>2021-22</i>	<i>2022-23</i>	<i>2023-24</i>	<i>2024-25</i>	<i>2025-26</i>	<i>2026-27</i>	<i>2027-28</i>	<i>2028-29</i>	<i>2029-30</i>	<i>2030-31</i>	<i>2031-32</i>	<i>2032-33</i>	<i>COMMENTS</i>
RENOVATION PROJECTS																						
ROOF REPLACEMENT																						
Main bld 2009																						
Ramp #1																						
Ramp #2																						
Media Center - Metal																						
PAINTING																						
Exterior				eval		\$65,000						eval		\$65,000								
FLOORING																						
Carpet								eval	\$40,000													
VCT -- Linoleum																						
DOORS/DOOR HARDWARE																						
WINDOWS																						
MECHANICAL																						
HVAC Systems												\$60,000										
Boilers																						
Chillers																						
Piping Systems																						
Kitchen Equipment																						
ELECTRICAL																						
Panel Upgrades																						
Lighting																						
Security/Fire/Intercom																		\$60,000				
GROUNDS																						
Track																						
Fields										\$20,000									\$20,000			
Fences/Gates																						
Playgrounds																						Site Funded
PARKING LOTS																						
Lighting																						Maintain existing
Overlay upgrade								\$60,000														
Sidewalk / Concrete																						Maintain existing
	\$0	\$0	\$0	\$0	\$0	\$65,000	\$0	\$60,000	\$40,000	\$20,000	\$0	\$60,000	\$0	\$65,000	\$0	\$0	\$0	\$60,000	\$20,000	\$0	\$0	

CAPITAL IMPROVEMENT PLAN

NORTH HIGH																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
Storage Building	\$25,000																						
ROOF																							
Building FA		eval		\$65,000														eval		\$30,000			
Building Cafeteria																							
Building Gym																							
Building Science												eval		\$195,000									
Building Media Center Commons																		eval		\$30,000			
Building Administration																		eval		\$35,000			
Building Tech Arts																		eval		\$35,000			
Building TA-B																							
Building HC																							
Building H																							
Building CC	eval		\$15,000															eval		\$20,000			
PAINTING																							
Exterior							eval		\$50,000	\$60,000								eval		\$60,000	\$60,000		
FLOORING																							
CARPET									eval		\$210,000											\$40,000	
VCT-Linoleum																							
GYM Flooring																							
DOORS/DOOR HARDWARE																							
WINDOWS																							
MECHANICAL																							
HVAC Systems			\$20,000										\$40,000										
Boilers																							
Chillers																							
Piping System																							
Kitchen Equipment																							
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom																						\$140,000	
GROUNDS																							
Track											Eval		\$160,000				eval						
Fields-Tennis 2011											Eval	\$220,000											Tennis 2011, Turf 2024
Natural Fields		\$20,000					\$20,000					\$20,000					\$20,000						
Fences/Gates																							
STUDENT PARKING LOT																							
Lighting / overlay													eval										
Main parking lot																							
Lighting / overlay-FA 2011													eval										
GYM parking																							
Lighting																							
Overlay													eval										
SIDEWALK / CONCRETE																							
	\$25,000	\$20,000	\$35,000	\$65,000	\$0	\$0	\$20,000	\$0	\$50,000	\$60,000	\$210,000	\$240,000	\$200,000	\$195,000	\$0	\$0	\$200,000	\$0	\$60,000	\$270,000	\$0		

CAPITAL IMPROVEMENT PLAN

McLOUGHLIN																						
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS
RENOVATION PROJECTS																						
Demo Annex																						
ROOF																						
Main Building				eval		\$ 210,000																
Black Gym METAL																						
Gold Gym													eval		\$ 140,000							
PAINTING																						
Exterior							eval		\$ 40,000													
FLOORING																						
Carpet								eval		\$ 180,000												
VCT or Linolium	\$ 24,000							eval		\$ 60,000												
DOORS/DOOR HARDWARE																						
WINDOWS																						
MECHANICAL																						
HVAC Systems																						
Boilers																						
Chillers																						
Piping System																						
Kitchen Equipment																						
ELECTRICAL																						
Panel Upgrades																						
Lighting																						
Security/Fire/Intercom																		\$ 60,000				
GROUNDS																						
Track			eval	\$ 160,000																		
Fields		\$ 15,000							\$ 15,000							\$ 15,000						
Irrigation systems																						
Fences/Gates																						
PARKING LOT																						
Lighting																						
Overlay upgrade									\$ 80,000								\$ 3,000					
Sidewalk / Concrete						\$ 20,000																
	\$ 24,000	\$ 15,000	\$ -	\$ 160,000	\$ -	\$ 230,000	\$ -	\$ -	\$ 135,000	\$ 240,000	\$ -	\$ -	\$ -	\$ -	\$ 140,000	\$ 15,000	\$ 3,000	\$ 60,000	\$ -	\$ -	\$ -	

CAPITAL IMPROVEMENT PLAN

OAK GROVE																						
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS
RENOVATION PROJECTS																						
ROOF																						
BLD - A																						
BLD - C																						
BLD - D																						
BLD - E			\$40,000																			
BLD - F																						
BLD - G	eval		\$60,000																			
BLD - H																						
PAINTING																						
Exterior				\$35,000										eval		\$35,000						
FLOORING																						
Carpet								eval		\$80,000												
VCT-Linoleum																						
DOOR HARDWARE																						
WINDOWS																						
MECHANICAL																						
HVAC Systems																						
Boilers																						
Chillers																						
Piping Systems																						
Kitchen Equipment																						
ELECTRICAL																						
Panel Upgrades																						
Lighting																						
Security/Fire/Intercom	\$30,000																					\$60,000
GROUNDS																						
Track							\$10,000															
Fields							\$20,000										\$20,000					
Fences/Gates																						
Playground																						Site Funded
PARKING LOTS																						
Lighting																						
Overlay upgrade																						
Sidewalk / Concrete																						
	\$30,000	\$0	\$100,000	\$35,000	\$0	\$0	\$30,000	\$0	\$0	\$80,000	\$0	\$0	\$0	\$0	\$0	\$35,000	\$20,000	\$0	\$60,000	\$0	\$0	

CAPITAL IMPROVEMENT PLAN

RUCH																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
ROOF																							
Main Building																	eval		\$80,000				
Music Building		\$25,000																					
North Wing																	eval		\$80,000				
South Wing																							
East Wing																							
PAINTING																							
Exterior							eval	\$35,000											eval		\$37,000		
FLOORING																							
Carpet								eval	\$25,000														
VCT-Linoleum																							
DOOR HARDWARE																							
WINDOWS																							
MECHANICAL																							
HVAC Systems	\$20,000																						
Boilers																							
Chillers																							
Piping Systems																							
Kitchen Equipment																							
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom		\$20,000														\$60,000							
GROUNDS																							
Track																							
Fields			\$20,000										\$20,000										
Fences/Gates																							
PARKING LOTS																							
Lighting																							
Overlay/Replacement							\$35,000																
Sidewalk / Concrete																							
	\$20,000	\$45,000	\$20,000	\$0	\$0	\$0	\$35,000	\$35,000	\$25,000	\$0	\$0	\$0	\$20,000	\$0	\$60,000	\$0	\$0	\$0	\$160,000	\$37,000	\$0		

CAPITAL IMPROVEMENT PLAN

SOUTH HIGH NEW																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
ROOF REPLACEMENT																							
Bld 1																							eval
Bld 2																							eval
Bld 3																							eval
Bld 4																							eval
Bld 5																							eval
PAINTING																							
Exterior						eval	\$80,000								eval	\$80,000							
FLOORING																							
CARPET												eval	\$120,000										
VCT-Linoleum																							
GYM Flooring																							
DOORS/DOOR HARDWARE																							
WINDOWS																							
MECHANICAL																							
HVAC System																							
Boilers																							
Chillers																							
Piping Systems																							
Kitchen Equipment																							
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom																							\$140,000
GROUNDS																							
Track														eval	\$160,000								
Turf Field												eval	\$230,000										
Natural Fields				\$20,000					\$20,000											\$20,000			
Irrigation systems																							
Fences/Gates																							
Field Buildings																							
Sidewalk / Concrete																							maintain existing
PARKING LOTS																							
Right turn lane	\$30,000																						Modify exit on Cunningham
Overlay																							
	\$30,000	\$0	\$0	\$20,000	\$0	\$0	\$80,000	\$0	\$20,000	\$0	\$0	\$0	\$350,000	\$180,000	\$0	\$80,000	\$0	\$0	\$20,000	\$140,000	\$0		

CAPITAL IMPROVEMENT PLAN

WASHINGTON																								
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS		
RENOVATION PROJECTS																								
ROOFING																								
MAIN BLD																								
1949 Addition									eval		\$45,000							eval		\$85,000				
GYM									eval		\$45,000													
MEDIA CENTER & CL 10-11									eval		\$45,000													
PAINTING																								
Exterior						eval		\$60,000									eval		\$60,000					
FLOORING																								
Carpet								eval		\$60,000														
Linoleum																								
DOORS/DOOR HARDWARE																								
WINDOWS																								
MECHANICAL																								
HVAC Systems	\$25,000							\$25,000															2013 Media Center, 2020 Classroom units	
Boilers																								
Chillers																								
Piping Systems																								
Kitchen Equipment																								
ELECTRICAL																								
Panel Upgrades																								
Lighting																								
Security/Fire/Intercom																	\$60,000							
GROUNDS																								
Track																								
Fields												\$10,000												
Irrigation systems																								
Fences/Gates																								
PARKING LOTS / Asphalt																								
Lighting																								
Overlay																								
Sidewalk / Concrete																								
	\$25,000	\$0	\$0	\$0	\$0	\$0	\$60,000	\$25,000	\$60,000	\$0	\$145,000	\$0	\$0	\$0	\$60,000	\$60,000	\$0	\$85,000	\$0	\$0	\$0			

CAPITAL IMPROVEMENT PLAN

MSD ED CENTER ANNEX																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
ROOF																							
Annex						eval		\$160,000															
PAINTING																							
Exterior															eval		\$20,000						
FLOORING																							
Carpet													eval		\$60,000								
Linoleum - VCT																							
DOORS/DOOR HARDWARE																							
WINDOWS																							
MECHANICAL																							
HVAC Systems										\$20,000												\$40,000	
Boilers																							
Chillers																							
Piping Systems																							
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom															\$20,000								
GROUNDS																							
Fences/Gates																							
Parking lot																							
Lighting																							
Overlay																							
Sidewalk / Concrete																							
	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$160,000	\$0	\$20,000	\$0	\$0	\$0	\$0	\$80,000	\$0	\$20,000	\$0	\$0	\$0	\$40,000		

CAPITAL IMPROVEMENT PLAN

MSD Educational Center																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
ROOF REPLACEMENT																							
Main Building										eval		\$220,000											
South Addition																							
North Addition																							
PAINTING																							
Exterior	\$40,000													eval		\$160,000							
FLOORING																							
Carpet										eval		\$140,000											
VCT-Linoleum																							
DOORS/ DOOR HARDWARE																							
WINDOWS	\$40,000	\$180,000	\$90,000																				Could be Grant Funded
MECHANICAL																							
HVAC Systems																						\$120,000	
Boilers																							
Chiller								eval		\$120,000													
Piping Systems																							
Kitchen Equipment																							
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom																\$80,000							
PARKING LOTS																							
Lighting																							
Overlay					\$140,000							eval		\$140,000									
Sidewalk / Concrete																							
	\$80,000	\$180,000	\$90,000	\$0	\$140,000	\$0	\$0	\$0	\$0	\$120,000	\$0	\$360,000	\$0	\$140,000	\$0	\$240,000	\$0	\$0	\$0	\$0	\$0	\$120,000	

CAPITAL IMPROVEMENT PLAN

MSD Educational Center-GYM																							
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	COMMENTS	
RENOVATION PROJECTS																							
ROOF REPLACEMENTS																							
GYM													eval		\$160,000								
PAINTING																							
Exterior-Seal Concrete			\$70,000																				
FLOORING																							
MAIN BLD				eval		\$20,000																	
Gym							\$15,000																
Aux-Gyms							\$15,000																
WINDOWS/DOORS						eval		\$40,000															
MECHANICAL																							
HVAC Systems																							\$60,000
Boilers																							
Chillers																							
Piping Systems																							
ELECTRICAL																							
Panel Upgrades																							
Lighting																							
Security/Fire/Intercom													\$20,000										
PARKING LOTS																							
Lighting																							
Overlay																							
Sidewalk / Concrete																							
	\$0	\$0	\$70,000	\$0	\$0	\$20,000	\$30,000	\$40,000	\$0	\$0	\$0	\$0	\$20,000	\$0	\$160,000	\$0	\$0	\$0	\$0	\$0	\$0	\$60,000	

CAPITAL IMPROVEMENT PLAN

MSD Educational Center-Stadium																						
Scope of Work	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	
RENOVATION PROJECTS																						
ROOFING																						
Stadium																	eval	\$80,000				
Visitor Section																	eval	\$60,000				
PAINTING																						
Exterior										eval		\$100,000										
FLOORING																						
Restrooms							\$25,000															
WINDOWS/DOORS								\$30,000														
MECHANICAL																						
Mechanical Upgrade																						
Piping System																						
Duct System																						
Exhaust Fans																						
Plumbing Fixtures																						
Hot Water Heater																						
GROUNDS																						
Natural Fields					\$15,000					\$15,000						\$15,000						
Track				eval		\$140,000																
Artificial Turf		eval		\$220,000													eval		\$220,000			
ELECTRICAL																						
Panel Upgrades																						
Lighting																						
Security/Fire/Intercom																						
PARKING LOTS																						
Lighting																						
Overlay																						
Sidewalk / Concrete																						
	\$0	\$0	\$0	\$220,000	\$15,000	\$140,000	\$25,000	\$30,000	\$0	\$15,000	\$0	\$100,000	\$0	\$0	\$0	\$15,000	\$0	\$140,000	\$220,000	\$0	\$0	

CAPITAL IMPROVEMENT PLAN

Furniture Purchases	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	
Enrollment Growth 2.2%																						
Elementary Growth	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400	14,400
HS/MS Growth	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	\$17,200	17,200
Replacement Cycle-20yr life																						
Elementary Replacement					\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	\$32,600	32,600
HS/MS Replacement					\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	40,000
Administration Furniture	\$5,000	\$5,000	\$5,000	\$5,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	10,000
Total Furniture	\$36,600	\$36,600	\$36,600	\$36,600	\$114,200																	

NTS Purchases	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	
Computer Replacement	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000	375,000
Switching Equipment -8 yr cycle	\$150,000								\$150,000								\$150,000					
TOTAL ALL SITES PER YEAR	\$525,000	\$375,000	\$525,000	\$375,000	\$525,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000												
Computer Replacement Cycle is 7 years																						

Vehicle Purchases	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
Mechanical						\$25,000	\$25,000	\$50,000				\$45,000						\$25,000	\$25,000	\$50,000	
Carpentry	\$25,000	\$25,000	\$25,000				\$25,000		\$50,000	\$50,000	\$25,000				\$25,000					\$25,000	
Grounds											\$25,000		\$30,000	\$35,000							
Custodial									\$25,000				\$25,000								
NTS					\$50,000	\$25,000						\$25,000					\$50,000	\$25,000			
Distribution Center								\$25,000		\$60,000				\$25,000						\$25,000	
Food Service											\$50,000										
TOTAL ALL SITES PER YEAR	\$25,000	\$25,000	\$25,000	\$0	\$50,000	\$50,000	\$50,000	\$75,000	\$75,000	\$110,000	\$100,000	\$70,000	\$55,000	\$60,000	\$25,000	\$0	\$50,000	\$50,000	\$25,000	\$100,000	\$0
Vehicle Replacement Cycle is 12 years																					

APPENDIX C – Demographic and Enrollment Forecasts

Long Range Facilities Plan

Medford School District 549C



JOHNSON REID
LAND USE ECONOMICS

DEMOGRAPHIC AND ENROLLMENT FORECASTS MEDFORD SCHOOL DISTRICT 549C

Prepared By:
JOHNSON REID, LLC

December 2011



JOHNSON REID
LAND USE ECONOMICS

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I. INTRODUCTION

The Medford School District retained Johnson Reid to prepare demographic analysis and enrollment forecasts to inform the District's long range planning process. This analysis utilized a range of informative parameters, particularly making use of recently released local level 2010 Census information. The methodology produces a district-wide enrollment forecast by grade level for the period between 2010 and 2020. We also extend the forecast through a 20-year horizon to coordinate with recent 20-year planning efforts conducted by the City of Medford. We then evaluate characteristics within the district's 14 Elementary School Service Areas (ESAAs) to determine the likely capture of total enrollment growth in each school boundary. Factors informing this "top down" allocation include recent development trends, relative demographic characteristics, housing characteristics, and existing development capacity. The objective of this process is to determine the "path of growth" likely to be realized geographically throughout the district to allocate resources accordingly.

The Medford School District serves a large geographic area reaching from the California and Josephine County borders to Central Point. It is the largest school district in Jackson County, encompassing 41% of the county population.

II. POPULATION AND HOUSING TRENDS

Between 2000 and 2010, population in the district grew at an average annual rate of just under 1%, while adding 7,773 new residents. Over the same interval the countywide population grew at a slight more accelerated pace (1.16%).

**FIGURE 1: JACKSON COUNTY AND MEDFORD S.D.
POPULATION GROWTH, (2000-2010)**

Geography	Population		
	2000	2010	AAGR
Jackson County	181,269	203,340	1.16%
Medford S.D.	76,725	84,498	0.97%

SOURCE: U.S. Census Bureau

Between the two census periods, the population of students in their "schooling years" (age 5-18) actually dropped during the decade, declining from 15,741 to 15,404 students. With growth in total population, this represented a decrease in the "student share" of population in the district. The decrease in student age population is not a local phenomenon, as the same was exhibited at the county level.

FIGURE 2: JACKSON COUNTY AND MEDFORD S.D. GROWTH IN SCHOOL AGE POPULATION, (2000-2010)

Geography	2000			2010			'00-'10
	Total Population	School Age Population	School Age Share	Total Population	School Age Population	School Age Share	School Age Pop AAGR
Jackson County	181,269	35,896	19.8%	203,340	35,036	17.2%	-0.24%
Medford S.D.	76,725	15,741	20.5%	84,498	15,404	18.2%	-0.22%

SOURCE: U.S. Census Bureau

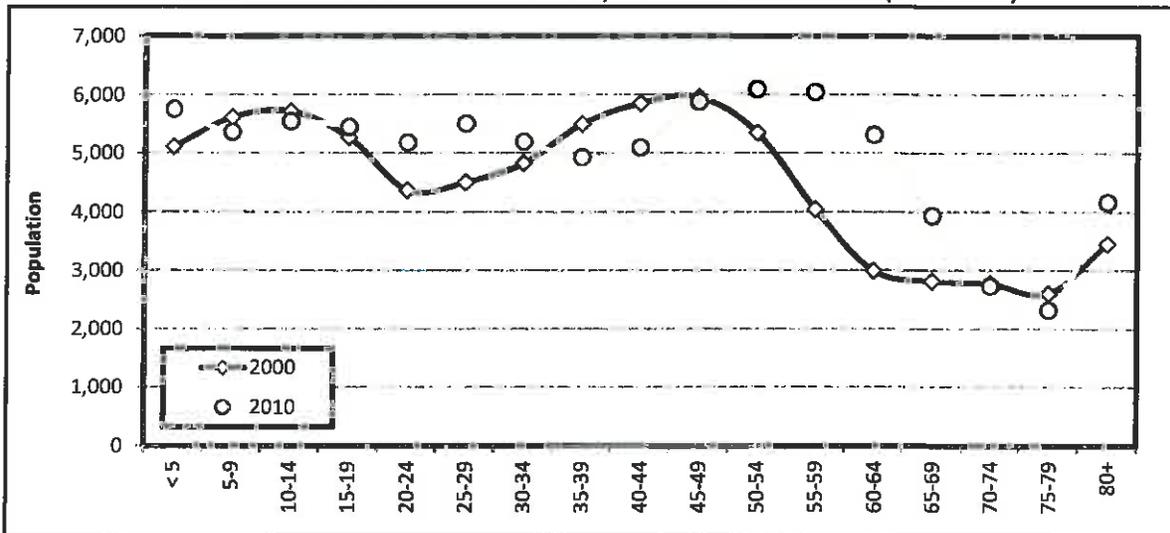
Reductions in student populations in the district are likely to be driven by several factors. First, declines began concurrently with the onset of the housing boom, where accelerated housing values likely drove family households to more affordable locations. This is evidenced by accelerated growth rates in neighboring jurisdictions, specifically Central Point and Eagle Point. Secondly, in the second half of the decade, the economic recession and subsequent "lagged recovery" have certainly stagnated recent in-



migration, with mobility declined at a national level. Economic conditions have been particularly poor in Southern Oregon, and it's probable that highly mobile demographic groups (who are also disproportionately parents) have sought work elsewhere during the latter half of the decade. While growth in these "labor" cohorts has been positive, the observed trend is well below the level that would have been likely since 2005.

The highest growth rates in the district population have been concentrated in 55-69 "baby boomer" population. This group combined for 70% of net population growth during the decade. A significant share of growth in this cohort is simply the aging in place of existing households, which is observed by the high concentration of 40-54 year olds in 2000. A second growth segment in the district includes those between 20 and 34 years. This group has accounted for 28% of net population growth. Further, this segment exhibits the highest fertility rates in the population and can explain the small "baby bump" exhibited over the last five years (the 0-4 age cohort).

FIGURE 3: TOTAL POPULATION BY AGE COHORT, MEDFORD SCHOOL DISTRICT (2000-2010)



SOURCE: U.S. Census Bureau

Growth in both households and housing units has exceeded general population growth in the district, with growth in housing units exceeding household growth by over 30%. This characteristic sign of the housing boom is reflected by both higher housing vacancy rates in Medford and Medford's growth as a retirement location. As mentioned above, family growth in the district has been a smaller share of total household growth. The ratio of family households to total households in the district has fallen from 68% to 65%

FIGURE 4: CHANGE IN HOUSING AND HOUSEHOLD CHARACTERISTICS, MEDFORD SCHOOL DISTRICT, (2000-2010)

	2000	2010	Δ	AAGR
Households	29,950	33,617	3,667	1.2%
Housing Units	31,422	36,321	4,899	1.5%
Family Households	20,463	22,029	1,566	0.7%

SOURCE: U.S. Census Bureau



III. BIRTHS TRENDS, FERTILITY, AND MIGRATION

The number of births that occur annually within a given geography is a function of the number of females in their "child bearing years" (age 15-44) and the rate at which those women have children.

FIGURE 5: FEMALE POPULATION IN CHILD BEARING YEARS AND FERTILITY RATES, MEDFORD SCHOOL DISTRICT AND JACKSON COUNTY, (2000-2010)

Geography/ Year	Total Population	Females Pop in Bearing Years 1/	Child Bearing Age Female Share	Births	Fertility Rate 2/	Total Fertility Rate (TFR) 3/
2000						
Jackson County	181,269	35,630	19.7%	2,045	57.4	1.86
Medford S.D.	76,725	15,354	20.0%	963	62.7	1.96
2010						
Jackson County	203,340	36,077	17.7%	2,345	65.0	2.02
Medford S.D.	84,498	15,667	18.5%	1,148	73.3	2.17

1/ Female population age 15-44

2/ Births per 1,000 child bearing females

3/ Total Fertility Rate (TFR) equals the average number of children a women will have in her lifetime

SOURCE: U.S. Census Bureau, Oregon Health Authority, and Johnson Reid

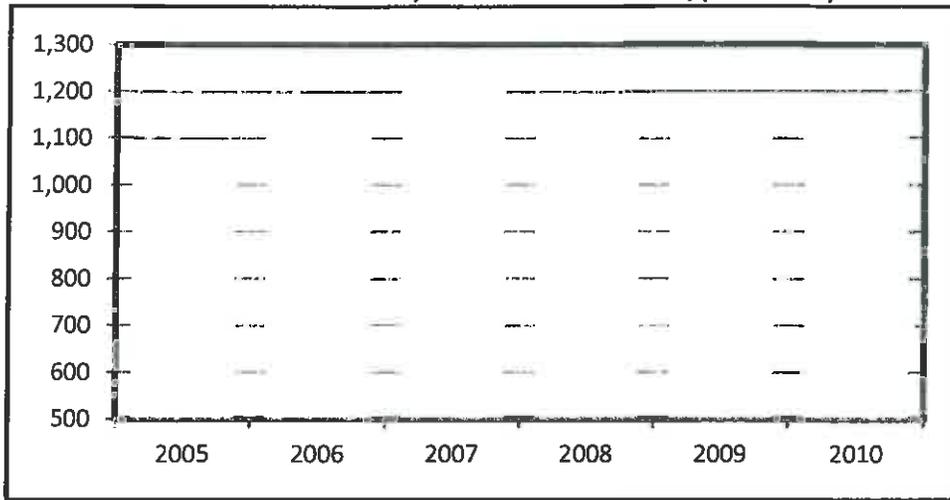
Over the last decade, the number of women in the district in their child bearing years has remained relatively flat, growing from 15,354 to 15,667. The concentration of this demographic segment has decreased slightly from 20% to 18.5%, which remains above the countywide average. Despite the small increase in mothers, the ratio of births to mothers has increased measurably, indicating an increase in fertility. All told, the fertility rate in the district has increased from 62.7 babies per 1,000 mothers in 2000 to 73.3, an increase of 16%. The total fertility rate, equal to an estimation of the total number of children a women will have in her lifetime, has also increased considerably. Both measures remain well above the countywide averages. Figure 5 illustrates that despite flat growth in both family households and child bearing mothers, these segments are having more children on average than in past years.

Two factors can explain the growth in these rates. First, the district has seen a 65% increase in the Hispanic population over the decade. Hispanic households tend to have much higher fertility rates than the general population. Secondly, the trend for women to delay having their first child into their late 20s and early 30s has played into the district's demographic composition of having a higher proportion of women age 25-34.

Over the last five years, the number of births in the district has exhibited little variance, falling between 1,144 and 1,225 since 2006 and a low of 1,018 in 2005. These birth levels will serve as a basis for Kindergarten age classes in our 2011-2016 forecast years.



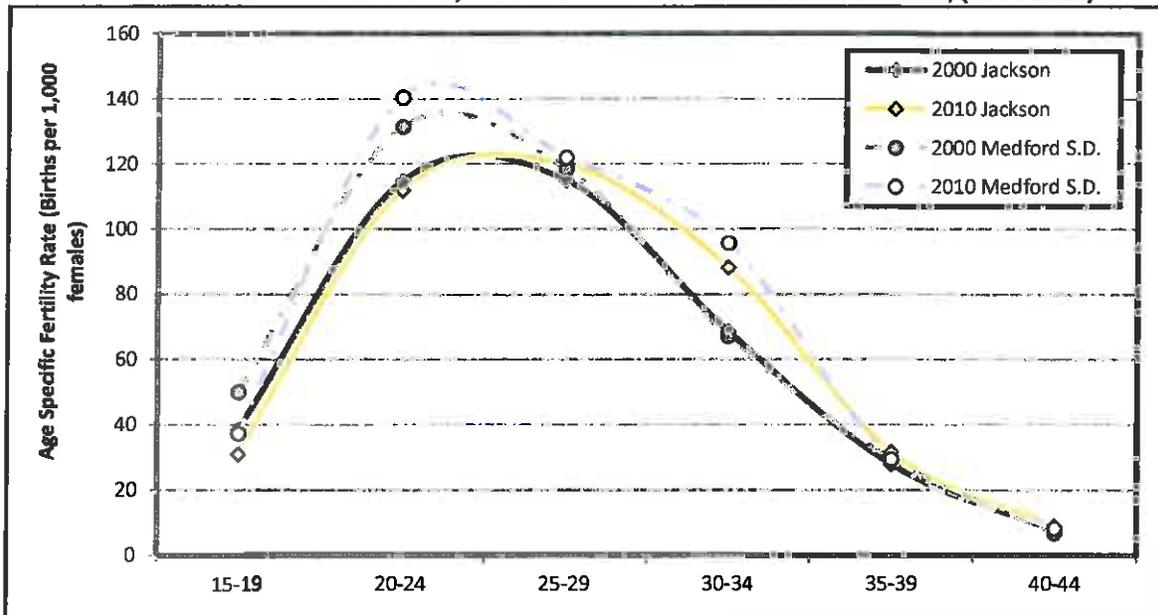
FIGURE 6: NUMBER OF BIRTHS, MEDFORD SCHOOL DISTRICT, (2005-2010)



SOURCE: Oregon Health Authority

Our forecast model in Section V will use age-specific fertility rates to estimate future birth rates. Age-specific fertility rates are expressed as the number of birth per 1,000 females in a give age cohort. For example, in 2010 there was an average of 140 births per 1,000 to mothers in the 20-24 age cohort. Highlighted in Figure 7, we observe that fertility rates have increased in the district in every age group with the exception of 15-19 year olds. Our forecast assumes age-specific rates will continue their current trend for the first five years of the forecast before leveling off at stabilized rates.

FIGURE 7: AGE SPECIFIC FERTILITY RATES, JACKSON COUNTY AND MEDFORD SCHOOL DISTRICT, (2000-2010)



SOURCE: U.S. Census Bureau, Oregon Health Authority, and Johnson Reid

Total population growth in any given geography is a function of two inputs, natural increase and net-migration. The first element, natural increase, is simply the reconciliation of the number of births and deaths over a given time period. Migration however, requires further analytical effort, as measures of the

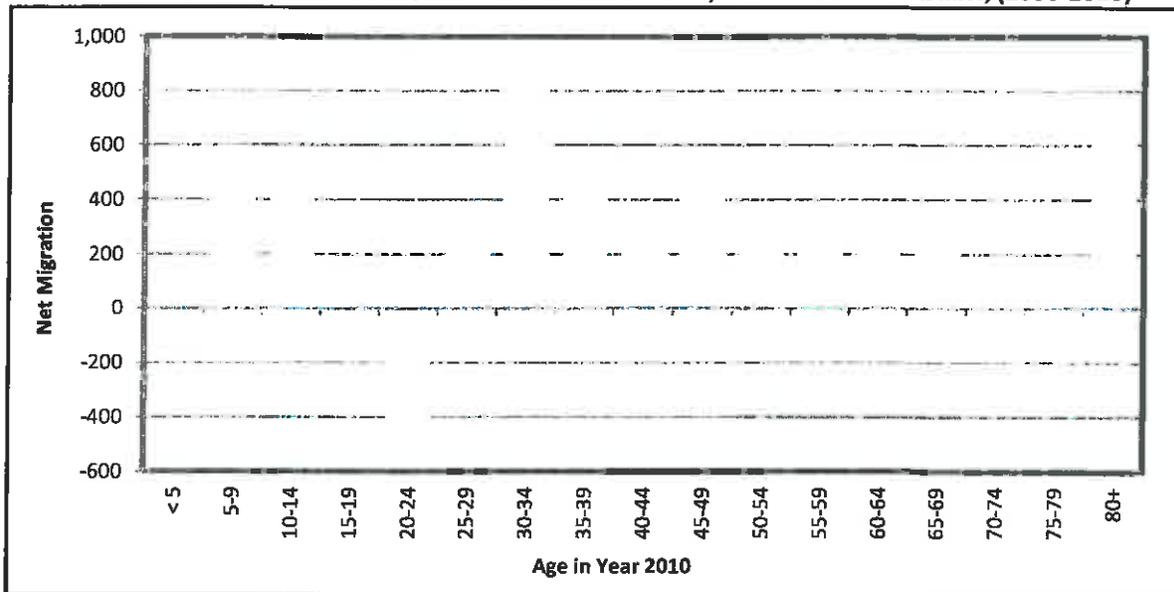


net flow of the population, particularly by age cohort, are rarely available at the local level. However, the recent release of 2010 local Census data provides an opportunity to develop timely estimate of recent migratory trends by age group in the district.

We begin with estimates of population by age and sex from two census periods. We then age in place the population of one cohort into the next, applying age specific survival rates to each group. Using a hypothetical example, in 2000, assume 1,000 residents age 40-44 are aged or "survived" to become 987 residents age 45-49 in 2005. This is what we would expect absent any migration effects. We can also observe that in 2005 we have a known population 1,200 residents age 45-49. By reconciling our actual population counts with "survived" estimates, we approximate the net-migration that occurred during the five year period, 213 in the case of our example.

The process above is repeated for every age and sex cohort through the 2010 census year. The residual provides in estimates of migration by cohort (which we can then convert to a migration rate, expressed as "x" persons per 1,000 residents).

FIGURE 8: AGE SPECIFIC POPULATION CHANGE FROM NET-MIGRATION, MEDFORD SCHOOL DISTRICT, (2000-2010)



SOURCE: U.S. Census, and Johnson Reid

Figure 8 is supportive of our intuitive knowledge of population dynamics in the Medford area. The region has consistently exhibited negative net-migration in the college age and early career cohorts, as people leave to pursue education or better employment opportunities elsewhere. The large influx of residents over the age of 80 is reflective of Medford's concentration of assisted living opportunities. We estimate that nearly 4,800 more residents moved into the district than out of it over the previous ten-years. This converts to a total net-migration rate of 6.2 persons per 1,000 residents. This estimate is well below the countywide average of 14.0 exhibited between 2000 and 2009¹. The migration rates converted from Figure 8 above will serve as baseline "structural" migration rates in our forecast analysis.

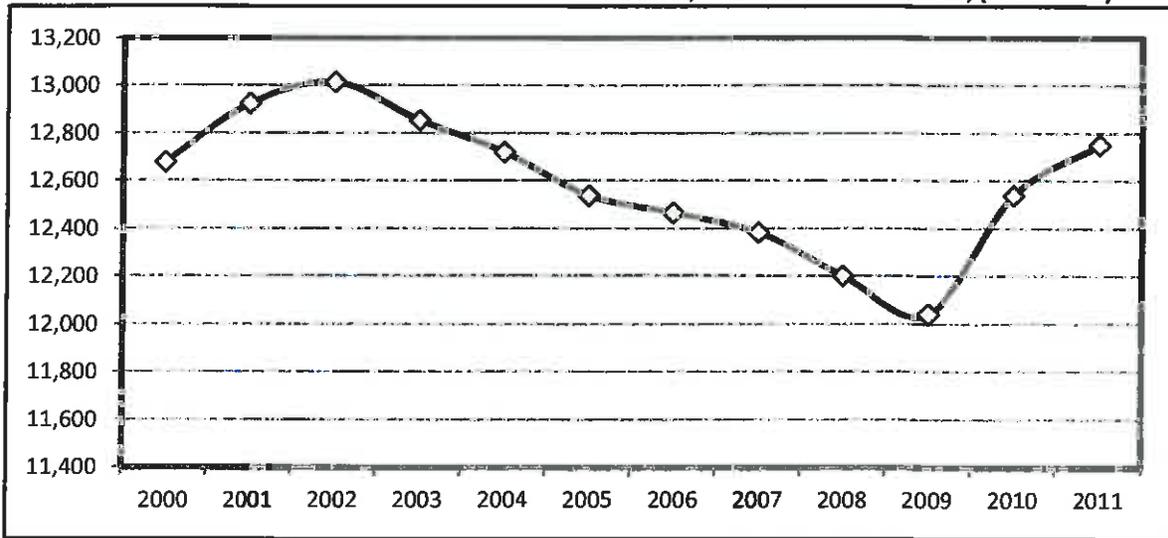
¹ Portland State University Population Research Center, intercensal estimates of components of population change. These estimates do not yet reflect a 2010 census revision, and are likely subject to change.



IV. ENROLLMENT TRENDS

Total K-12 enrollment peaked in 2002-2003, as the children born during the boomtown 1990's worked their way through the education system. In the early half to middle of the decade, rapid appreciation in housing values and lagging effects of the 2000-01 recession led to growth in affordable areas outside of the district. This is evidenced by observed declines in transition grades (1st, 7th) over that interval. Kindergarten classes have remained relatively stable, hovering within 5% of 900 students from 2000-2009.

FIGURE 9: TOTAL ENROLLMENT AND ENROLLMENT BY GRADE LEVEL, MEDFORD SCHOOL DISTRICT, (2000-2011)



SOURCE: Oregon Department of Education

Grade	Enrollment Year												2000-2011	
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	Δ	AAGR
K	901	914	886	885	873	923	856	897	896	904	1,025	962	61	0.6%
1	943	977	958	939	927	941	988	920	933	940	1,003	1038	95	0.9%
2	932	927	953	947	922	904	916	984	900	904	939	1013	81	0.8%
3	982	940	958	956	956	906	901	908	1,022	876	961	971	-11	-0.1%
4	1,060	982	949	975	954	978	926	911	919	1,004	928	955	-105	-0.9%
5	1,080	1,055	1,030	932	974	955	988	944	944	881	1,061	960	-120	-1.1%
6	984	1,083	1,048	992	925	947	961	967	930	923	899	1039	55	0.5%
7	981	968	1,097	1,052	970	908	909	937	960	901	925	927	-54	-0.5%
8	971	993	989	1,066	1,057	969	907	900	933	948	929	929	-42	-0.4%
9	954	1,064	1,027	1,015	1,130	1,069	997	914	901	953	1,003	977	23	0.2%
10	1,016	967	1,054	1,023	1,010	1,090	1,055	1,000	923	914	962	992	-24	-0.2%
11	928	1,014	938	1,023	967	942	1,057	1,013	934	876	896	970	42	0.4%
12	946	1,040	1,127	1,048	1,054	1,006	1,004	1,088	1,006	1,017	1,008	1018	72	0.7%
Total	12,678	12,924	13,014	12,853	12,719	12,538	12,465	12,383	12,201	12,041	12,539	12,751	73	0.1%
K-6	6,882	6,878	6,782	6,626	6,531	6,554	6,536	6,531	6,544	6,432	6,816	6,938	56	0.1%
7-8	1,952	1,961	2,086	2,118	2,027	1,877	1,816	1,837	1,893	1,849	1,854	1,856	-96	-0.5%
9-12	3,844	4,085	4,146	4,109	4,161	4,107	4,113	4,015	3,764	3,760	3,869	3,957	113	0.3%

SOURCE: Oregon Department of Education and Johnson Reid

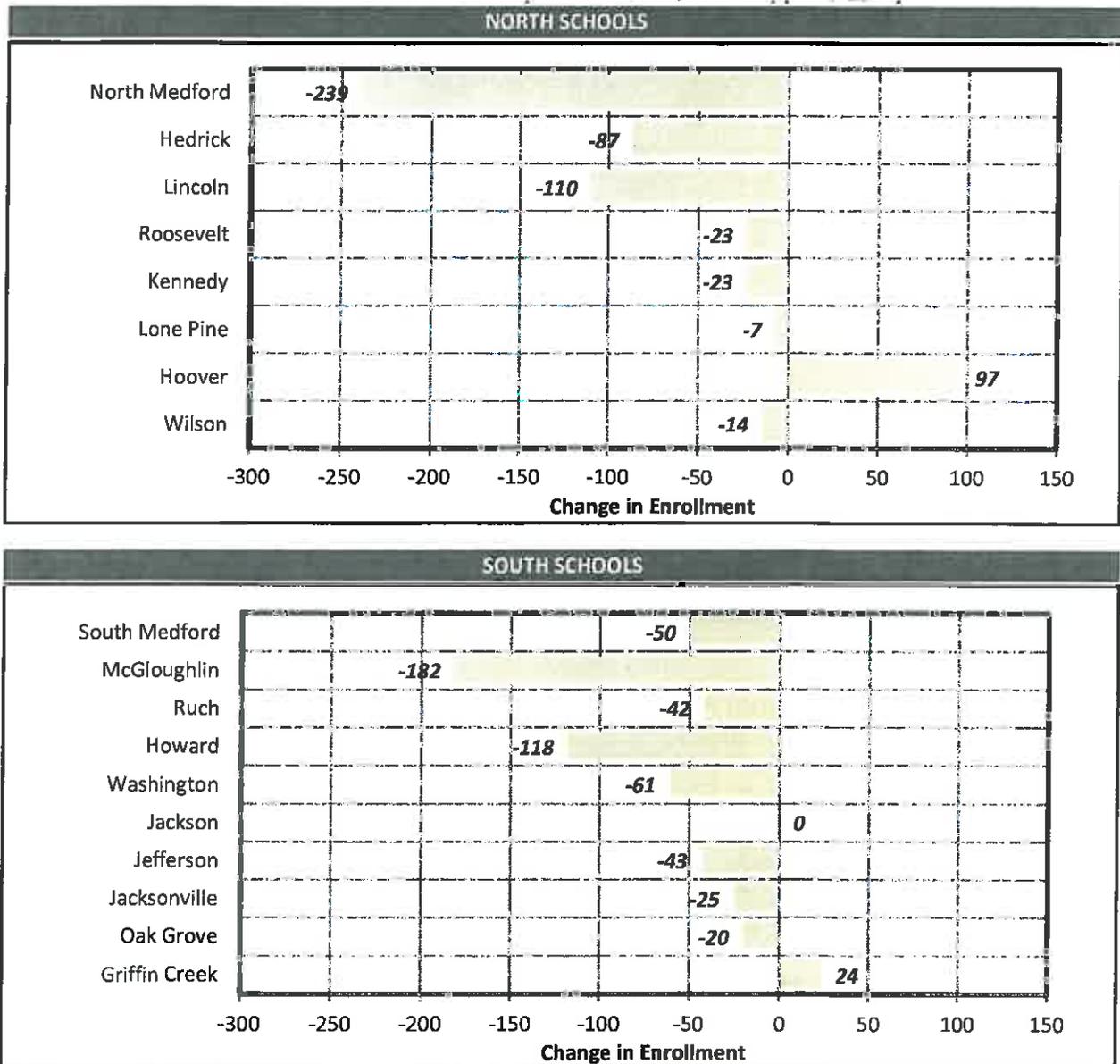
Early enrollment growth was driven by older students in middle, and to a greater extent high school. Growth was quickly offset by the small elementary school classes that subsequently worked their way through the system until enrollment troughed in 2009. However, the last two years have exhibited a sharp reversal in enrollment. The shift has been most prevalent at the elementary school level, exhibiting nearly 8% enrollment growth in just two years. This trend is not likely to be an anomaly, as the growth in fertility exhibited this decade (and subsequent babies born) are just now hitting the education system. This is



exemplified by the ratio of births during the last five years to kindergarten grade size over the same interval, with births (a proxy for future kindergarten size) exceeding the average class size by 22%.

Geographically within the district, enrollment is down in most every school since the 2000 fall term. Losses have been concentrated the Abraham Lincoln, Howard, and Washington ESAs. Only Hoover and Griffin Creek have net gains over this time period. Several ESAs have exhibited notable gains since enrollment reversed course in 2009, however recent 2009-2011 growth has been entirely located in the southern ESAs.

FIGURE 9: ENROLLMENT CHANGE BY SCHOOL, MEDFORD SCHOOL DISTRICT, (2000-2011)



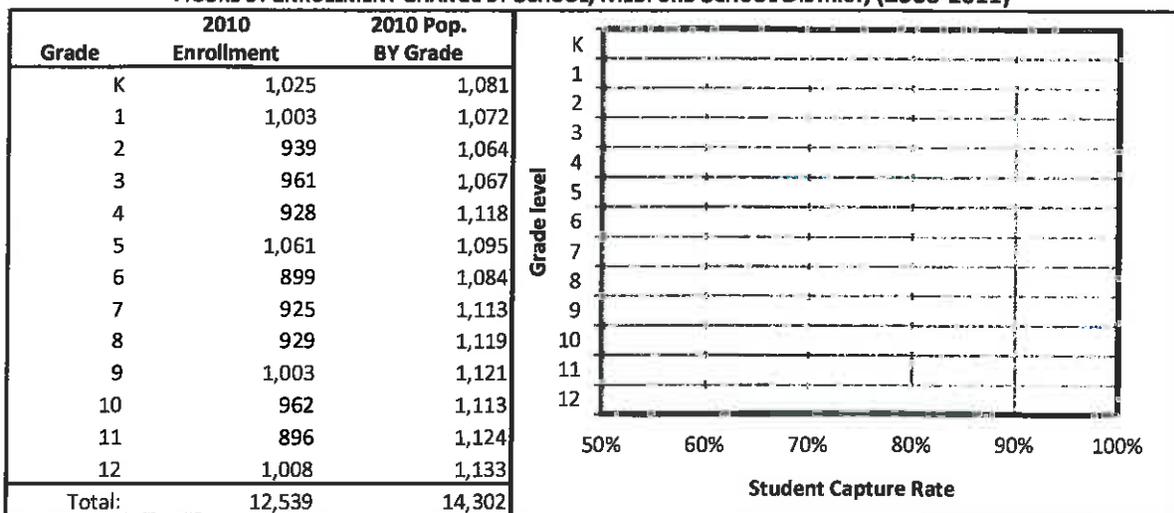
SOURCE: Oregon Department of Education



In Section V of this analysis we convert forecasts of the student age population to forecasts of enrollment in the district using two inputs, Student Capture Rates and Grade Progression Ratio's. The capture rate is simply the ratio of students whose age is within a given grade level compared to the observed enrollment by grade in that year. Because we do not have a measure of the actual age of all of the students in any given grade level (which is constantly changing), we make assumptions about the age distribution of students within a given grade. In this analysis we stratify children in any given cohort at a rate of 60% to the lower bound class and 40% to the upper bound class. For example, 100 students aged 10 years would see 60 students allocated to the 5th grade and 40 students allocated to the 4th grade. When this process is applied to our student population and compared to 2010 enrollment, we arrive at the capture rates in Figure 10. The total enrollment capture for the district in 2010 was roughly 88%. In other words, 12% of the resident student population in 2010 is either home schooled, attend schools in other districts, or attend public schools.

The major drawback of the capture rate variable is that capture rates tend to be more volatile *and* we only have a point in time estimate calculated against the 2010 Census population. We could conceivably work backwards population estimates but precision is likely to decline as small variances in population could reveal large changes in capture assumptions. Therefore, in our analysis we rely primarily on the transition grade capture rates (which tend to be more stable) to inform the forecast.

FIGURE 9: ENROLLMENT CHANGE BY SCHOOL, MEDFORD SCHOOL DISTRICT, (2000-2011)



SOURCE: Oregon Department of Education, U.S. Census, and Johnson Reid

The second forecasting tools we utilize are grade progression ratios (GPRs). A grade progression ratio is simply the share of students in any given grade that move into the next progressive grade. For example, in 2010 there were 1,003 1st Grade students enrolled in the district. In 2011 there were 1,013 2nd Grade students enrolled, resulting in a GPR of 1.01. A GPR of 1.00 indicates a stable progression whereas on average the number students moving (out-migration) dropping out, or attending private school are roughly equal to the number of students entering school (from private or home school), or moving in (in-migration). A GPR greater than 1.00 typically indicates positive net-migration (especially in elementary grades) with a ratio below 1.00 indicating the converse, or students dropping out or transferring. A positive of grade progression ratios are that we have observable annual data going back many years. In our analysis we use multi-year averages in our forecast application.



FIGURE 10: ANNUAL GRADE PROGRESSION RATIOS, MEDFORD SCHOOL DISTRICT, (2000-2011)

ANNUAL GRADE PROGRESSION RATIOS											
Grade	'00-'01	'01-'02	'02-'03	'03-'04	'04-'05	'05-'06	'06-'07	'07-'08	'08-'09	09-'10	'10-11
1	1.08	1.05	1.06	1.05	1.08	1.07	1.07	1.04	1.05	1.11	1.01
2	0.98	0.98	0.99	0.98	0.98	0.97	1.00	0.98	0.97	1.00	1.01
3	1.01	1.03	1.00	1.01	0.98	1.00	0.99	1.04	0.97	1.06	1.03
4	1.00	1.01	1.02	1.00	1.02	1.02	1.01	1.01	0.98	1.06	0.99
5	1.00	1.05	0.98	1.00	1.00	1.01	1.02	1.04	0.96	1.06	1.03
6	1.00	0.99	0.96	0.99	0.97	1.01	0.98	0.99	0.98	1.02	0.98
7	0.98	1.01	1.00	0.98	0.98	0.96	0.98	0.99	0.97	1.00	1.03
8	1.01	1.02	0.97	1.00	1.00	1.00	0.99	1.00	0.99	1.03	1.00
9	1.10	1.03	1.03	1.06	1.01	1.03	1.01	1.00	1.02	1.06	1.05
10	1.01	0.99	1.00	1.00	0.96	0.99	1.00	1.01	1.01	1.01	0.99
11	1.00	0.97	0.97	0.95	0.93	0.97	0.96	0.93	0.95	0.98	1.01
12	1.12	1.11	1.12	1.03	1.04	1.07	1.03	0.99	1.09	1.15	1.14

SOURCE: Medford School District and Johnson Reid

V. ENROLLMENT FORECAST

There are two fundamental inputs to enrollment growth. First, the natural change in the student population resulting from net births of the existing population entering the system; and second, enrollment growth resulting from net-migrants both bringing existing children into the district and adding to the potential velocity of new births.

In this section we develop district-wide forecasts of enrollment utilizing two methods. First, Johnson Reid's cohort-migration model relies on existing and anticipated age specific rates of mortality, fertility, and migration to estimate future population by age and sex cohort. Secondly, we utilize a standard capture-grade progression model as an additional forecast scenario.

A. COHORT MIGRATION MODEL

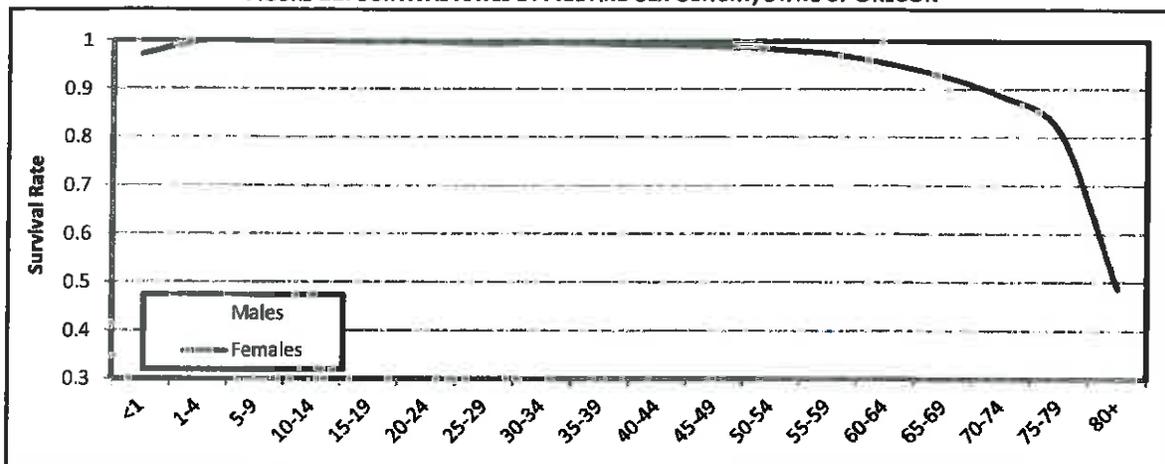
The Cohort-Migration Model forecasts future populations by age and sex simply by surviving the existing population in each age/sex cohort, adding the estimated number of births in the current year, and adding anticipated migration via anticipated age/sex specific migration rates.

Surviving the Population

The first analytical step, "surviving", relies on assumptions of mortality by age and sex. Because timely local data are rarely available, and survival rates remain relatively constant at younger cohorts, we utilized from the State of Oregon.



FIGURE 11: SURVIVAL RATES BY AGE AND SEX COHORT, STATE OF OREGON



SOURCE: Oregon Health Authority

These survival rates indicate each age/sex cohort's propensity to survive into the next five-year age cohort. For example, in 2010 there were 2,738 males aged 5-9 years in the Medford School District. Under the assumptions in Figure 11, 2,736 are expected to survive into the 10-14 age cohort. Excluding any migration impacts, this would become the new population base in 2015 for 10-14 year-old males. Because survival rates are very high among both student age and child bearing age mothers, survival rates have very little impact on the underlying enrollment forecast.

Birthing the Population

The second analytical step involves adding the estimated number of annual births to the population of each subsequent year. For this process, we utilize the district specific assumptions of fertility rates discussed in Section III above. Continuing with an example, in 2010 the female population and assumed age-specific fertility rates are represented in the following table. Taken together we assume that females age 15-44 in the Medford School District will have 1,192 babies in 2011 (which are "survived " according to the aforementioned method). These births are then distributed by the natural sex ratio at birth² and added to the district population. These persons are then subjected to rates of survival and migration just as the remainder of the population.

Mother's Age	Female Population	Fertility Rate	Estimated Births
15-19	2,813	35.7	101
20-24	2,651	139.7	370
25-29	2,818	123.0	347
30-34	2,757	100.7	278
35-39	2,442	30.2	74
40-44	2,647	8.5	23
TOTAL	16,128	73.9	1,192

SOURCE: Johnson Reid

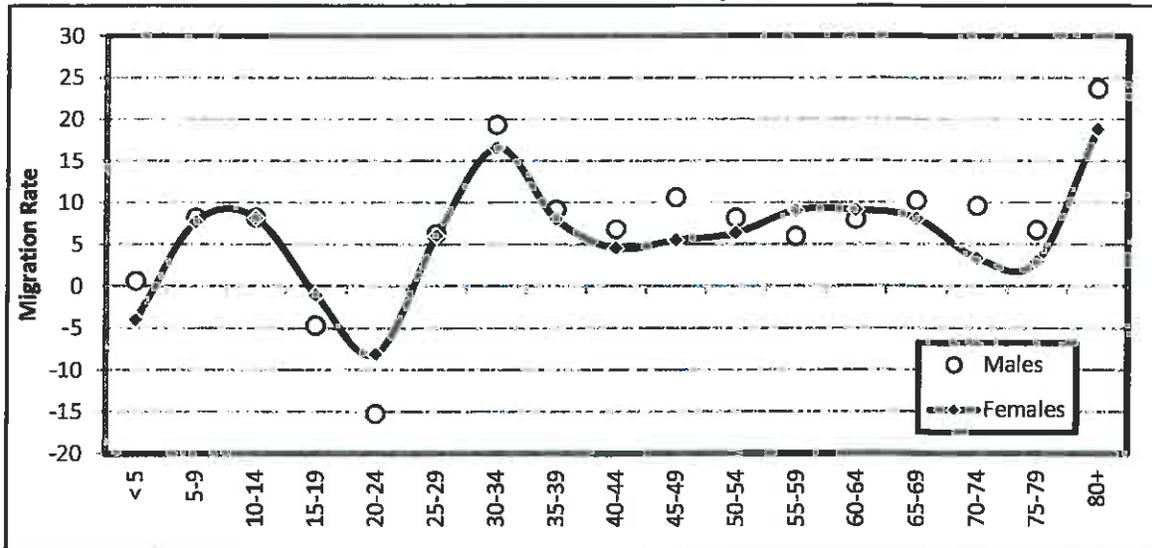
² The natural sex ratio at birth in the United States in 105 males, 100 females.



Migration Impacts

In our analysis we consider migration to be a function livability or trended migration, and employment driven migration. The latter is discussed below. Here we evaluate the impacts of existing migration trends exhibited in the population. We revisit Section III above, which identifies exhibited migration trends over the last ten years.

FIGURE 12: ESTIMATED MIGRATION RATES BY AGE AND SEX, MEDFORD SCHOOL DISTRICT



The total migration rate in the district has been moderate over the last decade, averaging 6.2 persons per 1,000 residents. In our component-migration model, we apply age and sex specific-migration rates in Figure 12 to population levels to reflect structural migration. We allow these rates to moderate over time to reflect demographic changes in the general population and the District's likelihood to capture a larger share early retirement age households through migration. Continuing our example, our assumed net-migration rate for 40-44 year old females is 4.5 persons per 1,000 residents. In other words, we expect that in any given year, a net 4.5 females age 40-44 will move into the district for every 1,000 40-44 year old female residents. In 2010 there were 2,543 females age 40-44 living in the district. Therefore, over the five-year period we would expect roughly 57 net-new female residents in the 40-44 age cohort as a result of migration.

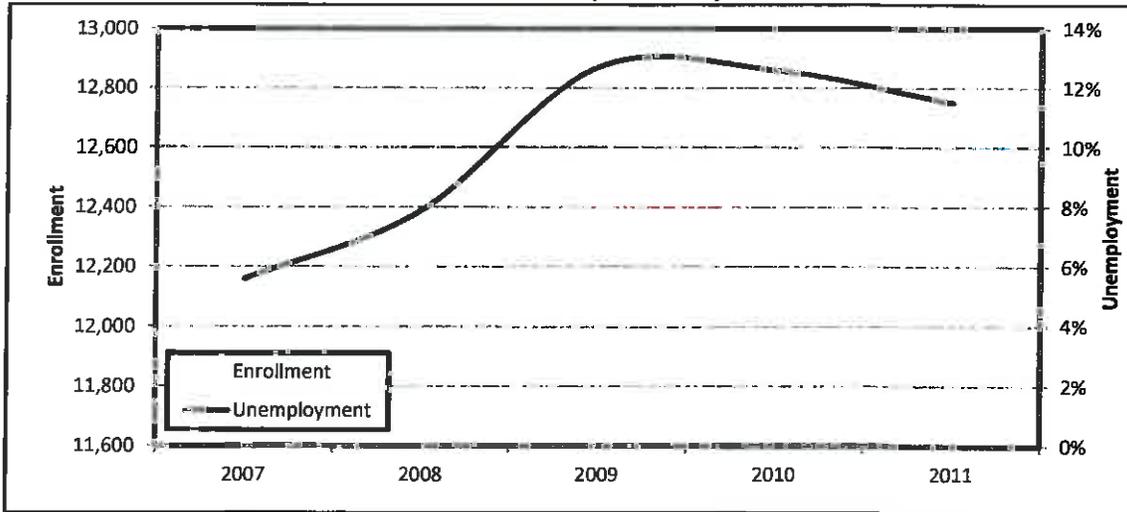
Employment Driven Migration

In addition to structural migration, we forecast additional net-new migration among highly mobile demographic segments in response to a recovery, and acceleration of economic growth in the coming years. Referring back to enrollment estimates from Section IV, we observe elementary enrollment peaking around 2002, and falling sharply in the district thereafter. A similar trend is observed in a leveling of births in the early half of the decade. This trend reflects our expectations of what we know about the relationship between economic and demographic conditions. The children attending school in the early 2000's were those born during the boomtown 1990's. Subsequently, at the local level, we begin to see a sharp drop off in student enrollment leading up to the housing boom, where housing affordability concerns surfaced, and family household fled to more affordable options. This "stall" in enrollment has been compounded by the subsequent housing bust, recession, and persistently high unemployment, where unemployment in Jackson County has exceeded 12% since the middle of 2008. Figure 13 exemplifies this association in terms of enrollment. Note the inverse relationship of unemployment and enrollment observed in the current



business cycle. Enrollment tends to fall in worsening economic conditions and increase during stabilization³. As detailed below, the relationship between jobs, population, and planning coordination with the City of Medford is critical element of our forecast analysis.

FIGURE 13: OBSERVED ENROLLMENT AND UNEMPLOYMENT RATE, MEDFORD SCHOOL DISTRICT, JACKSON COUNTY (2007-2011)



SOURCE: Oregon Employment Department and Johanson Reid

Planning Coordination

Strong facilities planning should include coordination at the local and regional level. In 2010 roughly 83% of all households within the Medford School District were also located within the Medford Urban Growth Boundary. As such, anticipated changes in City of Medford policy are likely to be observed within the district. In an effort toward regional coordination, this analysis made strong use of recent planning efforts at the city level, namely recent updates to the City's Comprehensive Plan:

City of Medford Comprehensive Plan, Goal 9: Economic Element

In 2009 the City of Medford completed its periodic update of the economic element of its Comprehensive Plan for the 2010-2030 planning period. By statute, this process involved the development of an economic development strategy and adopting estimates of employment growth over a 20-year planning horizon. Even before the recent recession lowered its economic base, the City is planning on accelerated economic growth over the next 20-years. It's adopted economic forecast calls for an average annual growth rate of 2.0%, adding 33,000 new jobs through 2030.

City of Medford Comprehensive Plan, Goal 10, Housing Element

The City's Goal 10 housing element was adopted in December of 2010. By statute this process requires the City to plan for long range housing growth and develop forecasts of population and households. By statute, this process involves a 20-year forecast of population. In its Comprehensive Plan, the City's adopted growth rate averaged 1.9% annual growth with the addition of 35,600 new residents over the planning period.

³ We have already discussed the historic birth/fertility impacts on the three-year enrollment trend. Without rigorous econometric analysis and/or survey data we cannot tease out the actual marginal contribution of natural increase and migration, respectively. However, the relationship between employment and population is well accepted.



As the aforementioned planning documents indicate, the region is planning on growth above and beyond what has been the status quo over the past decade. Therefore, our forecast makes assumptions about future population growth as function of these anticipated paths of growth.

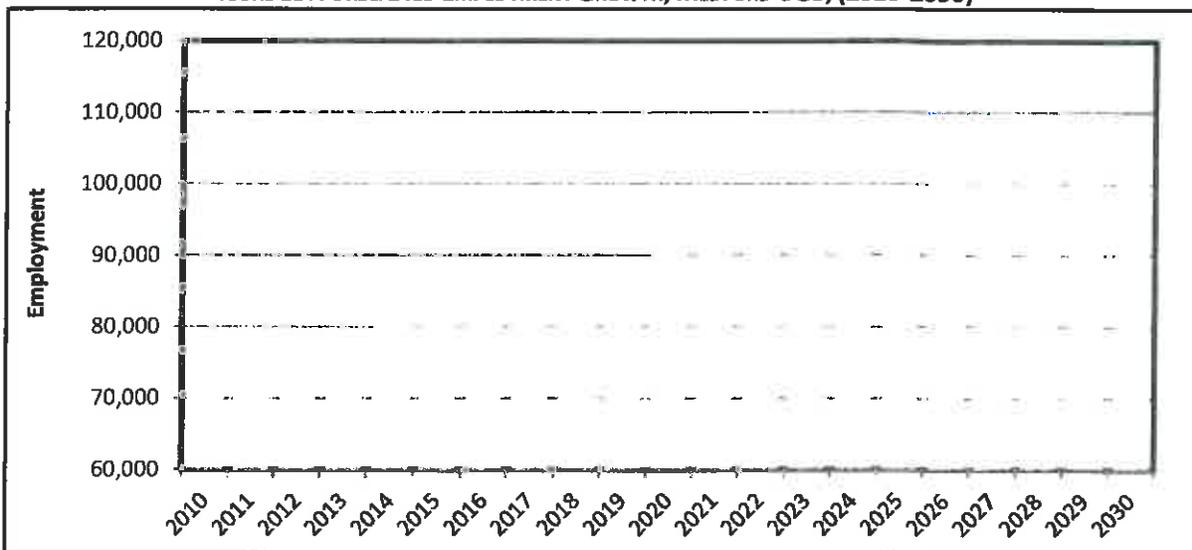
Labor Migration Model

Our labor migration model is predicated on the fact that where economic expansion occurs, population growth typically follows. Further, this characteristic is a particularly important element for enrollment forecasting as the most "mobile" demographic segments, with the ability to move for employment opportunities, also have the highest propensity to be parents. In the analysis that follows, we document forecasted economic growth adopted by the City of Medford, calculate residual resident labor demand supported by economic growth, and translate findings into likely labor driven migration above and beyond status quo migration rates.

Forecasted Employment Growth

Over the next 20-years, the City of Medford has adopted an average annual employment growth rate of 2.0% annually. This rate of growth translates into roughly 35,400 net new jobs within the Medford UGB over the next 20-years.

FIGURE 13: FORECASTED EMPLOYMENT GROWTH, MEDFORD UGB, (2010-2030)



SOURCE: Medford Comprehensive Plan, Economic Element

However, not all employment growth is likely to be filled by residents of the school district. According to the U.S. Census Bureau's Local Employment Dynamics program, an estimated 47% of School District residents worked in Medford⁴ in 2009. We allowed this ratio to trend to an average 60% rate on the margin given the on-going trend toward urbanization in the region. Reconciling these figures we estimated a need for roughly 21,000 net new workforce participants over the 20-year period as a result of planned economic growth in the region.

⁴ Actual count was 40% within the City of Medford. Johnson Reid revised this figure by the ratio of employment inside and outside of the UGB, plus no-covered workers.



Estimated Labor Force Growth

In light of the preceding analysis, we can forecast the future workforce balance under existing migration assumptions. The existing and forecasted working age population is stratified by age specific labor force participation rates to arrive at an estimate of the future labor force. Concerns over future labor force dynamics are immediately clear. If existing trends held true, the future local labor force is likely to get older and considerably less productive. Further, we forecast labor force growth of only 4,458 new workers over the 20-year period. When reconciled with the City's adopted employment forecast, we have a shortfall of over 16,700 workers. Therefore, if the City's forecasts are realized, as it is prudent to assume for planning purposes, either a drastic increase in labor force participation or additional net-migration growth⁵ will be required to meet anticipated workforce needs.

FIGURE 14: WORKING AGE AND LABOR FORCE GROWTH UNDER EXISTING MIGRATION TRENDS, MEDFORD SCHOOL DISTRICT, (2010-2030)

Age	Labor Force Age Population					Participation Rate	Estimated Labor Force				
	2010	2015	2020	2025	2030		2010	2015	2020	2025	2030
16-19	4,228	4,376	4,318	4,380	4,979	40.2%	1,700	1,759	1,736	1,761	2,002
20-24	4,886	4,990	5,164	5,078	5,160	74.4%	3,635	3,712	3,842	3,778	3,839
25-29	4,942	5,021	5,126	5,303	5,222	83.3%	4,117	4,182	4,270	4,417	4,350
30-34	5,049	5,366	5,470	5,585	5,772	83.3%	4,206	4,470	4,557	4,652	4,808
35-39	5,263	5,254	5,567	5,684	5,803	84.1%	4,426	4,418	4,682	4,780	4,880
40-44	5,596	5,388	5,373	5,681	5,804	84.1%	4,706	4,531	4,519	4,778	4,881
45-49	6,001	5,780	5,572	5,549	5,846	81.9%	4,915	4,734	4,563	4,545	4,788
50-54	5,883	6,124	5,916	5,706	5,677	81.9%	4,818	5,016	4,845	4,673	4,650
55-59	5,237	5,960	6,216	6,016	5,799	73.1%	3,828	4,357	4,544	4,397	4,239
60-64	4,277	5,255	5,991	6,264	6,077	54.1%	2,314	2,843	3,241	3,389	3,288
65-69	3,597	4,204	5,149	5,880	6,167	30.7%	1,104	1,291	1,581	1,805	1,893
70-74	2,944	3,376	3,944	4,810	5,495	17.8%	524	601	702	856	978
75-79	2,830	2,591	2,971	3,479	4,229	10.3%	291	267	306	358	436
80+	4,785	4,777	4,592	4,809	5,358	2.0%	96	96	92	96	107
Total:	65,518	68,461	71,369	74,222	77,387		40,680	42,276	43,479	44,286	45,138
Share of Laborforce Age 55 or older							20%	22%	24%	25%	24%
Share of Laborforce Peak Productive Years (25-54):							67%	65%	63%	63%	63%

SOURCE: Bureau of Labor Statistics and Johnson Reid

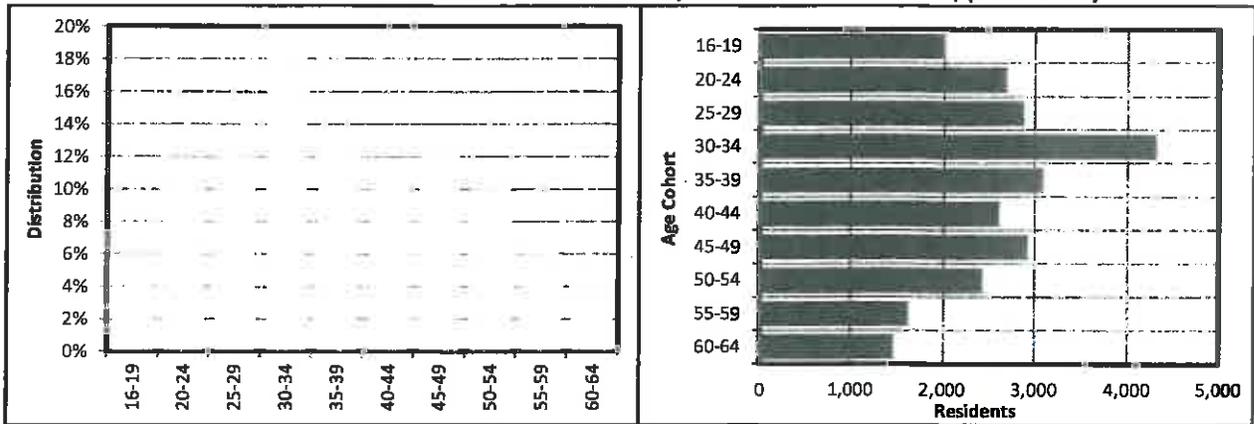
Labor Force Driven Migration

In light of figure's 13 and 14 above, we calculated the additional number of people likely to reside in the district as a function of economic growth. Assuming the district's capture of future labor driven residents and stability in labor force participation, we estimate future migratory growth in the vicinity of roughly 1,300 residents annually over the 20-year period. Further, we allocated labor force driven migration across each demographic segment. We began with the distribution of workers within the existing labor force, and shifted allocation slightly to reflect the likelihood of the most mobile cohorts to migrate for employment. Figure 15 presents our distribution of labor force driven migration by cohort.

⁵ Or a combination of both, this analysis assumes static labor force participation rates, which tend to move slowly over short time periods.



FIGURE 15: DISTRIBUTION OF LABOR FORCE DRIVEN MIGRATION, MEDFORD SCHOOL DISTRICT, (2010-2030)



SOURCE: Johnson Reid, LLC

School Age Children of New Migrants

While the results in Figure 15 demonstrate the likely impacts of economic growth on the workforce age population, it does not reflect the school age population associated with new migrants. People in these demographic segments have the highest propensity to be parents, who will both bring their existing children into the district and enter the population pool, having children at the same rate. To approximate the distribution of children associated with their migrating parents, we utilized an age-specific total fertility rate methodology. In other words, we assume that migrating mothers have the same propensity in each stage of their life to have children as the existing population (likely a conservative assumption as the exhibit trend has been migrants with higher fertility rates). For example, on average 100 random mothers age 25-29 were likely to have 3 children when they were 15-19 (child is now 10-14), 13.6 children when they were 20-24 (child is now 5-9), and 12.7 children in their current age cohort (child is < 5), for a total of 29 children. In our model, these children are considered the labor force driven increase in the child population.

**FIGURE 16: PROPENSITY FOR MIGRATING MOTHERS TO HAVE EXISTING CHILDREN BY CHILD'S AGE
MEDFORD SCHOOL DISTRICT**

Mother's Age	Child's Age						
	0-4	5-9	10-14	15-19	20-24	25+	
15-19	0.030	0.000	0.000	0.000	0.000	0.000	
20-24	0.137	0.030	0.000	0.000	0.000	0.000	
25-29	0.127	0.137	0.030	0.000	0.000	0.000	
30-34	0.123	0.127	0.137	0.030	0.000	0.000	
35-39	0.033	0.123	0.127	0.137	0.030	0.000	
40-44	0.010	0.033	0.123	0.127	0.137	0.030	
45-49	0.000	0.010	0.033	0.123	0.127	0.137	
50-54	0.000	0.000	0.010	0.033	0.123	0.127	

Over the 20-year period, this model translates into roughly 175 children age 5-17 migrating to the district annually with their parents. This represents the student age population, not assumed enrollment impacts.

Adjusting for Existing Migration Trends

The results in this section reflect the likely migratory path we expect to occur given planned economic growth. However, we must acknowledge that migratory trends are likely already in effect in the district. In other words, a share of this net-new growth is going to be met by what we have already called structural or

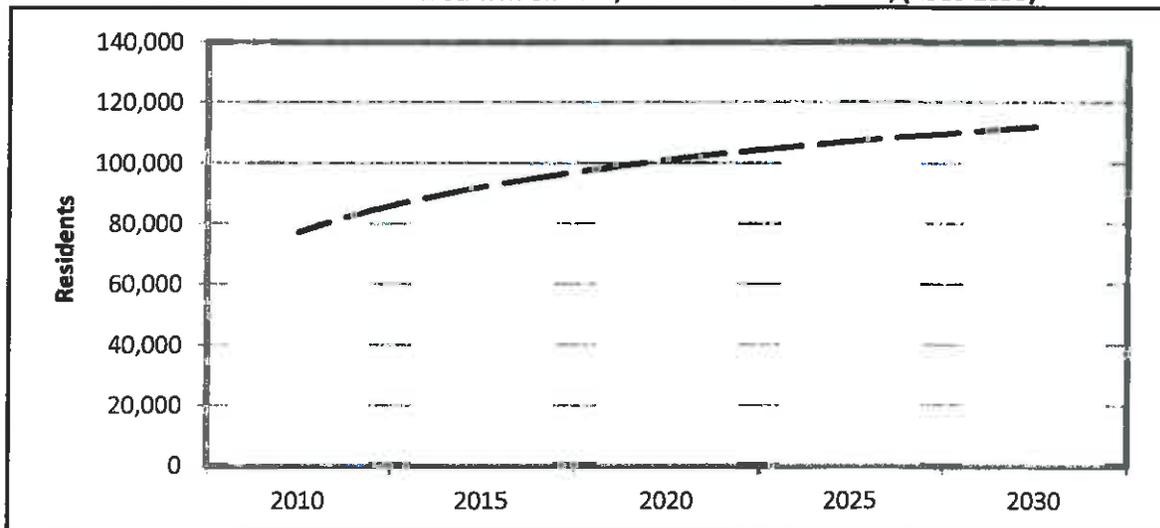


trended migration. For example, we estimate that over the next 20-years the district will exhibit a net-migration of 2,875 residents age 25-29 to maintain the current labor force balance and meet future economic need. However, the existing migration rate will generate 764 new residents in this group. The net-new growth above and beyond the existing trend is 2,111 residents, not 2,875. Therefore, for each age and sex cohort we "net out" existing migration and consider the labor driven totals to represent the migratory "ceiling".

District-Wide Population Forecast

The analytical tasks presented above combine to produce a forecast of the district population over the 20-year period. For simplicity, our model only considers the population aged zero to 80 years⁶. Over the 20-year period, we forecast roughly 35,000 new residents in the district, an average annual rate of 1.9% growth. These findings and this rate of growth is consistent with Medford's adopted 1.9% rate in its Comprehensive Plan. The student age population is expected to grow at slightly slower rate, while adding over 5,500 new student age residents.

FIGURE 17: DISTRICT-WIDE POPULATION GROWTH, MEDFORD SCHOOL DISTRICT, (2010-2030)



Conversion to Enrollment

Finally, our model converts student age population to forecasts of district-wide enrollment. As mentioned in Section IV, we utilize capture rates and Grade Progression Ratio's to convert student population to enrollment. Our model applies observed and anticipated capture rates by grade level to predict the number of students by grade level in the district. This process captures the effects of some grade levels to have a higher propensity to have alternative education options (private school, home schooling, out of district). This forecast scenario anticipates 1.8% average annual growth over the forecast period. Growth is expected to be higher in the first ten-year period, and moderate slightly from 2020-2030. The baby boom which began in 2006 is expected to continue during the first half of our forecast, creating accelerated growth in elementary and middle school enrollment. As these students progress through their grade years at expected grade progression rates, high school enrollment will grow substantially in the second half of the

⁶ Available data from the Census, Oregon Health Authority etc. aggregate all persons older than 80 into one group, because this group does not impact enrollment or labor considerably, we do not program the dynamics of this segment.



forecast. At the same time, high school enrollment growth is likely to lag in the first ten-years, as the low elementary school enrollment observed in recent years begins to reach high school.

FIGURE 19: ENROLLMENT FORECAST BY GRADE LEVEL, COHORT-MIGRATION MODEL, MEDFORD SCHOOL DISTRICT, (2010-2030)

Grade	ACTUAL ENROLLMENT							FORECAST ENROLLMENT*				2010-2020		2020-2030		2010-2030	
	2005	2006	2007	2008	2009	2010	2011	2015	2020	2025	2030	Δ	AAGR	Δ	AAGR	Δ	AAGR
BIRTHS*		1,141	1,225	1,182	1,146	1,148	1,189	1,324	1,409	1,498							
K	923	856	897	896	904	1,025	962	1,090	1,234	1,314	1,390	209	1.9%	156	1.2%	365	1.5%
1	941	988	920	933	940	1,003	1,038	1,161	1,284	1,374	1,427	281	2.5%	144	1.1%	424	1.8%
2	904	916	984	900	904	939	1,013	1,122	1,237	1,344	1,365	298	2.8%	128	1.0%	426	1.9%
3	906	901	908	1,022	876	961	971	1,162	1,212	1,351	1,348	251	2.3%	136	1.1%	387	1.7%
4	978	926	911	919	1,004	928	955	1,124	1,182	1,347	1,399	254	2.5%	217	1.7%	471	2.1%
5	955	988	944	944	881	1,061	960	1,074	1,192	1,338	1,429	131	1.2%	237	1.8%	368	1.5%
6	947	961	967	930	923	899	1,039	1,039	1,188	1,299	1,391	289	2.8%	203	1.6%	492	2.2%
7	908	909	937	960	901	925	927	1,008	1,153	1,254	1,358	228	2.2%	206	1.7%	433	1.9%
8	969	907	900	933	948	929	929	995	1,170	1,209	1,340	241	2.3%	170	1.4%	411	1.8%
9	1,069	997	914	901	953	1,003	977	1,062	1,159	1,215	1,366	156	1.5%	208	1.7%	363	1.6%
10	1,090	1,055	1,000	923	914	962	992	1,028	1,094	1,213	1,344	132	1.3%	249	2.1%	382	1.7%
11	942	1,057	1,013	934	876	896	970	979	1,036	1,183	1,282	140	1.5%	245	2.1%	386	1.8%
12	1,006	1,004	1,088	1,006	1,017	1,008	1,018	1,091	1,113	1,274	1,377	105	1.0%	264	2.1%	369	1.6%
Total	12,538	12,465	12,383	12,201	12,041	12,539	12,751	13,936	15,255	16,714	17,818	2,716	2.0%	2,562	1.6%	5,279	1.8%
K-6	6,554	6,536	6,531	6,544	6,432	6,816	6,938	7,772	8,530	9,367	9,751	1,714	2.3%	1,221	1.3%	2,935	1.8%
7-8	1,877	1,816	1,837	1,893	1,849	1,854	1,856	2,003	2,323	2,463	2,698	469	2.3%	375	1.5%	844	1.9%
9-12	4,107	4,113	4,015	3,764	3,760	3,869	3,957	4,161	4,403	4,884	5,368	534	1.3%	966	2.0%	1,499	1.7%

B. GRADE PROGRESSION MODEL

To ensure accuracy of forecast methodology, we produced a second forecast scenario using a standard grade progression model. This method assumes the observed and forecasted level of births, and captures this "entry" student population in the transition Kindergarten and 1st Grade years. Once captured into the enrollment pool, students are progressed through the system using observed GPRs identified in Figure 10 of Section IV. Our analysis utilized the three year average GPR for the first eight years of the forecast to incorporate recent trends, and allowed GPRs to trend toward the 10-year average. Further, we utilized a constant Kindergarten/1st Grade capture rate of 92%. This is below the 2010 observed rate of 95%, which we consider to be anomalously high.

FIGURE 20: ASSUMED AVERAGE GRADE PROGRESSION RATIOS, GRADE PROGRESSION MODEL SCENARIO

Grade	3-year Avg GPR	10-year Avg GPR
1	1.06	1.06
2	0.99	0.98
3	1.02	1.01
4	1.01	1.01
5	1.02	1.01
6	0.99	0.99
7	1.00	0.99
8	1.01	1.00
9	1.04	1.04
10	1.00	1.00
11	0.98	0.97
12	1.13	1.08

SOURCE: Medford School District and Johnson Reid



For example, in 2007 there were 1,225 births. The Grade Progression Model survives these births to their schooling years, and captures them at a 92% rate, yielding an estimated 2012 Kindergarten class of 1,096 students. This Kindergarten class is progressed through each grade in their schooling years by the assumed average GPRs for each grade. Because the Grade Progression Model is based on birth data generated in the same population growth model as the Cohort forecast, it is best to think of the GPR model as a calibration of the cohort model, filtering results through time tested observable (not estimated) data on the movement of students through the school system.

When applied, the GPR model yields results outlined in Figure 21. Despite using an entirely different methodology, we arrive at strikingly similar results when compared to the cohort model. The historic trend based Grade Progression Model actually yields slightly higher overall growth. The primary discrepancy of the two models is the timing of enrollment changes at different grade levels. For example, the GPR Model predicts that high school enrollment growth will still lag in the first ten years, but to a lesser magnitude.

FIGURE 21: ENROLLMENT FORECAST BY GRADE LEVEL, GRADE PROGRESSION MODEL, MEDFORD SCHOOL DISTRICT, (2010-2030)

Grade	ACTUAL ENROLLMENT*							FORECAST ENROLLMENT*				2010-2020		2020-2030		2010-2030	
	2005	2006	2007	2008	2009	2010	2011	2015	2020	2025	2030	Δ	AAGR	Δ	AAGR	Δ	AAGR
BIRTHS*		1,141	1,225	1,182	1,146	1,148	1,189	1,324	1,409	1,498							
K	923	856	897	896	904	1,025	962	1,094	1,240	1,320	1,396	215	1.9%	157	1.2%	371	1.6%
1	941	988	920	933	940	1,003	1,038	1,163	1,285	1,381	1,434	282	2.5%	149	1.1%	431	1.8%
2	904	916	984	900	904	939	1,013	1,127	1,243	1,344	1,364	304	2.8%	121	0.9%	425	1.9%
3	906	901	908	1,022	876	961	971	1,177	1,226	1,345	1,338	265	2.5%	112	0.9%	377	1.7%
4	978	926	911	919	1,004	928	955	1,045	1,194	1,345	1,391	266	2.6%	196	1.5%	463	2.0%
5	955	988	944	944	881	1,061	960	1,085	1,209	1,344	1,430	148	1.3%	221	1.7%	369	1.5%
6	947	961	967	930	923	899	1,039	1,058	1,206	1,297	1,394	307	3.0%	188	1.5%	495	2.2%
7	908	909	937	960	901	925	927	992	1,179	1,262	1,364	254	2.5%	185	1.5%	439	2.0%
8	969	907	900	933	948	929	929	972	1,212	1,232	1,351	283	2.7%	139	1.1%	422	1.9%
9	1,069	997	914	901	953	1,003	977	1,003	1,110	1,228	1,383	107	1.0%	273	2.2%	380	1.6%
10	1,090	1,055	1,000	923	914	962	992	1,098	1,138	1,224	1,361	176	1.7%	223	1.8%	399	1.7%
11	942	1,057	1,013	934	876	896	970	959	1,096	1,193	1,283	200	2.0%	188	1.6%	387	1.8%
12	1,006	1,004	1,088	1,006	1,017	1,008	1,018	1,073	1,155	1,272	1,362	147	1.4%	207	1.7%	354	1.5%
Total	12,538	12,465	12,383	12,201	12,041	12,539	12,751	13,847	15,493	16,787	17,851	2,954	2.1%	2,358	1.4%	5,312	1.8%
K-6	6,554	6,536	6,531	6,544	6,432	6,816	6,938	7,750	8,605	9,376	9,747	1,789	2.4%	1,143	1.3%	2,931	1.8%
7-8	1,877	1,816	1,837	1,893	1,849	1,854	1,856	1,964	2,391	2,493	2,714	537	2.6%	324	1.3%	860	1.9%
9-12	4,107	4,113	4,015	3,764	3,760	3,869	3,957	4,133	4,498	4,918	5,390	629	1.5%	891	1.8%	1,521	1.7%

* Includes all Medford School District Enrollment, including Public Charter Schools.

SOURCE: Medford School District and Johnson Reid, LLC

VI. ENROLLMENT FORECAST BY SCHOOL

In this section we allocate forecasted district-wide enrollment growth to individual schools within the district. While the importance of understanding total future enrollment as it relates to capacity is certainly clear, it's equally important to evaluate the *path of growth*, or where localized stress on school capacity may occur.

We utilize a "top-down" allocation method relying on a series of variables affecting the likely housing and migratory trends, in addition to birth trends in each school area. We also make assumptions by geography about the ratio of students who attend school in the ESAA they reside in, as well as propensity for alternative education options such as private school. However, we must use caution when interpreting results at small geographies for longer-term forecasts. Input variables among small area geographies tend to be more volatile, change quickly, and with small changes yielding measurable results. As such, we do not attempt to forecast any significant cyclicity beyond the near-term.



Factors affecting Capture/Allocation⁷

Because enrollment growth is a function of net-births and migration, we evaluate the area specific conditions relating to each component. For example, the Kennedy ESAA may have produced nearly 9% of births over the last 5 years; however, this same area is largely built out and is not likely to exhibit considerable net new housing growth on the margin. At the same time, areas like Jacksonville have exhibited considerable net new housing growth, and maintain a large amount of vacant buildable land. However, growth occurring in this ESAA has been disproportionately retirement age households, and the impact on enrollment is expected to be far more measured. What follows is a brief summary of a series of input variables we employ to predict the likely path of growth over the forecast period.

Fertility Rates

Average fertility rates are higher in the southern part of the district, averaging 76.8 per 1,000 mothers compared to 69.4 in the north. In 2010 the highest fertility rates were observed in the Jackson ESAA, followed by Howard and Washington. Ruch, Lone Pine, and Lincoln exhibit relatively low fertility rates during the same period.

Hispanic Population

Higher marginal birth rates are likely to be correlated with growth in the district's Hispanic population, as Hispanic households tend to have higher fertility rates. In 2010 Hispanic residents make up nearly 13% of the population. Over the last 10-years growth in the Hispanic population has been concentrated in Howard (+ 847), Oak Grove (+ 608), and Kennedy (+ 437). As a percentage, Griffin Creek also more than doubled its Hispanic population. In 2010 over 65% of the district's Hispanic Residents lived in the southern part of the district.

Females in Child Bearing Years

The ratio or number of females in child bearing years is strongly correlated with the number of babies born on the margin. In 2010, nearly 54% of females age 15-44 lived in the southern portion of the district. Howard (9.8% share), Kennedy (9.5%), and Oak Grove (8.7%) have the highest share of potential mothers. With these ESAAs all having above average fertility rates, we can reasonably expect an above average number of mothers having an above average number of babies in these ESAAs.

Recent Birth Activity

The babies born in each district over the last five years have the greatest likelihood of becoming the "next" elementary school class within that district. Now, some of these children will not survive, move out of district, or even to other ESAAs. Some will attend private school or home school. However, on average, we can reasonably expect a correlation between births within an ESAA in one year and a Kindergarten class size five and half years later. However, to determine if five year lagged births translate into a net increase in enrollment, we have to compare those births to current enrollment in that grade range. Here, we compare births from 2006-2010 to the 2010 K-4th Grade levels. A higher ratio indicates a greater likelihood of near term increase in elementary enrollment. As it stands, again, the highest ratios are in the south, with Jackson (2.32), Howard (1.86), Washington (1.81), and Oak Grove (1.72) leading the way.

Housing Unit Growth

In addition to birth related trends, which are likely to carry stronger enrollment correlation in the near-term, longer-term trends have a greater likelihood of being driven by migratory impacts, particularly as it

⁷ This section organizes ESAAs into "North Schools" and "South Schools". This distinction is determined by the Middle School boundary line. This delineation classifies the Howard ESAA in the south because it feeds McLaughlin Middle School.



pertains to the path of net-new residential growth. Johnson Reid tallied growth in new housing units in each ESAA over the last five years. We found that over 60% of housing unit growth was concentrated in the south. The largest share of residential growth was in the Howard and Hoover ESAs at 18.9% each. Strong growth also occurred in Griffin Creek (12%), Kennedy (11%) and Oak Grove (9%). Areas in the district that are largely built-out exhibited expected anemic housing growth, most notably Washington, Roosevelt, and Jefferson.

Vacant Land Inventory

Among the most important variables, the inventory of vacant residential land will arguably determine the path of population growth more than any other variables. Under the current urban growth boundaries (including Jacksonville), vacant residential land is roughly equally distributed between the north and south. In the north, nearly all vacant land is located in either Hoover (37%) or Lincoln (8%). In the South, Jacksonville has the largest share of vacant land (32%) followed by Griffin Creek (7%) and Oak Grove (5%). Taken together, these four ESAs comprise 89% of vacant land inventory in the district. We stress however, that household growth does not directly correlate to enrollment growth, and simply having vacant land does not ensure that growth will occur. For example, in the case of Jacksonville, household growth has not translated into enrollment growth, as Jacksonville has both a higher propensity of non-family households and with higher incomes, a greater propensity to attend private school.

Family Households

We consider growth and concentration of family households to determine an area's propensity to have net-migrants with children locating in the ESAA. Over the last 10-years, the majority of net-new family households located in Jacksonville (+26%), Oak Grove (+24%), Hoover (+14%), and Griffin Creek (+13%). Some districts, such as Ruch, Wilson, Washington, Lone Pine, and Jackson, have fewer family households today than they did in 2000. Certain ESAs simply have a lower concentration of family households. For example, in 2010 56% of households in Roosevelt were family households compared to 80% in Lincoln and 75% in Griffin Creek.

2nd - 5th Grade Average Grade Progression

A consistent indicator of net-migration into a district is the average grade progression ratio for grades 2-5, since these grades are not transitory or typically exhibit a drop-out rate. In other words, once a child is enrolled in the second grade, as long as her parents do not move out of the district, she typically remains in the same school through the 5th grade. Therefore, average GPRs greater than 1.00 indicate in-migration while GPRs less than 1.00 indicate students moving out of the ESAA. Over the last five years, areas that have exhibited growth display high GPRs, namely Hoover (1.09), Jacksonville (1.05), and Griffin Creek (1.01). We see low GPRs in areas where we know birth rates may be high, but little growth is occurring. Examples include Jefferson, Jackson, and Washington.

Figure 22 summarizes the observed variables outlined above. Johnson Reid combined these input parameters to make estimates of the likely migratory and birth patterns around the district over the forecast period.



FIGURE 22: SUMMARY OF ALLOCATION VARIABLES BY SCHOOL AREA, MEDFORD SCHOOL DISTRICT

School	Fertility Rate	Hispanic Population #	Share	Females 15-44 #	Share	5-year Birth Share	5-year Births to K-4	Housing Unit Growth	Vacant Land	Family HH Propensity	5-year 2-5 GPR
<u>NORTH SCHOOLS</u>											
Wilson	82.8	800	7.4%	1,316	8.4%	8.4%	1.66	4%	0%	47%	0.95
Hoover	72.1	466	4.3%	1,179	7.5%	6.1%	0.97	19%	37%	74%	1.09
Lone Pine	49.8	401	3.7%	1,004	6.4%	6.5%	1.20	1%	3%	75%	1.05
Kennedy	79.5	859	7.9%	1,485	9.5%	8.8%	1.67	11%	2%	67%	0.98
Roosevelt	69.7	905	8.3%	1,277	8.2%	7.7%	1.75	0%	1%	56%	1.00
Lincoln	51.4	356	3.3%	992	6.3%	4.4%		5%	8%	80%	1.02
Hedrick	69.2	3,787	34.9%	7,253	46.3%	42%	N/A	40%	52%	65%	
North Medford	N/A	4,966	45.7%	7,688	49.1%	49%	N/A	48%	30%	65%	
<u>SOUTH SCHOOLS</u>											
Griffin Creek	69.4	603	5.6%	1,152	7.4%	6.6%	1.11	12%	7%	75%	1.01
Oak Grove	75.4	1,323	12.2%	1,366	8.7%	8.7%	1.72	9%	5%	67%	0.98
Jacksonville	61.7	375	3.5%	859	5.5%	3.8%	0.96	10%	32%	68%	1.05
Jefferson	71.5	838	7.7%	1,049	6.7%	8.3%	1.66	3%	2%	66%	0.97
Jackson	100.9	1,259	11.6%	991	6.3%	10.1%	2.32	3%	0%	53%	0.97
Washington	80.6	1,101	10.1%	1,079	6.9%	7.9%	1.81	1%	0%	61%	0.99
Howard	85.3	1,441	13.3%	1,536	9.8%	10.9%	1.86	19%	2%	63%	0.98
Ruch	44.5	135	1.2%	382	2.4%	1.9%	1.98	2%	0%	72%	1.03
McGloughlin	76.8	7,075	65.1%	8,414	53.7%	58%	N/A	60%	48%	66%	
South Medford	N/A	5,896	54.3%	7,979	50.9%	51%	N/A	52%	70%	67%	

We developed allocation ratios for each school within the district which were then applied to our enrollment forecast by grade level in the previous section. We assumed that the district's public charter schools would maintain their trended enrollment levels, allocating remaining growth on the margin around the district. In the near-term (through 2015), greater weight was placed on recent birth and grade progression trends. For example, observable births within each area were captured and progressed through the system. Over the long-term 2015-2030, marginal enrollment growth is likely to be driven by recent and anticipated migratory trends, and greater weight is placed on factors such as land availability, planned housing unit growth, and propensity for family household growth.

Enrollment Growth by School

Figure 23 highlights our forecast of enrollment growth by individual school. Overall, the district's schools are expected to exhibit 1.8% average annual growth over the forecast period, adding nearly 4,800 students through 2030. A brief summary of the results in Figure 23 follows below:



FIGURE 23: ENROLLMENT FORECAST BY SCHOOL, MEDFORD SCHOOL DISTRICT

School	ACTUAL ENROLLMENT							FORECAST ENROLLMENT				2011-2020		2020-2030		2011-2030	
	2005	2006	2007	2008	2009	2010	2011	2015	2020	2025	2030	Δ	AAGR	Δ	AAGR	Δ	AAGR
NORTH SCHOOLS																	
Wilson	572	540	547	559	565	485	485	447	417	433	442	-68	-1.7%	25	0.6%	-43	-0.5%
Hoover	484	487	468	521	560	638	603	782	935	1,056	1,115	332	4.3%	179	1.8%	512	3.0%
Lone Pine	558	547	569	547	532	537	564	650	706	743	759	142	3.1%	52	0.7%	195	1.8%
Kennedy	547	547	587	561	555	515	519	566	624	658	673	105	2.2%	49	0.8%	154	1.4%
Roosevelt	385	404	354	372	368	407	406	416	435	458	469	29	0.7%	34	0.8%	63	0.7%
Lincoln	525	543	524	510	475	466	449	510	581	652	689	132	2.5%	107	1.7%	240	2.1%
Hedrick	956	930	922	935	894	908	894	917	1,109	1,153	1,249	215	2.2%	139	1.2%	355	1.7%
North Medford	1,941	1,877	1,890	1,759	1,757	1,775	1,734	1,884	2,039	2,224	2,431	305	1.6%	392	1.8%	697	1.7%
SOUTH SCHOOLS																	
Griffin Creek	560	550	538	599	562	593	580	704	835	951	1,008	255	3.9%	174	1.9%	428	2.8%
Oak Grove	455	538	514	500	474	471	492	571	693	820	877	201	4.4%	185	2.4%	385	3.3%
Jacksonville	401	366	361	361	325	391	400	459	528	597	630	128	3.4%	103	1.8%	230	2.5%
Jefferson	543	526	549	542	542	495	505	580	617	631	637	112	2.5%	20	0.3%	132	1.3%
Jackson	380	373	320	309	317	388	394	445	489	519	532	95	2.6%	43	0.9%	138	1.7%
Washington	443	421	439	413	405	420	443	488	515	527	534	72	2.3%	19	0.4%	91	1.3%
Howard	549	544	531	535	501	547	501	563	637	682	701	136	1.7%	64	1.0%	200	1.3%
Ruch	191	199	214	174	197	171	176	147	120	132	139	-56	-3.9%	19	1.5%	-37	-1.1%
McLoughlin	882	837	866	919	895	837	789	864	1,071	1,123	1,236	282	2.8%	165	1.4%	447	2.1%
South Medford	1,887	1,920	1,920	1,833	1,777	1,804	1,821	1,838	2,019	2,221	2,447	198	1.3%	428	1.9%	626	1.6%
K-6	6,593	6,585	6,515	6,503	6,378	6,524	6,517	7,329	8,131	8,859	9,206	1,614	2.5%	1,075	1.2%	2,689	1.8%
7-8	1,838	1,767	1,788	1,854	1,789	1,745	1,683	1,782	2,180	2,277	2,485	497	2.9%	305	1.3%	802	1.9%
9-12	3,828	3,797	3,810	3,592	3,534	3,579	3,555	3,722	4,058	4,445	4,878	503	1.5%	820	1.9%	1,323	1.6%
TOTAL:	12,259	12,149	12,113	11,949	11,701	11,848	11,755	12,833	14,369	15,581	16,569	2,614	2.3%	2,200	1.4%	4,814	1.8%

Summary of School Enrollment Forecast

- At the elementary school level, we anticipate the largest share of long-term enrollment growth will continue to be captured in the Hoover ESAA. Between 2005 and 2011 enrollment in Hoover grew by 25% while exhibiting 19% of the District's household growth. Hoover has average fertility rates and concentration of potential mothers. However, Hoover has 37% of the vacant residential land in the district and families locate there at an above average rate.
- Behind Hoover, Oak Grove and Griffin Creek are expected to exhibit significant enrollment growth. Both ESAAs have average fertility rates, above average concentration of potential mothers, and strong growth in the Hispanic population. Further, these ESAAs, on the fringe of the urban growth boundary, are clearly in the path of residential growth in the district. Taken together they combined for 22% of housing unit growth since 2005 and have 12% of vacant residential land in the district. With strong housing affordability relative areas like Hoover and Jacksonville, we expect Oak Grove and Griffin Creek to capture a growing share of net-migration on the margin.
- Jacksonville and Lincoln are two ESAAs that are likely to exhibit a capture of migratory growth on the margin. Each has a significant share of vacant land, and has exhibited housing unit growth. Jacksonville's growth will be tempered by its demographic characteristics, which are likely to produce a smaller than average number of children and families. However, migration will keep Jacksonville's enrollment growth above average. Lincoln, which has seen enrollment decline in recent years, has the highest concentration of families in the district, but below average fertility rates. Like Jacksonville, its growth will be predicated on net-new household growth and path of residential development.
- Unlike Jacksonville and Lincoln, the Howard and Kennedy ESAAs have strong fertility rates, strong family growth, and a concentration of mothers well above average. Further, since 2005 they have combined for 20% of the district's births and 30% of housing unit growth. However, each has



declined in enrollment since 2005. With a combined ratio of children under 5 to K-4 enrollment of over 1.75, we expect enrollment growth to be strong in these ESAs over the next 5-8 years. However, each has less than 2% of the residential land in the district, and the capacity for future housing unit growth is limited. We expect the effects of recent growth to influence enrollment in Howard and Kennedy over the near-term, with slower marginal growth over a long-term horizon.

- Lone Pine is largely built out and likely to exhibit measured long-term growth. However, Lone Pine had a small baby bump in 2007-2008, a share of which is likely to begin entering the school system in 2012 and 2013. This anomaly will elevate enrollment in short-term. However, low birth rates and limited capacity for marginal housing unit growth will keep long-term enrollment growth at bay.
- Roosevelt, Jackson, Jefferson, and Washington are a basket of ESSA's that we expect to capture a smaller share of long-term marginal growth. Each is largely built-out with little capacity for housing unit growth. In other words, these ESAs are less likely to experience net-migration or net-new household growth. However, growth in the near-term is likely given demographic characteristics and recent birth activity. However, in the long-run we would not anticipate any of these districts capturing greater than 5% of long-term K-6 enrollment growth.
- Wilson and Ruch are the ESAs least likely to exhibit positive enrollment growth. Ruch is an entirely rural location, which has exhibited negative birth, enrollment, and migration trends. The regional trend toward urbanization is likely to limit any growth in Ruch. With the exception of an above average fertility rate, Wilson exhibits poor input variables across the board. We expect Wilson to continue to exhibit negative enrollment growth in the near-term before stabilizing at a slow growth rate equal to a 2% capture of long-term growth.
- Based on the existing composition of elementary school students by age and school in the district, we expect McGloulin middle school to capture the lion's share of 7-8 grade enrollments in the near-term. However, over the long-term the growth differential narrows between the two schools, as recent child-age growth in north progresses through the grade system and into middle school.
- At the High School level, growth is expected to be distributed roughly similar to the Middle School distribution in the long-term. However, in the near term, the north will grow rapidly as strong recent enrollment at Hedrick filters into high school. Conversely, enrollment at McGloulin has been relatively low, tempering short-term enrollment growth at South Medford.

VII. CONCLUSION

In recent years, the Medford School District has exhibited declining enrollment among most of the District's facilities. The combination of housing affordability in the middle of the decade and a deepest economic recession in a generation had combined to reverse economic and demographic interest in the region. However, when broad based stabilization occurs, the City of Medford is planning on an accelerated period of economic and demographic expansion. Recent planning efforts have adopted an economic and housing growth rate of 2.0% and 1.9%, respectively. These planning objectives are likely to have influential impacts on district-wide enrollment, as roughly 84% of all housing units in the Medford School District are located within the Medford UGB.

In the preceding analysis, we identified the likely pattern of growth for the district over both a 10-year and 20-year planning horizon. Consistent with Medford's recent Comprehensive Plan updates, we forecast



average annual growth in the range of 1.9%. Because we expect labor driven net-migration to the principal contributor to population growth, we document how net-migrants have a higher propensity to be in more mobile age segments, who are also disproportionately parents.

In addition to planned migratory impacts, we have observed a measurable rebound in fertility rates throughout the district. This has in part been driven by a 65% increase in district's Hispanic population. For example, between 2005 and 2010 we observe an average annual number of births 19% higher than the 2000 level, indicating a mini-baby boom on the horizon of the early school enrollment.

Taken together, planned demographic growth translates into notable capacity concerns for the district. Outlined in Figure 24, several schools in the district are already at or near capacity. Specifically, Griffin Creek, Hoover, and Lone Pine elementary Schools are over capacity, with five additional schools within 10% of their cap.

FIGURE 24: EXISTING SCHOOL CAPACITY, MEDFORD SCHOOL DISTRICT FACILITIES (2010)

School/ Address	Building Size / SF	Teaching Stations	Student Capacity	2010 Enrollment	Residual Capacity	
Abraham Lincoln	3101 McLoughlin Drive	63,438	26	564	466	98
Griffin Creek	2430 Griffin Creek Road	54,930	26	563	593	-30
Hoover	2323 Siskiyou Boulevard	53,611	28	607	638	-31
Howard	286 Mace Road	59,530	28	607	547	60
Jackson	713 Summit Avenue	55,804	18	390	388	2
Jacksonville	655 Hueners Lane	57,561	22	477	391	86
Jefferson	333 Holmes Drive	52,943	24	520	495	25
Kennedy	2860 Keene Way Drive	54,788	30	650	515	135
Lone Pine	3158 Lone Pine Road	73,458	24	520	537	-17
Oak Grove	2838 West Main Street	59,355	24	520	471	49
Roosevelt	1212 Queen Anne Avenue	51,002	18	390	407	-17
Ruch	156 Upper Applegate Road	34,590	15	325	171	154
Washington	610 Peach Street	58,146	26	564	420	144
Wilson	1400 Johnson Street	49,972	25	542	485	57
ELEMENTARY:			334	7,239	6,524	715
Hedrick	1501 E. Jackson Street	158,990	44	1,085	908	177
McLoughlin	320 W. 2nd Street	161,072	42	1,035	837	198
MIDDLE:			86	2,120	1,745	375
North Medford	1900 N. Keene Way Drive	234,121	82	2,021	1,775	246
South Medford	1551 Cunningham Avenue	255,000	90	2,218	1,804	414
HIGH:			172	4,239	3,579	660

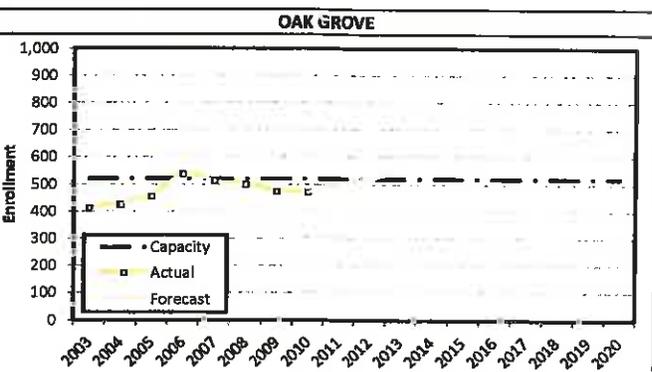
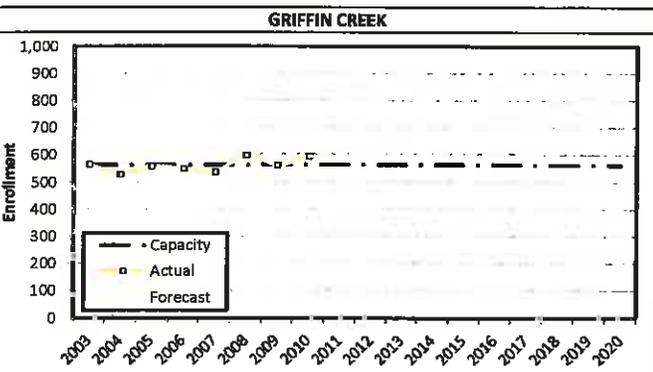
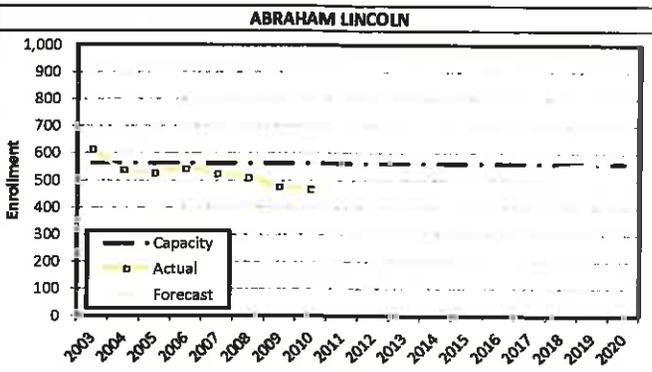
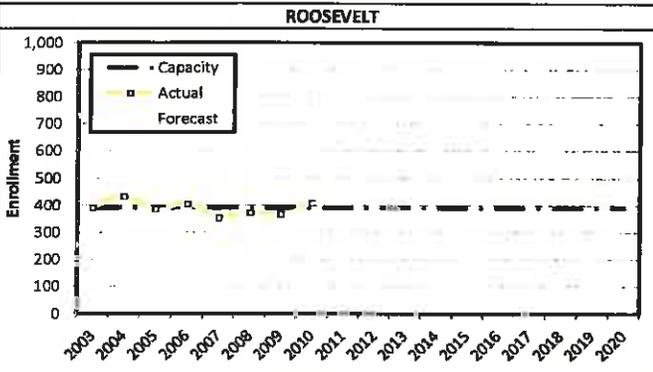
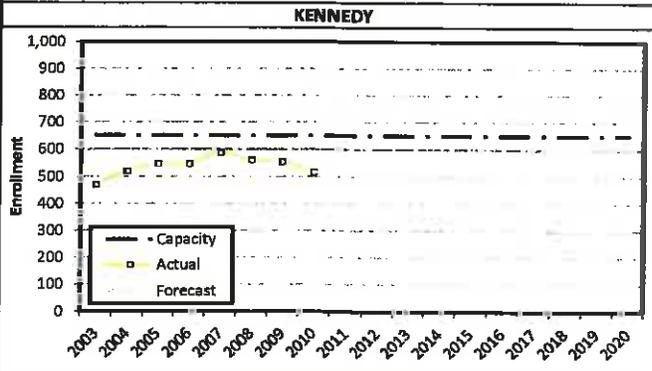
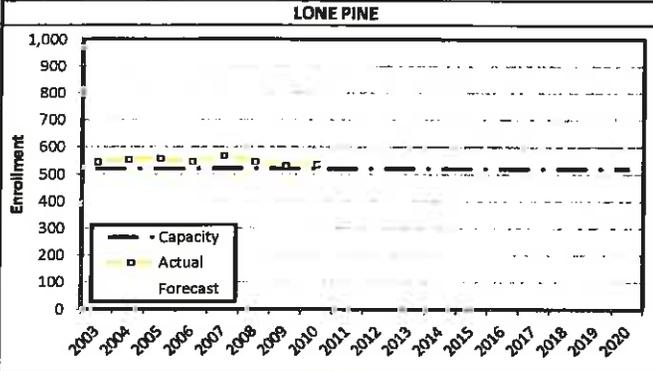
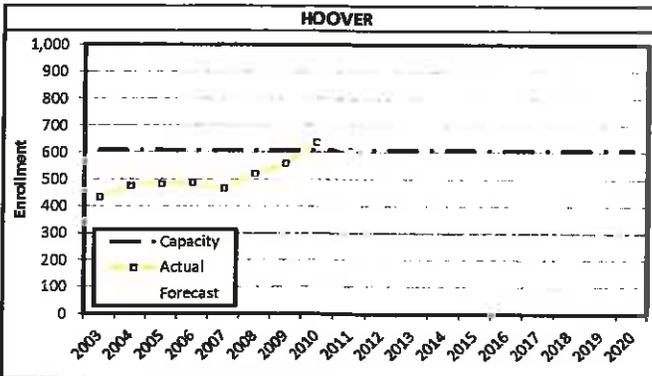
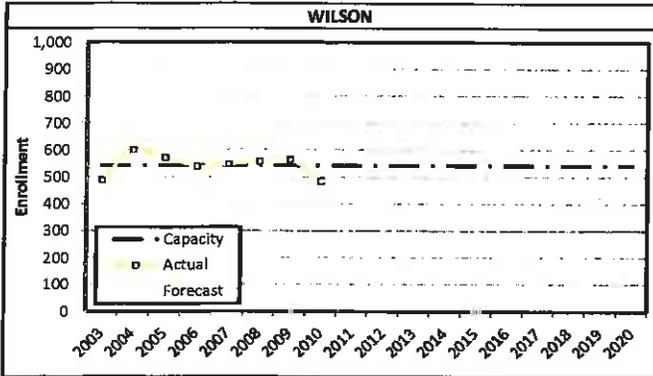
Over the next ten years, elementary school growth of over 1,600 students will create a need for at least one additional elementary school in the district. However, a look at growth on a geographic level compounds the issue. Specifically, the two schools currently exceeding capacity, Griffin Creek and Hoover, are expected to capture a significant share of growth on the horizon. All told, 10 of 14 elementary schools in the district are expected to at least approach capacity in the next 10-years under existing conditions. The largest deficiencies over a ten-year period are in Hoover (+328 students), Griffin Creek (+272 students), Lone Pine (+186 students), and Oak Grove (+173 students).

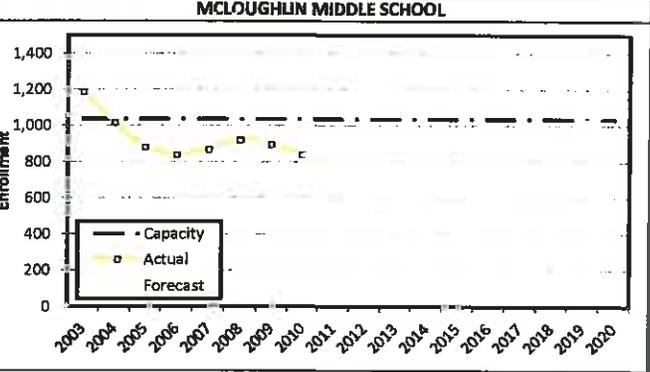
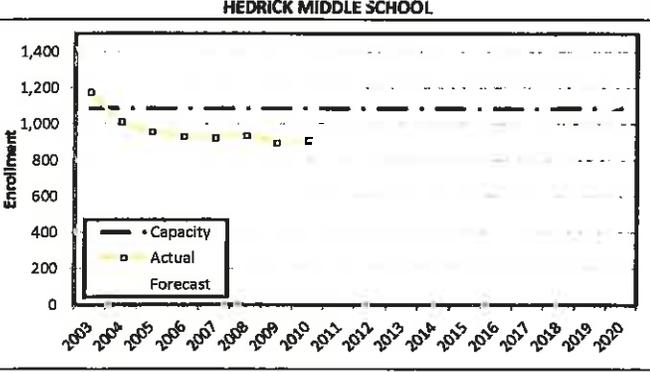
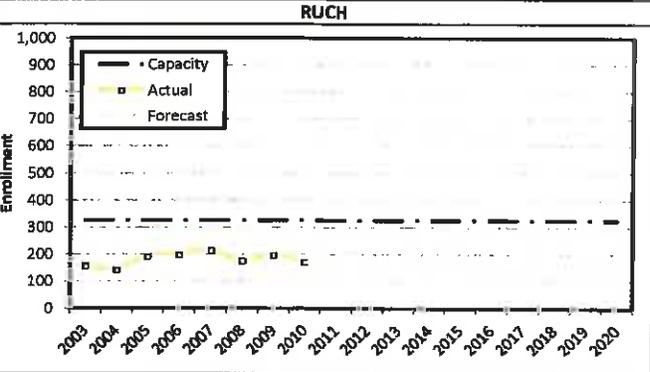
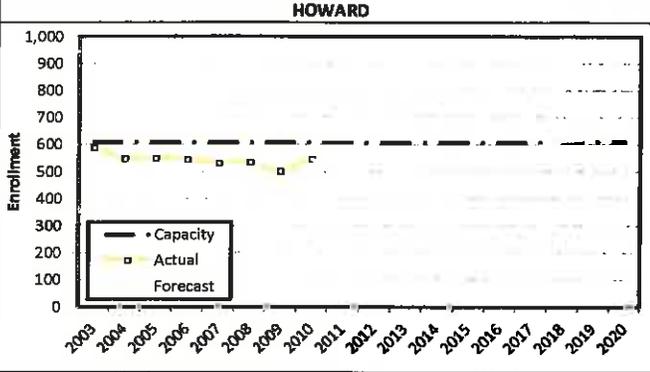
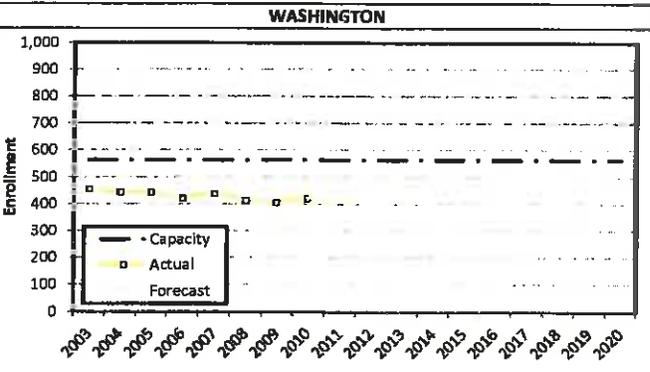
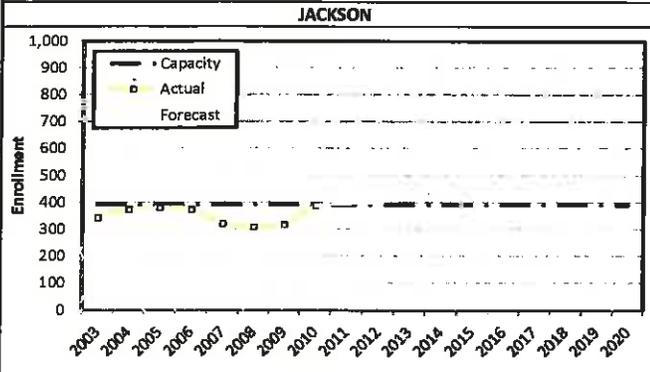
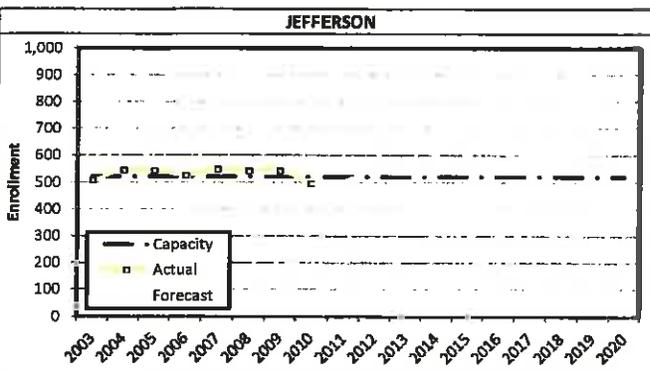
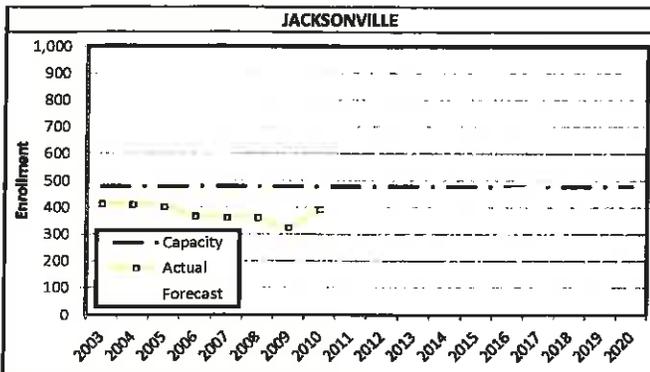
At the 7-8 grade level, Hedrick and McLoughlin Middle Schools are 16% and 19% below capacity, respectively. These current low enrollment levels are a function of the elementary school enrollment trough exhibited in the mid-2000s. However, the early grade enrollment bump underway since 2009 is likely to continue given recent birth and anticipated migration trends. Middle school enrollment growth is likely to trigger the need for an additional middle school by the end of the decade, as both schools exceed capacity.

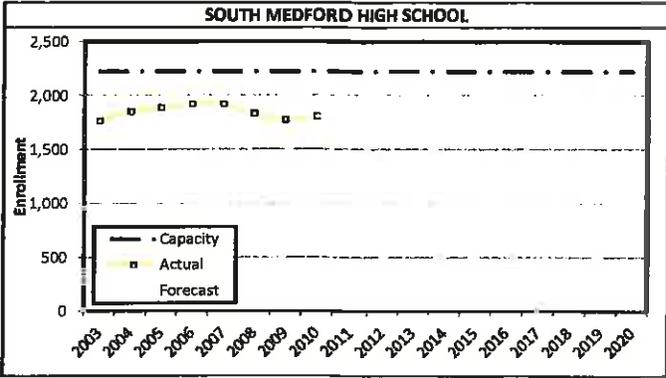
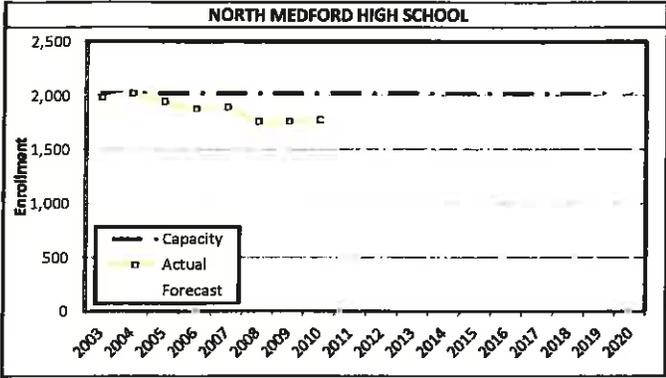


Finally, at the high school level, the combination of currently low enrollment levels and existing low enrollment at the middle school level is likely to keep high school enrollment below capacity over the 10-year horizon. Between 2005 and 2011, high school enrollment at North and South Medford fell by 7%. In recent years high school enrollment growth at Central Medford and Logos Public Charter has relieved pressure from the district's high school system considerably. Through 2010, high school enrollment is expected to grow by 503 students. At the forecasted trend, North and South Medford High Schools reach capacity in 2020 and 2024, respectively.

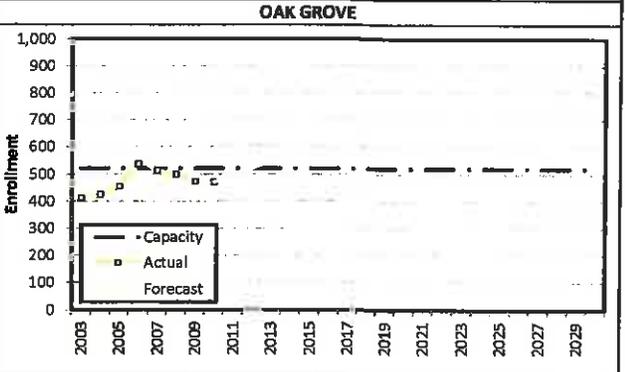
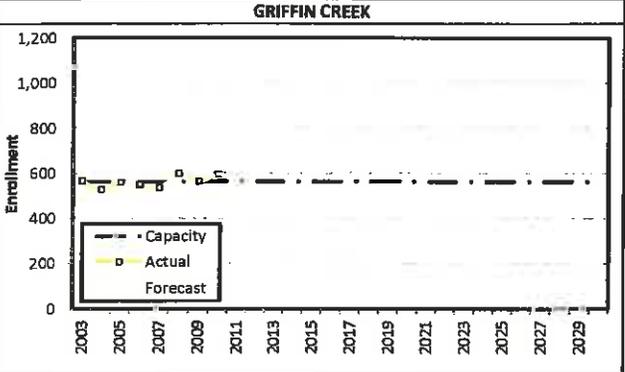
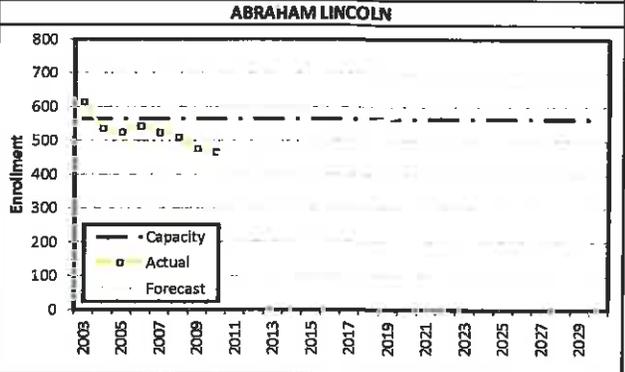
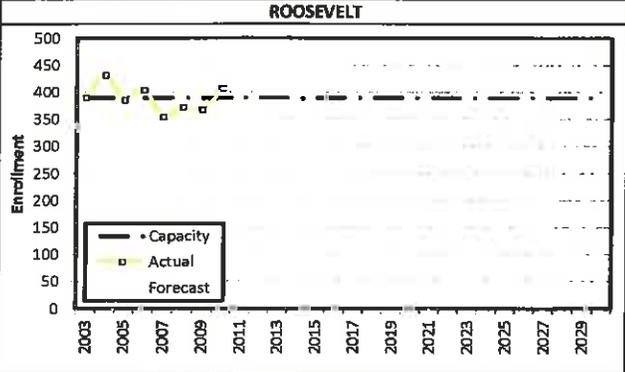
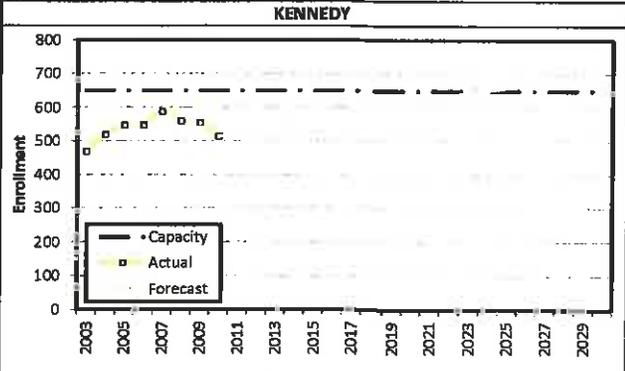
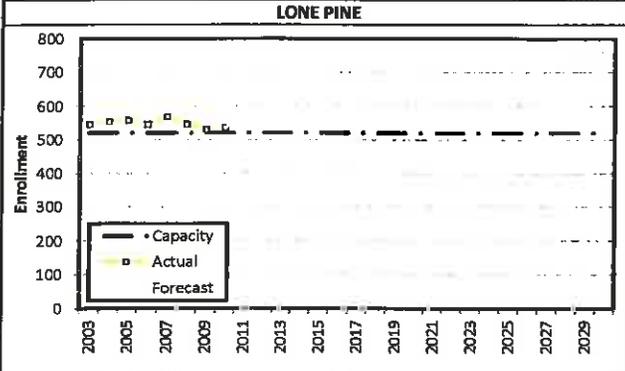
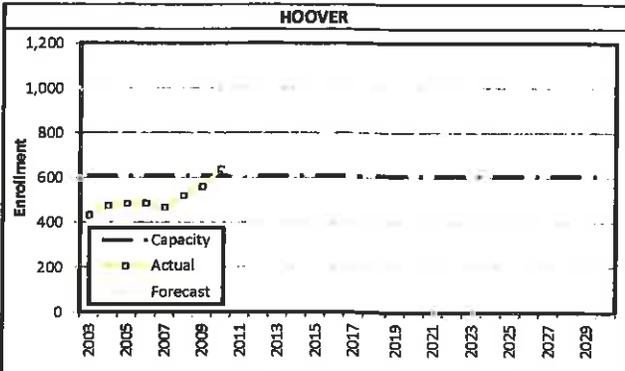
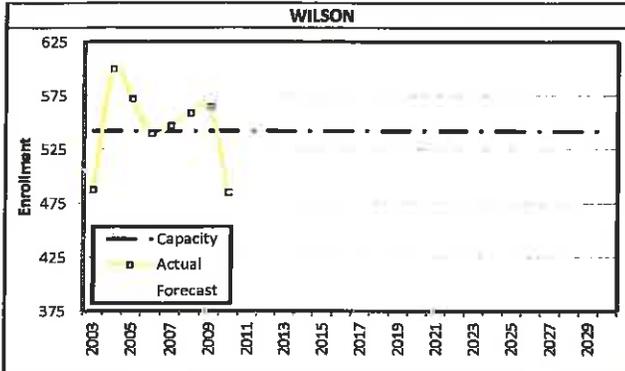
10-YEAR SCHOOL CHARTS

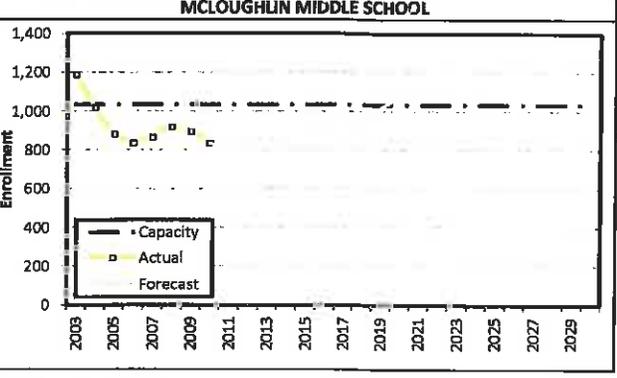
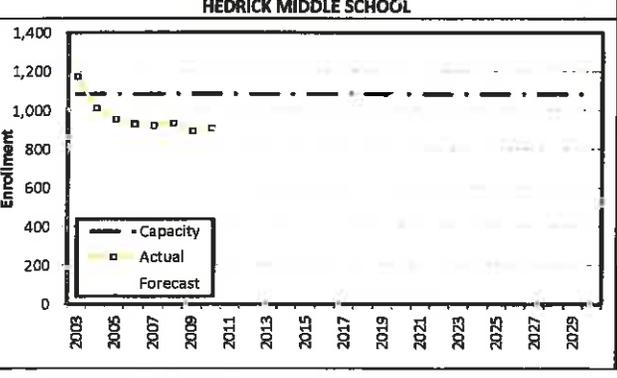
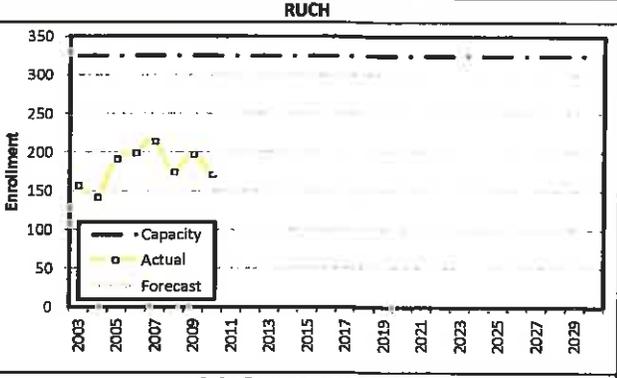
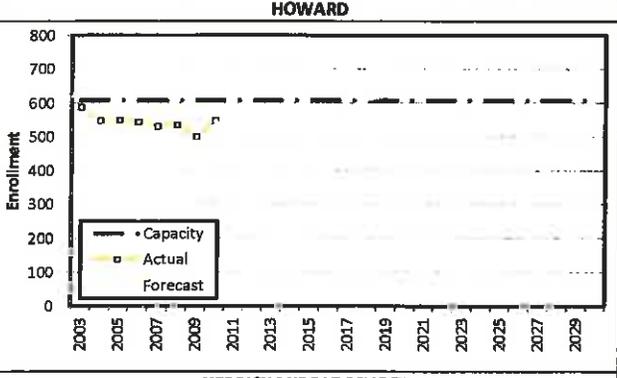
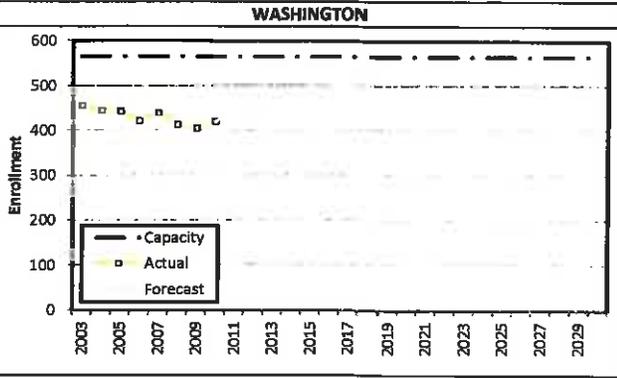
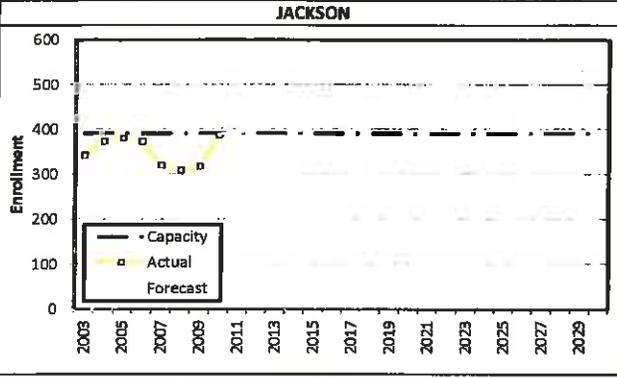
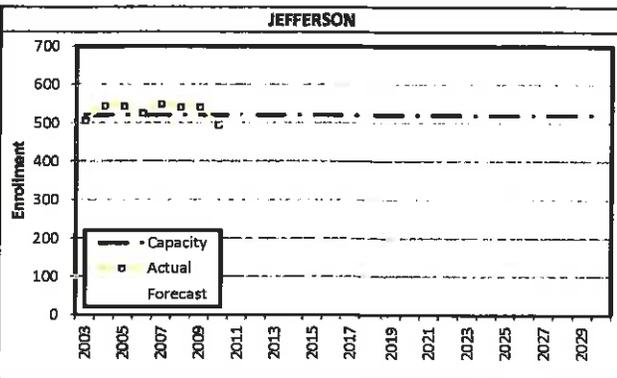
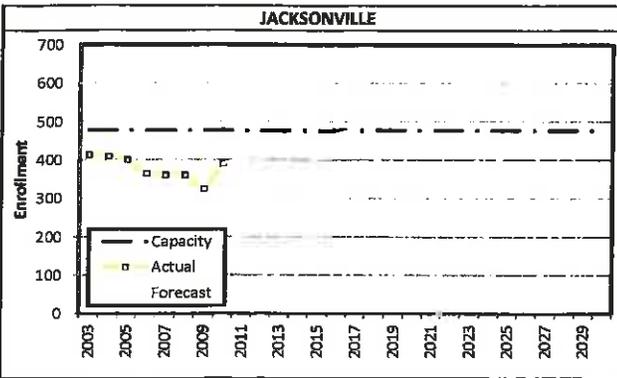


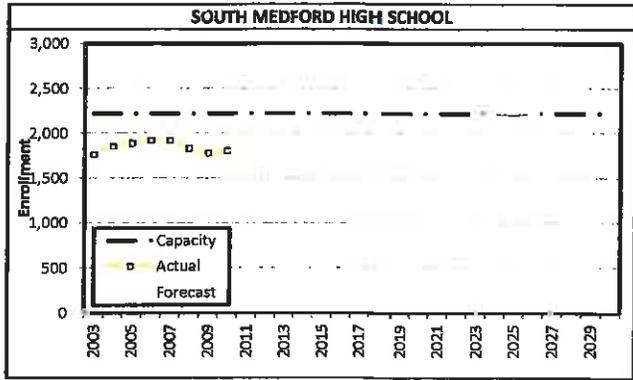
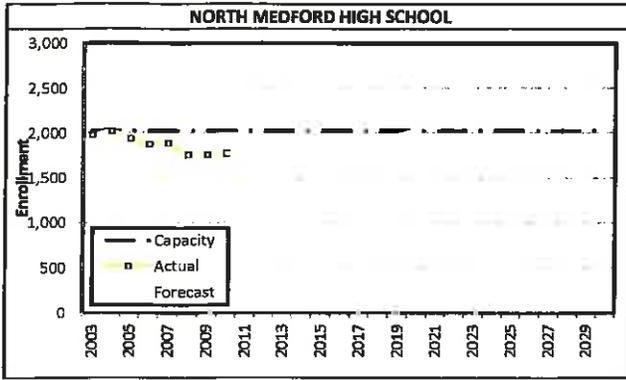




20-YEAR SCHOOL CHARTS









Medford School District 549C
 815 S. Oakdale Avenue
 Medford, OR 97501

INITIAL SCHOOL SITE EVALUATION – SITE NO. 1

2693 Willow Way (37-2W-35C-100). Approximately 600 feet west of Thomas Road and ¼ mile south of Stewart Avenue

Site location (address, map and tax lot)

No contiguous properties on the buildable land inventory

Contiguous or nearby school sites under evaluation

8.14	8.14	3-4 acres	SFR-6	Five Development, LLC
Parcel Acres	Total Site Acres	Useable	Zoning	Ownership

Site Characteristics

Topography: Relatively flat (0-3% slope)

Historical use: 1 SFD (MH)

Current use: 1 SFD (MH) on south portion of parcel; balance in horse pasture.

Other structures, improvements, or material that requiring removal and/or remediation: Livestock pens/covers. Historic county records include “accumulation of solid waste” and “heavy commercial equipment violation warnings/citations. Past aerial photos indicate the same for south side of parcel. 2010 aerial indicates debris has been removed. Legacy contamination issues possible.

Existing and planned streets (Medford Transportation System Plan), easements, or rights of way: Current access is solely by Willow Way, a substandard 20-foot wide street extending west from Thomas Road – a local order paved road with two travel lanes, graveled shoulders, no sidewalks. Easement driveway extends from Willow Way to serve SFD to north is located along east P/L. Irrigation ditch located along east P/L from south. Cunningham Avenue (minor arterial) is planned as Tier 3 project in Medford TSP to bisect parcel diagonally (SE to NW). Resulting configuration would be parcels of approx. 3-4 acres each to southwest and northeast of new ROW.

Adjacent Zoning and Land Uses

North: Medford SFR-6 zoned parcel (3.15 acres) developed with 2-story home built in 1990 adjacent to common property line.

South: County EFU zoned tract (29 acres) – Associated Fruit Co. owned “Maryland” pear orchard.

East: There are 13 parcels zoned Medford SFR-00 or SFR-6 between Site 1 and Thomas Road. Each of these parcels is developed with at least one residence – several have multiple homes. Homes vary in age from the early 20th century to recent construction.

West: County EFU zoned tract approximately 78 acres in area consisting of two parcels; structural improvements include one home and several outbuildings. Land predominantly in pasture/field use with a white oak wood on the northwest part of the land. Hull Road is the west boundary of the tract – approximately ¼ mile west of Site 1.

Medford 549C Schools Site Selection Criteria – Site No. 1

Criterion	OK	Concern
Safety These factors must be avoided:		
<ul style="list-style-type: none"> ▪ Adjacent to arterial roadways unless school site would have adequate room on property to maintain sufficient setback conducive to good learning environment (i.e., provide distance from traffic noise and emissions). Do not site adjacent to streets having four or more travel lanes. 		Planned minor arterial roadway extension of Cunningham Avenue would result in two irregularly shaped parcels undersized for the siting needs of any school facility.
<ul style="list-style-type: none"> ▪ Within 1,500 feet of railroad tracks 	✓	
<ul style="list-style-type: none"> ▪ Within airport approach overlay 	✓	
<ul style="list-style-type: none"> ▪ Crossed by high-voltage (500 KV) power lines 	✓	
<ul style="list-style-type: none"> ▪ Close to high-pressure lines, for example natural gas, gasoline sewer or water lines 	✓	
<ul style="list-style-type: none"> ▪ Contaminants/toxics in the soil or groundwater, such as from landfills, dumps, chemical plants, refineries, fuel tanks, nuclear plants, or agricultural use of pesticides or fertilizer, etc. 		County records document history of citations for solid waste accumulation and heavy equipment storage.
<ul style="list-style-type: none"> ▪ Close to high decibel noise sources 	✓	
<ul style="list-style-type: none"> ▪ Close to open-pit mining 	✓	
<ul style="list-style-type: none"> ▪ On or near a fault zone or active fault 	✓	
<ul style="list-style-type: none"> ▪ In a dam inundation area or 100- year flood plain 	✓	
<ul style="list-style-type: none"> ▪ Social hazards in the neighborhood, such as high incidence of crime and drug or alcohol abuse 	✓	
Location		
<ul style="list-style-type: none"> ▪ Location factors conducive to allow for efficient and logical school area boundaries (promotes boundaries where students live within half mile of respective schools). Maintain approximately one-mile separation from existing school sites 	✓	
<ul style="list-style-type: none"> ▪ Proximate to residential neighborhoods 	✓	
<ul style="list-style-type: none"> ▪ Multiple street approaches available (2 or more street frontages) 		Existing access is solely by way of a single 20-foot wide lane that extends 600' west from Thomas Road. Completely inadequate to service vehicular, pedestrian, and bicycle traffic and emergency access for a school. Future planned extension of Cunningham Ave. over the Willow Way would result in single frontage on an arterial roadway for undersized remnants of the split parent parcel.
<ul style="list-style-type: none"> ▪ Ability to maintain at least a 200-foot set back between classrooms and outdoor activity areas and nearby farm and forest practices 		Active orchard to south and pasturing to the west outside the urban growth boundary. The site currently just meets the threshold 8-acre siting standard and exceeds the 2:1 dimensional standard (somewhat narrow relative to length). Spray drift, noise, dust, and trespass conflicts may alternatively be mitigated by extensive vegetative screening with fencing and/or berming . However, the 200-foot

Medford 549C Schools Site Selection Criteria – Site No. 1

Criterion	OK	Concern
		setback is strongly advised as an appropriate separation between intensive agriculture and sensitive receptor sites such as play areas, class rooms, and the like.
<ul style="list-style-type: none"> ▪ Safe walking areas can be provided 		Willow Way is the only access to the site and is too narrow to safely accommodate school traffic load and safe walking. Extension of Cunningham Avenue in the future will improve roadway with sidewalks and bike lanes. However, the site will still have only a single frontage – a situation that will force a convergence of all vehicles, pedestrians, and bicycles to the one available approach.
Environment		
<ul style="list-style-type: none"> ▪ Desirable features include a variety of trees and plants or a wooded area and a natural water feature for use in education programs such as biology or outdoor learning 		No significant existing feature – landscape improvements viable, though.
<ul style="list-style-type: none"> ▪ Free from sources of noise that may impede the instructional process 		Orchard operations to south can generate noise during growing season – generous setback area needed
<ul style="list-style-type: none"> ▪ Free from air, water and soil pollution 		Soil contaminant concern requires on-site investigation
<ul style="list-style-type: none"> ▪ Provides aesthetic view from and of the site 	✓	
<ul style="list-style-type: none"> ▪ Compatible with the educational program 		OK if contaminant concerns cleared and setback to orchard can be accommodated
Soils		
<ul style="list-style-type: none"> ▪ Proximity to faults or fault traces 	✓	
<ul style="list-style-type: none"> ▪ Stable subsurface and bearing capacity 		Per NRCS, Medford silty clay loam (soil map symbol 127A) over all of Site 1 is moderately to severely limited for building sites and roadways due to shrink-swell, low strength, and wetness. Limitations of slight to moderate for recreational development such as playgrounds, trails, and picnic areas.
<ul style="list-style-type: none"> ▪ Danger of slides or liquefaction 	✓	
<ul style="list-style-type: none"> ▪ Positive drainage 		High water table (4-6 feet) Dec-Apr, though not perched.
Topography		
<ul style="list-style-type: none"> ▪ Generally level 	✓	
<ul style="list-style-type: none"> ▪ Flat sites preferred; If flat site unavailable, choose site with minimum need for major excavation 	✓	
<ul style="list-style-type: none"> ▪ Rock ledges or outcroppings 	✓	
<ul style="list-style-type: none"> ▪ Surface and subsurface drainage 		Storm water detention area will be necessary given clays and water table – limiting buildable area further
<ul style="list-style-type: none"> ▪ Level area for playfields 	✓	
Size and Shape		
<ul style="list-style-type: none"> ▪ Generally Rectangular, Length-to-width ratio does not exceed 2:1 		Exceeded (2.55 : 1) for 8.14 acre site. If split by future Cunningham Ave, resulting parcels will be generally triangular and of insufficient acreage – separated by arterial roadway.
<ul style="list-style-type: none"> ▪ Sufficient open play area and open space 		Not if split by Cunningham Ave extension in future.

Medford 549C Schools Site Selection Criteria – Site No. 1

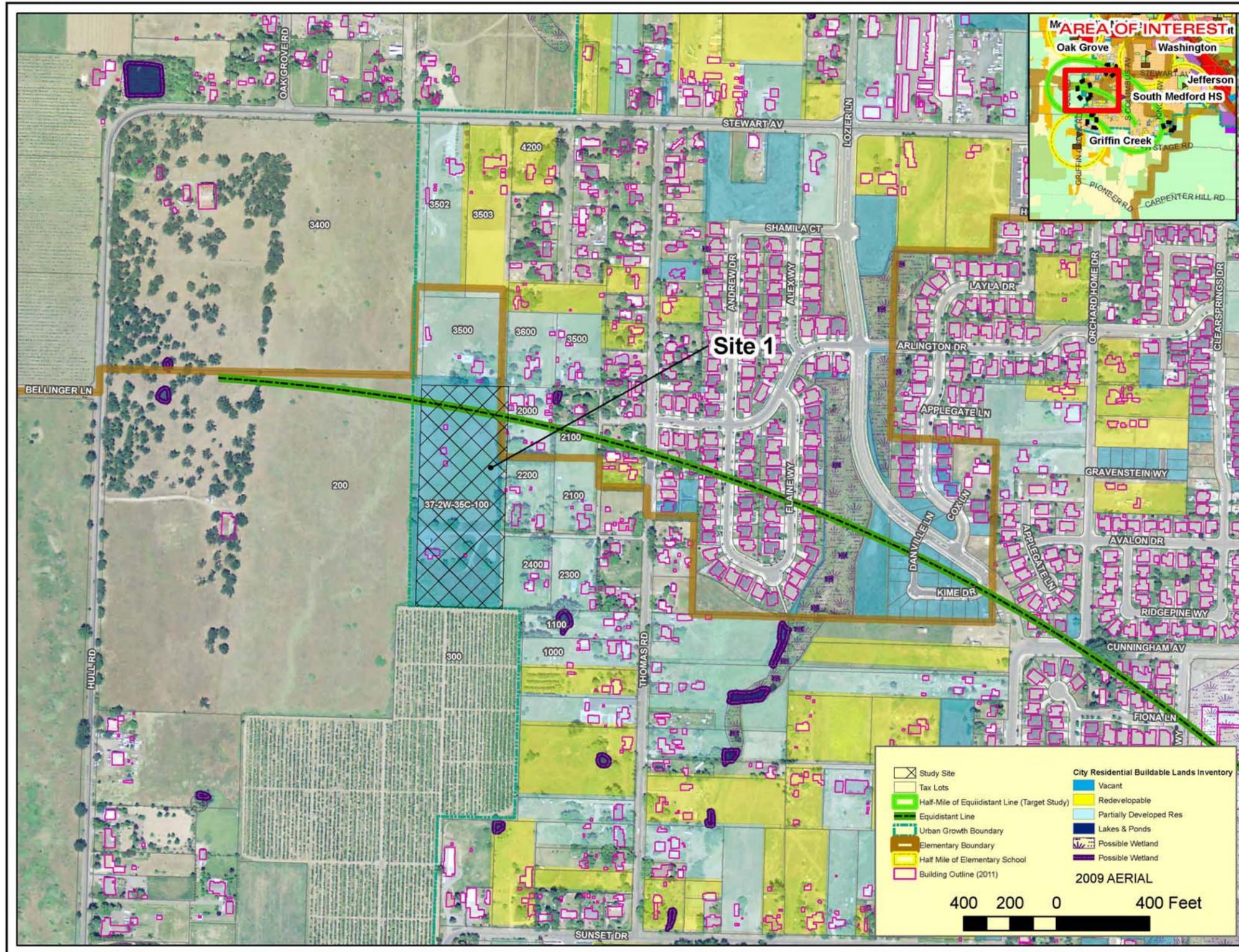
Criterion	OK	Concern
<ul style="list-style-type: none"> ▪ Potential for expansion for future needs 		Existing build-out of neighborhood to the east impracticable as expansion site. Expansion to south or west would be on land outside the urban growth boundary – requiring urban growth boundary amendment.
<ul style="list-style-type: none"> ▪ Area for adequate and separate bus loading and parking 		Existing site configuration marginal – and sole access by substandard Willow Way is wholly inadequate for any vehicular access needs. Split by Cunningham Ave ext. in future will create inadequate configuration.
Accessibility		
<ul style="list-style-type: none"> ▪ Obstacles such as crossings on major streets and intersections, narrow or winding streets, heavy traffic patterns 		Narrowness of Willow Way.
<ul style="list-style-type: none"> ▪ Access and dispersal roads 		20-foot wide Willow Way as sole access from a single direction; Thomas Road leading to Willow Way from both north and south generally lacks sidewalk improvements. Thomas Road is approximately 2/3 of a mile in length, connecting to Stewart Avenue approx. 1750 north of Willow Way and to Sunset Drive approx. 1700 feet to the south of Willow Way. There are 54 direct residential driveway accesses for lots that front on Thomas Road. Until such time as Cunningham Ave. may be extended, bus and other vehicular traffic patterns would likely result in conflicts with neighborhood residential traffic on the local order roadway.
<ul style="list-style-type: none"> ▪ Natural obstacles such as grades or gullies 	✓	
<ul style="list-style-type: none"> ▪ Access for bus transportation 		Willow Way inadequate; Morning bus fleet convergence routing along Taylor Road likely to create conflict with many existing residential driveways.
<ul style="list-style-type: none"> ▪ Routing patterns for foot traffic 		Route of approach limited to Willow Way/Thomas Road – may induce trespass over intervening pasture and orchard land to west and south.
<ul style="list-style-type: none"> ▪ Remote areas (with no sidewalks) where students walk to and from school 		Western edge of Medford urban area. Sidewalk infrastructure has been installed in nearby Elk Creek Estates Subdivision to east which then leads to Lozier Land and Stewart Ave. sidewalks. Cunningham Ave. extension would further extend s/w and bicycle infrastructure from east. Direct connection to Hull Road and Bellinger Lane and beyond to older rural subdivisions to west unlikely w/o urban growth boundary revision.
<ul style="list-style-type: none"> ▪ Easily reachable by emergency response vehicles 		Similar constraints as general access issues.
Public Services		
<ul style="list-style-type: none"> ▪ Available and feasible at time of construction 	✓	
<ul style="list-style-type: none"> ▪ Fire and police protection, including fire water lines 	✓	
Cost		
<ul style="list-style-type: none"> ▪ Reasonable costs for purchase of property, severance damages, relocation of residents and businesses, and legal fees 		Last conveyance was in 2005 for \$800,000. Basis relatively high given site constraints and existing infrastructure. ROW widening of Willow Way will require land acquisition and demo of several adjacent buildings. Impacted residents along Thomas Road would be expected to object to traffic and other impacts of school operations.

Medford 549C Schools Site Selection Criteria – Site No. 1

Criterion	OK	Concern
<ul style="list-style-type: none"> ▪ Reasonable costs for site preparation including, but not limited to, drainage, parking, driveways, removal of existing buildings, and grading 	✓	(other than access)
<ul style="list-style-type: none"> ▪ Environmental mitigation 		Elevated risk of legacy issues from past heavy equipment and solid waste violations
<ul style="list-style-type: none"> ▪ Reasonable maintenance costs 	✓	
Availability		
<ul style="list-style-type: none"> ▪ On the market for sale or likely to be available 		Not on market currently. Developer owned (Five Development LLC) – likely planned for future residential build-out with Cunningham Ave extension
<ul style="list-style-type: none"> ▪ Title clearance - unencumbered 		Unknown
<ul style="list-style-type: none"> ▪ Condemnation of buildings and relocation of residents to be avoided 		Willow Way improvements as needed will require demo of adjacent homes and structures and land acquisition. Land assembly by developer more likely than public condemnation in future when residential market improves substantially.

CONCLUSION

Site No. 1 is located on the half-mile equidistant line of the West Medford Target Study Area and on the present boundary line between Oak Grove and Griffin Creek Elementary Schools, and is approximately two-thirds of a mile from the present boundaries for the Washington and Jefferson Elementary Schools. Access is a major issue for this site. There is only one very substandard access approach presently available by Willow Way which itself extends from Thomas Road – a local order street. Although this road will someday be replaced by the planned extension of Cunningham Avenue as a minor arterial, that future remedy will split the site into two separate parcels that will be too small and ill-configured for public school use. Unless Cunningham Avenue can be extended further west to connect through to Hull Road, access to the site will continue to be limited to a single public approach from only one direction. Further consideration of the site is not warranted given the critical access limitations. Site No. 1 is unsuitable for use as a school site.



ELEMENTARY SCHOOL
ALTERNATIVES ANALYSIS - WEST MEDFORD
STUDY SITE 01

Figure 13



Medford School District 549C
 815 S. Oakdale Avenue
 Medford, OR 97501

INITIAL SCHOOL SITE EVALUATION – SITE NO. 2

Primary parcel located at 1032 Cherry Street (37-2W-35AA-800). Approximately 400 feet north of intersection with Stewart Avenue.

Site location (address, map and tax lot)

Contiguous parcels for Site No. 2 in several ownerships - all in Map 37-2W-35AA - include TL 300 (1.19 acres), TL 400 (1.54 acres owned by Nations Lending, LLC), TL 500 (1.54 acres), TL 600 (1.79 acres), TL 600 (0.3 acres), TL 1700 (0.6 acres), and TL 1800 (0.95 acres).

Contiguous or nearby school sites under evaluation

5.01	11.5	10 acres	SFR-10 SFR- 00 RR-2.5	Five Development, LLC
Parcel Acres	Total Site Acres	Useable	Zoning	Ownership

Site Characteristics

Topography: Relatively flat (0-3% slope)

Historical use: 1 SFD (MH)

Current use: Principal parcel (TL 800) vacant but has street infrastructure improvements installed for residential subdivision for which plat approval has expired. TL 300 has a house; TL 400 has a house; TL 500 vacant; TL 600 serves as parking/loading for TL 700 (Cherry Street Butcher Shop); TL 1700 vacant; TL 1800 has a house.

Other structures, improvements, or material that requiring removal and/or remediation: Use of TL 600 in assemblage would affect butcher shop on adjacent TL 700 as the building occupies all of TL 700 and appears to encroach onto TL 600 (in common ownership w/ TLs 600 and 500).

Existing and planned streets (Medford Transportation System Plan), easements, or rights of way: Principal parcel fronts on Cherry Street, a local order residential street that connects to Stewart Avenue – a major arterial – approx. 400-feet to the south. Local street and utility infrastructure has been stemmed into the principal parcel to begin a residential subdivision grid, but improvements have not yet been platted or accepted for public dedication. TLs 1700 & 1800 have direct frontage along Stewart Avenue approx. 460 feet west of the Cherry Street intersection.

Adjacent Zoning and Land Uses

North: Medford SFR-6 zoned Westwind Estates Subdivision developed with 25 residential lots along Windward Drive and Vicki Lane.

South: Stewart Avenue, and Medford MFR-30 zoned land to south of Stewart Ave. developed with apartment building (approx. 42,000 sq ft “Living on Track @ 1905 Stewart Ave.”). Orchard Home Drive extends south from Stewart Ave. to single family residential neighborhoods beyond.

East: Medford SFR-6 zoning predominates. Church located at NE corner of Stewart/Cherry intersection. Post-WWII residential neighborhoods further east (Douglas Addition, Westside Heights, Winchester Place, etc...), bound generally by Columbus/Stewart/Hamilton/Dakota Avenues.

West: County SR-2.5 zoning within urban growth boundary, which is approx. 1000 feet to west of site. Lozier Lane, a North-South roadway, is approx. 425 feet to west of site. Fronting on north side of Stewart Ave. west of site to Lozier Lane are several pre-existing commercial and industrial businesses including auto repair, self-storage warehouses, overhead door supply and repair company, and a convenience store.

Medford 549C Schools Site Selection Criteria – Site No. 2

Criterion	OK	Concern
<p>Safety These factors must be avoided:</p>		
<ul style="list-style-type: none"> ▪ Adjacent to arterial roadways unless school site would have adequate room on property to maintain sufficient setback conducive to good learning environment (i.e., provide distance from traffic noise and emissions). Do not site adjacent to streets having four or more travel lanes. 		<p>Stewart Ave. is a major arterial and designated truck/freight route pursuant to the Medford TSP. Currently, only two travel lanes exist. Stewart Ave. will eventually be improved to four lanes. Lozier is designated as major collector and freight route. Lozier to be improved to accommodate freight traffic as a medium range project (Tier 2). Intersection with Stewart would be expanded at that time to accommodate full freight movements.</p>
<ul style="list-style-type: none"> ▪ Within 1,500 feet of railroad tracks 	✓	
<ul style="list-style-type: none"> ▪ Within airport approach overlay 	✓	
<ul style="list-style-type: none"> ▪ Crossed by high-voltage (500 KV) power lines 	✓	
<ul style="list-style-type: none"> ▪ Close to high-pressure lines, for example natural gas, gasoline sewer or water lines 	✓	
<ul style="list-style-type: none"> ▪ Contaminants/toxics in the soil or groundwater, such as from landfills, dumps, chemical plants, refineries, fuel tanks, nuclear plants, or agricultural use of pesticides or fertilizer, etc. 		<p>County records document history prior to annexation of citations for solid waste accumulation and equipment storage. Adjacent pre-existing commercial and industrial uses may also have impacted site.</p>
<ul style="list-style-type: none"> ▪ Close to high decibel noise sources 		<p>Stewart Avenue is a noise source – principal parcel area adequately setback though.</p>
<ul style="list-style-type: none"> ▪ Close to open-pit mining 	✓	
<ul style="list-style-type: none"> ▪ On or near a fault zone or active fault 	✓	
<ul style="list-style-type: none"> ▪ In a dam inundation area or 100- year flood plain 	✓	
<ul style="list-style-type: none"> ▪ Social hazards in the neighborhood, such as high incidence of crime and drug or alcohol abuse 		<p>Higher than average reported crime incidents in area north of Stewart Avenue and near Columbus Ave.; proximity to commercial uses may present issues related to trespass, alcohol/tobacco, robbery attempts, etc...</p>
<p>Location</p>		
<ul style="list-style-type: none"> ▪ Location factors conducive to allow for efficient and logical school area boundaries (promotes boundaries where students live within half mile of respective schools). Maintain approximately one-mile separation from existing school sites 		<p>Site No. 2 is at the northern extent of the target study area, overlapping the line. A half-mile service area for a school at this site would encroach to the north into Washington and Oak Grove Elementary service areas. Student population to be served would likely be heavily weighted further to south and southeast of site as consequence.</p>
<ul style="list-style-type: none"> ▪ Proximate to residential neighborhoods 	✓	
<ul style="list-style-type: none"> ▪ Multiple street approaches available (2 or more street frontages) 	✓	
<ul style="list-style-type: none"> ▪ Ability to maintain at least a 200-foot set back between classrooms and outdoor activity areas 	✓	

Medford 549C Schools Site Selection Criteria – Site No. 2

Criterion	OK	Concern
and nearby farm and forest practices		
<ul style="list-style-type: none"> ▪ Safe walking areas can be provided 	✓	
Environment		
<ul style="list-style-type: none"> ▪ Desirable features include a variety of trees and plants or a wooded area and a natural water feature for use in education programs such as biology or outdoor learning 		Site is generally bare. Land conducive to landscape improvements. Small wetland indicated on NWI could be enhanced if still present (may have been graded out in preparation for subdivision)
<ul style="list-style-type: none"> ▪ Free from sources of noise that may impede the instructional process 		Adjacent and nearby commercial/industrial uses exist; Major arterial and designated truck route at Stewart Ave.
<ul style="list-style-type: none"> ▪ Free from air, water and soil pollution 		Ground contamination concerns from prior ownership activities (solid waste accumulation, equipment storage); adjacent commercial/industrial uses; Stewart Ave (noise/emissions).
<ul style="list-style-type: none"> ▪ Provides aesthetic view from and of the site 		No particular aesthetic views – general territorial. Adjacent outdoor storage and other businesses would need screening.
<ul style="list-style-type: none"> ▪ Compatible with the educational program 		Marginal
Soils		
<ul style="list-style-type: none"> ▪ Proximity to faults or fault traces 	✓	
<ul style="list-style-type: none"> ▪ Stable subsurface and bearing capacity 		Per NRCS, predominant Coleman loam (soil map symbol 34B) over Site 2 is moderately to severely limited for building sites and roadways due to shrink-swell, low strength, and wetness. Limitations are moderate for recreational development such as playgrounds, trails, and picnic areas.
<ul style="list-style-type: none"> ▪ Danger of slides or liquefaction 	✓	
<ul style="list-style-type: none"> ▪ Positive drainage 		High water table (1.5-2 feet) Dec-Apr, Apparent.
Topography		
<ul style="list-style-type: none"> ▪ Generally level 	✓	
<ul style="list-style-type: none"> ▪ Flat sites preferred; If flat site unavailable, choose site with minimum need for major excavation 	✓	
<ul style="list-style-type: none"> ▪ Rock ledges or outcroppings 	✓	
<ul style="list-style-type: none"> ▪ Surface and subsurface drainage 		Storm water detention area will be needed
<ul style="list-style-type: none"> ▪ Level area for playfields 	✓	
Size and Shape		
<ul style="list-style-type: none"> ▪ Generally Rectangular, Length-to-width ratio does not exceed 2:1 		Aggregated site would be irregularly configured to obtain necessary land area.
<ul style="list-style-type: none"> ▪ Sufficient open play area and open space 		If adequate assemblage of parcels can be achieved
<ul style="list-style-type: none"> ▪ Potential for expansion for future needs 		Not beyond identified parcels for assemblage.
<ul style="list-style-type: none"> ▪ Area for adequate and separate bus loading and parking 	✓	
Accessibility		

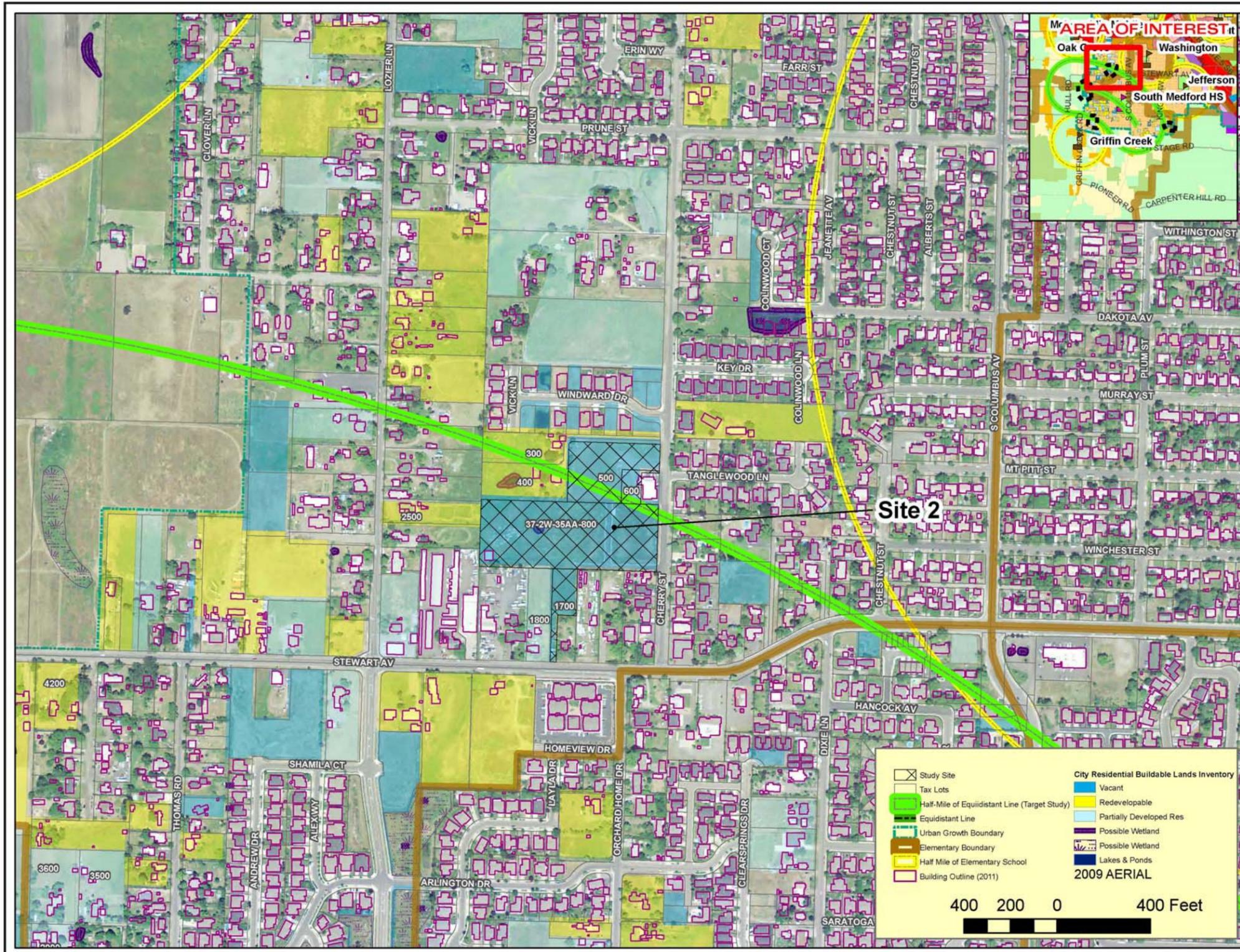
Medford 549C Schools Site Selection Criteria – Site No. 2

Criterion	OK	Concern
<ul style="list-style-type: none"> ▪ Obstacles such as crossings on major streets and intersections, narrow or winding streets, heavy traffic patterns 	✓	
<ul style="list-style-type: none"> ▪ Access and dispersal roads 	✓	
<ul style="list-style-type: none"> ▪ Natural obstacles such as grades or gullies 	✓	
<ul style="list-style-type: none"> ▪ Access for bus transportation 	✓	
<ul style="list-style-type: none"> ▪ Routing patterns for foot traffic 	✓	Additional east-west connectivity to north of site would be desired to connect Lozier with Cherry so as to avoid out-of-direction travel to and along Stewart Ave. high traffic corridor.
<ul style="list-style-type: none"> ▪ Remote areas (with no sidewalks) where students walk to and from school 	✓	
<ul style="list-style-type: none"> ▪ Easily reachable by emergency response vehicles 	✓	
Public Services		
<ul style="list-style-type: none"> ▪ Available and feasible at time of construction 	✓	
<ul style="list-style-type: none"> ▪ Fire and police protection, including fire water lines 	✓	
Cost		
<ul style="list-style-type: none"> ▪ Reasonable costs for purchase of property, severance damages, relocation of residents and businesses, and legal fees 		Site properties currently not listed, but developer owned. Last recorded sale of principal parcel only in 2008 was for \$875,000, and considerable expenditure for construction of residential street and utility infrastructure evidenced on-the-ground. TL 400 to north sold for \$704,000 in 2011. High cost may reflect committed work toward residential subdivision entitlement, design, preparation, and construction of infrastructure. Adaption for school use would strand much of that investment.
<ul style="list-style-type: none"> ▪ Reasonable costs for site preparation including, but not limited to, drainage, parking, driveways, removal of existing buildings, and grading 	✓	
<ul style="list-style-type: none"> ▪ Environmental mitigation 		Elevated risk of legacy issues from past heavy equipment and solid waste violations; adjacent commercial/industrial uses.
<ul style="list-style-type: none"> ▪ Reasonable maintenance costs 	✓	
Availability		
<ul style="list-style-type: none"> ▪ On the market for sale or likely to be available 		Not on market currently. Developer owned (Five Development LLC) – likely planned and committed for future residential build-out.
<ul style="list-style-type: none"> ▪ Title clearance - unencumbered 		Unknown – title research needed.
<ul style="list-style-type: none"> ▪ Condemnation of buildings and relocation of residents to be avoided 		Condemnation may be necessary to assemble adequate land area; demo of existing houses likely.

CONCLUSION

Medford 549C Schools Site Selection Criteria – Site No. 2

Criterion	OK	Concern
<p>Site No. 2 is located away from the half-mile equidistant line of the West Medford Target Study Area at the northern periphery. It is fully within the existing boundary for Oak Grove Elementary School and approximately one-quarter mile west of the Washington Elementary School service are. Acquisition cost would be high given need to assemble various ownerships and the relatively high cost basis for the existing owners. Demolition and/or condemnation may be necessary to acquire all the pieces. Existing adjacent and nearby commercial/industrial uses, environmental legacy issues, crime incidence, and high-traffic major arterial and designated truck/freight route at Stewart and Lozier Aves. further combine with the marginal site juxtaposition relative to existing schools to render Site No. 2 unsuitable.</p>		



**ELEMENTARY SCHOOL
 ALTERNATIVES ANALYSIS - WEST MEDFORD
 STUDY SITE 02**

Figure 14



Medford School District 549C
 815 S. Oakdale Avenue
 Medford, OR 97501

INITIAL SCHOOL SITE EVALUATION – SITE NO. 3

2175 Archer Drive (38-2W-02AB-4100) and 2574 and Broadview Avenue (38-2W-02AB-4200). Approximately 650 feet east of the intersection of Broadway Ave. & Griffin Creek Road.

Site location (address, map and tax lot)

No contiguous properties on the buildable land inventory.

Contiguous or nearby school sites under evaluation

3.29 & 6.74	10.03	3-4 acres	SFR-6/PD	Southwest Medford, LLC
Parcel Acres	Total Site Acres	Useable	Zoning	Ownership

Site Characteristics

Topography: Relatively flat (0-3% slope)

Historical use: 1 SFD built 1992 on TL 4200; 1 MH on TL 4100 (since removed).

Current use: 1 SFD on TL 4200; Spring Meadows Estates PUD (residential) approved for phased development of entire site. Phases 2 and 3 already platted and built to north of the remnant subject parcels. Remnant parcels have tentative plan approvals valid to 10/27/16. Subject property bound to PUD plan per PD overlay.

Other structures, improvements, or material that requiring removal and/or remediation: Accessory buildings to home.

Existing and planned streets (Medford Transportation System Plan), easements, or rights of way: ROW for future realignment of South Stage Road platted and reserved which splits site in two. Local streets (Woodside Drive, Bridgewater, La Conner, and alleyways) to serve the Spring Meadows PUD will grid the site into narrow SFR blocks. Common area easements and wetlands (north flowing swale eventually becomes Elk Creek).

Adjacent Zoning and Land Uses

North: Medford SFR-6 zoned Cyprus Creek Subdivision.

South: Medford SFR-00 zoned parcel to South Stage Road (current urban growth boundary).

East: Medford SFR-00 and SFR-4 zoned residential subdivisions (The Meadows at Griffin Creek; Splendor View Sub.).

West: County RR-5 zoned pre-existing residential subdivision (Clear View Sub.); urban growth boundary approx. ¼ mile west.

Medford 549C Schools Site Selection Criteria – Site No. 3

Criterion	OK	Concern
Safety These factors must be avoided:		
<ul style="list-style-type: none"> ▪ Adjacent to arterial roadways unless school site would have adequate room on property to maintain sufficient setback conducive to good learning environment (i.e., provide distance from traffic noise and emissions). Do not site adjacent to streets having four or more travel lanes. 		Planned major arterial roadway realignment of South Stage Road will split site in two. PUD Plan already commits as well to residential subdivision
<ul style="list-style-type: none"> ▪ Within 1,500 feet of railroad tracks 	✓	
<ul style="list-style-type: none"> ▪ Within airport approach overlay 	✓	
<ul style="list-style-type: none"> ▪ Crossed by high-voltage (500 KV) power lines 	✓	
<ul style="list-style-type: none"> ▪ Close to high-pressure lines, for example natural gas, gasoline sewer or water lines 	✓	
<ul style="list-style-type: none"> ▪ Contaminants/toxics in the soil or groundwater, such as from landfills, dumps, chemical plants, refineries, fuel tanks, nuclear plants, or agricultural use of pesticides or fertilizer, etc. 	✓	
<ul style="list-style-type: none"> ▪ Close to high decibel noise sources 	✓	
<ul style="list-style-type: none"> ▪ Close to open-pit mining 	✓	
<ul style="list-style-type: none"> ▪ On or near a fault zone or active fault 	✓	
<ul style="list-style-type: none"> ▪ In a dam inundation area or 100- year flood plain 	✓	
<ul style="list-style-type: none"> ▪ Social hazards in the neighborhood, such as high incidence of crime and drug or alcohol abuse 	✓	
Location		
<ul style="list-style-type: none"> ▪ Location factors conducive to allow for efficient and logical school area boundaries (promotes boundaries where students live within half mile of respective schools). Maintain approximately one-mile separation from existing school sites 		Site 3 just touches the southern boundary of the Target Study Area but is predominantly located south of the boundary and within ½ mile of Griffin Creek Elementary School. To far south to be conducive to this siting criterion.
<ul style="list-style-type: none"> ▪ Proximate to residential neighborhoods 	✓	
<ul style="list-style-type: none"> ▪ Multiple street approaches available (2 or more street frontages) 	✓	
<ul style="list-style-type: none"> ▪ Ability to maintain at least a 200-foot set back between classrooms and outdoor activity areas and nearby farm and forest practices 	✓	
<ul style="list-style-type: none"> ▪ Safe walking areas can be provided 	✓	
Environment		

Medford 549C Schools Site Selection Criteria – Site No. 3

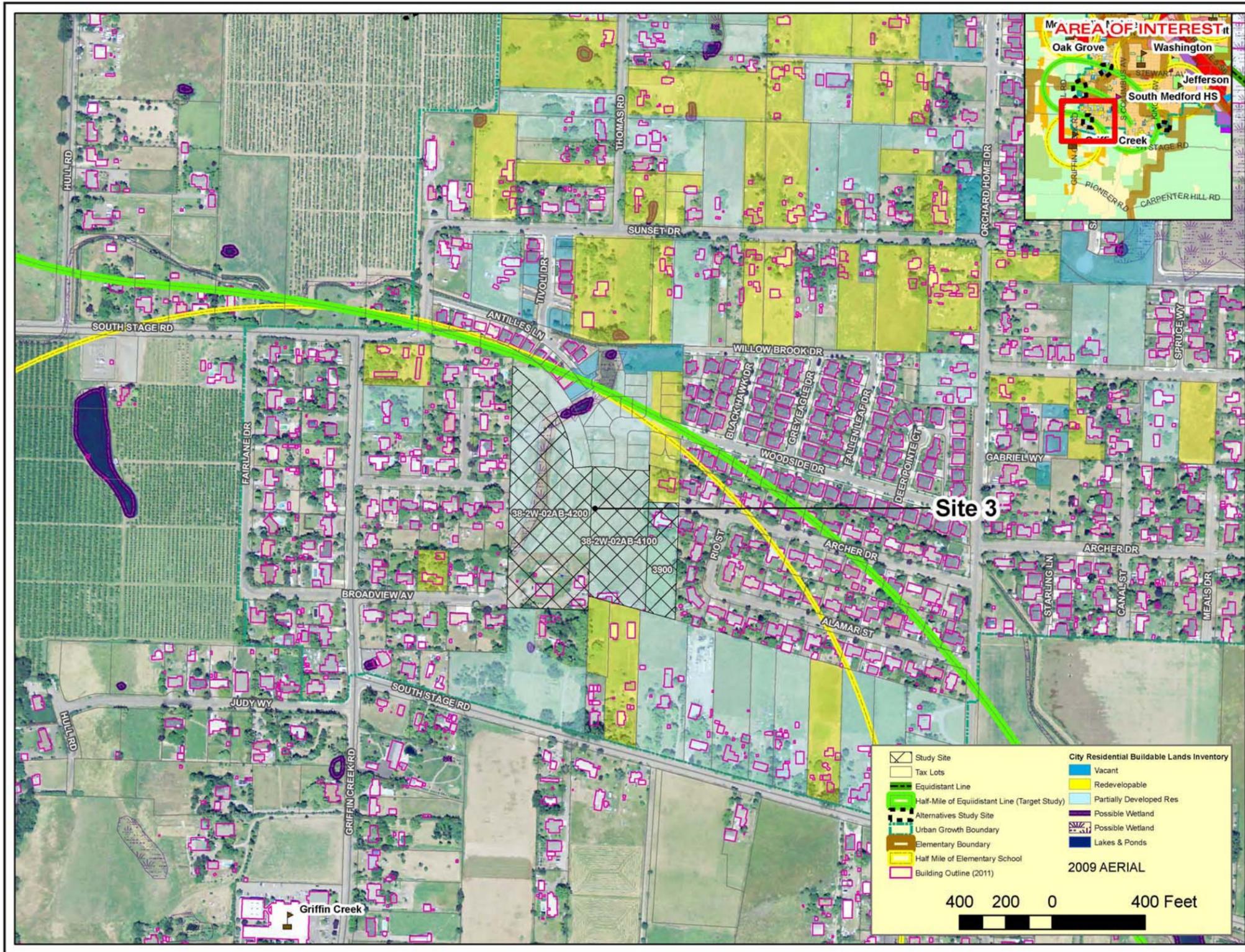
Criterion	OK	Concern
<ul style="list-style-type: none"> ▪ Desirable features include a variety of trees and plants or a wooded area and a natural water feature for use in education programs such as biology or outdoor learning 	✓	
<ul style="list-style-type: none"> ▪ Free from sources of noise that may impede the instructional process 	✓	
<ul style="list-style-type: none"> ▪ Free from air, water and soil pollution 	✓	
<ul style="list-style-type: none"> ▪ Provides aesthetic view from and of the site 	✓	
<ul style="list-style-type: none"> ▪ Compatible with the educational program 	✓	Except too close to Griffin Creek Elementary
Soils		
<ul style="list-style-type: none"> ▪ Proximity to faults or fault traces 	✓	
<ul style="list-style-type: none"> ▪ Stable subsurface and bearing capacity 		Per NRCS, predominant Coleman loam (soil map symbol 34B) over Site 2 is moderately to severely limited for building sites and roadways due to shrink-swell, low strength, and wetness. Limitations are moderate for recreational development such as playgrounds, trails, and picnic areas.
<ul style="list-style-type: none"> ▪ Danger of slides or liquefaction 	✓	
<ul style="list-style-type: none"> ▪ Positive drainage 		High water table (1.5-2 feet) Dec-Apr, Apparent.
Topography		
<ul style="list-style-type: none"> ▪ Generally level 	✓	
<ul style="list-style-type: none"> ▪ Flat sites preferred; If flat site unavailable, choose site with minimum need for major excavation 	✓	
<ul style="list-style-type: none"> ▪ Rock ledges or outcroppings 	✓	
<ul style="list-style-type: none"> ▪ Surface and subsurface drainage 	✓	Natural swale; wetland
<ul style="list-style-type: none"> ▪ Level area for playfields 	✓	
Size and Shape		
<ul style="list-style-type: none"> ▪ Generally Rectangular, Length-to-width ratio does not exceed 2:1 		Existing remnant parcels to be subdivided into small residential lots pursuant to PUD plan. Realignment of South Stage Road will split the remnant area in any case.
<ul style="list-style-type: none"> ▪ Sufficient open play area and open space 		Due to PUD and major arterial realignment.
<ul style="list-style-type: none"> ▪ Potential for expansion for future needs 		Area built-out or committed to residential subdivision
<ul style="list-style-type: none"> ▪ Area for adequate and separate bus loading and parking 		Same reasons
Accessibility		
<ul style="list-style-type: none"> ▪ Obstacles such as crossings on major streets and intersections, narrow or winding streets, heavy traffic patterns 		South Stage Road realignment
<ul style="list-style-type: none"> ▪ Access and dispersal roads 		SS Road and local street network would function well except that resulting lot configuration will be unsuitable.

Medford 549C Schools Site Selection Criteria – Site No. 3

Criterion	OK	Concern
▪ Natural obstacles such as grades or gullies		Significant wetland swale runs through site
▪ Access for bus transportation		PUD plan inappropriate for use
▪ Routing patterns for foot traffic	✓	
▪ Remote areas (with no sidewalks) where students walk to and from school	✓	
▪ Easily reachable by emergency response vehicles	✓	
Public Services		
▪ Available and feasible at time of construction	✓	
▪ Fire and police protection, including fire water lines	✓	
Cost		
▪ Reasonable costs for purchase of property, severance damages, relocation of residents and businesses, and legal fees		Committed to residential subdivision/PUD development which should completely phased by 2016.
▪ Reasonable costs for site preparation including, but not limited to, drainage, parking, driveways, removal of existing buildings, and grading		Wetland would have increased costs and substantively reduced useable area for school site
▪ Environmental mitigation		Wetland mitigation likely
▪ Reasonable maintenance costs	✓	
Availability		
▪ On the market for sale or likely to be available		Extremely unlikely
▪ Title clearance - unencumbered		Committed to PUD plan and related CC&Rs for planned community
▪ Condemnation of buildings and relocation of residents to be avoided		Condemnation would almost certainly be required to foreclose completion of the planned residential development.

CONCLUSION

Site No. 3 is poorly located primarily beyond the southern extent of the West Medford Target Study Area and within ½ mile of Griffin Creek Elementary. The site is encumbered by a PUD plan and planned community association and covenants. Significant wetlands would reduce the available acreage even if available, and the realignment of South Stage Road – a major arterial – will render the site unsuitable as to size, shape, and inability to maintain an adequate setback from the roadway. Site No. 3 is unsuitable for use as a school site.



ELEMENTARY SCHOOL
 ALTERNATIVES ANALYSIS - WEST MEDFORD
 STUDY SITE 03

Figure 15



Medford School District 549C
 815 S. Oakdale Avenue
 Medford, OR 97501

INITIAL SCHOOL SITE EVALUATION – SITE NO. 4

2145 Kings Highway (38-1W-01AA-3900, 4000 & 4200 and 38-1W-06B-400). Located along east side of Kings Highway opposite of Trinity Way.

Site location (address, map and tax lot)

No

Contiguous or nearby school sites under evaluation

0.53, 2.78, 2.3, & 4.73	10.34 (9.06 adjacent acres in several ownership are mapped with site – but very unlikely)	8 acres	SFR-10	West Main Church of Christ
Parcel Acres	Total Site Acres	Useable	Zoning	Ownership

Site Characteristics

Topography: Relatively flat (0-3% slope)

Historical use: 1 SFD built 1970 on TL 4000; remainder in tillage as indicated on aerial maps over time

Current use: Same. Church owner has acquired parcels separately over time starting in 1994 per county deed records.

Other structures, improvements, or material that requiring removal and/or remediation: Detached garage

Existing and planned streets (Medford Transportation System Plan), easements, or rights of way: Kings Hwy is designated as a minor arterial in this vicinity. MID easements indicated on deeds (canal to east).

Adjacent Zoning and Land Uses

North: Medford SFR-10 zoned MH Park (Spring View Estate) and Kings View Subdivision further north; Cooked Creek flows along/over NW boundaries of Site 4.

South: Medford SFR-00 zoned parcel to South Stage Road (current urban growth boundary).

East: Urban growth boundary and County EFU zoned farm tract under tillage (formerly in orchard); MID canal, irrig. pond

West: Medford SFR-00 to SW; Medford SFR-6 due west with newer SFR neighborhood (Trinity Estates Subdivision)

Medford 549C Schools Site Selection Criteria – Site No. 4

Criterion	OK	Concern
Safety These factors must be avoided:		
<ul style="list-style-type: none"> ▪ Adjacent to arterial roadways unless school site would have adequate room on property to maintain sufficient setback conducive to good learning environment (i.e., provide distance from traffic noise and emissions). Do not site adjacent to streets having four or more travel lanes. 		There would be room on-site to setback from King’s Highway, a minor arterial. However, all school related traffic would be concentrated at the arterial frontage access as there exists no alternative street approaches and due the high concentration of enrollment that would approach from the west and north. The safety concern is thereby exacerbated by the site location at the edge of the district’s boundary.
<ul style="list-style-type: none"> ▪ Within 1,500 feet of railroad tracks 	✓	
<ul style="list-style-type: none"> ▪ Within airport approach overlay 	✓	
<ul style="list-style-type: none"> ▪ Crossed by high-voltage (500 KV) power lines 	✓	
<ul style="list-style-type: none"> ▪ Close to high-pressure lines, for example natural gas, gasoline sewer or water lines 	✓	
<ul style="list-style-type: none"> ▪ Contaminants/toxics in the soil or groundwater, such as from landfills, dumps, chemical plants, refineries, fuel tanks, nuclear plants, or agricultural use of pesticides or fertilizer, etc. 		Unknown – further review / on-site invest. needed
<ul style="list-style-type: none"> ▪ Close to high decibel noise sources 	✓	
<ul style="list-style-type: none"> ▪ Close to open-pit mining 	✓	
<ul style="list-style-type: none"> ▪ On or near a fault zone or active fault 	✓	
<ul style="list-style-type: none"> ▪ In a dam inundation area or 100- year flood plain 		100-year floodplain assoc. w/ Crooked Creek subjects NW portion of site to inundation
<ul style="list-style-type: none"> ▪ Social hazards in the neighborhood, such as high incidence of crime and drug or alcohol abuse 	✓	
Location		
<ul style="list-style-type: none"> ▪ Location factors conducive to allow for efficient and logical school area boundaries (promotes boundaries where students live within half mile of respective schools). Maintain approximately one-mile separation from existing school sites 		Site 4 just touches the southeast extent for the boundary of the Target Study Area. A school at this site would be very close to the ½-mile radius area for Jefferson Elementary – the walkable school service areas would have substantial overlap. The site is also located near the outer perimeter of the District Boundary. A half-mile area around Site 4 would actually extend into the Phoenix-Talent School District and there is very sparse population to the east between the urban growth boundary and Hwy 99. A new school site should be located closer to the centroid of the target study area and, for that matter, the district boundary rather than adjacent to another district.
<ul style="list-style-type: none"> ▪ Proximate to residential neighborhoods 	✓	
<ul style="list-style-type: none"> ▪ Multiple street approaches available (2 or more street frontages) 		Kings Highway is the only existing or planned street frontage. Access is by flagstrip driveway.

Medford 549C Schools Site Selection Criteria – Site No. 4

Criterion	OK	Concern
<ul style="list-style-type: none"> ▪ Ability to maintain at least a 200-foot set back between classrooms and outdoor activity areas and nearby farm and forest practices 	✓	
<ul style="list-style-type: none"> ▪ Safe walking areas can be provided 	✓	
Environment		
<ul style="list-style-type: none"> ▪ Desirable features include a variety of trees and plants or a wooded area and a natural water feature for use in education programs such as biology or outdoor learning 	✓	
<ul style="list-style-type: none"> ▪ Free from sources of noise that may impede the instructional process 	✓	
<ul style="list-style-type: none"> ▪ Free from air, water and soil pollution 	✓	
<ul style="list-style-type: none"> ▪ Provides aesthetic view from and of the site 	✓	
<ul style="list-style-type: none"> ▪ Compatible with the educational program 	✓	Except too close to Jefferson Creek Elementary
Soils		
<ul style="list-style-type: none"> ▪ Proximity to faults or fault traces 	✓	
<ul style="list-style-type: none"> ▪ Stable subsurface and bearing capacity 		Per NRCS, predominant Coker clay (soil map symbol 33A) over Site 4 is severely limited for building site development and roadways due to shrink-swell, low strength, wetness, and cutbanks cave. Limitations are also severe for recreational development such as playgrounds, trails, and picnic areas due to wetness.
<ul style="list-style-type: none"> ▪ Danger of slides or liquefaction 	✓	
<ul style="list-style-type: none"> ▪ Positive drainage 		High water table (0.5-1.5 feet) Dec-Apr, Apparent.
Topography		
<ul style="list-style-type: none"> ▪ Generally level 	✓	
<ul style="list-style-type: none"> ▪ Flat sites preferred; If flat site unavailable, choose site with minimum need for major excavation 	✓	
<ul style="list-style-type: none"> ▪ Rock ledges or outcroppings 	✓	
<ul style="list-style-type: none"> ▪ Surface and subsurface drainage 		Coker Clay has slow intake, percs slowly. Crooked Creek 100-year floodplain encroaches over NW part of site.
<ul style="list-style-type: none"> ▪ Level area for playfields 	✓	
Size and Shape		
<ul style="list-style-type: none"> ▪ Generally Rectangular, Length-to-width ratio does not exceed 2:1 	✓	
<ul style="list-style-type: none"> ▪ Sufficient open play area and open space 	✓	
<ul style="list-style-type: none"> ▪ Potential for expansion for future needs 	✓	The Medford Buildable Lands Inventory identifies adjacent “re-developable” parcels to the south of the principal parcels in Site 4. Those southerly parcels are thereby identified on the Site 4 map. There are six of these parcels having a total of seven existing residences. Only two parcels are in

Medford 549C Schools Site Selection Criteria – Site No. 4

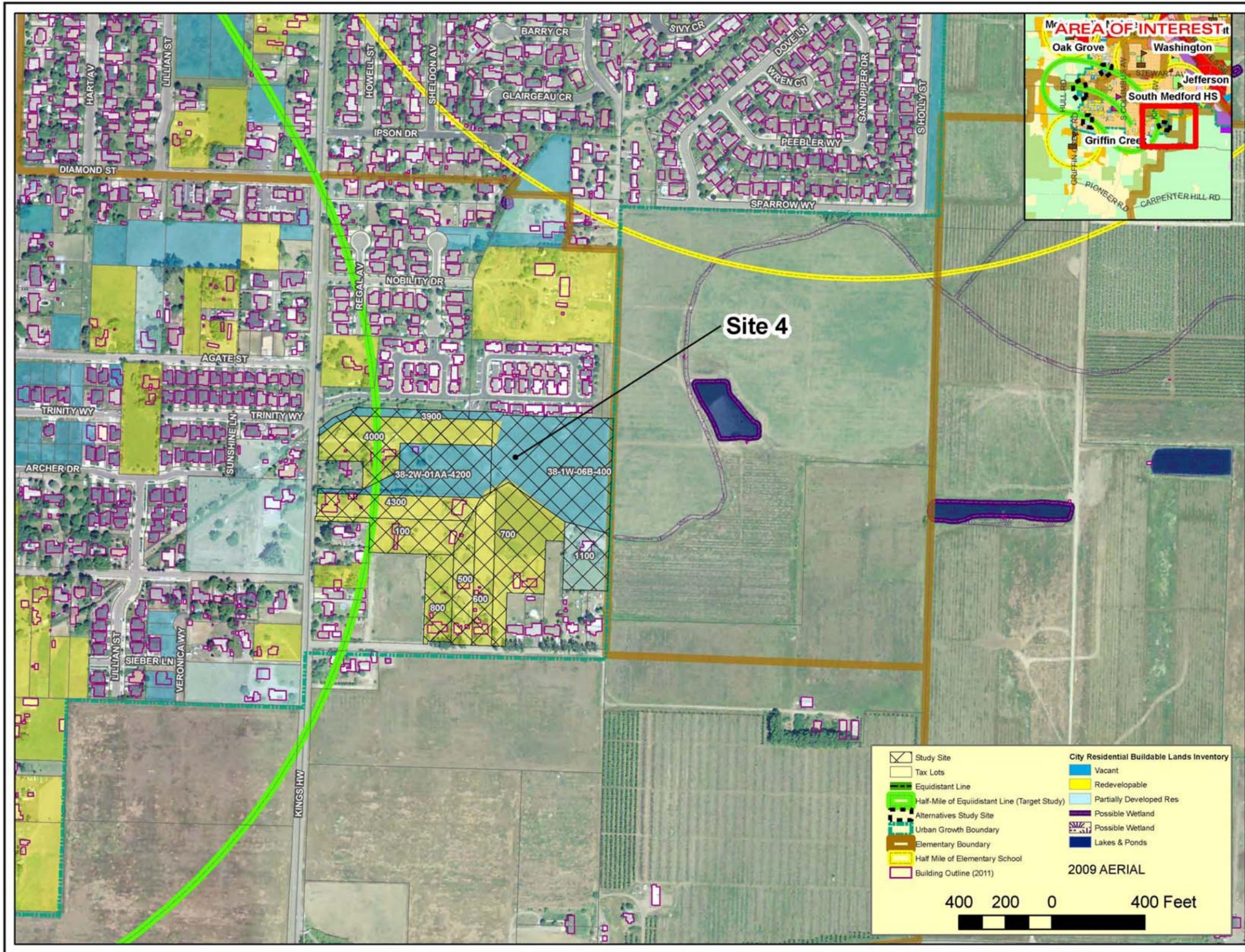
Criterion	OK	Concern
		common ownership. Parcel size ranges from 1.02 to 2.75 acres (only one exceeds two acres). The combined area of the additional lots is 9.06 acres. However, the configuration of the parcels are long and narrow oriented on the north-south axis. The homes are tightly spaced in a row along the frontage of Experiment Station Road with panhandled lots to the rear of these parcels resulting in a second line of structures north of the first. The effect of the pattern is that only about 1.5 acres of adjacent vacant area would potentially available by way of property line adjustment with the willingness of the neighboring owners. The structural pattern would likely preclude the ability to extend access for school use without demolition of structures and displacement of residents.
<ul style="list-style-type: none"> ▪ Area for adequate and separate bus loading and parking 	✓	
Accessibility		
<ul style="list-style-type: none"> ▪ Obstacles such as crossings on major streets and intersections, narrow or winding streets, heavy traffic patterns 		Drawing enrollment heavily from the west will require most student to cross arterial street (Kings Hwy). Kings Highway is heavily travelled and generally without sidewalk. Shoulders are graveled and narrow with adjacent bar ditches – not conducive to safe pedestrian or bicycle travel. No local connectivity directly to north, south, or east. Off-site frontage improvements would be necessary.
<ul style="list-style-type: none"> ▪ Access and dispersal roads 		All links converge at one access point (King’s Hwy). Local network to west and north well developed beyond congestion point. Private access street for MH park along north of Site 4 not designed to accommodate school traffic loads or volumes. Additional land assembly would be needed to connect south to Experiment Station Road – which would require upgrade as it is currently a narrow rural lane in poor condition.
<ul style="list-style-type: none"> ▪ Natural obstacles such as grades or gullies 		Floodplain / Crooked Creek along northwest boundaries.
<ul style="list-style-type: none"> ▪ Access for bus transportation 		Must converge with all other school and base traffic patterns at Kings Highway frontage
<ul style="list-style-type: none"> ▪ Routing patterns for foot traffic 		Same issue on convergence.
<ul style="list-style-type: none"> ▪ Remote areas (with no sidewalks) where students walk to and from school 	✓	
<ul style="list-style-type: none"> ▪ Easily reachable by emergency response vehicles 		Congestion at start and end of school day would impact response time
Public Services		
<ul style="list-style-type: none"> ▪ Available and feasible at time of construction 	✓	
<ul style="list-style-type: none"> ▪ Fire and police protection, including fire water lines 	✓	
Cost		
<ul style="list-style-type: none"> ▪ Reasonable costs for purchase of property, severance damages, relocation of residents and businesses, and legal fees 		Committed to residential subdivision/PUD development which should completely phased by 2016.

Medford 549C Schools Site Selection Criteria – Site No. 4

Criterion	OK	Concern
<ul style="list-style-type: none"> ▪ Reasonable costs for site preparation including, but not limited to, drainage, parking, driveways, removal of existing buildings, and grading 		Wetland would have increased costs and substantively reduced useable area for school site
<ul style="list-style-type: none"> ▪ Environmental mitigation 		Wetland mitigation likely
<ul style="list-style-type: none"> ▪ Reasonable maintenance costs 	✓	
Availability		
<ul style="list-style-type: none"> ▪ On the market for sale or likely to be available 		Not on the market currently. Existing church ownership has been assemble methodically over years – likely planned for its own future growth needs. Cost basis appears to be reasonable based on deed records should owner be inclined to sell.
<ul style="list-style-type: none"> ▪ Title clearance - unencumbered 		Title report needed. No obvious encumbrances noted.
<ul style="list-style-type: none"> ▪ Condemnation of buildings and relocation of residents to be avoided 		To provide better connectivity east of Kings Hwy, acquisition for access to Experiment Station Road to south may require use of condemnation. Widening and improvement of Experiment Station Road to be suitable for school circulation would likely require demolition of adjacent homes and structures which are closely arrayed along the narrow lane.

CONCLUSION

Site No. 4 is poorly located beyond the southeast extent of the West Medford Target Study Area and would result in substention overlap of ½ mile service areas with Jefferson Elementary. The site is encumbered by the 100-year floodplain for Crooked Creek and the City’s adopted riparian setback of 75’ from bank (fish bearing stream). Access is limited to the single street frontage along a minor arterial (King’s Highway). Improving local connectivity to the east of King’s Highway will be difficult and will have severe impacts to the local residents. Even then, the student population will reside primarily in areas to the west given the site location at the edge of the district boundary. East side connectivity improvement, which will be difficult to accomplish, will have marginal effect on the overall traffic pattern as a result. Site No.4 is unsuitable for use as a school site.



ELEMENTARY SCHOOL
ALTERNATIVES ANALYSIS - WEST MEDFORD
STUDY SITE 04

Figure 16



Medford School District 549C
 815 S. Oakdale Avenue
 Medford, OR 97501

INITIAL SCHOOL SITE EVALUATION – SITE NO. 5

1255 Hull Road (37-2W-35B-3400 & 372W35C-200). Located at southeast corner of the intersection of Hull Road with Stewart Avenue. The two tax lots comprise a single parcel that is split by a quarter-section line.

Site location (address, map and tax lot)

Site 1 is adjacent and east, within the UGB.

Contiguous or nearby school sites under evaluation

78.09	78.09	78.09 acres	EFU	Hull Road Ranch, LLC
Parcel Acres	Total Site Acres	Useable	Zoning	Ownership

Site Characteristics

Topography: Relatively flat (0-3% slope)

Historical use: 1 SFD (two-story) built 1920 – burned/demo'd in 2003; balance oak woods (west/NW) and horse pasture (east)

Current use: non-intensive livestock pasturing (horses); open space; white oak grove (West/NW).

Other structures, improvements, or material that requiring removal and/or remediation: Two barns and several small sheds.

Existing and planned streets (Medford Transportation System Plan), easements, or rights of way: The subject property is bound by Stewart Avenue to the north which bears south and turns into Hull Road along the west side of the parcel. Hull Road continues ¾ mile south to connect with South Stage Road. Stewart Avenue is designated as a County Arterial and is currently improved with two travel lanes and widened paved shoulders to accommodate bicycles. The County's TSP plans for widening to three lanes (add median) with sidewalks between Thomas Road and Hull Road as a Tier 1 road improvement project. Oak Grove Road intersects in a T-junction with Stewart Avenue to the north of the subject property (approximately centered). Oak Grove Road connects to West Main Street (the former route for Jacksonville Highway 238) approximately one mile to the north. Hull Road is designated as a County Major Collector and is currently improved as a two lane roadway with wide paved shoulders for bicycles. An RTP Tier 1 pedestrian and bicycle improvement project is to widen shoulders on Hull Road between South Stage Road and Stewart Avenue as an important connection between roads with good bike facilities. Bellinger Lane forms a T-intersection with Hull Road to the west of the subject property approximately half-way between the north and south property lines (being approximately ¼ mile south of Stewart Avenue). Bellinger Lane is a County Major Collector that ultimately connects to South Stage Road approximately two miles to the west. A Tier 2 pedestrian and bicycle improvement project is planned in the County TSP to bring it up to rural major collector standards between South Stage Road and Hull Road. This project was identified to separate cyclists from the expected traffic volume between Medford and Jacksonville. In the Medford TSP, Cunningham Avenue (minor arterial) is planned as Tier 3 project to extend to the eastern property line of the subject property and due east of the Bellinger Lane intersection at Hull Road.

Adjacent Zoning and Land Uses

North: Stewart Avenue; County RR-2.5 zoned exception area (Hiles Lark Meadows Subdivision).

South: County EFU zoned tract (29 acres) to the SE – Associated Fruit Co. owned "Maryland" pear orchard. County EFU zoned parcel (5.73) w/ single story SFD (built 1935) south of subject and abutting east ROW of Hull Road. County records indicate pre-existing (pre-1973) building contractor/cabinet maker business in association with residence (Bostwick Construction and Millworks). County zoned RR-2.5 exception area further south along east ROW of Hull Road to South Stage Road.

East: Medford UGB; three parcels along east p/l approx. 3 to 8 acres each zoned Medford SFR-6 each developed w/ a SFD.

Residential neighborhood of 30+ lots zoned mix of County RR-2.5 and Medford SFR-00 further east to Thomas Road.

West: Hull Road; Three parcels abutting Hull Road to north of Bellinger Lane to Stewart Ave. zoned County EFU in tract ownership. SFD (MH) and barn on northerly parcel (TL 3300) with balance (remainder of TL 3300, and TLs 3301/3302) in pear orchard use (Reich orchard – approx. 28 acres). County RR-5 zoned residential neighborhood further west (approx. 700 feet west of Hull Road) extends approximately one mile west to Arnold Lane.

Medford 549C Schools Site Selection Criteria – Site No. 1		
Criterion	OK	Concern
Safety These factors must be avoided:		
<ul style="list-style-type: none"> ▪ Adjacent to arterial roadways unless school site would have adequate room on property to maintain sufficient setback conducive to good learning environment (i.e., provide distance from traffic noise and emissions). Do not site adjacent to streets having four or more travel lanes. 		Stewart Avenue designated as County rural arterial to north, and Hull Road/Bellinger Lane as County rural major collectors to west. County TSP indicates that primary purpose for Hull/Bellinger collector designation is to widen shoulders for bicycle connections. No designated truck/freight routes. Parcel has adequate area to accommodate deep setbacks from surrounding roadways and uses.
<ul style="list-style-type: none"> ▪ Within 1,500 feet of railroad tracks 	✓	
<ul style="list-style-type: none"> ▪ Within airport approach overlay 	✓	
<ul style="list-style-type: none"> ▪ Crossed by high-voltage (500 KV) power lines 	✓	
<ul style="list-style-type: none"> ▪ Close to high-pressure lines, for example natural gas, gasoline sewer or water lines 	✓	
<ul style="list-style-type: none"> ▪ Contaminants/toxics in the soil or groundwater, such as from landfills, dumps, chemical plants, refineries, fuel tanks, nuclear plants, or agricultural use of pesticides or fertilizer, etc. 	✓	
<ul style="list-style-type: none"> ▪ Close to high decibel noise sources 	✓	
<ul style="list-style-type: none"> ▪ Close to open-pit mining 	✓	
<ul style="list-style-type: none"> ▪ On or near a fault zone or active fault 	✓	
<ul style="list-style-type: none"> ▪ In a dam inundation area or 100- year flood plain 	✓	
<ul style="list-style-type: none"> ▪ Social hazards in the neighborhood, such as high incidence of crime and drug or alcohol abuse 	✓	
Location		
<ul style="list-style-type: none"> ▪ Location factors conducive to allow for efficient and logical school area boundaries (promotes boundaries where students live within half mile of respective schools). Maintain approximately one-mile separation from existing school sites 	✓	Note: outside urban growth boundary, but on the center axis/equidistant line for the target area.
<ul style="list-style-type: none"> ▪ Proximate to residential neighborhoods 	✓	Note: outside urban growth boundary, but adjacent to city residential neighborhoods to east and the rural residential exception areas west of Medford comprising many early 20 th

Medford 549C Schools Site Selection Criteria – Site No. 1

Criterion	OK	Concern
		century rural subdivisions and settlements.
<ul style="list-style-type: none"> ▪ Multiple street approaches available (2 or more street frontages) 	✓	
<ul style="list-style-type: none"> ▪ Ability to maintain at least a 200-foot set back between classrooms and outdoor activity areas and nearby farm and forest practices 	✓	
<ul style="list-style-type: none"> ▪ Safe walking areas can be provided 	✓	<p>Note: Sidewalk or – preferably – a pedestrian/multi-use trail improvement needed along Stewart Ave, Hull Road, and Bellinger Lane as provided for in the Oregon Dept. of Transportation’s practical design guidelines. Sidewalks are planned for Stewart Ave. in the current County TSP. Bicycle lanes have been provided along Oak Grove Road, but no sidewalks or trail. An extension of Oak Grove south of Stewart Avenue could be provided as a local order access. Walkway or trail could be extended to school site from Willow Way (to east), or extend Cunningham Avenue to Hull Road for direct full access. Interim walkways can be provided over remainder of property until local street grid would be more fully developed.</p>
Environment		
<ul style="list-style-type: none"> ▪ Desirable features include a variety of trees and plants or a wooded area and a natural water feature for use in education programs such as biology or outdoor learning 	✓	Stands of white oak form a grove over the west/NW part of the land.
<ul style="list-style-type: none"> ▪ Free from sources of noise that may impede the instructional process 		Orchard operations to south and to the northwest can generate noise during growing season – generous setback area needed. Large grove of white oak between school site and orchard to NW provides substantial vegetative screening.
<ul style="list-style-type: none"> ▪ Free from air, water and soil pollution 	✓	
<ul style="list-style-type: none"> ▪ Provides aesthetic view from and of the site 	✓	
<ul style="list-style-type: none"> ▪ Compatible with the educational program 	✓	
Soils		
<ul style="list-style-type: none"> ▪ Proximity to faults or fault traces 	✓	
<ul style="list-style-type: none"> ▪ Stable subsurface and bearing capacity 		<p>Per NRCS, the west half of the parcel is comprised of Ruch gravelly silt loam (soil map symbol 158B) which is well drained on alluvial fan derived dominantly from metamorphic rock. It has moderate limitation due to shrink-swell for building site development. Moderate for recreational development are small stones, dusty. The east half of the parcel is comprised of Medford silty clay loam (soil map symbol 127A) which is moderately to severely limited for building sites and roadways due to shrink-swell, low strength, and wetness. Limitations of slight to moderate for recreational development such as playgrounds, trails, and picnic areas.</p>
<ul style="list-style-type: none"> ▪ Danger of slides or liquefaction 	✓	
<ul style="list-style-type: none"> ▪ Positive drainage 		High water table (4-6 feet) Dec-Apr, though not perched.

Medford 549C Schools Site Selection Criteria – Site No. 1

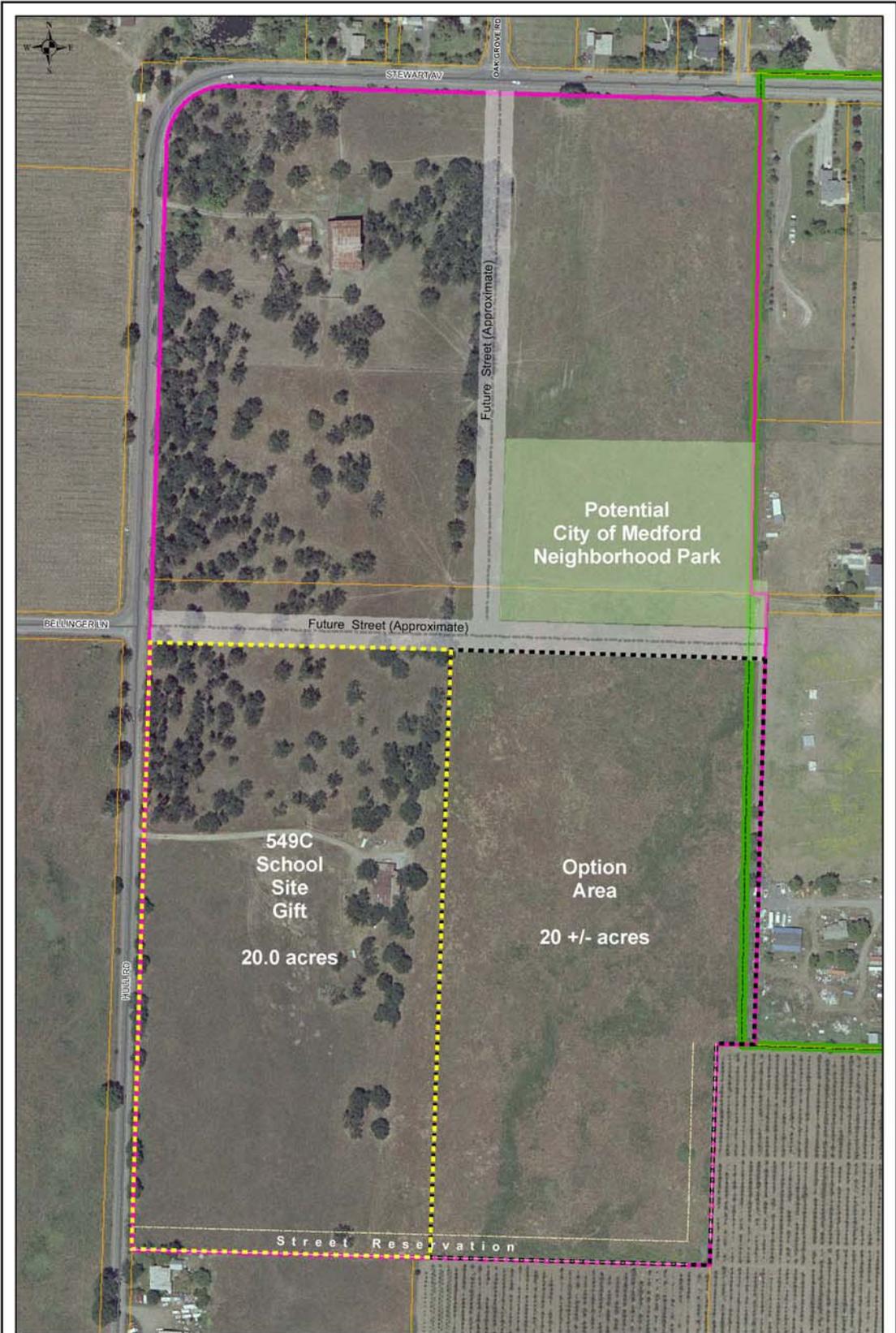
Criterion	OK	Concern
Topography		
<ul style="list-style-type: none"> ▪ Generally level 	✓	
<ul style="list-style-type: none"> ▪ Flat sites preferred; If flat site unavailable, choose site with minimum need for major excavation 	✓	
<ul style="list-style-type: none"> ▪ Rock ledges or outcroppings 	✓	
<ul style="list-style-type: none"> ▪ Surface and subsurface drainage 	✓	
<ul style="list-style-type: none"> ▪ Level area for playfields 	✓	
Size and Shape		
<ul style="list-style-type: none"> ▪ Generally Rectangular, Length-to-width ratio does not exceed 2:1 	✓	
<ul style="list-style-type: none"> ▪ Sufficient open play area and open space 	✓	
<ul style="list-style-type: none"> ▪ Potential for expansion for future needs 	✓	20 acres available on donation school site; additional 20 acres available as option to district.
<ul style="list-style-type: none"> ▪ Area for adequate and separate bus loading and parking 	✓	
Accessibility		
<ul style="list-style-type: none"> ▪ Obstacles such as crossings on major streets and intersections, narrow or winding streets, heavy traffic patterns 		Higher order streets abut to north and south, but traffic congestion is light. Well designed crossing points should be provided over Stewart Avenue and Hull Road. Separated multi-use trail recommended along parcel frontages, and extended to Willow Way/Cunningham terminus to east and to directly Oak Grove Road to north until such time as it may be extended.
<ul style="list-style-type: none"> ▪ Access and dispersal roads 	✓	Note: Direct connection to east by planned Cunningham extension to urban growth boundary and extension of Oak Grove Road south from Stewart Avenue would effectuate a well connected street grid for access and dispersal. On-site access improvements could provide similar connectivity. Primary access from Stewart, Oak Grove Road, Hull Road, and Bellinger Lane provide multiple existing approaches that provide for nearby dispersion to South Stage Road (to west and south), West Main Street (to north), and Lozier Lane and Columbus Avenue (to east).
<ul style="list-style-type: none"> ▪ Natural obstacles such as grades or gullies 	✓	
<ul style="list-style-type: none"> ▪ Access for bus transportation 	✓	
<ul style="list-style-type: none"> ▪ Routing patterns for foot traffic 		On-site direct connections to Stewart Ave/Oak Grove and to Willow Way can and should be provided along with frontage improvements for pedestrian facilities. Off-site pedestrian improvement along approach roads should be provided.
<ul style="list-style-type: none"> ▪ Remote areas (with no sidewalks) where students walk to and from school 		Property is outside but adjacent to urban growth boundary currently. If brought into urban growth boundary as a desired school site, sidewalk improvement strategy should be provided with transportation facility plan.
<ul style="list-style-type: none"> ▪ Easily reachable by emergency response vehicles 	✓	

Medford 549C Schools Site Selection Criteria – Site No. 1

Criterion	OK	Concern
Public Services		
<ul style="list-style-type: none"> ▪ Available and feasible at time of construction 	✓	Note: subject to urban growth boundary inclusion. Public sewer and water infrastructure presently exists at Stewart Avenue and Oak Grove Road.
<ul style="list-style-type: none"> ▪ Fire and police protection, including fire water lines 	✓	Note: subject to urban growth boundary inclusion. Public sewer and water infrastructure presently exists at Stewart Avenue and Oak Grove Road.
Cost		
<ul style="list-style-type: none"> ▪ Reasonable costs for purchase of property, severance damages, relocation of residents and businesses, and legal fees 	✓	Note: The property owner has pledged a gift of a 20 acre school site on the southwest quarter of the property to District 549C. The District has also negotiated an exclusive right to provide for future purchase of the southeast quarter of the property (20 acres, more or less) as an option whereby the option may be exercised at any time through December 31, 2030.
<ul style="list-style-type: none"> ▪ Reasonable costs for site preparation including, but not limited to, drainage, parking, driveways, removal of existing buildings, and grading 	✓	
<ul style="list-style-type: none"> ▪ Environmental mitigation 		On-site full environmental report will be required for any site. No intensive on-site obvious issues discovered in this preliminary evaluation.
<ul style="list-style-type: none"> ▪ Reasonable maintenance costs 	✓	
Availability		
<ul style="list-style-type: none"> ▪ On the market for sale or likely to be available 	✓	Note: As per gift and option agreement
<ul style="list-style-type: none"> ▪ Title clearance - unencumbered 	✓	
<ul style="list-style-type: none"> ▪ Condemnation of buildings and relocation of residents to be avoided 	✓	

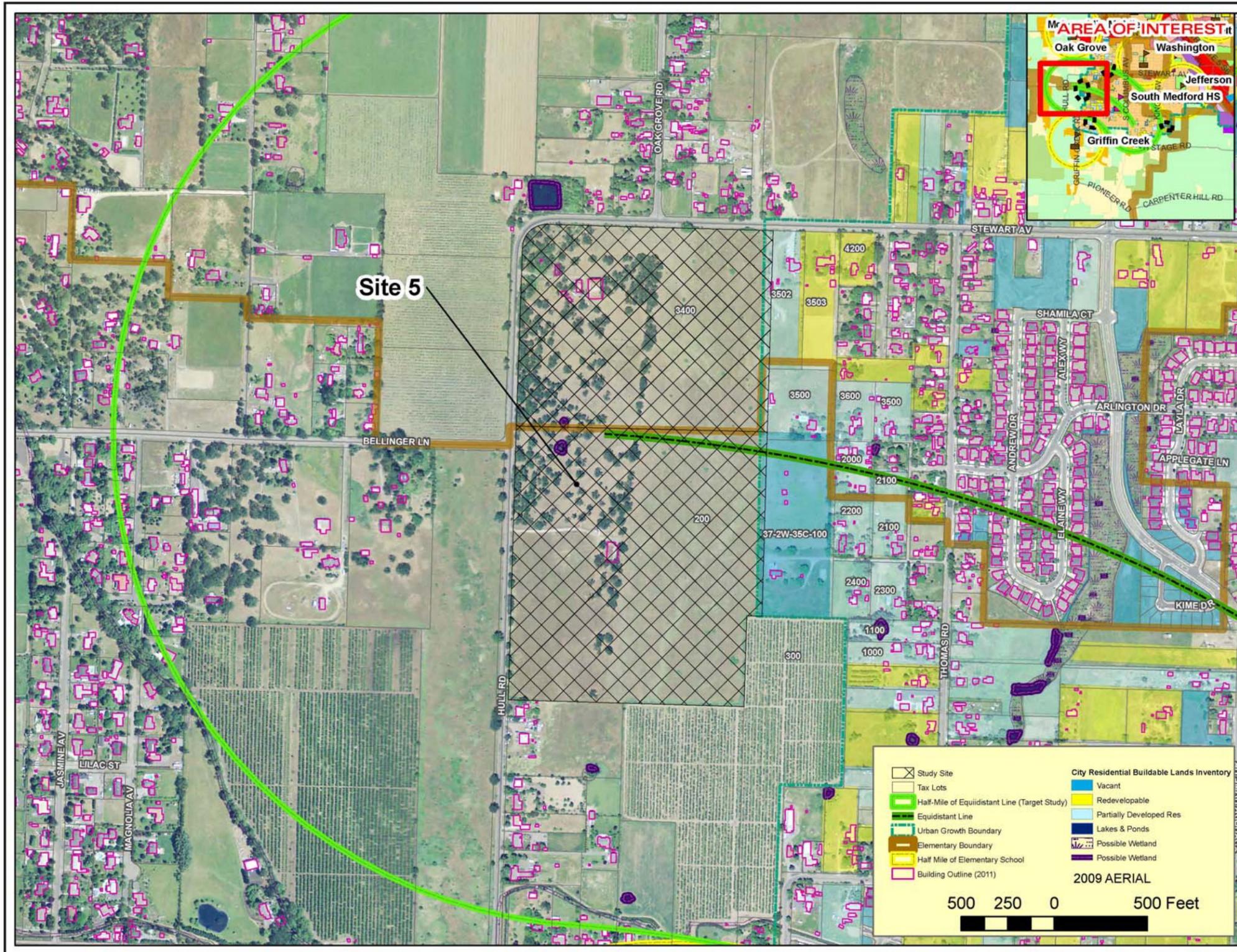
CONCLUSION

Site No.5 is located on the half-mile equidistant line of the West Medford Target Study Area and on the present boundary line between Oak Grove and Griffin Creek Elementary Schools. A school at this site would provide for a ½ mile walkable service area that would touch but not overlap those for Oak Grove or Griffin Creek Schools. Close-in rural residential areas include neighborhoods more than 100 years old along Bellinger, Arnold, and Madrona Lanes and Oak Grove Road that would be well served by the site. The site is also well located to serve the existing and projected urban population for West Medford to complement Oak Grove Elementary and Griffin Creek Elementary which are due north and south respectively. Direct access is currently available to the site which fronts on Hull Road at its junction with Bellinger Lane. These roads connect to South Stage Road to the south and west, and Stewart Avenue to the north, to accommodate approach from several major travel corridors. Public utilities are present adjacent and nearby. The site is level, stable, and of sufficient size and composition to meet the District’s educational program and siting standards. The site is also suitably sized, configured, and located to provide for flexibility to construct a middle school facility with a one-mile service area that would nearly touch but not encroach the one-mile area around McLoughlin Middle School. The parcel is also well situated to provide for a community park for southwest Medford identified as a need in the Public Facility Element of the Medford Comprehensive Plan [Parks and Leisure Services Plan, Table 3 – CP-20 “Sunset Park”]. Development of a community park facility in close proximity to a school site is consistent with the City’s comprehensive plan policies related to park and school planning. Given the location on the axis of the target study area, sufficient buildable area without cost or need for land condemnation or building demolition, ability to provide for collocation of a middle school site and a community park, existing and planned street networks, Site 5 is a desirable and suitable site for school facilities. However, municipal water and public sewer utilities – while physically available – may not be extended to a site located outside the urban growth boundary. Inclusion of this site within the urban growth boundary will require consideration and approval by the City of Medford, Jackson County, and the State of Oregon.



- Subject Property
- School Gift Site
- Tax Lots
- Option Area
- Potential Park
- Urban Growth Boundary





ELEMENTARY SCHOOL
ALTERNATIVES ANALYSIS - WEST MEDFORD
STUDY SITE 05

Figure 17

APPENDIX E – 2006 Bond Project List

Long Range Facilities Plan

Medford School District 549C



Medford School District 549C
500 Monroe Street
Medford, Oregon 97501
(541) 842-3636

For the past year, a committee of concerned citizens and staff appointed by the Board has studied the condition of Medford School District's buildings. Committee members have toured every school; consulted with citizens, parents, teachers, and administrators; looked at enrollment trends; and worked with facilities experts. In March and April, the Committee held public forums about building needs in every one of the District's 18 schools plus 1 community-level forum. The Board received the recommendations at its meeting on Tuesday, May 2.

The Committee has concluded that our buildings need major work. The average age of our facilities is 62 years. Roofs leak, walls are crumbling, dry rot abounds, heating systems malfunction, many schools do not have ventilation or air-conditioning—the list goes on. As quoted from the February 19, 2006 *Mail Tribune*, "We must reinvest in our school buildings or risk losing our initial investment."

The facilities Committee has recommended actions to fix these problems. The School Board will consider the recommendations and decide what to do. The recommended Bond is \$189,227,011.

This fact sheet summarizes the Committee's recommendations school by school. Additional information is available on the District website: www.medford.k12.or.us.

You are invited to review the information and share your thoughts with the School Board.

You may comment on the recommendations at Board Meetings, which are scheduled for May 16 and June 6, or send written comments to the Board. The address for regular mail is Medford School District 549C, 500 Monroe Street, Medford, Oregon, 97501. If you wish to e-mail your comments, please access the District website at www.medford.k12.or.us.

Your thoughts will be appreciated.

Sincerely,

Larry Nicholson
School Board Chairman

Phil Long
Superintendent



Medford School District 549C Long-Range Facilities Planning Committee Board Charge to the Committee

Recognizing that Medford District Schools are centers of the three communities they serve, and that our capital assets in land and improvements are valuable community holdings necessary for the education of our children and in need of proper management to support the essential mission of the District in educating the youth of our communities that they should become caring, contributing citizens and competitive in the marketplace in order to further their private interests and those of the communities; and, recognizing that the knowledge, expertise, and good sense of the members of our communities are needed to advise the Board on these matters, the Board of Education of the Medford School District 549C, charges its Long-Range Facilities Planning Committee with the tasks of:

1. Determining the communities' wishes, values, and aspirations for the condition and capacity of their school buildings and grounds;
2. Developing and articulating a standard school vision that represents the communities' values and expectations for the locations, size, nature, and conditions to be found in all District school buildings;
3. Evaluating economic and demographic projections that reasonably represent the anticipated enrollment capacity needed over the five, ten, and twenty year planning horizons to properly serve the community;
4. Evaluating the current physical conditions of all District properties;
5. Evaluating the nature, numbers, and locations of the facilities needed to appropriately support the proper and effective instruction of all students now and in the future;
6. Determining the variance, if any, between the factors above;
7. Establishing the estimated costs, if any, to eliminate any variance identified;
8. Evaluating the various means of funding any needed improvements; and
9. Offering to the Board of Education whatever recommendations the Committee deems appropriate as to the best possible management of the District's school facilities over the long term with planning horizons of five, ten, and twenty years.

Given this charge, the Board gratefully acknowledges the efforts of the Committee to periodically meet together toward advancing these ends over the coming months and we look forward to receiving the learned advice of the Committee in the form of its recommendations on the management of District school facilities expected to be presented to the Board in April of 2006.

Our gratitude on behalf of the entire Medford School District is extended to all those in our three communities who serve and contribute to this effort and assist in securing the proper management of the District's facilities, which are assets valued at over \$178,000,000.

SUMMARY OF FACILITIES RECOMMENDATIONS

High Schools

NORTH MEDFORD – Combination raze/gut/remodel/new from several detached buildings into one large main building. Demolish some structures.

Cost: \$50,509,755.

Background: Wood is the main exterior material in many buildings, and they are heavily damaged by dry rot. Detached classroom buildings make security a problem. Heating-water pipes are badly deteriorated and leak 1,000 gallons of heated water a day. Roof leaks and flooding have damaged classrooms, gyms, and the auditorium. Science rooms and technology infrastructure are outdated. Flooring includes asbestos tile.

History: Built in 1967. Remodels/additions in 1973-81 and 1992.

Size: 226,712 square feet, 64 classrooms, 61.1-acre campus.

SOUTH MEDFORD – Build new school on District land at Columbus and Cunningham. Renovate existing building for use as a third middle school. Move District purchasing warehouse, maintenance, instructional media, network telecommunications, and nursing into renovated building.

Cost: \$63,454,369.

Background: Existing structure is sound, but the campus is too small to function effectively as a high school. Remodeling would require relocating 1,800 students, and there's no room for them elsewhere.

History: Built in 1931. Remodels/additions in 1938, 1949, 1956-60, 1980, 1985, 1992-95.

Size: 215,366 square feet, 78 classrooms, 21-acre campus.

Middle Schools

HEDRICK – Upgrade heating-ventilation, increase security, remove asbestos, repair flooring, and ADA compliance.

Cost: \$1,404,018.

Background: Building underwent major remodeling in 1996-98. However, heating-water pipes lack welded seals, and numerous leaks are damaging the building.

History: Built in 1955. Remodels/additions in 1960, 1965, 1978-79, 1996-98.

Size: 125,668 square feet, 41 classrooms, 11-acre campus.

McLOUGHLIN – Fix roofing, upgrade heating-ventilation, increase security, remove asbestos, and repair flooring.

Cost: \$1,201,200.

Background: Building underwent major remodeling in 1996-98 but not all areas were remodeled or air-conditioned.

History: Built in 1926. Remodels/additions in 1939, 1948, 1957, 1961, 1964, 1996-98.

Size: 90,746 square feet, 39 classrooms, 12-acre campus.

3RD MIDDLE SCHOOL – Renovate South Medford and convert it into a middle school.

Cost: \$14,173,129.

Note: Once South Medford is converted, the three middle schools will begin serving 6th graders as well as 7th and 8th graders. This will free up much needed space in the elementary schools, which will then serve pupils in kindergarten through 5th grade.

SUMMARY OF FACILITIES RECOMMENDATIONS

ABRAHAM LINCOLN – Exterior painting.

Cost: \$49,500.

Background: Funded by a previous bond measure, this school offers durability, classroom size, learning environment and safety features that are a model for facilities District-wide.

History: Opened in 1997.

Size: 45,000 square feet, 23 classrooms, 20-acre campus.

GRIFFIN CREEK – Fix roofing, upgrade heating-ventilation, increase security, remove asbestos, repair flooring, ADA compliance, replace windows, connect to city water, and purchase land for bus/parking area.

Cost: \$2,039,424.

Background: Overall, building is durable and in good shape. Concerns include classroom doors that only lock from the outside, inadequate well-water supply, and a too small parking lot.

History: Built in 1902. Remodels/additions in 1933, 1948, 1951, 1953, 1955, 1961, 1966, 1969-70, 1982, 1996.

Size: 48,853 square feet, 25 classrooms, 9-acre campus.

HOOVER – Fix roofing, upgrade heating-ventilation, increase security, upgrade lighting, remove asbestos, repair flooring, ADA compliance, replace windows, upgrade technology, and upgrade parking.

Cost: \$2,820,477.

Background: Building offers adequate-size classrooms, plus a like-new gym and cafeteria, which were rebuilt after a fire. Concerns include dry rot in breezeways, inadequate electrical circuits, plus a lack of fencing and other security measures to deter campus intruders and vandalism.

History: Built in 1958. Remodels/additions in 1961, 1975, 1992, 1995.

Size: 53,611 square feet, 29 classrooms, 7-acre campus.

HOWARD – Fix roofing, upgrade heating-ventilation, increase security, remove asbestos, repair flooring, ADA compliance, replace windows, upgrade/expand restrooms, and mothball or sell old building.

Cost: \$1,084,014.

Background: Overall, building is in good condition and offers adequate-size classrooms. Concerns include dry rot in exterior beams, water damage, campus vandalism, and inadequate restrooms. Old building houses various District support services, which would move.

History: Founded in 1912. 9 classrooms and gym built in 1972; main building, in 1983.

Size: 59,530 square feet, 27 classrooms, 5-acre campus.

JACKSON – Close and redistribute pupils among Jefferson, Oak Grove, Wilson, Roosevelt, and Washington. Maintain the building and evaluate for other uses for the Jackson Community.

Background: This is the smallest urban school in the District, with approximately 375 pupils. The planned shift of all 6th graders from elementary schools to middle schools will create enough capacity to accommodate Jackson students on other campuses. This will save the estimated \$5.5 million cost to repair the school.

History: Built in 1911. Remodels/additions in 1937, 1949, 1965, 1995, 1996-98.

Size: 44,916 square feet, 23 classrooms, 6-acre campus.

JACKSONVILLE – Fix roofing, upgrade heating-ventilation, increase security, remove asbestos, repair flooring, painting, and fix paving and parking.

Cost: \$462,660.

Background: Overall, building is in excellent condition. Concerns include failing heat pumps and old carpets that are deteriorating.

History: Built in 1954. Remodels/additions in 1982, 1990, 1995.

Size: 54,728 square feet, 21 classrooms, 10-acre campus.

JEFFERSON – Fix roofing, upgrade heating-ventilation, increase security, upgrade lighting, remove asbestos, repair flooring, ADA compliance, replace windows, and relocate kindergarten rooms.

Cost: \$2,964,270.

Background: Overall, school is in good condition considering the 51-year age of its main building. Concerns include numerous roofing leaks, classroom doors that only lock from the outside, and a lack of campus fencing.

History: Built in 1955. Remodels/additions in 1965, 1971, 1991, 1995, 1996.

Size: 45,567 square feet, 28 classrooms, 13-acre campus.

KENNEDY – Fix roofing, upgrade heating-ventilation, increase security, remove asbestos, repair flooring, ADA compliance, improve drainage, and resurface play areas.

Cost: \$1,870,447.

Background: Building offers adequate-size classrooms and gymnasium, plus air conditioning throughout. Concerns include roofing leaks, lack of fencing and other security measures to deter campus intruders and vandalism, and classroom doors that only lock from the outside.

History: Built in phases 1977-82.

Remodels/additions in 1992, 1994-95.

Size: 53,500 square feet, 28 classrooms, 10-acre campus.

SUMMARY OF FACILITIES RECOMMENDATIONS

Elementary Schools -- Continued

LONE PINE – Replace with new school. Continue using library-media center building.

Cost: \$12,220,509.

Background: Overall, buildings are antiquated. Concerns include leaks, dry rot, flooding, outmoded heating and ventilation systems, inadequate electrical system, asbestos, and access for the disabled. It will be more cost effective to replace the school than repair existing structures.

History: Built in 1926. Remodels/additions in 1933, 1948, 1952, 1957, 1963, 1965, 1966, 1983, 1991, 1996.

Size: 65,626 square feet, 30 classrooms, 10-acre campus.

OAK GROVE – Reconfigure, remodel, and add classrooms for growing enrollment.

Cost: \$8,249,327.

Background: Concerns include roofing leaks, flooding, mold/mildew, inadequate electrical connections, asbestos, and lack of fencing to deter campus intruders.

History: Built in 1891. Remodels/additions in 1925, 1937, 1939, 1949, 1953, 1961, 1967, 1995, 1996.

Size: 42,073 square feet, 19 classrooms, 10-acre campus.

ROOSEVELT – Gut and remodel entire facility, and add classrooms for growing enrollment.

Cost: \$8,541,905.

Background: Building is constructed of unreinforced brick and masonry, and earthquake safety is a concern. Other concerns include roof leaks, flooding, antiquated heating, inadequate ventilation, disabled access, and lack of parking.

History: Built in 1911. Remodels/additions in 1983, 1985, 1996-97.

Size: 45,778 square feet, 29 classrooms, 4.5-acre campus.

RUCH – Fix roofing, upgrade heating-ventilation, increase security, remove asbestos, repair flooring, ADA compliance, seismic upgrade, paint exterior, and repair restrooms and locker rooms.

Cost: \$1,102,704.

Background: Concerns include deteriorating roofs, aging paint, and poor ventilation.

History: Built in 1913. Remodels/additions in 1914, 1951, 1955, 1957, 1961, 1966-68, 1996.

Size: 26,056 square feet, 16 classrooms, 11-acre campus.

WASHINGTON – Add classrooms, convert gym into cafeteria and classrooms, build new gym, fix roofing, upgrade heating-ventilation, increase security, remove asbestos, repair flooring, ADA compliance, replace windows, seismic upgrade, expand kitchen and office, and upgrade electrical system.

Cost: \$7,244,918.

Background: Concerns include extensive leaking and water damage from failing roofs and foundations. Other concerns are inadequate cafeteria facilities, dry rot, mold/mildew, inadequate electrical connections, problems with ventilation, doors that lock from the outside, and a lack of fencing and other security measures to deter campus intruders and vandalism.

History: Built in 1931. Remodels/additions in 1949, 1987, 1995, 1996-97.

Size: 45,553 square feet, 25 classrooms, 7-acre campus.

WILSON -- Fix roofing, upgrade heating-ventilation, increase security, upgrade lighting, remove asbestos, repair flooring, ADA compliance, replace windows, seismic upgrade, expand cafeteria, upgrade restrooms, and parking.

Cost: \$3,594,140.

Background: Concerns include extensive leaking, dry rot in structural beams, inadequate water heating, and lack of cafeteria space.

History: Built in 1958. Remodels/additions in 1961, 1964, 1967, 1981, 1992, 1995.

Size: 44,205 square feet, 25 classrooms, 11-acre campus.

Other District Facilities

DISTRICT WAREHOUSE/PURCHASING – Now housed on North Columbus Street, would be moved to the 3rd middle school, which is the remodeled South Medford High.

COST TO MOVE: \$1,306,800.

OLD HOWARD SCHOOL – Maintenance, Instructional-Media, NTS Networking-Telecommunications, and Nursing would be moved to the 3rd middle school, which is the remodeled South Medford High.

COST TO MOVE: \$2,397,384.

WESTSIDE SCHOOL – Now houses the Naval Reserve Unit, which is ending its lease this year.

NOTE: The School Board should consider selling all three buildings and using proceeds to offset bond costs and/or fund future maintenance.

QUESTIONS & ANSWERS ABOUT OUR BUILDINGS

Q: What prompted the review of school-building conditions?

A: Widespread deterioration was one factor. For example, the roofs at all but two schools had developed major flaws. Another factor that prompted the review was a lack of funding for building upkeep. In recent years, the District responded to uncertain state funding by focusing its budget on personnel and services for students. Building upkeep suffered, so much so that a backlog of major maintenance projects has reached more than \$22 million. Much of the maintenance funding that was available went into repairs of outdated components that the District could not afford to replace. A year ago, the School Board decided that something had to be done, so it appointed the Long-Range Facilities Planning Committee to study the issue and recommend solutions.

Q: What were the results of the school-building review?

A: The Facilities Committee toured every school; talked with parents and educators; consulted with building experts; and held community forums in every school. The Committee found that 17 of the District's 18 schools have problems that will cost hundreds of thousands to tens of millions of dollars to fix. They concluded that the problems are so pervasive they are harming the learning and working environments for those who use the buildings. Effects of deteriorating asbestos, pervasive water leaks, and bird mite infestations result in buildings that are unhealthy. They also concluded that the District does not receive enough annual state funding to fix the problems without completely undermining essential operations such as teaching.

Q: What has the Facilities Committee recommended?

A: The Committee has recommended creating a minimum District-wide standard to optimize educational effectiveness and eliminate inequities between schools. The Committee's recommendation brings every school up to that standard. The Committee has determined the top priorities that must be found in all schools should center on health, safety, and security. These include air quality/comfort, asbestos abatement, seismic upgrades, water quality, classroom size, lighting, electrical wiring and circuitry that supports 21st Century technologies, and the use of quality materials for long-lasting durability and ease of maintenance.

The Committee also has recommended adding middle-school space to accommodate all sixth graders who now attend elementary schools. Once completed, the recommended projects should remain functional for at least 20 years. The Committee has recommended paying for the work with a voter-approved Bond Measure totaling \$189,227,011 and with the sale of some District property.

Q: What is the importance of school buildings to our community?

A: The District's current schools represent a taxpayer investment of \$202,000,000. School buildings cover more than 1.3 million square feet of space, and campuses occupy more than 190 acres of land. More than 12,000 students are educated in District schools and more than 1,000 people work in them. Thousands of community members use District facilities for civic and church meetings, after-school child care, adult education, concerts, plays, scouting activities, and a wide variety of athletics.

**Medford School District 549C
Building Improvement Task Force
Options for Board Consideration**

Overview

On November 7, 2006, Medford School District voters passed a \$188.9 million bond measure to fund extensive renovation and replacement of facilities across the District. The Ballot Title and accompanying explanation expressed the intent of the School Board for these projects.

Since the election, bond projects have been completed at five schools. Work has reached the mid-point at a sixth school, and preparations are well underway for the remaining projects.

Engineering evaluations and design revisions have prompted major reassessments of projects at four schools and resulted in the immediate closure of two of these. Because of this, the projected cost of the total bond project is now significantly higher than was originally anticipated. Consequently, the School Board has determined that the scope of bond projects must be revised.

In August 2007, the School Board authorized a task force to undertake a public review of bond projects, reprioritize them and bring the budget back into alignment with resources.

The Task Force has developed four options for consideration by the community and School Board. They will be presented to the School Board on October 2, 2007, at the Board's 6:30 meeting in the South Medford High School Cafeteria.

There are multiple ways for community members to comment on the Task Force options. The Board will conduct a public hearing on October 16, 2007, at the Board's 6:30 meeting in the South Medford High School Cafeteria. District residents may comment electronically at the District's comment link. (Click here to submit a comment). Written comment may also be mailed to the School Board at the following address: *Medford School Board, 500 Monroe Street, Medford, OR 97501*. For comments to be considered as part of the public record, the contributor must include name and address and must be a patron of the Medford School District. The Board appreciates written comments because these are more accessible and retrievable.

The School Board intends to make a final decision on this matter at its November 6, 2007, School Board meeting. The Board seeks a solution that responds to the educational best interest for Medford students for the next fifteen years and beyond and supports the intent of the bond measure approved by voters in November, 2006.

Review of Completed and Scheduled Projects:

On November 7, 2006, Medford School District 549C patrons passed a Bond Measure authorizing the issuance of \$188.9 million in General Obligation Bonds to fund extensive renovation and facility replacement projects on District properties across the District. The Ballot Title and accompanying explanation expressed the intent of the School Board for these projects. Any changes to the scope of bond projects are governed by the language used in the Ballot Title document.

After the passage of the Bond Measure, the District embarked on an aggressive program of planning, design, and construction, tackling six of the renovation projects during this past summer. The bond projects scheduled for Griffin Creek, Hoover, Jefferson, and Kennedy Elementary Schools were substantively completed to allow for the start of school on September 6, 2007. Phase One of two phases of the larger renovation project at Washington Elementary was also completed. Phase Two involves the construction of a new cafeteria and is scheduled to be completed by the end of January 2008.

These projects shared many common aspects including extensive roofing replacement, upgrades to HVAC (Heating/Ventilation/Air Conditioning) systems, extensive abatement of asbestos and removal of hazardous asbestos materials, renovated restrooms, interior painting, new flooring, upgrades in security door hardware, compliance with ADA (Americans with Disabilities Act) requirements, and energy-efficient windows. Griffin Creek was connected to city water alleviating problems that have challenged that site for years. The one Lincoln Elementary project – painting the exterior – was completed by mid-August.

Four more renovations are scheduled for completion in Summer 2008. The projects at Ruch, Jacksonville, Howard, and Wilson Elementary Schools involve many of the similar elements of the recently completed renovations.

Oak Grove and Lone Pine Elementary Schools are also scheduled for significant renovations and new construction. Because of the scope of these two projects, they are scheduled to begin in Summer 2008 and to be completed by Fall 2009.

Review of Changes from the Original Proposed Projects:

In January 2007 the District began a more thorough process for finalizing the scope of renovations and new construction at North and South Medford High Schools. The District's new Facility Manager brought his experience in facilities management and his training as a licensed professional engineer to this task and provided the District with a level of expertise it was lacking during the initial development of the bond measure. Engineering assessments for the North High facility revealed that the current buildings were in much better structural condition than the District originally believed. This information led to the reconsideration of the plans for North High reducing the anticipated cost of renovations to an estimated \$34 million. These renovations will include upgrades to the HVAC (Heating/Ventilation/Air Conditioning) system, improved day-lighting, hazardous material removal, floor replacement, re-roofing, ADA and security upgrades, underground piping replacement, and improvements to site drainage.

Meanwhile, it was becoming clear that the original budget for a new South High facility was significantly underestimated. The original construction cost estimate, provided by a reputable consulting firm, had been adjusted down when the budget was developed, and adequate inflation factors were not applied. In addition, the original budget did not include the costs of wetlands mitigation, site improvements, P.E./Athletic fields, parking, street upgrades, and traffic lights. A more thorough programming and design process also indicated the original building concept was slightly undersized. All of these factors led to an estimated shortfall of more than \$19 million for this project alone.

While District staff remained determined to identify all possible cost-saving measures, most notably by internally managing many projects, thus avoiding costly contractor and consultant mark-up feeds, it was becoming clear that cost saving measures alone would likely not close the gap between needs and funding. The District's new Chief Financial Officer had already determined that the bond proposal did not include the cost of issuing the bonds. While he recommended that this cost (estimated to be about \$1.5 million) could be funded if the District carefully invested bond proceeds during the construction process, he also recommended that some of the bond projects be broken into smaller parts so that should the budgets become too tight, the District could strategically contain costs without diminishing the benefit of the renovations. His experience as Chief Financial Officer in districts both smaller and much larger than the Medford School District greatly advantaged the District as it put its first issue for \$40 million in general obligation bonds out on the bond market.

District staff continued a more thorough and comprehensive assessment of the remaining projects. In late-May 2007 the District received engineering assessments of two of the anticipated renovation projects. DCI Engineers determined that significant portions of Jackson and Roosevelt Elementary Schools were unsafe and strongly recommended discontinuing the use of those sites until the buildings could be significantly renovated.

The reports for the two schools noted that the masonry materials used in the original 1911 portions of the buildings were incorrectly manufactured and would most likely fail should a significant seismic event occur. Furthermore, the reports cautioned that the truss systems in the gymnasiums would likely collapse under the weight of a large snowfall or significant wind storm. These reports when coupled with a recent state seismic study of public school buildings heightened the District's concern about student and staff safety at Jackson and Roosevelt schools.

The District took swift action. It closed the schools and relocated students to other District facilities. The subsequent assessments of these two projects resulted in the upward adjustment of the budgets from about \$7.7 million to about \$13 million for each school. This added an estimated \$10.5 million to the total cost of the bond projects. Unless the scope of the projects is significantly altered, this amount, when coupled with the challenges described above, pushes the overall cost of all bond projects beyond the boundaries of what is fiscally manageable.

While the District is confident in the quality and integrity of the assessments conducted by DCI Engineers, concern raised by community members has prompted the District to seek an additional structural assessment of both Jackson and Roosevelt. The results of this additional professional opinion will be reported to the School Board and community when they are available. The School Board will consider these assessments as it makes its final decision.

Description of Task Force Activities:

The School Board determined it should provide a means for public review of the bond projects for the purpose of reprioritizing and bringing the budget back into alignment with the resources. A Bond Projects Review Task Force was formed in August 2007 and the Board developed specific Task Force objectives and a timeline. This fourteen-member Task Force met on September 4, 2007, and September 18, 2007.

The first Task Force meeting focused on the key bond documents, updated project budgets, school enrollment and facility optimal capacity reports, and discussion about how other districts have dealt with enrollment decline and facility usage. Questions about the actual capacity need revealed this fact about the original bond proposal: if all the projects in the original proposal had been completed as anticipated, the District would operate at about 81% of optimal capacity. The Task Force broke into three work groups and processed the question "What kind of buildings do we need to help students be successful?" As a result the Task Force created a set of guiding statements it could consider when developing solution options.

The second Task Force meeting began with a review of all of the written public comment that had come to the District since September 4. The Task Force reviewed the list of guiding statements about school facilities that it had drafted during the first meeting. District staff updated the Task Force on projects budgets noting that the bids

for the two largest projects (Jefferson and Washington) had been very competitive and accurate, which confirms the budget methodology currently being employed by the District and has helped the District control costs established in the spring. These projects were awarded to local contractors.

District staff provided the Task Force with 12 examples of possible options before the Task Force split into three work groups. Each group was asked to develop two viable options to bring back to the larger group for discussion. After the groups reconvened as the larger Task Force committee, they found that among them they had developed four distinct options. These options are described below and address the projects to be completed for eight school sites (Oak Grove, Lone Pine, Jackson, and Roosevelt Elementary Schools, Hedrick and McLoughlin Middle Schools, and North and South High Schools). Each of these options can be completed within the resources authorized by the voters.

Summary of Task Force Options

Below are the four options developed by the Task Force for consideration by the community and the School Board. The Board will use these four options as the basis for discussion of a final resolution to this matter. The Board may (1) choose one of the four options, (2) choose to modify one of the options, or (3) based on public input seek additional funding to accomplish more completely the scope of the bond measure.

Option A (17 campuses)

2 High Schools

3 Middle Schools (6-8)

1 K-8 School (Ruch), and

11 Elementary Schools (K-5)

- Build New South Medford High on a new, larger site
- Significantly renovate North Medford High
- Do not reopen Jackson and Roosevelt facilities
- Convert, upgrade, improve current South Medford High to Middle School (6-8)
- Significantly renovate Oak Grove Elementary (K-5)
- Build new (and renovate portions of) Lone Pine Elementary (K-5)
- Protect, renovate and improve all other campuses

Impact of Option A on school attendance areas and annual operational budget:

Convert Hedrick and McLoughlin from 7-8 to 6-8

Convert all elementary schools from K-6 to K-5

Option A fully implements the middle school concept the District has invested in for several years which creates K-5, 6-8, and 9-12 schools across the District. This was a model that found favor with many patrons when piloted several years ago. It would be

easiest to implement because the change would occur between school years and could coincide with the boundary adjustments that occur every five to seven years as the District balances school enrollment with changes in where students live.

Option A redistributes classroom space by using the current South High asset, which is an efficient use of a resource that is at the end of its useful life as a High School, but could, when remodeled, provide additional years of service as a middle school. Structurally sound portions of Jackson and Roosevelt could eventually be available for educational and special program use to serve community needs throughout the school day. This might require future collaboration among the School District, the City of Medford, and/or various local and regional agencies.

Option A requires the adjustment of school attendance boundaries for most elementary schools and the middle schools. Roosevelt students would likely be distributed among Hoover, Lone Pine and Wilson. Wilson and Lone Pine would likely see some students shifted to Kennedy and Lincoln. Jackson students would likely be distributed among Washington, Oak Grove and possibly Jefferson. Additional boundary changes could move Griffin Creek and Oak Grove students to Jacksonville.

Elementary school size would not increase because approximately 900 6th-graders would be redistributed among the three middle schools. The middle schools would have populations of about 850-900 (about the same size that Hedrick and McLoughlin are now).

The District facilities would be operating at about 86% of capacity and have room for more classes to support smaller class-sizes or, if mandated by the state, full-day kindergarten. The District might see some additional savings in its annual operating costs by operating one fewer school facility.

Option B (16 campuses)

2 High Schools

14 "Elemiddle" Schools (K-8)

- Build New South Medford High on a new, larger site
- Significantly renovate North Medford High
- Do not reopen Jackson and Roosevelt facilities
- Significantly renovate Oak Grove Elementary School (K-8)
- Build new (and renovate portions of) Lone Pine Elementary School (K-8)
- Protect, renovate and improve all other campuses

Impact of Option B on school attendance areas and annual operational budget:

Convert Hedrick and McLoughlin from 7-8 to K-8

Convert all elementary schools from K-6 to K-8

Option B creates walking neighborhood schools for more students, by making K-8 schools in walking distance of many more students from K through 8th grade. The option reconfigures Hedrick and McLoughlin as K-8 schools in the Roosevelt and Jackson neighborhoods, allowing more children to walk to these schools and remain in that neighborhood school for after-school activities.

Some educators maintain that the K-8 structure provides more continuity for students through their early adolescent years and increases student academic success. Other potential benefits include stronger association with teachers and more positive relationships between younger and older students. Some suggest that parental involvement continues through eighth grade because of the relationships parents make with staff at the neighborhood school.

As in Option A, the structurally sound portions of Jackson and Roosevelt could eventually be available for educational and special program use to serve community needs throughout the school day. By reducing the number of facilities by two, lower operating costs are probable. Because this option envisions not using the current South High building as a school, this could save several million dollars in remodeling costs for that facility.

Option B requires the adjustment of school attendance boundaries for most elementary schools. The middle schools would cease to exist as middle schools. Roosevelt students would likely attend school at the Hedrick K-8 site. Jackson students would likely attend school at the McLoughlin K-8 site. Additional boundary changes would impact every other elementary school because of the need to ensure students are located where there is capacity to serve them.

The District facilities would operate at about 86% of capacity. The District could see some additional savings in its annual operating costs by operating two fewer school facilities.

Option C (17 campuses)

2 High Schools

1 Middle School (6-8)

7 "Elemiddle" Schools (K-8)

7 Elementary Schools (K-5)

- Build New South Medford High on a new, larger site
- Significantly renovate North Medford High
- Do not reopen Jackson and Roosevelt facilities
- Convert, upgrade, improve current South Medford High to Middle School (6-8)
- Significantly renovate Oak Grove Elementary School (K-5)
- Build new (and renovate portions of) Lone Pine Elementary School (K-5)
- Protect, renovate and improve all other campuses

Impact of Option C on school attendance areas and annual operational budget:

*Convert Hedrick and McLoughlin from 7-8 to K-8
Convert existing South facility to 6-8
Convert 4 elementary schools from K-6 to K-8
Convert 7 elementary schools from K-6 to K-5
Ruch remains K-8*

Option C presents a hybrid of Options A and B by creating more walkable neighborhood schools for more students. It provides more schools that are within walking distance of many more students from Kindergarten through 8th grade. The option reconfigures Hedrick and McLaughlin as K-8 schools in the Roosevelt and Jackson neighborhoods, allowing Roosevelt and Jackson children to walk to a neighborhood school and remain in the neighborhood for after-school activities. While the Task Force did not specify which schools would be K-8 and which would be K-5, it would appear that the elementary schools where this might be more feasible are Griffin Creek, Howard, Jacksonville, Kennedy, Lincoln, and/or Lone Pine.

As in Option A, the structurally sound portions of the current Jackson and Roosevelt facilities could be available for educational and special program use throughout the school day. By reducing the total number of facilities by one, lower operating costs are probable.

Option C requires the adjustment of school attendance boundaries for most elementary schools and some additional facility renovations to accommodate seventh and eighth grade students at the elementary school sites. The middle school sites could be configured several ways with varying degrees of grade-level separation and autonomy. Currently this is accomplished at Hedrick and McLoughlin by having different starting and ending times for the younger and older students. Additionally, elementary students can reside together in one portion of the facility while the middle school students would occupy another portion. This would require additional renovations to accommodate the needs of younger students. The current South High would be converted to a 6-8 middle school and would serve the grade 6-8 students choosing a more traditional middle school experience.

The District facilities would operate at about 86% of capacity. The District could see some additional savings in its annual operating costs by operating two fewer school facilities.

Option D *(current configuration, 18 campuses)*

2 High Schools

2 Middle Schools (7-8)

14 Elementary Schools (K-6)

- Significantly renovate North Medford High
- Protect, upgrade and improve current South High to remain SMHS

- Significantly renovate (rebuild portions of) Jackson, Oak Grove and Roosevelt Elementary Schools (K-6)
- Build new (and renovate portions of) Lone Pine Elementary School
- Protect, renovate and improve all other campuses

Impact of Option D on school attendance areas and annual operational budget:

Option D eliminates the new South High project and invests approximately \$26 million in Jackson and Roosevelt schools. It would require a significantly larger investment in the current South High facility than would be needed for remodeling it into a middle school or using it for some other purpose. This is because of the size of the student body. Currently, South High has over 1900 students (about double the size of a middle school). The size of the cohorts of students in elementary school suggests the District will continue to have high school enrollments of 1800 to 2000 for at least the next decade.

While **Option D** keeps the existing K-6, 7-8, 9-12 structure, the District anticipates the need to realign elementary attendance area boundaries simply because of the imbalance in enrollment across the District. Several elementary schools have experienced enrollment growth and have run out of classrooms to serve students. Other elementary schools have declined in enrollment and have excess classroom space. Additionally, as the District has been able to add teachers to reduce class sizes, this has required additional classroom space. Should the state mandate full-day kindergarten, the District will need space available at the seven non-Title 1 schools that currently only offer half-day sessions.

The District facilities would operate at about 92% of capacity. The District would see little, if any, additional savings in its annual operating costs. This option does not provide for the future growth that is anticipated for the District but it could free up some funds that could be directed back into the existing facilities or simply not be levied.

Comment on Task Force Options:

The School Board is open to, and encourages, other ideas from the District patrons that might result in the greatest benefit for all students and the community.

There are multiple ways for community members to comment on the Task Force recommended options for consideration by the School Board. Opportunities include a public hearing on October 16 and a comment link from this website. Comments may also be mailed to the School Board at the following address: *Medford School Board, 500 Monroe Street, Medford, OR 97501*. For comments to be included in the public record, the contributor must include name and address and must be a patron of the Medford School District.