

# PLANNING COMMISSION STUDY SESSION AGENDA JANUARY 14, 2019



## Commission Members

David Culbertson  
Joe Foley  
Bill Mansfield  
David McFadden  
Mark McKechnie  
E. J. McManus  
Patrick Miranda  
Jared Pulver

Planning Commission study sessions  
are held on the second and fourth  
Mondays of every month  
Study Sessions begin at noon

## City of Medford

Lausmann Annex Room 151  
200 S. Ivy Street, First Floor  
Medford, OR 97501  
541-774-2380



## Planning Commission

# Agenda

### Study Session

January 14, 2019

Noon

**Lausmann Annex, Room 151**  
200 South Ivy Street, Medford, Oregon

---

10. Introductions
20. Discussion items
  - 20.1 **CP-18-182** Phoenix-Talent School District Master Plan
30. Adjournment

Meeting locations are generally accessible to persons with disabilities. To request interpreters for hearing impaired or other accommodations for persons with disabilities, please contact the ADA Coordinator at (541) 774-2074 or [ada@cityofmedford.org](mailto:ada@cityofmedford.org) at least three business days prior to the meeting to ensure availability. For TTY, dial 711 or (800) 735-1232.



**MEMORANDUM**

Subject Phoenix-Talent School District Long-Range Facilities Master Plan  
Comprehensive Plan Amendment

File no. CP-18-182

To Planning Commission *for January 14, 2019 study session*

From Seth Adams, AICP, Planner III

Date January 7, 2019

---

**Overview**

A legislative amendment to incorporate by reference, the Phoenix-Talent School District Long-Range Facilities Master Plan into the Comprehensive Plan, and to make related updates to the Conclusions, Goals, Policies and Implementation Strategies of the Comprehensive Plan.

The Phoenix-Talent School District has formally requested that all of the jurisdictions affected by its recently adopted Long-Range Facilities Master Plan (City of Phoenix, City of Talent, City of Medford, and Jackson County) incorporate the document into their respective comprehensive plans.

**Background**

ORS 195.110 requires a city and/or county containing large school districts to include, as an element of its comprehensive plan, school facilities plans prepared by the districts in consultation with the affected city and county. Both the Medford 549C and Phoenix-Talent school districts are considered “large school districts”.

Under ORS 195.110, school district facilities plans must cover a period of at least 10 years and must include the following elements:

- Population projections by school age group.
- Identification by the city or county and the large school district of desirable school sites.
- Descriptions of physical improvements needed in existing schools to meet the minimum standards of the large school district.
- Financial plans to meet school facilities needs, including an analysis of available tools to ensure facilities needs are met.

- Analysis of:
  - The alternatives to new school construction and major renovation; and
  - Measures to increase the efficient use of school sites, including multiple-story buildings and multipurpose use of sites.
- Ten-year capital improvement plans.
- Site acquisition schedules and programs.

In their school facilities plans, large school districts must identify school facilities needs based on population growth projections and land use designations contained in the city's and/or county's comprehensive plan. Facilities plans must provide an analysis of the land inside the UGB that is suitable, as a permitted or conditional use, for school facilities required for the 10-year period covered by the school facilities plan. If a large school district finds that there is an inadequate supply of suitable land for facilities for the 10-year period, the city or county, or both, and the district must cooperate in identifying land for school facilities and take necessary actions, such as adopting appropriate zoning, aggregating existing parcels in separate ownership, or adding one or more sites designated for school facilities to a UGB pursuant to applicable law.

The Medford 549C School District adopted its Long Range Facilities Plan in 2012, and that plan was incorporated into the Public Facilities Element of the City of Medford Comprehensive Plan in January 2014 (Ord. 2014-16). The Medford 549C School District updated its plan in January 2015, and that amended plan was subsequently incorporated into the City of Medford Comprehensive Plan in February 2016 (Ord. 2016-19).

At present, Conclusion No. 12 in the Schools section of the Public Facilities Element of the City of Medford Comprehensive Plan, states: "Additional work with the Phoenix-Talent School District is needed towards the development and adoption of a long-range facilities plan into the City of Medford Comprehensive Plan Public Facilities Element." The Phoenix-Talent School District recently adopted its Long-Range Facilities Master Plan (**Exhibit A**), and has formally requested that all of the affected jurisdictions (City of Phoenix, City of Talent, City of Medford, and Jackson County) incorporate it into their respective comprehensive plans.

#### **NEXT STEPS**

In order to incorporate the Phoenix-Talent School District's Long-Range Facilities Master Plan into the City of Medford Comprehensive Plan, staff will need to request the initiation of a Comprehensive Plan amendment from the Planning Commission. This request is tentatively scheduled to be a consent calendar item on the Planning Commission agenda of January 24, 2019. Assuming the Planning Commission approves the initiation of the amendment, staff will draft the Comprehensive Plan amendment language and present it to the Planning Commission at a future study session.

As the School District's plan affects multiple jurisdictions, the involved parties have agreed that the various Planning Commissions conduct their formal reviews of the Long-Range Facilities Master Plan in the following order:

1. Phoenix Planning Commission
2. Talent Planning Commission
3. Medford Planning Commission

If any of the three city Planning Commissions request changes to the Plan that would affect another jurisdiction, the School District will go back to the prior Commission(s) in order to get the requested changes approved. Once all three city Planning Commissions have recommended approval of the Master Plan, the District will forward it to the County Planning Commission for review, and if the County requests changes that could affect the interests of any of the cities, then the requested changes would be brought back to the applicable Planning Commission for concurrence on the changes.

Once the Planning Commission review process is completed, the School District Board would adopt amendments reflecting the changes (if any) that occurred during the Planning Commission reviews. The updated Master Plan would then be reviewed by the various City Councils in the same order as the Planning Commissions, with the final review being the County Board of Commissioners.

#### **Attachments**

- A. Technical Memorandum from CSA Planning, dated November 26, 2018, with Phoenix-Talent School District Long-Range Facilities Master Plan 2018-2037 (please contact Planning if you would like copies of any of the Plan's Appendices)



## Technical Memorandum

**CSA Planning, Ltd**

4497 Brownridge, Suite 101  
Medford, OR 97504

Telephone 541.779.0569  
Fax 541.779.0114

Nathan@CSAplanning.net

To: City of Medford Planning Commission  
Cc: Carla Paladino, Medford Principal Planner  
Date: November 26, 2018

**Subject: Phoenix-Talent Long Range Facilities Master Plan**

---

The attached Long Range Facilities Master Plan has been highlighted to bring focus to items of importance to the City of Medford. The purpose of the highlighted text is to ease the Planning Commission's workload by focusing the attention on the matters that are Medford-specific.

In discussions with City officials and the School District, the primary issues for the City of Medford are the long term need for a new middle school location, working with the County to determine the future land use of the Coal Mine Road property owned by the district, and the capacity of Orchard Hill Elementary.

These items along with others important to Medford are summarized below and can all be found in the Master Plan.

- The Middle School has the fewest students of any district school within comfortable walking distance. 20% of the student body requires travel of more than 5 miles in each direction. Future growth in the district is projected to occur primarily in Southwest Medford, further exacerbating the issue. A future second Middle School would be more optimally located in the center of the district.
- The Coal Mine Road property's future should be coordinated between the District and the City as it may present a solution to the District's Middle School dislocation problem or provide additional space for an Elementary School.
- Orchard Hill Elementary is projected to reach or exceed maximum capacity in the 2030s. Additional land may be helpful to accommodate growth.
- Growth projections for the City of Medford, which are built on expected UGB build out and long-range planning. Future enrollments are in turn devised from these growth patterns to help paint a picture of future facility needs in each city.
- Individual facility capacity and infrastructure assessments and proposed improvements as a result of the successful bond measure.
- Finally, the plan has a list of policies and strategies meant to address the goals and issues considered within.

Thank you,

CSA Planning, Ltd.

A handwritten signature in blue ink that reads 'Nathan Emerson'. The signature is written over a horizontal line.

Nathan Emerson  
Associate

cc. File



November 10, 2018

Phoenix Talent School District

**CSA Planning, Ltd**

4497 Brownridge, Suite 101  
Medford, OR 97504

Telephone 541.779.0569  
Fax 541.779.0114

[jay@CSAplanning.net](mailto:jay@CSAplanning.net)

**RE: Phoenix Talent School District Long-Range Facilities Master Plan (Updated)**

Dear Phoenix-Talent School District,

CSA Planning Ltd. is pleased to transmit the District an updated Long-Range Facilities Master Plan under cover of this letter. On behalf of our entire team, CSA continues to be honored to work on this project for the District.

In the original master plan, Straus and Seibert Architects did a great job developing cost-effective design solutions to address identified needs. They also engaged sub-consultants to work on key specialty areas of the project. Architectural Cost Consultants provided timely and detailed cost estimating to keep the project moving forward. District Staff was excellent to work with throughout the planning process.

We expect the updated Long-Range Facilities Master Plan will serve the District well over the coming years. The updates to the plan reflect the consequences of the bond measure approval and resolution of certain land-holding policy decisions of the District. The Plan will continue to guide the District's decision-making with respect to its school campuses and other real-estate assets. We hope this work product will continue to inform community discussions around those issues and allow the District's preferred plan to be implemented.

The School Board should adopt this version of the plan by resolution. That resolution should direct CSA Planning and staff to begin the process to incorporate the plan into the local Comprehensive Plans for Medford, Phoenix, Talent and Jackson County.

Thank you again for this opportunity.

Sincerely,

CSA Planning, Ltd.

A handwritten signature in blue ink, appearing to read 'Jay Harland', is written over a horizontal line.

Jay Harland  
President

## **ACKNOWLEDGMENTS**

CSA would like to thank all those who supported this planning process to develop a new Long-Range Facilities Master Plan. Specifically we would like to thank the following individuals:

***PHOENIX-TALENT SCHOOL BOARD:***

Craig Prewitt, Chairman  
Marina Piantentini, Vice Chair  
Sara Crawford  
Dawn Watson  
Richard Nagel  
Nate Shinn  
Shana Vos

***PROJECT ADVISORY TEAM:***

Sara Crawford  
Dawn Watson  
Sara Adams  
Mike Davis  
Stephanie Holtey  
Roland Kretschmann  
Alan Vos  
Shana Vos  
Jeanette Woods

***DISTRICT STAFF:***

Teresa Sayre, Past Superintendent  
Brent Barry, Superintendent  
David Marshall, Past Business Manager  
Jon McCalip, Director of Facility Maintenance

***CONSULTANT TEAM:***

Jay Harland, CSA Planning Ltd.  
Beverly Thruston, CSA Planning Ltd.  
Dave Straus, Straus and Seibert Architecture  
Gary Corn, Straus and Seibert Architecture  
Bill Watson, Straus and Seibert Architecture  
Stan Pszczolkowski, Architectural Cost Consultants  
Jason Prins, Structural Solutions, Inc.

# TABLE OF CONTENTS

Acknowledgments .....	ii
Table of Contents .....	iii
1 Executive Summary.....	5
1.1 Review and Analysis of District Facility Needs:.....	5
1.2 Facility Capacity and Enrollment Summary .....	6
1.3 Elementary and Middle School Issues.....	6
1.3.1 Building Design and Function .....	7
1.3.2 Value in Existing Improvements .....	7
1.3.3 Geography and Site Conditions.....	7
1.3.4 Existing School Conditions .....	7
1.4 Addressing High School Facility Challenges.....	8
1.4.1 Existing Building Design and Function.....	8
1.4.2 Value in Existing Improvements .....	9
1.4.3 Geography and Site Conditions.....	9
1.4.4 Options Considered for High School.....	9
1.5 Other Real Estate Assets Evaluation .....	9
1.6 Plan to Improve District Facilities.....	10
2 Introduction .....	14
2.1 Project Purpose and Scope .....	14
2.2 Planning Process Summary .....	14
2.3 Pedagogy and Curriculum Guidance.....	15
3 Student Enrollment Forecasts and Facility Capacity Analysis.....	16
3.1 Existing Student Population Base Analysis.....	16
3.1.1 Enrollment and Trends by School .....	16
3.1.2 Enrollment and Trends by Grade.....	18
3.1.3 Enrollment Geographic Distribution .....	19
3.1.4 Existing Conditions School Capacity Analysis .....	21
3.1.5 Existing Enrollment Summary .....	22
3.2 Regional Growth .....	22
3.2.1 Regional Population Growth Projections .....	22
3.2.2 Population Growth in Phoenix-Talent School District.....	23
3.3 Base Enrollment Forecast & Capacity Analysis.....	25
3.4 Enrollment Projection and Capacity Analysis Conclusions .....	27
4 Inventory and Assessment of Existing Facilities.....	28
4.1 Orchard Hill Elementary School .....	29
4.2 Phoenix Elementary School .....	31
4.3 Talent Elementary School .....	33
4.4 Talent Middle School .....	36
4.5 Phoenix High School.....	38
4.6 Other Real Property Assets .....	40
5 Build Scenarios Identified for Each School and Other Real Estate Assets .....	42
5.1 Build Scenario Priorities.....	42
5.2 Elementary Schools and Middle School Improvements.....	43
5.3 High School Improvements.....	44
5.4 Non-School Improvements.....	45
6 Analysis of Plan Context and District’s Facility Position .....	46
6.1 Policy and Regulatory Context.....	46

6.1.1	Special Capital Funding and Improvement Programs .....	46
6.1.2	Building Code Compliance Thresholds.....	46
6.1.3	Security and Safety Issues .....	47
6.1.4	Land Use Regulations.....	48
6.2	Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis.....	48
6.2.1	Strengths.....	49
6.2.2	Weaknesses.....	50
6.2.3	Opportunities .....	52
6.2.4	Threats (Risks).....	55
6.2.5	SWOT Conclusions (Synthesis).....	56
7	Cost Estimates for Build Scenarios .....	57
7.1	Cost Estimate Process.....	57
7.2	Direct Construction Cost Summary.....	57
7.3	Soft Costs .....	57
7.4	Cost Estimate Summary .....	58
8	Preferred Improvement Plan and Financing Considerations.....	61
8.1	Planning Process Outcome .....	61
8.2	Bond Measure Implementation .....	65
9	Facility Policies and Asset Strategies.....	67
10	Appendices (on CD-ROM).....	CD
10.1	Existing Conditions Reports (Facilities Assessment Documents).....	CD
10.1.1	Existing Conditions List.....	CD
10.1.2	Facility Condition Assessment Checklists .....	CD
10.1.3	Structural Evaluations Summary .....	CD
10.1.4	HVAC Assessment Reports .....	CD
10.2	Cost Estimating and Financing Items.....	CD
10.2.1	Proposed Bond-Budget Improvements.....	CD
10.2.2	Conceptual Cost Estimate.....	CD
10.2.3	Bond Levy Analysis .....	CD
10.3	Project Advisory Team Materials.....	CD
10.3.1	Tech Memo #1.....	CD
10.3.2	Powerpoint Tech Memo 1 .....	CD
10.3.3	PAT Meeting #1 Minutes .....	CD
10.3.4	Tech Memo #2.....	CD
10.3.5	Tech Memo #3.....	CD
10.3.6	Powerpoint Tech Memos 2 & 3.....	CD
10.3.7	PAT Meeting #2 Minutes .....	CD
10.3.8	Tech Memo #4.....	CD
10.3.9	Design Solution Concepts .....	CD
10.3.10	PAT Meeting #3 Minutes .....	CD
10.3.11	Tech Memo #5.....	CD
10.3.12	Powerpoint Tech Memos 5 & 6.....	CD
10.3.13	PAT Meeting #4 Minutes .....	CD
10.3.14	PAT Meeting #5 Minutes .....	CD
10.3.15	Tech Memo #6.....	CD
10.3.16	Powerpoint School Board Meeting.....	CD
10.4	School Board Resolutions .....	CD
10.4.1	Resolution 17-8 .....	CD
10.4.2	Resolution Adopting Long-Range Facilities Master Plan.....	CD

# **1 EXECUTIVE SUMMARY**

CSA Planning Ltd. was engaged to prepare a Long-Range Facilities Master Plan for the Phoenix-Talent School District in 2016-2017. CSA worked with the architectural firm Straus and Seibert Architects to identify facility issues and develop solutions to identified issues. Architectural Cost Consultants to prepare cost estimates for identified school facility projects. Straus and Seibert Architects engaged sub-consultants with professional specialties to identify and address key issues – such as structural integrity- as needed.

The planning process utilized a Project Advisory Team (PAT) that included District staff, District Board Members, and interested citizens. The Project Advisory Team provided valuable input throughout the planning process to refine concepts, add policy context and develop strategic solutions to facilities challenges. The Project Advisory Team Provided key input at the beginning of the process on optimum and maximum classroom sizes as well as perspective on the educational vision and approach of the District, see Section 2.3.

The Long-Range Facilities Master Plan was developed in 2016-2017 and described the real property needs and building needs of the District for the next 10 to 20 years. While considerable detail is necessary in the process to inventory existing conditions, the scope of the project is planning-level. The project seeks to solve identified, but solvable, facilities problems with specifically identified projects. The identified projects are planning level solutions that will require additional refinement work to realize the final result. Some problems may not be readily solvable with specific identified improvements. For these issues, the plan provides policy guidance so that future directed planning processes can work toward solutions to these more long-term challenges.

The plan also includes updates through May of 2018. These updates reflect the approval of the bond measure. They also reflect real estate policy decisions made by the Phoenix-Talent School District since the 2017 version of the plan was prepared.

## ***1.1 Review and Analysis of District Facility Needs:***

A thorough analysis was performed to identify facilities needs and deficiencies. The analysis sought to identify all the major facilities issues through the master planning process. A brief summary of the technical aspects included in the planning process is as follows:

- 1. Analyzed Student Populations and Projected Future Enrollment**
- 2. Assessed Facility Conditions from a Variety of Perspectives:**
  - a. Safety and Security
  - b. Functionality and Capacity
  - c. Building Integrity Assurance
  - d. Energy Efficiency
  - e. Site Conditions
  - f. Policy and Regulatory Context.

3. **Developed Improvement Concepts to Address Deficiencies**
4. **Cost Estimating**
5. **Prioritization and Selection of Preferred Improvement Plan**
  - a. Preliminary Consultant Developed Concepts
  - b. The Project Advisory Team, District Staff and the School Board refined the improvement options to select a preferred improvement plan that balances funding considerations with the needs of the District.

## **1.2 Facility Capacity and Enrollment Summary**

The optimum and maximum numbers of students per classroom were developed by the District. CSA Planning analyzed existing and future enrollment in relation to the District's facility capacity numbers. CSA then projected future enrollment to identify expected facility capacity issues during the Long-Range Facilities Master Plan period. The analysis identified the following capacity issues:

- The High School has excess capacity. This is an inefficient condition that requires energy and maintenance of significantly more gross-square footage than is necessary to serve the current high school population.
- The District has exhibited a pronounced loss of enrollment after Elementary School for many years. The loss of these students represents approximately a \$1 million dollars in lost instructional revenue from the State every year.
- Orchard Hill Elementary School is projected to approach capacity in the 2031-2036 timeframe. This is even with the assumption that capacity at Orchard Hill will be preserved by a series of elementary school boundary amendments to expand the Phoenix Elementary School boundary and reduce the Orchard Hill Elementary School boundary. Orchard Hill also currently has acute capacity issues with the Cafeteria.
- Phoenix Elementary is projected to have adequate capacity.
- Talent Elementary has adequate capacity currently. However, future capacity issues may arise as the modular classrooms reach the end of their useful life and if a more permanent and appropriate home for the Outdoor Discovery Program is not determined.
- There is also a degree of excess capacity at Talent Middle School. This excess capacity is less of an issue with respect to the absolute building efficiency than it is in relation to future student population growth proximity to Talent Middle School.

## **1.3 Elementary and Middle School Issues**

While the overall challenges and needs associated with Elementary and Middle School are extensive, the overall strategy for each of these campuses is the same. The overall strategy is to make reinvestments in the existing campuses and structures to assure they are available to serve existing and future student populations for the planning period. The bond measure funds are directed at major structural, safety, capacity and and mechanical issues while leaving certain maintenance issues to be addressed with other funding sources.

### 1.3.1 Building Design and Function

Notwithstanding the excess capacity at Talent Middle School, all three elementary schools and Talent Middle School are appropriate from a design and function standpoint to serve the District's needs. There are no building designs or functional issues that cannot be solved in a reasonable and cost effective manner for these four campuses.

### 1.3.2 Value in Existing Improvements

Overall, the value in the existing improvements far outweighs the replacement costs to build new. Each school is due for some major improvements and upgrades to enhance safety, security, assure future building integrity, and improve energy efficiency. However, these objectives can all be accomplished through refitting existing structures more cost-effectively than could be accomplished by building new. Reinvestments in these structures do not represent a sunk cost and appropriate reinvestments should benefit the District for many years to come.

### 1.3.3 Geography and Site Conditions

The site conditions and geography of each of the elementary schools is well suited to meet the needs of the projected student bodies over the next ten years. Orchard Hill Elementary School may begin to experience some mild crowding by the end of the planning period depending on the rate of growth in Southeast Medford. All the Elementary School campuses are well situated to serve current and future enrollment distributions. The sites are all adequate in size and configuration to handle current student populations; some additional land at Orchard Hill Elementary may be beneficial toward the end of the planning period.

Talent Middle School has both site configuration and geographic challenges. Geographically, many students are located a long distance from the campus and this is expected to impact enrollment negatively over the planning period. The site itself is adequately sized but its configuration is somewhat long and narrow and much of it is tucked behind a row of single-family houses. The Talent Middle School site conditions are not ideal but they are not sufficiently problematic to justify a new school site at this time.

### 1.3.4 Existing School Conditions

All four school campuses have significant condition issues that include safety and security issues, functional issues, energy efficiency, and building integrity issues. Safety issues are primarily due to seismic deficiencies. Seismic retrofitting is required at all four campuses; the seismic retrofitting will not necessarily ensure the structure will remain useable following a major earthquake but it is intended to assure safe exit of the structure following a major earthquake. Security issues primarily concern the ability to secure entry and exit points; all of the schools have uncontrolled access points that are not well integrated with circulation and do not have modern hardware or security technology. Lighting and electrical systems are deficient to some extent at all the five main campuses. HVAC systems in all the schools are at the end of their useful life and are not energy efficient from a current best practices perspective. Roofing systems are failing at all the schools except Talent Middle School. Floor coverings throughout the five main campuses are failing and require replacement.

In addition to these Districtwide deficiencies, each school has a particular set of challenges. The most significant additional deficiencies are each main school campus is the following:

**ORCHARD HILL ELEMENTARY SCHOOL:** The cafeteria is significantly undersized and circulation to get to and from the cafeteria is very problematic. Additionally, the external circulation for bus pick-up and parent/student drop-offs is less than ideal. Capacity may become an issue toward the end of the 20 year planning period.

**PHOENIX ELEMENTARY SCHOOL:** The actual configuration of the school is appropriate for its use and function but the internal circulation and external circulation is not well coordinated. Some of the classrooms are built-in-place modular classrooms that are nearing the end of their useful life.

**TALENT ELEMENTARY SCHOOL:** The actual configuration of the school is appropriate for its use and function but the internal circulation and external circulation is not well coordinated. Some of the classrooms are built-in-place modular classrooms that are nearing the end of their useful life. Also, a portion of the student body is enrolled in Outdoor Discovery School which is housed in a nearby facility that is not purpose-built classroom space that is well past its useful life.

**TALENT MIDDLE SCHOOL:** The cafeteria is undersized significantly for the student body. Bus pick-up and drop-offs is a significant congestion and safety issue. The geographic and excess capacity issues at Talent Middle School are not being addressed with specific actions in the long-range facilities master plan, because there are no straightforward and cost-effective solutions. These conditions are not readily solvable and will need to be handled through management processes in the short-term with development of a long-term solution over the next ten years.

## **1.4 Addressing High School Facility Challenges**

The existing high school has numerous functional issues in addition to all the worn-out systems common at the other campuses. Cost-effective reinvestment in a school with numerous functional issues is problematic. The District must compete for enrollment with nearby high schools that are in good to excellent condition – St. Mary’s, South Medford High School and Ashland High School. These conditions present the primary challenge that must be addressed in this Long-Range Facilities Master Plan District because of the short-term operations and long-term enrollment risks presented by the existing condition of the High School.

### **1.4.1 Existing Building Design and Function**

The existing building design is problematic. The Theater and Gymnasium complex is reasonably well designed and could be made to function properly with appropriate refitting efforts. While the Commons is a nice space, it is surrounded by a maze of poorly circulating hallways that connect to low-ceilinged classrooms and some that do not have windows or natural light. The classrooms are somewhat organized by subject but the flow between them is limited. Also, the classroom space exists at multiple finished floor elevations which is not a desirable condition. The materials and design of the classroom space makes it difficult to renovate in anything resembling a cost-effective manner. The poor circulation results in very inefficient layout on a per built-foot per student basis which increases maintenance and energy costs per student. Achieving appropriate campus security with all entrances and exits is another major issue.

### 1.4.2 Value in Existing Improvements

The District has considerable value in the Gymnasium and Theater complex portion of the High School. This portion of the High School could warrant cost-effective reinvestment.

The net-present value of the classroom space is minimal if viewed from the standpoint of bringing the existing spaces up to a modern standard appropriate for high school level education that is comparable to competing facilities in the area.

### 1.4.3 Geography and Site Conditions

The best aspect of the High School is the geography and site conditions. The geography is well located to serve the student body. The site is at least as walkable and bikeable as any other potential location in the District. The site itself is sufficiently large to serve the high school population. It is not adjacent to high speed roadways that might create a potential safety issue but it is still close to the region's arterial road network to allow good access for students and staff. Replacing the site with a new green-field site in a cost effective manner would be a challenge.

### 1.4.4 Options Considered for High School

Four generalized solutions to the High School were considered during the original long-range planning process as follows:

- “Minimal Build”- This option would have made minimum investment to squeeze the remaining useful life out of the classrooms while making progress on the Gym and Theater so that it would still be viable for the third option listed here.
- “Renovate Existing Structure” – This option planned the requirements to reconstruct the existing classroom facilities to address the multitude of functional issues.
- “Reconfigured High School” – This option planned new classrooms south of the existing Theater and Gymnasium core so that those components could be refitted and used going forward with new construction limited to the classroom space.
- “New High School on Greenfield Site” – This option would construct a completely new High School at a new location.

## 1.5 Other Real Estate Assets Evaluation

In addition to the five main school campuses, the Long Range Facilities Master Plan evaluated the other real estate assets of the District from the standpoint of strategic value to the District. The issues identified for those other real estate holdings are as follows:

- District Admin Office Building: This building is in good shape and requires minimal reinvestment.
- Maintenance Support Buildings in Phoenix: These buildings are in poor shape and need to be refit or replaced.
- Main Maintenance Building on Colver Road: This building is not salvageable and should be replaced in a different location (see below on Colver Road Property).

- **Coal Mine Road Property:** This site is not expected to be needed in the next twenty years for a new school. However, it may represent a potential solution to address the middle school location issues in the next round of master planning in fifteen to twenty years. The hold cost is minimal at this point, so the opportunity cost to hold onto it appears low.
- **Colver Road Property:** This site is still useful for extra athletics fields, the bus logistics facility and a new relocated primary maintenance building. However, the site has approximately 10-12 acres of surplus land that is not expected to be necessary for School operations anytime in the reasonably foreseeable future (even well beyond 20 years) and has been declared surplus property by the School Board, see Resolution No. 17-8. As part of this resolution, the District directed staff to take appropriate steps to achieve highest and best value for this surplus land.
- The District also owns property across from Talent Elementary School that is currently being used for the Outdoor Discovery School. This property not especially valuable but it could be sold as surplus if the District found a better option for the Outdoor Discovery School.

## **1.6 Plan to Improve District Facilities**

The major improvement policy choice that was confronted by the District in the Master Planning Process concerned the High School. Consensus formed around the Reconfigured Phoenix High School improvement concept that would retain the existing Gymnasiums/Theater core area and construct new classrooms, this design solution is shown in Atlas Figure 9. This concept has a number of advantages, as follows:

- This design solution has the potential to stem the enrollment loss risk by having a High School facility that is on par with competing facilities.
- Total cost is much less than a completely new school at a new greenfield site. Net savings are estimated to be in the \$7 million to \$15 million dollar range but the result would still be an essentially new high school facility.
- The project can be phased so that the initial build has adequate capacity for the next 15-20 years but will be configured in a way that additional capacity can be added very cost effectively in the future if that future planning process were to determine additional capacity is appropriate.

As the planning process progressed, the importance of the Reconfigured High School for the entire future of the District became more apparent. This led to a prioritization process that balanced improvement priorities at the four other schools without jeopardizing the Reconfigured High School project.

The consultant team presented an initial set of potential build packages to the Project Advisory Team that included total cost estimates for each package. If all the recommended improvements were completed in a single-set of projects, the total project budget was just approximately \$98 million. The estimates for identified improvements were prepared by Architectural Cost Consultants in Tigard, Oregon and are located in Appendix 10.2.2. The Plan assumes an additional 25% of the direct costs will be needed for these purposes.

Of the full build estimate of around \$98 million for all potentially needed improvements, the District determined that about \$13 million worth of those improvements, while needed, are not absolutely necessary within the planning period. This prioritization process resulted in a plan with a total budget of approximately \$83 million. Out of that total project budget, the District identified approximately \$11.5 million in improvements that are needed but can be implemented through smaller incremental improvement projects over time in a cost-effective manner and financed using non-bond revenues – such as operational revenues, excise tax revenues, surplus property sales, etc. These projects are generally deferred maintenance items like painting, floor coverings and new energy efficient lighting lamp replacements.

The remaining \$72 million dollars was proposed to be funded with \$68 million through a General Obligation Bond that was approved by the electorate in the District on November 7, 2017 with the additional \$4 million coming from State matching grants. The design schematics for the preferred improvement plans are provided on Atlas Figures 5-11. The following table summarizes the major identified improvements for each school and the approximate total budget for improvements at each school associated with the bond component of the improvement package:

<b>Orchard Hill Elementary School Bond-Funded Planned Improvements:</b>	
<b>Bond Budget includes:</b>	<b>\$5,212,328</b>
1	Remodel administration for security
2	New cafeteria addition
3	Remodel old cafeteria
4	Seismic upgrade throughout structure
5	Replace existing HVAC equipment
6	New roof where not already replaced
7	New security entrance hardware & electronics
8	Replace all handles throughout with ADA compliant
9	Reconfigure playground as required for new cafeteria

**Phoenix Elementary School Bond-Funded Planned Improvements:**

<b>Bond Budget includes:</b>	<b>\$5,405,564</b>
1 Remodel administration for security	
2 Seismic upgrade throughout structure	
3 Replace existing HVAC equipment	
4 Remove & Replace roof	
5 New security entrance hardware & electronics	
6 Replace all handles throughout with ADA compliant	
7 New divider wall at classrooms in round building	
8 New windows in Primary Wing	
9 Renovate Art Room	
10 Upgrade fire alarm system	
11 New gated entry court and decorative security fencing at classrooms	
12 Replace parking lot	

**Talent Elementary School Bond-Funded Planned Improvements:**

<b>Bond Budget includes:</b>	<b>\$5,465,837</b>
1 Remodel administration for security	
2 Seismic upgrade throughout structure	
3 Replace existing HVAC equipment	
4 Remove & Replace roof	
5 New security entrance hardware & electronics	
6 Replace all handles throughout with ADA compliant	
7 New divider wall at classrooms in round building	
8 New windows in Primary Wing	
9 Upgrade plumbing in Primary Wing	
10 Remodel Restrooms	
11 Renovate Art Room	
12 New gated entry court and decorative security fencing at classrooms	

**Talent Middle School Bond-Funded Planned Improvements:**

<b>Bond Budget includes:</b>	<b>\$6,792,604</b>
1	Remodel administration and entries for security
2	Expand existing cafeteria
3	Repair Roof as needed
4	Seismic upgrade throughout structure
5	Replace existing HVAC equipment
6	Replace Fire alarm & Intercom systems
7	Replace all handles throughout with ADA compliant
7	Add accessible ramp at main entry & improve accessibility at northern entries
8	Extend sidewalk along eastern bus loop

**Reconfigured Phoenix High School Bond-Funded Planned Improvements**

*Gym Core includes- athletic facilities, theater, culinary room and band room*

<b>Bond Budget includes:</b>	<b>\$48,332,647</b>
1	Replace existing HVAC equipment for Gym Core
2	Seismic upgrade Gym Core
3	Remove & Replace roof of Gym Core
4	Remodel Existing Band Room to Choir Room
5	Remodel existing theater
6	Remodel all athletic facilities
7	Upgrade locker rooms
8	Relamp or replace existing lighting
9	Construct new academic wing with dining & commons
10	Construct new Fine and Industrial Arts wing
11	New communications/fire alarm connecting new & existing buildings
12	New security system
13	Expand existing parking lot
14	New track facility
15	Upgrade existing bleachers
16	New softball and soccer fields

## **2 INTRODUCTION**

CSA Planning Ltd. was engaged to prepare a Long-Range Facilities Master Plan for the Phoenix-Talent School District. CSA worked with the architectural firm Straus and Seibert Architects to prepare planning-level design solutions for identified school facility projects and Architectural Cost Consultants were engaged to prepare planning-level cost estimates. Straus and Seibert Architects engaged sub-consultants with professional specialties to identify and address key issues – such as structural integrity- as needed.

The planning process engaged a Project Advisory Team (PAT) that included District staff, District Board Members, and interested citizens. The PAT provided valuable input throughout the planning process to refine concepts, add policy context and develop strategic solutions to facilities challenges.

### ***2.1 Project Purpose and Scope***

The Long-Range Facilities Master Plan generally uses a twenty-year planning period, but this plan takes a 2016-2026 ten-year look and a 2016-2036 twenty-year look. The ten-year look tends to be more specific because it is somewhat easier to envision likely future conditions over the next ten years and the 10-20 period is treated in a more general way.

The Long-Range Facilities Master Plan describes the real property needs and building needs of the District for the next 20 years. While considerable detail is necessary in the process to inventory existing conditions, the scope of the project is planning-level. The project seeks to solve identified, but solvable, facilities problems with specifically identified project. The identified projects are planning level solutions that will require additional refinement work such as construction plan set development, etc. Some problems may not be readily solvable with specific identified improvements. For these issues, the plan provides policy guidance so that future directed planning processes can work toward solutions to these more long-term challenges.

### ***2.2 Planning Process Summary***

A brief summary of the main technical aspects of the planning process is provided as follows:

#### **1. Existing Conditions Analysis**

- a. CSA evaluated existing enrollment and student distributions
- b. The project team evaluated existing facility conditions with respect to safety and security issues, functional and capacity issues, building integrity assurance, and energy efficiency. The analysis identified those facility conditions that were deficient or could benefit from future improvements

#### **2. Future Student Projections and Facility Improvement Concepts**

- a. CSA projected future student distributions and enrollment and performed capacity analysis of the existing schools to handle future student enrollments
- b. SSA developed facility improvement concepts for each of the District's schools
- c. The consultant team developed recommendations regarding other District real estate holdings and facilities

### 3. Concept Refinement and Cost Estimating

- a. The consultant team worked with the Project Advisory Team through a series of meetings to refine the improvement concepts consistent with District objectives and needs.
- b. The refined improvement concepts were transmitted to Architectural Cost Consultants to cost estimating of the identified improvement concepts.

### 4. Prioritization and Selection of Preferred Improvement Plan

- a. The consultant team developed a set of improvement options for consideration by the District.
- b. The Project Advisory Team, District Staff and the School Board refined the improvement options to select a preferred improvement plan that balances funding considerations with the needs of the District.

The working documents for the development of the plan are provided in the appendices to the plan. The Project Advisory Team materials and minutes from the Project Advisory Team meetings are available in Appendix 10.3.

## 2.3 Pedagogy and Curriculum Guidance

Early in the planning process, the Project Advisory Team discussed issues and provided input on the educational vision and approach to pedagogy for the District. A summary of this input to the plan is provided in Section 5 of Tech Memo #1 as follows:

Based on the dialogue and research thus far, we understand the District's pedagogy to have a foundation of traditional K-12 teaching methods focused on a "common core" curriculum augmented with unique education opportunities based upon student/parent demand. Phoenix-Talent has a number of these demand based programs, such as:

- Two-way Language Immersion at Phoenix and Talent Elementary Schools
- Outdoor Discovery School at Talent Elementary
- SDI and STEM Technology Programs at Talent Middle School
- Ag-FFA and Vet-Tech at Phoenix High School
- Talented and Gifted programs

In follow-up discussion on these issues, the Project Advisory Team agreed that this general educational approach has worked for the District in the past and the District intends to continue this successful pedagogy/curriculum approach into the future. This guidance was then incorporated into the balance of the analysis in the plan and especially helped identify functional issues with the buildings that would affect educational endeavors.

## 3 STUDENT ENROLLMENT FORECASTS AND FACILITY CAPACITY ANALYSIS

Section 3 of the plan sets forth the District analysis of student population. The analysis utilized student enrollment data and trends from the District’s database. Future growth analysis utilized CSA’s proprietary regional growth model to estimate future enrollment conditions at the schools. The spatial distribution of CSA’s regional growth model projections are primarily based upon Oregon’s land use planning system that applies to jurisdictions with the District. Growth rate estimates for the analysis are based upon a number of economic factors and were compared for reasonableness of the District’s growth share estimates to the total growth projected in the County from other accepted projections. All base data in the model is a direct apportionment of the most recent population data available at the block-group level from the U.S. Bureau of the Census.

### 3.1 Existing Student Population Base Analysis

This data informs the projections for future years in the next step of the Long-Range Facility Master Plan process that will help the district identify future needs.

#### 3.1.1 Enrollment and Trends by School

To determine what direction the levels of enrollment in the Phoenix-Talent School District have been taking over the past 10 years we first looked at enrollment by school.

Table 3.1.1.1 – Enrollment by School 2006 to 2015

School / Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
<b>Orchard Hill</b>	367	400	398	421	352	364	367	406	438	440
<b>Phoenix Elementary</b>	489	502	436	369	431	424	413	373	387	404
<b>Talent Elementary</b>	508	541	491	491	493	392	438	469	522	495
<b>Talent Middle School</b>	653	664	629	637	596	602	600	601	582	575
<b>Phoenix High School</b>	867	889	852	824	739	777	804	802	826	746
<b>Total Enrollment <sup>1/</sup></b>	2,884	2,996	2,806	2,742	2,611	2,559	2,622	2,651	2,755	2,660

<sup>1/</sup> Enrollment numbers do not include the Armadillo Charter School.

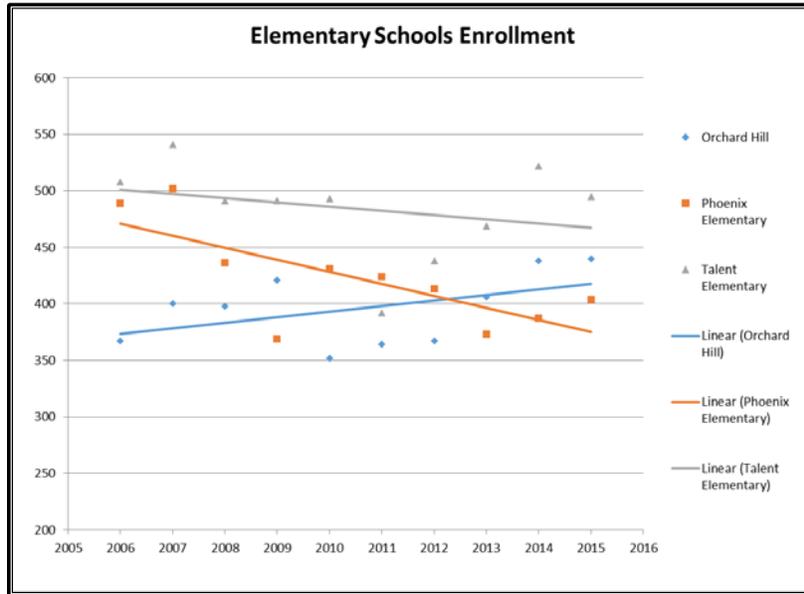
Using linear regression, the analysis looked to see what trend those numbers show. The table below depicts statistical trends based on the past 10 years of enrollment:

Table 3.1.1.2 – Enrollment Statistics by School

2006 to 2015	Mean	Standard Deviation	Linear Regression (OLS)	
			Equation	R-Square
<b>Orchard Hill</b>	395.3	30.14	y = 4.9273x - 9511	0.2205
<b>Phoenix Elementary</b>	422.8	42.43	y = -10.667x + 21868	0.5214
<b>Talent Elementary</b>	484.0	40.46	y = -3.7576x + 8039	0.0711
<b>Talent Middle School</b>	613.9	28.55	y = -9.2182x + 19147	0.8599
<b>Phoenix High School</b>	812.6	46.87	y = -10.921x + 22770	0.4480
<b>Districtwide Enrollment</b>	2,728.6	129.31	y = -32.527x + 68119	0.4931

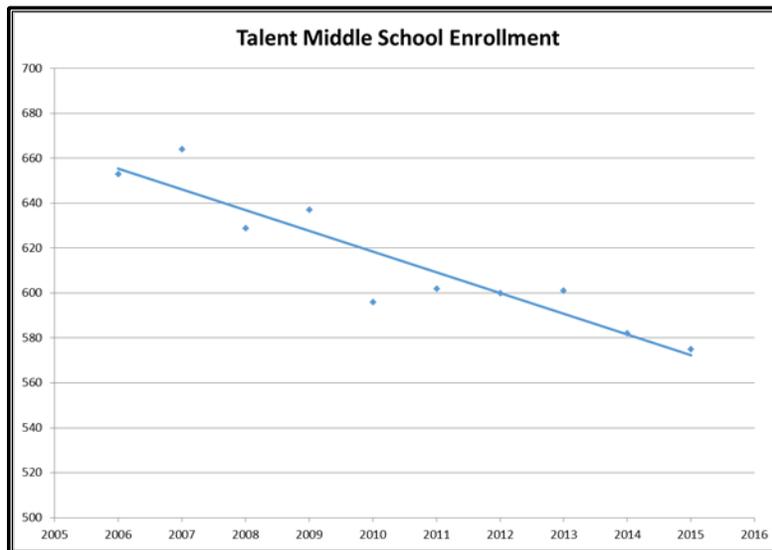
The statistics above provided the basis for the graphs below depicting the trend lines for each school’s enrollment and the District as a whole. Where the R-Square is greater than around 0.75, it indicates a discernable trend in the enrollment numbers. Where the R-Square is less than 0.75, it means that the variation in the enrollment numbers over the years fluctuate irregularly and as such do not indicate a trend up or down in enrollment.

Figure 3.1.1.1- Elementary School Enrollment by Year



The enrollment statistics indicate essentially flat enrollment for K-5 elementary schools with slightly positive enrollment growth for Orchard Hill Elementary and slightly negative enrollment decline for the other two elementary schools. However, the R-square is less than 0.53 in all cases. Thus, the regression does not indicate a discernable trend in the data.

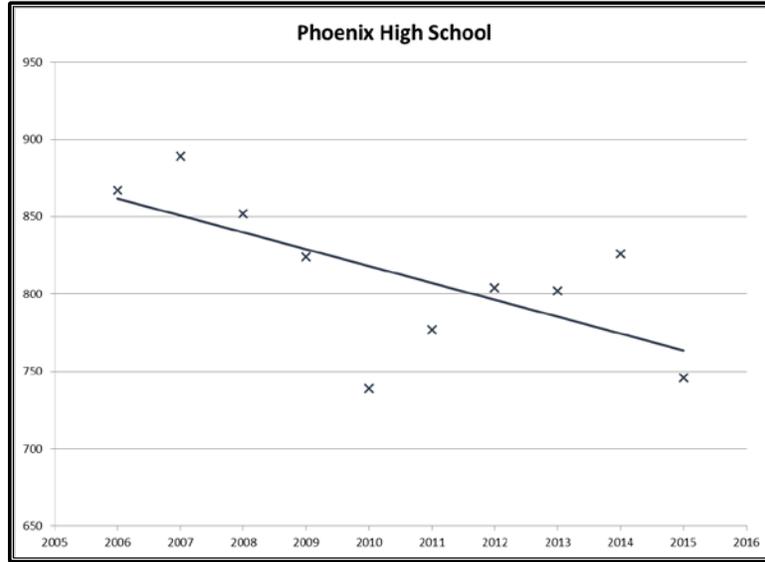
Figure 3.1.1.2 - Middle School Enrollment by Year



Enrollment is negative for Talent Middle School. The school has lost an average of about 9 students per year for the last ten years; this is independent but affected by the attrition between the elementary and middle school transition period. An R-square of 0.86 indicates a trend that has been stable over the last 10 years. Flat enrollment in Elementary should lead to flat enrollment in Middle School but that is not the case. The District is losing students in this age cohort.

High School enrollment is also negative but there is not as established a trend. Fluctuations have occurred as a result of several factors such as charter schools and open enrollment.

Figure 3.1.1.3 - High School Enrollment by Year



**3.1.2 Enrollment and Trends by Grade**

Table 3.1.2.1 looks at the enrollment numbers by grade over the past ten years at all schools.

Table 3.1.2.1- Enrollment by Grade

Grade	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Mean	Std. Dev.
K	209	236	207	159	203	207	215	237	235	232	214.0	21.4
1	210	221	229	209	196	209	192	200	240	213	211.9	13.4
2	221	229	209	223	225	189	212	205	213	234	216.0	12.0
3	240	256	219	216	218	189	198	215	211	223	218.5	17.2
4	229	252	229	230	217	193	193	206	242	211	220.2	17.9
5	255	249	232	244	217	193	208	185	206	226	221.5	21.5
6	190	236	211	220	210	195	195	202	187	193	203.9	13.9
7	233	190	222	195	200	212	193	203	197	188	203.3	13.3
8	230	237	196	222	186	195	212	196	198	194	206.6	15.8
9	207	246	207	210	206	198	191	214	194	187	206.0	15.0
10	257	216	226	214	171	217	211	192	224	179	210.7	22.5
11	217	234	195	207	187	177	214	197	200	197	202.5	14.7
12	186	193	224	193	175	185	188	199	208	183	193.4	12.7

Below, based on the number of students in each grade, we project how many students are expected to enroll the in the grade above the following year. Table 1.2.2 shows the difference between the expected number of students and the actual enrollment.

**Table 3.1.2.2- Enrollment Change by Grade**

Grade	2007	2008	2009	2010	2011	2012	2013	2014	2015	Mean
1	12	-7	2	37	6	-15	-15	3	-22	0.1
2	19	-12	-6	16	-7	3	13	13	-6	3.7
3	35	-10	7	-5	-36	9	3	6	10	2.1
4	12	-27	11	1	-25	4	8	27	0	1.2
5	20	-20	15	-13	-24	15	-8	0	-16	-3.4
6	-19	-38	-12	-34	-22	2	-6	2	-13	-15.6
7	0	-14	-16	-20	2	-2	8	-5	1	-5.1
8	4	6	0	-9	-5	0	3	-5	-3	-1.0
9	16	-30	14	-16	12	-4	2	-2	-11	-2.1
10	9	-20	7	-39	11	13	1	10	-15	-2.6
11	-23	-21	-19	-27	6	-3	-14	8	-27	-13.3
12	-24	-10	-2	-32	-2	11	-15	11	-17	-8.9
<b>District Total</b>	61	-203	1	-141	-84	33	-20	68	-119	-44.9

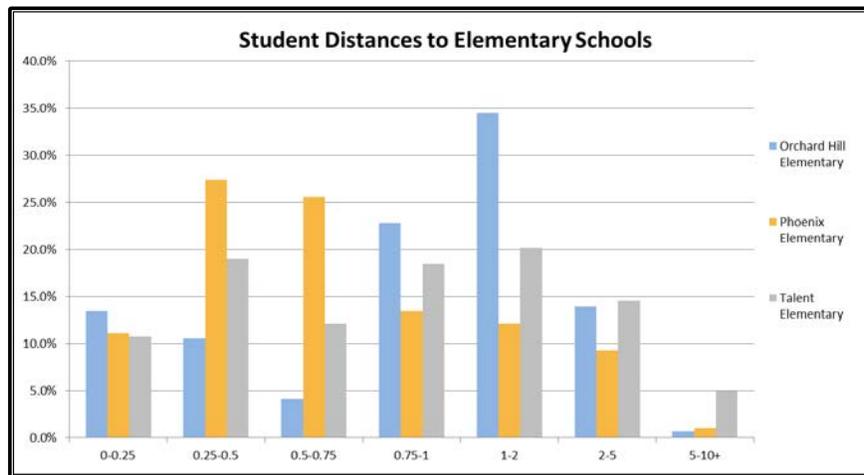
A consistent pattern of enrollment loss can be seen from Elementary School to Middle School at Grade 6 in the District that averages 15.6 students per year over the last 10 years. This pattern has been somewhat less pronounced over the last four years, however. Except for the losses from Elementary School to Middle School, the mean differential from one year to the next is relatively negligible on average from grades K-10. Losses again appear in grades 11 and 12 which tends to be the point at which some students drop out of High School.

From a facility space planning standpoint, the standard deviation in enrollment by grade is tight relative to the mean and ranges from 12 to 22.5 students per year per grade. This is less than an entire class District-wide making it possible for the District to absorb historic student volatility within the classrooms that are available for each grade level; however this does not mean challenges have not arisen due to unequal geographic distribution within the Elementary School District areas.

### 3.1.3 Enrollment Geographic Distribution

Atlas Figures 2-4 is a series of Maps that depict the distribution of students in the District. The Maps depict enrollment by School and show boundaries between Elementary School Districts. Below are associated graphs that depict the Euclidean (straight line) distance of students to their respective schools in the 2014-2015 school year.

**Figure 3.1.3.1- Percentage of students by walking distance to Elementary School**

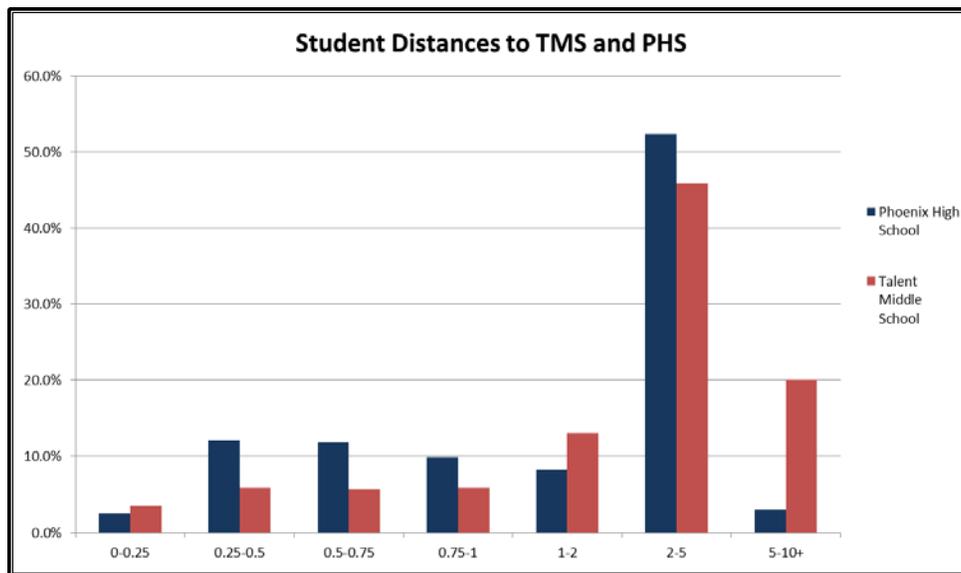


The Elementary School graph indicates that Phoenix Elementary is the most walkable of the three elementary schools from a distance standpoint with over 35% of the students located less than ½ a mile from the school and another 25% less than ¾ of a mile. Completion of the ODOT construction work on Highway 99 will further enhance the walkability of this school. From a facility standpoint though, additional sidewalk improvements on Highway 99 are still needed.

Talent Elementary students are more evenly distributed across their district, but still a large number of students live within a reasonable walking distance to the school.

Orchard Hill is the least walkable and has less than 25% of its student body within a ½ mile of the school. The school is located on the southeast border of the City of Medford which limits its walkability, as there is no housing to the south at this time. The school boundary also extends across I-5 which makes the road miles distance that much further when compared to the Euclidean distance in the above analysis, especially for the large group of students that are 1-2 Euclidean miles from the school, but can be as much as 5-7 road miles away.

Figure 3.1.3.2- Percentage of students by walking distance to Middle and High Schools



In addition to walking, biking also becomes a more viable alternative mode of travel for Middle School and High School students. Less than one mile is generally a reasonable walking distance for Middle School and High School students and less than two miles is a reasonable biking distance. Nevertheless, except in very dense large urban areas, High Schools and Middle Schools tend to serve a broad area and significant portions of the student body is often bussed, transported by parents or high school students may drive themselves.

For the type of school district Phoenix High serves, it is relatively proximate to its student body. Almost 45 percent are within a reasonable biking and walking distance.

Typically, middle schools would be more closely located to their student body than high schools, but that is not the case for Phoenix-Talent. There are 15% more high school

students within a comfortable walking distance to Phoenix High school than there are to Talent Middle School. The location of Talent Middle School requires 20% of the student body to travel more than 5 miles each way by Euclidean distance and somewhat further by road miles. This is significantly more distance for a significant portion of the student body than most other middle schools in the region. Ashland, Medford, Central Point, and Eagle Point all have more centrally located middle schools in relation to their student body.

### 3.1.4 Existing Conditions School Capacity Analysis

Table 1.4.1, below, compares the capacity of each school in relation to the enrollment in each school over the last three years. Capacity is based upon the number of students in each instructional classroom (music rooms and gyms are not counted as instructional rooms at the elementary schools). An optimum number is given for the desired number of students in a classroom and the maximum number reflects the greatest number of students in a classroom at that school level that would be considered acceptable to the District.

**Table 3.1.4.1 – Percent of Capacity Used by Enrollment**

	2013		2014		2015		Student/Classroom		Number of Class Rooms	Capacity Numbers	
	Optimum	Maximum	Optimum	Maximum	Optimum	Maximum	Optimum	Maximum		Optimum	Maximum
<b>Orchard Hill</b>	67.7%	56.4%	73.0%	60.8%	73.3%	61.1%	25	30	24	600	720
<b>Phoenix Elementary</b>	62.2%	51.8%	64.5%	53.8%	67.3%	56.1%	25	30	24	600	720
<b>Talent Elementary</b>	72.2%	60.1%	80.3%	66.9%	76.2%	63.5%	25	30	26	650	780
<b>Talent Middle School</b>	58.9%	50.5%	57.1%	48.9%	56.4%	48.3%	30	35	34	1,020	1,190
<b>Phoenix High School</b>	66.8%	57.3%	68.8%	59.0%	62.2%	53.3%	30	35	40	1,200	1,400
<b>District Enrollment</b> <sup>/1</sup>	65.1%	55.1%	67.7%	57.3%	65.4%	55.3%				4,070	4,810

<sup>/1</sup> The Talent Elementary School capacity data includes the two classrooms at the Outdoor Discovery School.

Overall, the District has considerable available capacity in its system. Operating with some available capacity margin can be beneficial because it affords the District capacity to handle modest short-term surges in enrollment without the need to construct new facilities. Being somewhat under capacity also allows for smaller class sizes, provided there is adequate revenue in the instructional budget to support those teacher ratios. The existing District facilities could support Elementary Schools and the Middle School with class sizes of 20 and the High School with a class size of just 23, but these are smaller class sizes than revenues have historically supported from an instructional standpoint.

The Phoenix-Talent School District, overall, appears to be on the threshold of being over-built from the standpoint of ideal capacity, especially as it relates to Middle School and High School. There is a point of ideal efficiency, beyond which extra facilities simply represent additional fixed costs, such as maintenance, and are not necessary to serve the typical student enrollment base.

The above Capacity Analysis does take credit for all of the existing classrooms, including the four modular classrooms at Phoenix Elementary and the four modular classrooms at Talent Elementary, as well as the two classrooms at the Outdoor Discovery School at Talent Elementary. However, it is important to be aware that the Existing Conditions Capacity Analysis is “just the math” regarding space available and is silent on the qualitative aspects of the space. The next phase of the project will look at future conditions and that process will evaluate the appropriateness of modulars and other less than standard classrooms, as a means to satisfy long-term enrollment needs.

### 3.1.5 Existing Enrollment Summary

Overall, enrollment at the elementary level has been relatively constant over the last ten years. Existing elementary school facilities have adequate capacity, from a supply of instructional classrooms standpoint, to handle additional enrollment. Enrollment at the middle school and high school is in decline.

In comparing current data to the last Facilities Master Plan from the 1999, the total elementary school enrollment now in the same range as the total elementary school enrollment in the late 1990's. Middle school enrollment has dropped to levels not seen since the early 1990's. High school enrollment was growing rapidly in the late 1990's, but enrollment has levelled off to a current figure that is near the enrollment figures in the late 1990's.

**Table 3.1.5.1 – 1996 to 1999 Enrollment      Table 3.1.5.2 – 2012 to 2015 Enrollment**

School / Year	1996	1997	1998	1999	Mean	School / Year	2012	2013	2014	2015	Mean
<b>Elementary Schools</b>	1375	1385	1348	1377	1371	<b>Elementary Schools</b>	1218	1248	1347	1339	1288
<b>Middle School</b>	647	655	660	649	653	<b>Middle School</b>	600	601	582	575	590
<b>High School</b>	758	798	808	802	792	<b>High School</b>	804	802	826	746	795
<b>Total Enrollment <sup>1</sup></b>	2780	2838	2816	2828	2816	<b>Total Enrollment <sup>1</sup></b>	2622	2651	2755	2660	2672

In planning for facilities now, it is useful to evaluate enrollment in the context of the 1999 Master Planning effort, because this was the last time that facility capacity and adequacy was assessed on a District-wide basis. If the prior Master Plan included facilities that were planned to have adequate capacity, and enrollment has remained constant, then the existing facilities should be expected to be substantially adequate (in size but not necessarily condition) to meet current needs. If in the future the entire enrollment at the elementary schools level was retained through high school, then enrollment at Phoenix High School would be approximately 150 students per year higher than current levels. From a supply of instructional classrooms standpoint, the Talent Middle School and Phoenix High School are capable of handling all the through-put from the three elementary schools without overcrowding in the event all these “lost students” were somehow retained.

## 3.2 Regional Growth

The first step in the enrollment projection process is to look at regional growth projections. Future enrollment in the Phoenix-Talent School District is localized in response to region-wide population change. Thus, the methodology we employ in the enrollment projections is to examine regional growth projects and then estimate the amount of regional growth that might reasonably be captured in the Phoenix-Talent School District area.

### 3.2.1 Regional Population Growth Projections

The table below depicts three county-wide population projections from three distinct but appropriate foundational sources, as follows:

**Table 3.2.1.1 – Regional Population Growth**

	2020		2025		2030		2035		2015 Census Estimate
	pop.	growth	pop.	growth	pop.	growth	pop.	growth	
Office of Economic Analysis	223,458	10,891	238,955	26,388	253,274	40,707	265,624	53,057	212,567
PSU Population Reserch Center	222,583	10,016	234,561	21,994	245,963	33,396	255,840	43,273	212,567
Jackson County Comprehensive Plan	246,031	33,464	261,497	48,930	276,437	63,870	291,150	78,583	212,567
Average	230,691	18,124	245,004	32,437	258,558	45,991	270,871	58,304	212,567

These sources have a fair degree of variance within the projections. By 2035, there is a difference of over 35,000 people countywide. However, all the analysis sources project significant regional growth that is projected to be not less than 43,273 people; an amount of growth that is more than any single City other than Medford in Jackson County.

From an enrollment standpoint, this means the chances of flat or enrollment declines in the medium and long-term are relatively low; barring some sort of unanticipated moratorium on development or a significant and unexpected change in the overall economic/demographic picture. However, the amount of enrollment captured by the District will depend on the share of the regional growth that is located in the District and the District’s ability to attract and retain students in an ever more competitive education service environment.

**3.2.2 Population Growth in Phoenix-Talent School District**

To estimate the population growth within the District, CSA adapted a proprietary model CSA developed for the Rogue Valley Transportation District for their boundary location analysis. Parameters were developed for that model to estimate the expected development capacity yield, in terms of population and employment, of individual tax lots based upon the applicable land use plan regulations. All base population data comes from data the U.S. Bureau of the Census.

Essentially, the model estimates future population, by location, based upon the applicable land use regulatory framework at full build-out. This is done for all Urban Growth Boundary (UGB) areas which are lands designated to meet urban needs in the next 20 years, and for all Urban Reserve (UR) areas, which are additional lands designated to meet urban needs over the next 50 years.

All three cities are in the process of amending their UGB’s to accommodate additional lands, so it is expected that some portion of the existing Urban Reserves will be consumed as urban land over the next 20 years. The City of Medford has selected a draft UGB boundary and that draft boundary was utilized in the projections. Phoenix and Talent have both identified the amount of residential lands needed, but have not specified a location. However, because Phoenix and Talent are entirely located within the School District Boundary the residential need projection for the next 20 years is adequate; regardless of the location selected for expansion to meet that need it will be located within the School District boundary.

Thus, the remaining projection analysis requires assumptions about the pace of development. These assumptions are described in the below table:

**Table 3.2.2.1 – Development Pace Assumptions within District**

Development Pace Estimates			Medford	Phoenix	Talent
0-10 Year Build-Out	UGB	Modest Pace	40%	5%	10%
		Moderate Pace	60%	10%	50%
		Rapid Pace	85%	15%	70%
	URA	Modest Pace	5%	8%	15%
		Moderate Pace	10%	21%	25%
		Rapid Pace	15%	42%	35%
0-20 Year Build-Out	UGB	Modest Pace	95%	10%	10%
		Moderate Pace	95%	20%	70%
		Rapid Pace	95%	30%	90%
	URA	Modest Pace	40%	32%	35%
		Moderate Pace	55%	56%	55%
		Rapid Pace	80%	75%	80%

The development pace assumptions are based upon CSA’s experience with development in the Bear Creek Valley and our knowledge of the area. The Medford pace assumptions are based upon pretty steady development of the areas and the rapid pace of development assumption is estimating that most all of the land being included in Medford’s UGB in the pending UGB amendment will be built out 20 years from now. It is also important to note, that the analysis for Medford assumes that land being added as part of the Medford’s UGB process that is owned by the Rogue Valley Manor will be restricted to an Active Adult Retirement Community which is not relevant for purposes estimated student population in the future; this restriction was offered by the property owner as part of the UGB review process and has been imposed by the Council. If this restriction is modified in the future to allow standard residential development, that policy change will be expected to increase Phoenix-Talent School District enrollment projections.

Phoenix is more complicated because much of the land within the UGB is in-fill which tends to go at a much slower pace than greenfield development. Certain residential areas are severely constrained by slopes. The Urban Reserve areas of Phoenix are expected to develop at a slightly slower pace than in other cities because most all of the growth in Phoenix is planned east of the freeway and the City has relatively little urban development and existing infrastructure in this area.

The assumptions for Talent assume strong demand for housing in Talent. The UGB lands are heavily dependent on installation of a railroad crossing. If the railroad crossing is constructed in the short to medium term then much of the land will build out in the next 20 years. If the crossing is not constructed then relatively little of the capacity in Talent’s UGB will be built out over the next 20 years. Development of lands added to the UGB are assumed to be consumed at a reasonable pace and the rapid development pace assumptions would assume most all of the land added to the UGB will be consumed within the next 20 years.

This methodology yields the following projected population growth district-wide:

**Table 3.2.2.2 – District Population Growth**

District-wide Forecast Population Growth			Medford	Phoenix	Talent	Total
0-10 Year Growth	UGB & URA	Modest Pace	1570	132	303	2005
		Moderate Pace	2377	349	1147	3872
		Rapid Pace	3375	673	1605	5652
0-20 Year Growth	UGB & URA	Modest Pace	3976	508	451	4935
		Moderate Pace	4108	894	1753	6754
		Rapid Pace	4328	1209	2322	7859

As a matter of scale, the projections represent the growth in population equivalent to an additional City of Talent in the District by the end of 2035.

When applying a rational-location methodology to these types of projections, it is useful to keep the end goal in mind. As long as the upper and lower bounds of the assumptions are likely to capture actual future conditions and the upper and lower bounds are not so wide as to be completely unreasonable on either end, then the assumptions are adequate for planning purposes. It is also useful to compare results from this type of rational-location approach to the empirical population projections for the entire county to check for reasonableness. The below table provides this comparison:

**Table 3.2.2.3 – Growth Percentage Comparisons**

	Percent of County Growth through 2025			Percent of County Growth through 2035		
	Modest	Moderate	Rapid	Modest	Moderate	Rapid
Office of Economic Analysis	8%	15%	21%	9%	13%	15%
PSU Population Research Center	9%	18%	26%	11%	16%	18%
Jackson County Comprehensive Plan	4%	8%	12%	6%	9%	10%
<b>Average</b>	<b>6%</b>	<b>12%</b>	<b>17%</b>	<b>8%</b>	<b>12%</b>	<b>13%</b>

Over the next 20 years, the table indicates that the population growth in the District would represent a range of 6 percent to 18 percent of the region’s growth during the period. Phoenix-Talent School District is near the geographic center of the Bear Creek Valley and so one would expect demand in this geography to keep pace with the region provided there is adequate land supply. The land use planning documents for the area are intended to supply adequate land for urban uses in these areas over time. Moreover, half of the forecast growth is located within the UGB of Southeast Medford where development has been occurring at a reasonable pace over the years and most all of this land is planned and zoned for urban development and the infrastructure planning for this area is either in place or is planned with financial mechanisms to support delivery.

### **3.3 Base Enrollment Forecast & Capacity Analysis**

With the future population forecast for the District reasonably estimated, it is necessary to convert the area-wide population into student populations. These calculations are based upon census data.

This data reduction requires several steps. First, the census ratios of student population age groups from the population as a whole in the County were estimated. These estimates were based upon an average of the 2010 census and ACS estimates from 2011, 2012, and 2013. Application of these ratios to the forecast future population in the District yielded the student age population in the future years. The student age population growth by age cohort was then divided by the number of years in that cohort to arrive at growth per individual age. The census also provides an estimate of the number of student aged people in each cohort that attend public school. This ratio varies by the age of the students- 91.7% for Kindergarten, 94.3% for 1<sup>st</sup> through 4<sup>th</sup> grades, 91.1% for grades 5 through 8, and 87.4% for grades 9 through 12. These ratios were applied to the estimated student population for each age associated with the grade for that ratio. This series of ratio calculations from the District-wide population estimates yields the following district enrollment projections over the next 10 years:

**Table 3.3.1.1 – 0 to 10 Years Enrollment Forecasts**

	Existing Enrollment (mean last 10 yrs)	Modest Development Pace			Moderate Development Pace			Rapid Development Pace		
		Enrollment	Optimum Capacity	Maximum Capacity	Enrollment	Optimum Capacity	Maximum Capacity	Enrollment	Optimum Capacity	Maximum Capacity
0-10 years										
Elementary	1302	1444	78%	65%	1588	86%	72%	1690	91%	76%
TMS	614	651	64%	55%	769	75%	65%	778	76%	65%
PHS	812	880	73%	63%	963	80%	69%	1043	87%	74%
<b>Total</b>	<b>2728</b>	<b>2976</b>			<b>3320</b>			<b>3510</b>		

Over the next ten years, the District can expect to grow back to historic levels from the last 10 years and perhaps grow as much as 500 additional students. On a Districtwide basis, the District is projected to have adequate facility space capacity for these students. Projecting over the 20 year period, the enrollment growth is projected to continue:

**Table 3.3.1.2 – 0 to 20 Years Enrollment Forecasts**

	Existing Enrollment (mean last 10 yrs)	Modest Development Pace			Moderate Development Pace			Rapid Development Pace		
		Enrollment	Optimum Capacity	Maximum Capacity	Enrollment	Optimum Capacity	Maximum Capacity	Enrollment	Optimum Capacity	Maximum Capacity
0-20 years										
Elementary	1302	1639	89%	74%	1772	96%	80%	1837	99%	83%
TMS	614	746	73%	63%	841	82%	71%	853	84%	72%
PHS	812	1011	84%	72%	1092	91%	78%	1141	95%	81%
<b>Total</b>	<b>2728</b>	<b>3396</b>			<b>3704</b>			<b>3831</b>		

Total elementary capacity is expected to be approached by the end of the planning period. This indicates that more detailed investigation into the elementary school boundaries is appropriate. The following table depicts the results of this analysis:

**Table 3.3.1.3 – Elementary School Enrollment Forecasts**

		Modest Development Pace			Moderate Development Pace			Rapid Development Pace		
		Enrollment	Optimum Capacity	Maximum Capacity	Enrollment	Optimum Capacity	Maximum Capacity	Enrollment	Optimum Capacity	Maximum Capacity
0-10 years										
	Orchard Hill	532	89%	74%	598	100%	83%	654	109%	91%
	Phoenix Elementary	397	66%	55%	413	69%	57%	433	72%	60%
	Talent Elementary	515	79%	66%	577	89%	74%	603	93%	77%
0-20 years										
	Orchard Hill	692	115%	96%	708	118%	98%	718	120%	100%
	Phoenix Elementary	422	70%	59%	449	75%	62%	469	78%	65%
	Talent Elementary	525	81%	67%	615	95%	79%	651	100%	83%

The above 10-year table shows potential capacity problems at Orchard Hill Elementary. Some of the capacity issues could be addressed through boundary changes with Phoenix Elementary that would eventually move all City of Phoenix students to Phoenix Elementary and limit Orchard Hill to Medford students. These boundary changes could be made as the need arises. The twenty-year forecast essentially assumes that this boundary change has been done and Orchard Hill is still at or near capacity even with these large elementary sub-district boundary changes.

It is also important to note that the capacity analysis for Talent Elementary includes all four modular classrooms and the two classrooms at the Outdoor Discover Program. Given the high utilization of Talent Elementary School over the ten year period, this raises the question of when a permanent six classroom addition to Talent Elementary school to appropriately handle expected enrollments or an alternative location of the Outdoor Discovery Program is determined.

### **3.4 Enrollment Projection and Capacity Analysis Conclusions**

Regional growth is expected to stem the slightly downward trend in enrollment that the District has experienced over the last ten years. It is expected to turn slightly positive but not abruptly so. Regional growth is not expected to outstrip school capacities in the 10 year period, but the District should be thinking about real estate acquisition or retention of the existing asset at Coal Mine Road to address capacity issues at Orchard Hill Elementary in the 15-20 year timeframe.

Investments in the District's facilities are likely to affect enrollment and revenues going forward. However, it is not expected that such investments will induce demand to such an extent that, in the medium term, the need for expensive new facilities will materialize that would not otherwise have been necessary. Future enrollment is expected to be correlated to an uncertain degree to the facility decisions surrounding the high school.

## **4 INVENTORY AND ASSESSMENT OF EXISTING FACILITIES**

The first step in planning to address the facilities themselves is to identify any deficiencies with the existing infrastructure. This was accomplished through a series of walk-throughs by CSA Planning and Straus and Siebert Architects as well as sub-consultant professionals, such as structural engineers with the Principals from each school and also key maintenance staff. The District contracted independently with mechanical firms to assess the condition of HVAC systems in the buildings and provided these reports to CSA and SSA. Detailed assessment information is provided in the Appendix 10.1.

The facilities assessment information in Section 4 for each school focuses on identified deficiencies. However, the inventory and assessment process evaluated schools from a number of different perspectives to assure a comprehensive understanding of the schools and the physical plants that exist to support the educational objectives of the District. The assessment evaluated components such as:

- Education equity considerations such as any physical components that might affect compliance with regulatory requirements like Title IV issues or ADA issues as well as more subjective considerations like pace planning for key special learning programs at the schools.
- Environmental Hazards considerations some of which were considered by consultant team and some of which were developed in-house by the facilities maintenance programs at the District.
- A structural engineer evaluated schools for seismic integrity.
- CSA reviewed National and State historic registers to determine if any of the schools are identified as protected resources. One portion of Talent Elementary School, the “Original Wing” is identified with an Oregon Historic Site Record. As such, future improvements planned for Talent Elementary School should be coordinated with the State Historic Preservation Office (SHPO). CSA examined local comprehensive plans and no other schools were identified as Goal 5 protected historic resources within those local Comprehensive Plans.
- The school sites were evaluated from the perspective of local land use regulations like Comprehensive Plans and zoning regulations.
- A wide variety of security and functional issues were evaluated for each school.
- Site Design
- Aesthetics
- Energy Efficiency
- Facility Maintenance and Life-Cycle Costs

## 4.1 Orchard Hill Elementary School

Orchard Hill Elementary School is the newest school in the District. The site is challenging because it is somewhat narrow and one of the two accesses is between two single family residences. The facilities are generally in good to fair condition, however there are critical roof and seismic issues that require immediate attention or the school is at risk of rapid deterioration. A modest retrofit is now appropriate to replace worn out systems, address the critical issues and resolve the more minor functional issues at the school. The below list summarizes existing issues at the school identified thus far in the process:

<b>Orchard Hill Elementary - Key Statistics</b>			
1011 La Loma Drive, Medford			
Original Bldg.-	1983	Teaching Classrooms	24
Additions-	2002	Music Room	1
<b>Grades Housed</b>	<b>K-5</b>	Portable Classrooms	0
<b>Optimum Capacity</b>	<b>600</b>	Covered Play Area	1
Maximum Capacity	720	Improvement Value	\$3.2M
<b>Total SF</b>	<b>53,614</b>	Land Value	\$1.6M
Gym (sf)	7,140	ImpV/LV	2.0
Cafeteria (sf)	1,203	Coverage Factor	12.1%
<b>Site Acres</b>	<b>10.15</b>		

<b>ORCHARD HILL ELEMENTARY SCHOOL</b>	
<b>Systems</b>	
1	Roof members failing in some areas. Many leaks due to flashing failure.
2	The HVAC systems throughout are inadequate and need retro-commissioning.
3	Seismic Retrofitting required, install masonry anchors and strap to roof diaphragm & add nailing and strapping to connect shear walls to roof diaphragm and shearwall connections & add drag struts and chords to existing shearwall elements. Install in conjunction with roof replacements where appropriate.
4	The roof supporting the kitchen hood support has failed and is being held up by temporary bracing. The roof structure needs to be replaced.
5	Inadequate electrical receptacles & service to support current needs.
6	Lighting systems need updating for energy efficiency. Old fixtures in many areas provide inadequate light for task work.
7	Communication system needs to be upgraded. Unable to communicate directly between school buildings and outside grounds. Consider new bell and intercom system.
8	Security system is needed to allow for lock-downs & after hour surveillance. Need windows & entries secured.
9	Gym floor failing.
10	Much of the carpeting throughout school needs replacement.
11	Art room is in poor condition.
<b>Functional Issues</b>	
1	Main Office cannot see the main entrance (security issue)
2	Staff asked for new restrooms in office area (currently single stall restroom)
3	Open classroom concept creates noise issues, except 4 <sup>th</sup> & 5 <sup>th</sup> grades

ORCHARD HILL ELEMENTARY SCHOOL	
4	Cafeteria-extremely small cafeteria. Fire restrictions allows 124 students in cafeteria, logistics issue with students waiting for table (OHE has 415 students). Cafeteria kitchen so small, staff cannot store all the food
5	Gym-has built in cafeteria tables that are seldom, if ever, used.
6	Theater stage can be accessed from gym and music room, but is not ADA accessible
7	Would like to add a health clinic, like the one offered at PES operated by La Clinica; OES does not have a school nurse on staff
8	Inadequate storage throughout
<b>Exterior Issues</b>	
1	Cement tile roof is in good condition, however flashing leaks at wall intersections, gutters and downspouts are causing water damage. Major roof leaks during rainy season, buckets used to catch water
2	Playground entrance to bathrooms is an issue. Have approx. 200 kids at recess and these are the only bathrooms available, which has approx. 3 stalls (for boys and girls). Bathrooms do not meet ADA standards.
3	Good bus turnaround; however not enough space is available for parent pick-up. Cars end up parked as far as Juanipero. Worst congestion lasts about 10-15 minutes during pick up time.
4	Would like to have cover over the basketball courts and playground
5	Would like to have covered walkway to and along bus loading area
6	Northeast corner need additional security fencing and gate.

## 4.2 Phoenix Elementary School

Phoenix Elementary is functionally serviceable, but is in need of an extensive retrofit. Investments in the existing building are expected to be appropriate in proportion to the existing assets and investment. The cost to find a new site and replace the existing school would be expected to far exceed the cost to improve the existing buildings. The school has four modular classrooms. Future projections should determine whether these modulares will be needed, and if so, consideration should be given to replacing them with permanent classrooms. Despite, the basic adequacy of the school there is an extensive list of improvements that are warranted at this school. Below is a summary of the issues identified thus far in the process:

<b>Phoenix Elementary - Key Statistics</b> 215 N Rose Street, Phoenix			
Original Bldg.-	1954	Teaching Classrooms	20
Additions-	1998	Music Room	1
<b>Grades Housed</b>	<b>K-5</b>	Portable Classrooms	4
<b>Optimum Capacity</b>	<b>600</b>	Covered Play Area	1
Maximum Capacity	720	Improvement Value	\$1.7M
<b>Total SF</b>	<b>54,933</b>	Land Value	\$781K
Gym (sf)	3,836	ImpV/LV	6.1
Cafeteria (sf)	3,836	Coverage Factor	16.1%
<b>Site Acres</b>	<b>7.81</b>		

<b>PHOENIX ELEMENTARY SCHOOL</b>	
<b>Systems</b>	
1	Open classroom concept causes issues with comfort levels and HVAC control. The HVAC systems throughout are inadequate and need retro-commissioning.
2	Hot water supply is inadequate in some areas.
3	A large portion of roofing is failing and needs replacement.
4	Seismic Retrofitting required, install masonry anchors and strap to roof diaphragm & add nailing and strapping to connect shear walls to roof diaphragm and shearwall connections & add drag struts and chords to existing shearwall elements. Install in conjunction with roof replacements where appropriate.
5	Security system is needed to allow for lock-downs & after hour surveillance. Need windows & entries secured.
6	Inadequate electrical receptacles & service to support current needs.
7	Bell/Intercom system needs replacing
8	Sewage backflows 2 to 3 times per year
9	Many plumbing fixtures do not meet ADA standards. Flush is extremely loud for students in Kinder rooms.
10	Carpeting throughout school needs replacement.
11	Door hardware does not meet ADA standards throughout most of building.
12	Kitchen and roll-up doors need to be upgraded.
13	Primary Wing windows need replacement
<b>Functional Issues</b>	

PHOENIX ELEMENTARY SCHOOL	
1	Front office needs to be more "user friendly"
2	Not enough meeting areas.
3	Need more storage for cafeteria and athletic gear
4	Open classroom concept with Library/Media center in middle. Noise runs across the open area. Would like to get rid of "divider" walls due to noise. Consider closing off classrooms.
5	Security issues because class doors open to outside from the back of each room.
6	Computer lab gets very noisy & interferes with quiet library time. Would like to relocate computers.
7	Art room needs to be bigger. Sprayed on popcorn ceiling finish needs to be removed.
8	Bathroom doors-kept open all the time, due to ventilation issues. Can see into the bathroom area from the mirrors on wall.
9	Music Room/Multi-Purpose-needs projector/screen.
10	Open area at front of school to gym is a security issue-not fenced off.
11	Gym/Lunch room tables need to be replaced
12	Main gym needs projector/technology-sound system upgrade. Holds assemblies/parents night activities. No seating available for a basketball games (though only used for practice). Need backboards.
<b>Exterior Issues</b>	
1	ADA standards not met in many areas- door hardware, ramp slopes.
2	Parent drop-off traffic control is a challenge
3	Gutters & siding issues-run down the side
4	Understructure/roof has a lot of bare wood
5	Need something to deter skateboarders riding on edge of small retaining walls.
6	Track needs to be renovated
7	Parking lot needs repair
8	Open area at front of school to gym is a security issue-not fenced off.

### 4.3 Talent Elementary School

Talent Elementary is functionally serviceable, but is in need of an extensive retrofit. Investments in the existing building are expected to be appropriate in proportion to the existing assets and investment. The cost to find a new site and replace the existing school would be expected to far exceed the cost to improve the existing building.

In addition to the standard classrooms, the school has four modular classrooms. A separate building across the street houses the Outdoor Discovery School which is in very rough shape. If the demand for these classrooms continues long term, consideration should be given to constructing permanent classrooms to meet these future needs.

There is an extensive list of improvements that are warranted at the school. The issue of rehousing the Outdoor Discovery School combined, the a desire to redirect the bus circulation, along with issues related to the unusual circular portion of the school will present design challenges for a retrofit of this school and the budget should include adequate design funds to assure an optimum site design solution can be achieved.

Below is a summary of the issues identified thus far in the process:

<b>Talent Elementary - Key Statistics</b>			
<i>307 W. Wagner Creek Road, Talent</i>			
Original Bldg.-	1949	Teaching Classrooms	20
Additions-	1973	Music Room	1
<b>Grades Housed</b>	<b>K-5</b>	Portable Classrooms	4
<b>Optimum Capacity</b>	<b>600</b>	Covered Play Area	1
Maximum Capacity	720	Improvement Value	\$1.7M
<b>Total SF</b>	<b>53,302</b>	Land Value	\$998K
Gym (sf)	3,836	ImpV/LV	1.1
Cafeteria (sf)	3,802	Coverage Factor	12.3%
<b>Site Acres</b>	<b>9.98</b>		
<b>Outdoor Discovery School</b>			
<i>215 W. Wagner Creek Road, Talent</i>			
Original Bldg.-	1968	Teaching Classrooms	2
Additions-	-	Music Room	shared
<b>Grades Housed</b>	<b>K-5</b>	Portable Classrooms	0
<b>Optimum Capacity</b>	<b>50</b>	Covered Play Area	0
Maximum Capacity	56	Improvement Value	\$63.9K
<b>Total SF</b>	<b>2,000</b>	Land Value	\$90.2K
Gym (sf)	shared	ImpV/LV	1.4
Cafeteria (sf)	shared	Coverage Factor	9.0%
<b>Site Acres</b>	<b>0.51</b>		

<b>TALENT ELEMENTARY SCHOOL</b>	
<b>Systems</b>	
1	The HVAC systems throughout the main building inadequate and need retro-commissioning. Old boiler has been abandoned. Needs to be removed and room secured.
2	Hot water pressure is inadequate and is unavailable in some areas where needed. No hot water in old wing.
3	Seismic Retrofitting required, install masonry anchors and strap to roof diaphragm & add nailing and strapping to to connect shear walls to roof diaphragm and shearwall connections & add drag struts and chords to existing shearwall elements. Install in conjunction with roof replacements where appropriate.
4	Security system is needed to allow for lock-downs & after hour surveillance. Need windows & entries secured.
5	Inadequate electrical receptacles & service to support current needs.
6	Plumbing fixtures need to be replaced. Toilets & fixtures corroded and no longer cleanable.
7	Carpet and tile floor covering failures at most areas of the school.
8	Exit devices are old crash bars and some are beginning to fail.

TALENT ELEMENTARY SCHOOL	
9	Door hardware old and failing. Some doors are padlocked because the door hardware is worn out or removed.
10	Gym floor failing at Cafeteria area.
11	Exposed monocote ceilings at gym, art, and music room.
12	Hallway floorcovering failing from moisture wicking
13	Ceiling in Primary wing is failing and needs replacement
14	Window units need to be closed if not used and walls insulated.
15	Counters and cabinetry failing throughout
16	Some rooms, including the Cafeteria and Art Room, have sprayed on acoustic popcorn finish. Needs to be removed and ceilings refinished.
<b>Functional Issues</b>	
1	Main Entry is a safety concern- no way to easily monitor who enters; needs more open area, possibly a foyer
2	Front office needs to be more "user friendly", desk areas need redesign
3	Windows in Kindergarten too high for students to see out.
4	Gym is especially noisy and has no sound control.
5	Need long-term solution for location for the Boys and Girls Club program
<b>Exterior Issues</b>	
1	Roofing at old gym and round building useful life ending or ended.
2	Walkway roofing and rain drains and column downspouts rusting through the masonry.
3	Want to look at alternate bus loop location from Second Street
4	Track needs to be renovated
5	Need additional breezeway covers connecting buildings.

In addition to the main elementary school buildings, the Outdoor Discovery School is housed in a building across W. Wagner Street from the main school campus. The issues identified to-date with this building include the following:

OUTDOOR DISCOVERY SCHOOL	
<b>Systems</b>	
1	Building is in overall poor condition. Most systems past useful life cycle.
2	Electrical and plumbing systems need upgrading.
3	Roof is in poor condition and is leaking. Needs replacement.
4	Windows and interior doors need replacement.
<b>Functional Issues</b>	
1	Building interior configuration is awkward. Students must walk through a classroom to access restrooms.
2	Need sink in second classroom.
<b>Exterior Issues</b>	
1	Exterior envelope in poor condition despite newer paint.
2	Landscaping needs maintenance.



### 4.4 Talent Middle School

The structure and design of the middle school is well suited to its purpose. The building itself is in fair to good condition. However, a number of systems require repairs and the school is in need of extensive retrofitting or replacement of systems such as HVAC and floor coverings. Notwithstanding that the overall functional design of the building works reasonably well, the school does have several specific functional issues that need to be addressed. Many of these functional issues arise from the nature of the site itself. The site is long and narrow and tucked behind a row of single-family dwellings which makes access challenging. This also has corollary effects on the building design and options to address building functional issues. The below list summarizes the issues identified thus far in the process:

<b>Talent Middle School - Key Statistics</b>			
<i>102 Christian Avenue, Talent</i>			
Original Bldg.-	1990	Teaching Classrooms	34
Additions-	'99,'03	Music Room	1
<b>Grades Housed</b>	<b>6-8</b>	Portable Classrooms	0
<b>Optimum Capacity</b>	<b>990</b>	Gyms	2
Maximum Capacity	1155	Improvement Value	\$14.1M
<b>Total SF</b>	<b>97,006</b>	Land Value	\$565K
Sports Facil. (sf)	18,135	ImpV/LV	25.0
Cafeteria (sf)	3,360	Coverage Factor	16.5%
<b>Site Acres</b>	<b>13.49</b>		

<b>TALENT MIDDLE SCHOOL</b>	
<b>Systems</b>	
1	The HVAC systems throughout are inadequate and need retro-commissioning.
2	Inadequate electrical receptacles & service to support current needs. Hallway light switches an issue. Need replacement with either keyed covers or changed to motion sensors.
3	Seismic Retrofitting required, install masonry anchors and strap to roof diaphragm & add nailing and strapping to connect shear walls to roof diaphragm and shearwall connections & add drag struts and chords to existing shearwall elements. Install in conjunction with roof replacements where appropriate.
4	Plumbing systems at shower areas and other high water use areas need updating.
5	Much of the carpeting throughout school needs replacement.
6	Security system is needed to allow for lock-downs & after hour surveillance. Need windows & entries secured.
7	Kitchen rollup doors are beginning to fail.
8	Door hardware is worn and non-compliant with ADA or safety measures.
9	Intercom/Bell system needs updating
10	Multi-media systems are out-of-date.
<b>Functional Issues</b>	
1	Main entrance is not accessible. Need vestibule inside of entrance for control. Access to office needs to be reconfigured.
2	Exterior security an issue at breezeway area that opens to parking lot.

TALENT MIDDLE SCHOOL	
3	Cafeteria- currently operate with 2 lunch periods; can only fit 150/200 kids per cycle; try to get students thru as quickly as possible. Potential for enclosing adjacent breezeway to increase cafeteria size. Could eliminate the need to secure area with fence.
4	Gyms needs storage area to hold athletic equipment separate from custodial storage.
5	Sprinkler system is exposed throughout building. Detract from look of the hallways and are open to vandalism.
6	No onsite health clinic.
7	No kiln available for ceramics program.
<b>Exterior Issues</b>	
1	Field and track in poor condition and need updating. Not a regulation track (not quite ¼ mile track).
2	ADA issues include lack of ramps to main entry, entries off of bus loop, and sports field
3	Bus Loop: 14/15 buses running and only 10 can fit into loop area with 4 waiting on street. Students are walking on asphalt curve bump (very small area between curve/buses) to access their bus.
4	Courtyard plantings are not maintained. Is there adequate irrigation?
5	Fire Lane behind school is gravel only
6	Ventilation vents are covered in back of school, screen hanging down on one of them.
7	Gravel drive that leads to the entry doors from track & field area an issue. Gravel is tracked into entry and hallway daily, issue - gravel is stuck in doors which is a security issue, because doors are not locking properly.
8	Need a sign at Wagner Creek to help in wayfinding. Crossing between elementary school and middle school needs upgrading
9	No covered outdoor area.

## 4.5 Phoenix High School

Phoenix High School has numerous functional, system, and exterior issues. Most all of the major systems require extensive repair or complete replacement. Functionally, the school is not well laid out. This is the one school where cost to retrofit and make the school fully functional may not represent a sound investment when compared to replacement because almost every aspect of the school is in need of redesign and replacement, with the exception of the gymnasiums and theater area. The below list summarizes the issues identified thus far in the process:

<b>Phoenix High School - Key Statistics</b>			
<i>745 N. Rose Street, Phoenix</i>			
Original Bldg.-	1954	Teaching Classrooms	38
Additions-	'89,'05	Music Rooms	2
<b>Grades Housed</b>	<b>9-12</b>	Portable Classrooms	0
<b>Optimum Capacity</b>	<b>1110</b>	Gyms	2
Maximum Capacity	1295	Improvement Value	\$8.2M
<b>Total SF</b>	<b>163,209</b>	Land Value	\$1.7M
Sports Facil. (sf)	37,693	ImpV/LV	4.8
Cafeteria (sf)	5,927	Coverage Factor	17.9%
<b>Site Acres</b>	<b>20.99</b>		

<b>PHOENIX HIGH SCHOOL</b>	
<b>Systems</b>	
1	The HVAC systems throughout the main building and gymnasiums are failing or have failed and need replacement and retro-commissioning.
2	Hot water is not available in all areas where needed.
3	Seismic Retrofitting required, install masonry anchors and strap to roof diaphragm & add nailing and strapping to connect shear walls to roof diaphragm and shearwall connections & add drag struts and chords to existing shearwall elements. Install in conjunction with roof replacements where appropriate.
4	A large portion of roofing is failing and needs replacement.
5	Lighting systems need updating for energy efficiency. Old fixtures in many areas provide inadequate light for task work.
6	Security system is needed to allow for lock-downs & after hour surveillance. Need windows & entries secured.
7	Food Service freezer has issues.
8	Inadequate electrical receptacles & service to support current needs. Many rooms are jury-rigged with extension cords to spread out usage to avoid blowing circuits.
9	Much of the carpeting throughout school needs replacement.
10	Door hardware does not meet ADA standards throughout most of building.
11	Many plumbing fixtures do not meet ADA standards.
12	Inadequate number of gas shutoffs at science areas
<b>Functional Issues</b>	
1	Need new front entry foyer abutting office with registrar and office entry opening directly onto it.
2	Office areas need reconfiguring. Many areas do not have adequate space or layout for use.

PHOENIX HIGH SCHOOL	
3	- Need a system that provides easy access to counselor, etc without having to walk all over school
4	- First Aid room-has curtains only. School does not have a health clinic.
5	- Crisis Area-is an open desk area. Teens feel uncomfortable in open area rather than in closed room
6	- Staff Locker/Admin office-backs up to one of the restrooms-not noise proof
7	Wayfinding throughout the school is very difficult. Circulation is constricted and confusing. Many dead-ends. Canopies were installed to identify the office door, etc-to direct traffic. Hallways have been numbered, but floor plan is irregular.
8	Ramps within the hallways occur in odd locations and isolate rooms at different levels.
9	School has 32 exterior doors. Makes it difficult to control access/egress during "lock-down" procedures. Non-students can enter without being seen.
10	Lack of natural daylighting impacts both staff and students. Many interior classrooms without windows.
11	Awkward Food Service/Cafeteria area circulation for students. Cafeteria room too small. Crowded connection to Commons.
12	Portion of library used for TRIO and other programs is too small and isolated from the counselors
13	Library is the "heart" of the school, used for many meetings. However is unusually small for a high school library.
14	Room for computers/media center is needed for students & parents, but oversized for actual demand.
15	Theater: Alcove/public entrance from Rose Street, to entry to Theater is odd, seems like you are entering from the back of the theater. Student body cannot fit into theater, not large enough to even hold staff meetings. Stage is inaccessible-needs wheelchair lift.
16	Band Room completely isolated from the rest of the school by loading ramp. Storage room HVAC is non-functional.
17	FFA/Ag Building does not meet access standards. Classroom needs renovation.
<b>Exterior Issues</b>	
1	ADA standards not met in many areas- door hardware, ramp slopes, Rose Street and other exterior thresholds.
2	Track is past useful lifespan and needs replacing
3	Football Bleachers in poor repair. Need replacing.
4	"No man's" asphalt drive area between Weight Room and Commons. Unpleasant space, impacts views from Commons.

## 4.6 Other Real Property Assets

**District Offices:** The District has office buildings next to Phoenix Elementary School. The exterior of this office building is in relatively good shape. It has a metal roof which appears to be in decent condition. A more detailed functional evaluation might be warranted to assure district administrative functions are being optimized.

<b>District Office / Maintenance Bldgs</b> 409 Fourth Street, Phoenix			
Offices	2003		
Maint Bldgs.	1975		
<b>Total SF</b>	<b>8,890</b>	Improvement Value	\$490K
District Office	4,610	Land Value	\$202K
2 Maintenance Bldgs	4,280	ImpV/LV	2.0
<b>Site Acres</b>	<b>0.50</b>	Coverage Factor	40.7%

<b>DISTRICT OFFICE</b>	
<b>Systems</b>	
1	HVAC system functions poorly and needs retro-commissioning
2	Voice/data system needs replacement
<b>Functional Issues</b>	
1	Building is functioning well at current time
<b>Exterior Issues</b>	
1	Parking lot and landscaping need continuing maintenance

Adjacent to the District offices are the IT Building and the Maintenance Warehouse. The IT building was upgraded in 2003. The Warehouse is in pretty tough shape and functions poorly. The identified issues are described below:

<b>DISTRICT IT BUILDING</b>	
<b>Exterior Issues</b>	
1	Parking lot to north needs to be retopped.

<b>DISTRICT OFFICE MAINTENANCE WAREHOUSE</b>	
<b>Systems</b>	
1	Building is in overall poor condition. Roof is in poor condition. Regularly leaking.
2	Building is not sprinkled. Could be a hazard to surrounding buildings.
3	Doors and locks need replacement.

DISTRICT OFFICE MAINTENANCE WAREHOUSE	
Functional Issues	
1	Poor condition makes buildings hard to use. Materials are stored haphazardly.
2	Heating and Cooling are essentially non-existent. No insulation. Makes buildings difficult for maintenance workers to work in.
Exterior Issues	
1	Parking for building is awkwardly laid out.

**Colver Road Property:** Aside from the existing schools, the District’s Colver Road property is its largest real estate holding by land area. The property is being used for athletic fields including soccer and softball as well as bus parking and maintenance facilities. The property is located adjacent to the northwest corner of the City of Talent. While the property is outside the Talent Urban Growth Boundary, it is located within the City’s Urban Reserve which means it may be brought into the City’s UGB at a future time. The Regional Problem Solving Plan currently restricts use of this property to school uses in the event it is brought into the UGB.

Colver Road Fields/ Maintenance Facility			
6450 Colver Road, Talent			
Original Bldgs.-	1975,	Playing Fields/	3
Bus Barn -	1992 1997	Buildings	3
<b>Total SF</b>	<b>10,756</b>	Improvement Value	\$246K
Maint Bldgs	5,080	Land Value	\$519K
Bus Barn	3,876	ImpV/LV	2.0
<b>Site Acres</b>	<b>43.09</b>	Coverage Factor	0.6%

COLVER ROAD MAINTENANCE BUILDINGS	
Systems	
1	Roof and exterior wall materials deteriorating and may need replacement in within 5 years.
2	Plumbing fixtures and piping not upgraded in 2003 remodel is in poor condition and should be replaced.
3	Interior wall finishes in poor condition
4	Exterior doors and locks need replacement.
Functional Issues	
1	Poor condition makes buildings hard to use.
2	Heating and Cooling are essentially non-existent. No insulation. Makes buildings difficult for maintenance workers to work in.
Exterior Issues	
1	Dirt/gravel drive and parking areas have issues during periods of rain
2	No organization to outdoor material storage.

**Coal Mine Road property:** The District owns 11.73 acres at the northeast corner of Coal Mine Road and North Phoenix Road. The property is located within the City of Medford city limits and is zoned SFR-10, which is a high-density, single family zone. The property is currently vacant. A portion of the property appears to be impacted by wetlands.

## **5 BUILD SCENARIOS IDENTIFIED FOR EACH SCHOOL AND OTHER REAL ESTATE ASSETS**

Build scenarios were developed for each school. For each facility, the build scenarios only considered costs from a best investment value standpoint. Each scenario considered the expected future capacity needs for the school within the planning period. From a value standpoint, certain improvements were considered with mutual cost-effectiveness. For example, coordination of needed roof repairs with seismic improvements can reduce costs because access to roof substructure will be required for much of the seismic retrofitting.

### ***5.1 Build Scenario Priorities***

The build scenarios were based upon the priorities developed through the planning process. The priorities are for safety and security, future building integrity assurance, functional and capacity issues, and energy efficiency.

- Safety issues primarily concern seismic upgrades. The seismic upgrades do not necessarily assure a school will remain safe to use following a major earthquake but is intended to assure safe exit of the structure for people within the school.
- Security issues primarily concern exits and entries to the school facilities. Many of the schools have numerous entries and exits with little or no controls in place. Security improvements will address these entry and exit point issues. These access issue points also concern building functional issues in many cases. Lesser security issues will concern improved fire alarm systems, PA systems upgrades and door locking systems.
- Building integrity issues concern improvements necessary to cost-effectively maintain existing school facilities. Examples include roof system upgrades necessary to maintain water integrity of the structure. If such improvements are not made in the near term, the structure is at risk of deteriorating at an accelerated rate.
- Functional issues concern school improvements that will configure the school with an appropriate learning environment.
- Energy efficiency involves changes to the building to make it more energy efficient.

With the priorities set for the build scenarios, the approaches for each school were developed through the planning process.

## 5.2 Elementary Schools and Middle School Improvements

For the elementary schools and the middle school, relatively minor functional issues were identified. As such, for these schools, the general approach was to develop build scenarios that represented cost-effective solutions to improve the schools in a manner that would serve the needs of the district from the standpoint of energy efficiency, assuring future building integrity and resolving safety and security issues. These build scenarios are all needed improvements. However, they are agnostic with respect to financing and the preferred improvement plan may determine certain improvements are not absolutely necessary within the planning period when funding constraint are considered. Tech Memo #4 and the associated design concepts for the school improvement concepts are provided in Appendices 10.3.8 and 10.3.9. For all the elementary schools and the middle school, the following general improvements were identified:

### General Improvements at all Schools:

1. All school facilities require upgrade for seismic compliance. The basic identified problem is structural connection of roof and walls at perimeter and interior shearwalls.
2. All of the schools require replacement and upgrades of the HVAC equipment.
3. Exterior security upgrades will be required at all schools to control exterior access.
4. ADA upgrades are needed at restrooms, entrances and walkways. Door hardware upgrades are needed throughout.
5. Paint and refurbish all interior spaces not being remodeled.
6. Refurbish and paint exterior of all facilities.
7. Extensive roof repairs or roof replacements

In addition to the general improvements for all schools above, the below improvements were identified to address specific issues at each school:

### A. Orchard Hill Elementary:

1. Relocate and expand the Cafeteria
2. Remodel Administration & Main Entry
3. Replace carpeting throughout
4. Convert and add lighting to LED lamps or fixtures
5. Remodel existing Cafeteria for storage and meeting space

### B. Phoenix Elementary:

1. Enclose exterior corridors connecting the four separate buildings
2. Replace existing modular classrooms with new construction
3. Replace carpeting throughout
4. Replace windows in Primary Wing
5. Convert lighting to LED lamps or fixtures

### C. Talent Elementary:

1. Enclose exterior corridors connecting the four separate buildings
2. Replace existing modular classrooms with new construction
3. Replace carpeting throughout, new HVAC throughout
4. Convert lighting to LED lamps or fixtures
5. Add new class rooms and support spaces for the Outdoor Discovery Program (ODP) on the elementary school site

D. Talent Middle School:

1. Enclose exterior corridor adjoining the Cafeteria
2. Add cover over existing entry walk and add ramp access to main entry
3. Add new sidewalks at bus loading and from main entry to street.

Detailed list of improvement concept development can be found in Appendix 10.3.8 and 10.3.9. The plans depicting the identified improvement locations are shown on Atlas Figures 5-9.

### **5.3 High School Improvements**

With respect to identifying the needed High School improvements, the High School has a multitude of issues. This makes determining the needed improvements less straightforward for the High School. Security issues exist throughout the building with numerous unsecured entry points. Seismic safety issues exist throughout the building. Building Integrity issues exist throughout the site due to failing roofing and other sources of water infiltration. Energy consumption of the High School is high.

In addition to all the problems with the structure itself, the High School has numerous functional issues. The circulation of the building is poor which makes it difficult to navigate and creates excessive circulation space. The building has multiple finished floor elevations which is both unconventional and undesirable. Many of the classrooms have no windows for natural light and fewer options for fire egress. The total square-footage of the building is substantially oversized relative to the minimum square-footage needed to serve the student enrollment which leads to significant maintenance and energy expenses to maintain and heat and cool a building that is much bigger than required. Many of the classrooms have very low ceilings which results in somewhat oppressive classroom space.

In spite of all the building issues, the High School does have some redeeming qualities. Spatially, the High School site is well positioned to serve current and future student population. The site is relatively easy to access from all parts of the District and is easily walkable and bikeable for much of the student body that lives in Phoenix. Parts of the building are in relatively good condition – specifically the gymnasium and theater area.

Two approaches for the High School build were developed based upon two very different funding conditions. The first approach was High School Reconfiguration which reuses the positive aspects of the site and the building by keeping the gym and theater core area and constructing a new classroom facility on the south side of the site. This approach would construct a new high school for about 2/3rds of the school. The second “minimal” approach assumed a funding solution that would address all the needs at the other schools and delay the full improvements to the High School to a future funding measure.

The reconstruction of the High School is the most complicated of the District projects and elements of the Reconfigured High School project are described below:

1. A significant portion of the existing facility will be demolished (entire north classroom wing) retaining the existing Gyms and Theater core.
2. A new one or two-story classroom wing will be added to the south of the gyms
3. A new one-story Arts/Industrial Arts wing will be added to the north of the gyms in the area of the demolished classrooms.
4. The existing Gyms, Locker-rooms and Theater will be refurbished.
5. The stadium bleachers will be refurbished,
6. Existing track to be reconstructed
7. Relocate Parking lot and two playing fields

Detailed list of improvements is provided in Appendix 10.3.8 and 10.3.9. The plans depicting the identified improvement locations are shown on Atlas Figures 5-9.

The “minimal” approach to the High School involves the needed improvements to the athletic and gymnasium facilities to advance the ultimate objectives for the full build project and then makes the minimum investments in the remaining structure to keep it minimally functional until the new classroom construction is funded.

## **5.4 Non-School Improvements**

In addition to the improvements to the schools themselves, the build scenarios have identified needed improvements to the accessory facilities of the District, as follows:

1. New roofing, siding, windows and doors at the District Distribution Warehouse
2. New 4,800 SF Maintenance Facility to be constructed at Colver Road site. Existing deteriorated Colver Road facilities will be demolished

## **6 ANALYSIS OF PLAN CONTEXT AND DISTRICT'S FACILITY POSITION**

This section of the plan evaluates Plan Context and Financial Considerations associated with financing the cost estimates from Section 6.

### **6.1 Policy and Regulatory Context**

It is important to have a basic understanding of the policy and regulatory context under which Oregon K-12 schools operate. This section provides a primer on the relevant policy and regulatory context that relate to and inform the Long-Range Facility Master Plan process.

#### **6.1.1 Special Capital Funding and Improvement Programs**

Schools in Oregon have a number of funding programs which can be used to fund capital improvements or defray the costs of certain capital improvements, some of these programs include the following:

**Senate Bill 1149** - Senate Bill 1149 provides funds through a program administered by the Oregon Department of Energy to pay for energy systems upgrades. The District has undertaken required audits to qualify for reimbursement for energy systems upgrades and these audits are reflected in the facilities analysis.

**Energy Trust of Oregon Incentives** – Unfortunately Senate Bill 1149 dollars are only available as reimbursements for investments in existing buildings and they do not give full credit for decisions to construct new more energy efficient buildings. There are other opportunities for incentives for new construction through the Energy Trust of Oregon.

**Senate Bill 1036 Construction Excise Tax** - The District has established a construction excise tax. Revenues from this tax are generated by real property improvements in the District. Most all improvements identified in the Long-Range Facilities Master Plan will be eligible for expenditure of these funds.

**Senate Bill 447** – Senate Bill 447 in the 2015 legislature authorized up to \$123M in matching funds for capital construction for school improvements. The State funds match local funds that are authorized by voters through approval of a levy to retire the debt on the issuance of General Obligation Bonds for school construction. Sixty percent of the funds are to be released based upon a prioritization scheme of students below the poverty level and assessed value in the district. The next round is to be distributed on a first-in-time basis. The District may qualify for this match but the planned projects selection did not assume a grant dollar award. The maximum match for the District is \$4M which was awarded to the District

#### **6.1.2 Building Code Compliance Thresholds**

Another important regulatory issue that needs to be considered in the long-range facility master planning process is the interplay between improvements and building code requirements. Building codes are complex, but their application is relatively straightforward for new buildings – the current codes apply. These issues become much more complicated for remodels. In general, the more extensive the remodel the more new

code update thresholds are reached. There are somewhat fuzzy lines between where routine maintenance ends and where new construction begins as part of a major building retrofit such as is needed for all the District's schools.

Several types of new code issues can escalate costs dramatically, such as the following:

- Seismic or Structural improvements
- ADA Compliance
- Safety- Such as Electrical, Sprinklers, Smoke Alarms, Food Service

The interplay between various code component issues can cause chain reactions that can dramatically increase prices. For instance, when a seismic retrofit requires a new shearwall: Installing the new shearwall then affects a hallway, which now requires the entire hallway to be remodeled to meet current ADA requirements. This requires moving an interior wall. The new wall requires new electrical. The new electrical requires a whole new circuit panel which requires that entire service to be upgraded, and so on. It is important to keep in mind that these are generally all good things. Most of the code requirements exist for a reason and these requirements improve safety and accessibility for the occupants. But the costs can add up quickly.

It is often the case in these planning processes that the accountant in all of us wants to have high levels of precision and accuracy for each item to "make sure there are no surprises and not to waste any money." Among other reasons, the interplay between various code requirements makes this an ideal rather than a practical reality. From a Long-Range Facility Master Planning process standpoint, it is beyond the scope of the planning process to identify how each code interplay issue will arise for each specific project let alone all the identified projects as a collective.

At the Long-Range Facility Master Planning process level, these issues are handled with contingency funds in the planning budgets and the way in which the direct costs are estimated. The detailed code interplay issues are worked out as the individual projects are programmed and designed (or bundles of related projects on the same building). There is a silver lining to the contingency budgeting approach. The District's facilities have a wide range of needs that are unlikely to be fully funded by most any reasonably expected funding scenario. If less contingency is consumed by the highest priority projects than was originally projected in the Long-Range Facilities Master Plan, then additional funds become available for lower priority (but still important) projects.

### **6.1.3 Security and Safety Issues**

From a Long-Range Facility Master Planning standpoint, there is an important distinction between the concepts of "safety" and "security". Safety in the context of facility planning does not necessarily mean "personal safety". Safety in the context of facility master planning refers to things like seismic integrity of the buildings and electrical system engineering. Safety is accomplished through systems that are adequate designed, engineered, constructed and maintained.

"Security" issues may have personal safety implications, but it is a more day-to-day management issue than "safety issues". Security is addressed at the Long-Range Facility Master Planning level at a more functional design level. Ultimately, some specific security systems may be installed to meet identified security needs, but the security system should be selected and designed to work with the functional approach taken for security at the

school. Some of the existing conditions functional issues with major security concerns are the poor circulation combined with numerous exterior doors at the High School. As the Master Plan was developed, security was revisited many times to consider how the overall layout and functional solutions will be expected to work from a security standpoint. This iterative process considered security from a number of perspectives, including the following:

- Local Law Enforcement Perspectives
- Security Technology
- Policy Approach to Security
- Common Sense

#### **6.1.4 Land Use Regulations**

ORS 195.110 requires all school districts with enrollment of greater than 2,500 students to adopt a School Facility Plan. This statute requires local governments to adopt the School Facility Plan into the local Comprehensive Plan if the same is requested by the School District. Adoption of the School Facility Plan into the Comprehensive Plan provides the District a policy basis to require local land use plans be coordinated with the school facility plans and provides a framework for the School District to request land use policy changes necessary or appropriate to implement the District's facilities plan.

Land use regulations can also come into play in a manner similar to building code thresholds. Entitlement costs can be a significant expense associated with real estate development in Oregon. Schools are frequently located in residential areas and are permitted by cities through "Conditional Use Permits". For new school construction or a substantial remodel (especially that add square footage), cities have wide latitude to require changes to site designs, exterior elevations, and to ask for public works improvements. If the Long-Range Facility Master Plan, for example, called for a significant addition to Orchard Hill Elementary School the City of Medford Public Works might request Juanipero to be widened to meet their current street standards. This frontage is almost 360 feet long and a street improvement of this type could easily cost \$150k-\$250k. Unanticipated improvements to satisfy land use permitting requirements are another reason that the major project budgets in the Long-Range Facility Master Plan include contingency funds, although no insurmountable land use barriers were identified through the plan development process.

## **6.2 Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis**

Now that the plan has framed up the enrollment trends, examined school conditions and developed improvement scenarios for each school, it is useful to step back and consider the bigger picture issues confronted by the District to work towards a preferred plan. SWOT analyses are a traditional analytic framework for this type of planning process that tends to be effective even if it is a little pedestrian.

This SWOT is focused on the physical infrastructure of the Phoenix-Talent School District. While the analysis includes some curriculum/pedagogy considerations in the analysis, it is not an analysis of the strengths, weaknesses, opportunities and threats associated with the District's instructional activity per se.

## 6.2.1 Strengths

The strengths section of the SWOT identifies the areas of strength the District has with respect to its school facilities and real estate holdings.

### 6.2.1.1 School Geography and Transportation

The elementary schools are generally well located to serve the existing and future student population base. The High School site is near the geographic center of the district and is well located to serve the District. It is easy biking and walking distance to most all the students who live in Phoenix, but would benefit from improved sidewalks on Highway 99 north of the Fern Valley Intersection.

### 6.2.1.2 School Campus Characteristics

- The schools have adequate total square footage to meet current and projected future enrollment needs.
- The basic design of the Middle School and the elementary schools is appropriate for their intended use and function.
- The Middle School and elementary schools condition is sufficient to warrant future capital investments to refit those facilities to serve existing and future enrollment.

### 6.2.1.3 Other Real Estate Holdings

- District Office is in good condition.
- The Colver Road property is a very large property that is reasonably flat and reasonably well located for the District maintenance activities, bus storage and logistics, and for athletic fields that supplement the on-campus athletic fields at the individual schools.
- The Coal Mine Road property is within Medford's Urban Growth Boundary and is planned and zoned for residential use. The site is in a prominent location at the corner of Coal Mine Road and North Phoenix Road. The site is currently vacant.

### 6.2.1.4 Capital Investment Funding

The District is nearing the end of the existing school bond which will sunset in 2019. The District also has resources available through the construction excise tax and many HVAC improvements may be fundable through Senate Bill 1149 that provides funding for energy efficiency upgrades.

### 6.2.1.5 Pedagogy

The District has an excellent approach to pedagogy with a foundation of common core instruction that is supplemented with a variety of exceptional programs based upon the needs and desires of the student body over time. Flexibility and adapting to new opportunities is a hallmark of the District's educational approach.

### 6.2.1.6 Enrollment

Enrollment has been steady at the Elementary schools over the last ten years. The cities of Medford and Phoenix and Talent are all planning for growth. There is market demand for growth in these areas if the regulatory and infrastructure demand can be addressed. Even a modest pace of the planned growth in these cities should be sufficient to assure some degree of enrollment growth over the next ten years with additional growth in the ten to twenty year timeframe.

## 6.2.2 Weaknesses

The weaknesses section of the SWOT identifies the areas of weakness the District has with respect to its school facilities and real estate holdings.

### 6.2.2.1 School Geography and Transportation

Maintaining balance with the enrollment between Orchard Hill Elementary sub-district and the Phoenix Elementary sub-district has been a challenge. It is expected that this challenge will increase with student population growth in Southeast Medford. Enrollment projections indicate that balancing capacity over the next 10 years will require sub-district boundary adjustments so that all City of Phoenix students attend Phoenix Elementary in order to keep Phoenix Elementary appropriately utilized and not overcrowd Orchard Hill Elementary.

The location of the Talent Middle School near the southern district boundary is problematic. Typically, middle schools are relatively close to their student body. The location of Talent Middle School requires 20% of the student body to travel more than 5 miles each way by Euclidean distance and somewhat further by road miles. This is significantly more distance for a significant portion of the student body than most other middle schools in the region. Ashland, Medford, Central Point, and Eagle Point all have more centrally located middle schools in relation to their student body. This geographic challenge is likely a contributing factor in enrollment declines that appear between 5<sup>th</sup> and 6<sup>th</sup> grade in the District. This challenge is made more complicated by the size and condition of the Middle School which is more than adequate for the use.

From a size standpoint, the school has excess capacity beyond what is needed for the existing enrollment. It is sufficiently sized to support significant projected enrollment growth. From a condition standpoint, the school is in reasonably good condition and with appropriate reinvestment can serve the District's needs for many years. Thus, because it is a quality school with sufficient capacity, the "simple" solution to build a second Middle School nearer to the Medford students is problematic from a financial standpoint as needed space and investment is already available for Middle School students at Talent Middle School.

### 6.2.2.2 School Campus Characteristics

- For the Talent Middle School and the elementary schools, the weakness is the risk presented if somewhat sizeable capital reinvestment does not occur or is substantially delayed. All these schools are functional, reasonably designed and have adequate capacity. However, all the schools are due for a substantial refit – well beyond basic maintenance – to deal with issues like HVAC systems that are worn out, safety features like fire alarm systems, seismic integrity and roof system failures. Failure to make these reinvestments in a timely manner could result in rapid deterioration of all four of these schools and/or risk to students due to failure of structural systems in a seismic event. If inadequate measures are taken at this time, complete remodels or replacement would likely be required by the end of the 20-year Long-Range Facility Master Plan period. Given the current condition of these four schools, delay of major capital reinvestment could make this risk a reality and instead of reinvesting on the order of \$44M total in these schools now, the District would be faced with a replacement or remodel price tag that would be 2/3rds this amount or more for each of the four schools.

- With respect to the High School, the classroom component of the school has major design/functional issues as well as the need for substantial reinvestment in all the major systems. The indoor athletics facilities and the theater are in better shape, but are still due for a significant refit that is on par with investments appropriate at the other schools. Unlike the other schools, however, the condition of the High School classroom portion of the school is problematic on a number of levels and likely contributes to the reduced enrollment in the High School when compared to elementary enrollment of the District. A very extensive remodel would be necessary to make the classroom space desirable and functional.
- A current district weakness is found in the poor condition of the maintenance facilities and resources. Sufficient reinvestment is needed to modernize and repair or replace the District's maintenance facilities so that they are adequate for providing an appropriate level of maintenance for the refurbished district schools and facilities.

#### 6.2.2.3 Other Real Estate Holdings

- Colver Road - The main weakness in the Colver Road property is just how large it is. It may have, at one time, been considered as a future high school site. However, even if the District considered a new high school on a green field site, CSA would recommend against this location because it is too far removed from the center of the District and the future population growth in south Medford. Locating a new high school further from the District center would mean a continued enrollment exodus from the District would be likely over the long term. The savings in land cost versus finding a more centrally located green field site would not be expected to be worth the loss in enrollment and associated revenue.
- Coal Mine Road- This site may be too small for a full middle school.
- District Maintenance Facilities – facilities are in severely deteriorated condition. Upgrading these facilities is needed to support maintaining the school improvements.

#### 6.2.2.4 Capital Investment Funding

Overall, Phoenix-Talent School District has a somewhat limited tax base to support bonding for school improvements. The District boundaries contain relatively little in the way of industrial and commercial development. Industrial and Commercial development pays significant property taxes without creating new demand for schools. When compared to other districts in Jackson County, Phoenix-Talent School District has much less employment land in its taxing boundary- Central Point has the western White City Industrial Area and downtown Central Point and the Tolo area, Eagle Point has the eastern portion of the White City Industrial area, Medford has a number of large and valuable employment areas. Ashland has relatively few employment areas, but has very high assessed land values for its residential lands and the employment land areas it does have are very valuable.

#### 6.2.2.5 Pedagogy

It appears the main pedagogy weakness the District has related to facilities results from the loss of students beyond elementary school. The single middle school location in Talent, combined with the poor condition of the high school results in reduced enrollment. The reduced enrollment translates to less money available for instructional

revenue and this limits the spectrum of programs and activities that can be offered at the middle and high school level.

The other challenge to pedagogy associated with facilities is the attraction and retention of high quality teachers for the high school. The current high school classroom environment is sufficiently low that attracting and retaining high quality teachers to teach in that high school facility is challenging and a problem that has the potential to get much worse.

#### 6.2.2.6 Enrollment Policies

Enrollment has become more liberal and dynamic over the last several years. It is no longer a simple matter of geography and policies controlled directly by the school board. Between private school options, charter school options, traditional district transfers, and open enrollment the competition landscape for students has changed dramatically. From a facility standpoint, efficient facilities require minimum utilization rates, and the High School and Middle School have relatively low utilization rates which translates to low levels of efficiency.

### 6.2.3 Opportunities

This section identifies and describes the opportunities for Phoenix-Talent School District based upon the strengths the District has and education landscape going forward.

#### 6.2.3.1 Capture Larger Share of Elementary Enrollment at Middle School

Stemming the losses in enrollment from elementary school to middle school is a huge opportunity. The geographic dislocation issues for certain Orchard Hill Elementary students are a major contributing factor to these issues. Because the District needs to also deal with the facility quality issues at the high school and the existing middle school is in fair condition and has adequate capacity for growth, the “simple solution” of building a new relocated middle school does not appear prudent at the short term although it will likely need to be addressed in the longer term – in say 15 to 25 years. If the District substantially solves the facility quality issues at the high school, then that will help but not likely resolve this issue. Thus, short and medium term creative solutions appear required. Potential strategies might include the following:

##### Short/Medium Term (0-10 years):

1. Establish policies to consider (or even go so far as to promote) co-located charter school on the middle school site or development of a magnet school. A charter school would result in a lease-back arrangement from the charter school that would increase utilization at the school while generating revenue. This could also be done with a magnet school model in Talent Middle School rather than a Charter School model that would not create lease-back revenue but would generate instructional revenue and increase utilization rates.
2. Identifying some niche or programmatic instructional curriculum that could be provided to middle school students in south Medford on a small (possibly even leased) site. It could be that students are at this niche campus two days a week and at the main campus three days per week but this would limit the number of days that parents need to get their middle school age kids to Talent.

##### Longer Term (10-20 years):

3. Consider a second middle school that would be 5<sup>th</sup>-6<sup>th</sup> grade in Southeast Medford. Moving 5<sup>th</sup> graders to a middle school would take pressure off of Orchard Hill Elementary which will begin to reach or exceed capacity in the 10-20 year period – even with sub-district boundary adjustments with Phoenix Elementary. Having 6<sup>th</sup> grade in that school reduces the number of years that Medford students need to go all the way to Talent down to just two years. Also, 6<sup>th</sup> graders do not need as complete of athletic facilities as 7<sup>th</sup> and 8<sup>th</sup> graders which would thereby reduce the cost of the new school.

#### 6.2.3.2 Capture Larger Share of Elementary Enrollment at High School

In addition to actively working on creative solutions to the middle school geography problem in the short and medium term, holding on to more elementary school enrollment through the high school level will likely require the incentive of the reconfigured high school concept. This represents more than just a straight-line benefit. It has the potential to support iterative improvement, where better facilities can be expected to attract more students. In addition, having buildings that run more efficiently with less energy and maintenance expense leaves more revenue for instruction, allowing the District to offer a wider range of programs which can be expected to attract even more students.

#### 6.2.3.3 Potential Surplus Property

The District has established policies to identify and acquire lands for future school needs well in advance of the need for school construction. This is excellent public policy that should be continued. However, the District should also evaluate its real estate holdings from time-to-time to determine if the property it is holding for future schools is still considered to be well located to meet future school needs, or whether such land should become surplus. The District has two large parcels that may be surplus property from the standpoint of sites appropriate for new schools, as follows:

- **Colver Road Property-** Originally the Colver Road property was envisioned as a site for a future high school. Its location and size are not ideal however. The property is larger than is needed for the current athletics and maintenance uses. It is also not well located in relationship to the district population. In reviewing the potential of the property, a portion of the Colver Road property would likely still be needed to provide athletic fields if the High School remains at its current site. In addition the site continues to be appropriate for district maintenance facilities. However, not all of this property is needed for athletic and maintenance facilities and the bus storage and operations. A portion of the site could likely be made available as surplus property. For example, if it is determined that 12.5 acres are surplus property, and if such land were to be included in Talent’s UGB and be available for urban development, the value of this property would be expected to be in the \$1.5m-\$2.5m range. Preliminary review of the deed history indicates the property was transferred from Jackson County and no reversionary clauses appeared in the deed; if the District were to select a strategy to sell any of this property, a title report and legal opinion on the title regarding full market sale is recommended.
- **Coal Mine Road Property-** This property is approximately 11 acres and was acquired in 2010 for \$1.3m. The property is large enough to accommodate an elementary school or possibly a 5<sup>th</sup>-6<sup>th</sup> grade middle school, but may be too small for a full new middle school and appropriate athletic fields to serve 6<sup>th</sup>-8<sup>th</sup> grades. There appears to be adequate capacity in Talent Middle School for the next 10-15 years with no

problems. Solving the geographic issues with the middle school in the long-term is important, but the time value of money to hold a \$1.3m property for 10-15 years before the District would even start looking at doing something with it should be revisited on an occasional basis.

#### **6.2.3.4 Long-Term Middle School Site Selection**

This opportunity relates to a potential decision to liquidate the Coal Mine Road property if it is determined to be surplus property. There are several potential future school site locations that might make sense in growth areas planned on the east side of Phoenix. As part of the UGB amendment process for Phoenix, the District should consider reaching out to property owners in the area. As part of Medford's UGB process, many property owners offered to donate land for a future school as part of their UGB proposal because they viewed the value of future school site planning to be a net benefit to the rest of their proposed development land. This potential may exist for the Phoenix-Talent district as well.

#### **6.2.3.5 Policies for Flexible Space Design for Flexible Pedagogy**

The District has a history of timely and creative responses to new and changing instructional demand from the students and their parents in the District. This is commendable instructional policy, but can create facility challenges because curriculums can be more flexible than buildings.

If the District constructs new buildings or substantially reconstructs existing buildings, the District should consider policy guidance to include flexible and adaptable spaces in the design that can be reconfigured to meet future needs without major structural, mechanical, or electrical costs.

#### **6.2.3.6 Efficiency Improvements**

Investments in the Districts facilities have the opportunity to create significant efficiency improvements, such as:

- The District buildings have some large energy bills that are due in significant part to low efficiency buildings being heated and cooled with worn out and low efficiency HVAC. Upgrades to these facilities, will reduce operating costs for the District by tens of thousands of dollars.
- The life-cycle cost of the materials in many of the schools is high. For example, most of the district has roll carpeting which is slightly cheaper at installation but requires the entire room to be replaced when sections of the carpet begin to fail. Changing over to carpet tile allows only the failed sections to be replaced which can keep the schools feeling and looking new over time.
- Maintenance of the schools has been variable ranging from fair to poor overall. The District's recent hire of Jon McCalip introduces dramatic increase of expertise in both facility maintenance knowledge and construction management knowledge. If this newly deployed human resource is combined with a significant reinvestment in the schools, modest increases in annual maintenance expenses have the potential to yield a much higher quality learning experience from a facility standpoint.

#### **6.2.3.7 UGB Amendments**

In addition to specific involvement in the Phoenix UGB amendment to identify a site to meet the long-term needs for a future second middle school, the District may wish to

consider weighing in at a policy level for the UGB processes for Medford, Phoenix and Talent. The enrollment projections assume successful UGB amendments in all the cities served by the District. Failed UGB amendments could introduce some risk of declining enrollment over time. Successful UGB amendment will create supply to increase the likelihood that enrollment will move in the direction of higher school utilization rates which makes the facilities more efficient. Also, especially in the case of Medford's UGB, there is a plan for a new "employment campus" area that would significantly increase the District's tax base by bringing in new tax-paying businesses within the district boundaries without adding more residences in that area that would increase school demand. This has the potential to significantly improve the financial position of the District over time.

In the interest of disclosure and transparency regarding this policy question; the land for the proposed employment campus in Medford is owned by clients of CSA Planning Ltd.

### 6.2.4 Threats (Risks)

This section seeks to identify and describe the threats for Phoenix-Talent School District based upon the strengths the District has and education landscape going forward.

#### 6.2.4.1 Middle School Location vs. Existing Facility Investment

The existing investment and capacity in the middle school versus its location relative to the student base is a threat. If state policies continue to allow more and more enrollment flexibility this threat risk will continue and may be made worse if Medford 549C were to build a new middle school in a location that is near the southeast Medford Area or creates a new middle school sub-district that creates significant new capacity at Hedrick. The level of investment in the existing facility and its capacity is such that the Phoenix-Talent School District has limited options in the short and medium term to address these issues.

#### 6.2.4.2 Elementary School Building Conditions Trend-line

Failure to invest in the elementary schools in the near term is likely to put these facilities on a rapid deterioration trend-line that routine maintenance could not stem. This would create a massive liability for the District in the future while jeopardizing the grade levels with the best enrollment rates.

#### 6.2.4.3 Land Use Policies on Colver Road Property

If it is determined that at least a portion of the Colver Road property is surplus property, then there is a major land use policy barrier to achieving the maximum achievable price for the property. While the property was designated Urban Reserve and so can be brought into the UGB it has a policy restriction on the use of the property for educational purposes only. Full value of any surplus land can only be achieved if the property is available for development.

Also, the regional plan and the Talent TSP contemplate a road through the eastern boundary of the property and then extending south along the eastern orchard boundary to Wagner. As part of a development project, this road is probably fundable in significant part but represents a potential cost liability to the School District or a future acquirer.

#### 6.2.4.4 High School Design and Function

As has been discussed elsewhere, the design and function of the High School is an ongoing threat to enrollment and the more liberal the state enrollment policies become the greater the threat posed by the design and function of the high school.

#### 6.2.4.5 Residential Development Pace in Phoenix and Talent

The enrollment projections have a wide range of potential student populations by 2036. Most all of that variation is based upon assumed residential development pace in Talent and Phoenix. There are regulatory and physical challenges to development in these cities. The District has adequate school capacity to serve the growth in these areas, but if the growth does not materialize, then some of the schools will continue to be somewhat under-utilized.

#### 6.2.4.6 Position to Capture State Capital Investment Funding

Overall, the District is in a difficult situation to capture state investments in capital infrastructure. The District has been characterized as being too “rich” for much state assistance in capital infrastructure (like the prioritization in the bond matching program) but the reality is that the District still has very low local assessed value tax base when compared to neighboring districts like Medford, Ashland and Central Point.

### 6.2.5 SWOT Conclusions (Synthesis)

The SWOT analysis points the District in the direction of a Long Range Facilities Master Plan that focuses on addressing the acute High School deficiencies in the immediate term while seeking to address the following additional issues:

- Consider creative short/medium term solutions to address the geographic challenge associated with Medford students attending Talent Middle School.
- Develop a strategy to address longer term capacity issues at Orchard Hill Elementary and create a more permanent solution for the middle school location problem for Medford kids.
- Recognize that the capacity analysis of Talent Elementary School includes the Outdoor Discovery School classrooms. The Outdoor Discovery School building is in poor condition and real classrooms are needed for these students. Talent Elementary school also has four modular classrooms that are nearing the end of their useful life. There appears to be both a medium and long-term need for all six of these classrooms to be housed in permanent high quality classroom space.
- Decisions and policies related to the potential surplus properties should be weighed carefully by the District as the master plan is implemented over the next five years.

The SWOT analysis contained herein was developed during the planning process in advance of the bond proposal. It is retained in its “pre-bond approval form” to provide insight and guidance to future facility planning efforts on how and why the choices were made to identify needs and develop a preferred plan. As the District moves forward with the new and improved facilities made possible by the bond measure passage, the District’s circumstances will change. This change will cause the District’s strengths, weaknesses, opportunities and threats to evolve from those described in this “pre-bond approval” SWOT.

## **7 COST ESTIMATES FOR BUILD SCENARIOS**

This section of the plan describes the cost estimating process for the build scenarios developed through the planning process. These estimates were used to select a preferred plan. Detailed direct construction cost estimate information is available in Appendix 10.2.2.

### **7.1 Cost Estimate Process**

During the planning process, conceptual design packages were prepared which identified key information about the elements needed for constructing proposed improvements at each school and district site. These were submitted to ACC Cost Consultants, LLC who then set-up their estimating spreadsheets to assign costs to each element based on current market pricing. ACC continually updates their database of construction costs to assure they have the most up-to-date cost information. These conceptual cost estimates are intended to be conservative with the goal of assuring that there will be adequate funds identified to cover the costs of the planned improvements.

### **7.2 Direct Construction Cost Summary**

The base cost estimate from ACC Cost Consultants, LLC provides an estimate of what the total “Direct Construction Costs” will be for each project. Also described as “hard” costs, these include the cost of all materials and labor to construct a project, plus the contractor’s costs including general conditions, insurance, bonding, plus overhead and profit. It does not include furniture or other “soft” costs.

To that number, two additional multipliers are applied to assure that there is room in the budget for changes as the detailed designs are developed, as well as respond to inflation that pushes costs up every year. The “estimating/design contingency” is important as we are at a planning level development of the design of each project. Our team has provided the Estimator with the plans showing the amount of square footage we anticipate will be added or remodeled at each site, plus a description of what the types of construction and equipment we anticipate will be used. It is not possible to anticipate everything that will be needed to complete the project at this stage. Therefore, a contingency of 10% has been added to every project estimate to anticipate the difference in costs between the conceptual design and the final design.

In addition, an escalation factor is applied. This factor converts the estimate, which is calculated in today’s 2017 costs, to what the likely cost for the same project will be the year it is most likely to begin construction. In this case we are using 2020 as the start date for the projects. The escalation cost applied here is 15.85% which equals roughly 5.3% per year for inflation.

### **7.3 Soft Costs**

When developing a budget for construction it is important to account for all the many “soft” costs that are also part of construction projects. These costs include but are not limited to the following:

- Project Management/Construction Management fees
- Design and Engineering fees
- Special Consultants fees
- Land use and Building permits
- Testing and Inspection Fees

- Legal fees
- Financing/bond costs
- Furniture and equipment
- Moving costs

The list varies with each project. Typically we add 25 to 30% to cover these added costs to complete the budget. For the planning level of this project, we are using 25%.

## **7.4 Cost Estimate Summary**

Attached is a Cost Estimate Summary for each of the projects by school that the team has selected. It includes both the “hard” and “soft” costs as well as the contingencies discussed earlier. Below is an overview of the estimates for each school. We have divided the costs into two major categories: Base Work and Facility Upgrades. Base work is work that does one of three things – solves security issues, addresses fire/life/safety of the buildings, or performs maintenance and replacement necessary to prevent rapid deterioration of buildings and infrastructure that are expected to be needed for the District going forward. Facility Upgrades are improvements that represent functional enhancements to the District’s facilities.

### **Base Work includes:**

- Seismic Upgrades
- Key repairs to the facilities to avoid further deterioration
- Replacements of roofs and HVAC as required
- Efficiency upgrades to facility lighting
- Safety improvements such as fencing and entry security
- ADA upgrades at the restrooms, hardware replacement, etc.
- Replace flooring and other finishes as needed
- Repainting inside and out

### **Facility Upgrades include:**

- Enclosing elementary school corridors
- Replacing portables with permanent classrooms
- Adding or expanding cafeterias where needed.
- Reconfiguring high school with new classroom wings

<b>2020 CONSTRUCTION COST ESTIMATES OVERVIEW</b>			
<i>Includes hard &amp; soft costs, contingency and escalation</i>			
<b>Orchard Hill Elementary School</b>			
	<u>Base Work</u>	<u>Facility Upgrades</u>	<u>Total</u>
	\$4,477,906	\$3,588,624	<b>\$8,066,530</b>
<b>Phoenix Elementary School</b>			
	<u>Base Work</u>	<u>Facility Upgrades</u>	<u>Total</u>
	\$7,395,328	\$5,487,991	<b>\$12,883,319</b>
<b>Talent Elementary School</b>			
	<u>Base Work</u>	<u>Facility Upgrades</u>	<u>Total</u>
	\$7,080,149	\$6,663,799	<b>\$13,743,948</b>
<b>Talent Middle School</b>			
	<u>Base Work</u>	<u>Facility Upgrades</u>	<u>Total</u>
	\$9,455,918	\$711,064	<b>\$10,166,982</b>
<b>Total Construction Costs Elementary &amp; Middle Schools</b>	<b>Base Work</b>	<b>Facility Upgrades</b>	<b>Total</b>
	\$28,409,301	\$16,451,478	<b>\$44,860,779</b>
<b>High School Options</b>			
<b>Phoenix High School</b>			A. Reconfigured High School
	<u>Demolition &amp; Site</u>	<u>Remodel</u>	<u>New Construction</u>
	\$5,255,225	\$7,464,109	\$35,613,313
			<b>\$48,332,647</b>
<b>Phoenix High School</b>			B. Minimum Improvements
	<u>Track/Stadium</u>	<u>Min Remodel</u>	<u>Gym/Theater Core</u>
	\$1,235,895	\$2,840,295	\$4,088,940
			<b>\$8,165,129</b>

The above table includes both High School options that were given serious consideration during the planning process. The first High School project is the Reconfiguration that rebuilds approximately 2/3rds of the High School. The second option makes the minimum improvements to the High School necessary to keep the facility minimally usable over the next ten years while making key improvements in the Gym/Theater Core to assure it remains viable for a future High School Reconfiguration.

In addition, there are several proposed district facility projects that need to be considered. These include looking at what is the most cost effective option for housing the Outdoor Discovery Program and replacement of the deteriorated maintenance facilities.

<b>District Facilities</b>		
<b>ODP &amp; Magnet School Alternates:</b>		
<i>Select Alternate 1-</i>	New classroom wing for ODP	\$2,507,754
<i>OR Alternate 2-</i>	ODP at TMS	<b>\$53,949</b>
<i>OR Alternate 3-</i>	ODP plus Magnet School at TMS	\$270,067
<hr/>		
<b>District Office:</b>	Upgrade HVAC & telephone system	<b>\$256,442</b>
<hr/>		
<b>Maintenance Buildings:</b>	New siding/roof at Maintenance Warehouse	\$409,206
	New Maintenance Building at Colver Rd.	\$2,074,656
		<b>\$2,483,862</b>

Estimates are reflective of the analysis and information developed in the planning process. These estimates are based upon the discussions and selections of the Project Advisory Team as they reviewed the design options provided by our team for each school. Conservative design and escalation contingencies have been included to make room for the inevitable increases that occur as a project goes through the design and construction process. This is intended to assure that the funding amounts for the key projects selected by the District are adequate to move forward when they are ready. It is preferable to find that you have some funds left over, rather than coming up short for a critical project. Remaining funds, if there are any, can then be put toward other projects that did not make the final bonded improvement project list.

## **8 PREFERRED IMPROVEMENT PLAN AND FINANCING CONSIDERATIONS**

### ***8.1 Planning Process Outcome***

The cost estimates for all of the District’s facility needs was around \$98 million. Given the condition of the District’s facilities, the identified needs are almost universally “needs” not “wants”. Nevertheless, the needs were developed irrespective of the financial means of the District to implement the plan.

The plan could not have been implemented to any meaningful extent with the financial resources of the District without passage of a new capital facilities bond. Following the technical consulting work, the Project Advisory Team and the School Board evaluated the needs identified in the Master Planning process to prioritize the needed improvements and to select a preferred improvement plan. The objective of the preferred improvement plan was to attain the optimum balance between value to the tax payer, utility for the District’s education objectives, and political reality that significant implementation of the plan required voter approval of a general obligation bond.

The first major prioritization decision concerned the options for the High School. While consensus developed around the Reconfigured High School solution as the optimum solution from physical and cost-effectiveness standpoints. A question with respect to timing required prioritization by the District. The District was confronted with two basic options: delay the High School improvements to a future funding measure to reduce that project budget item in this round by approximately \$40 million and make available more resources for the rest of the District’s needs or include the High School Reconfiguration in this bond request and make some tough decisions on the rest of the District’s priorities to develop a bond request with a reasonable likelihood of success.

The District selected the latter option after careful consideration for a number of reasons including the following:

- The High School Reconfiguration is the “big ticket item” and interest rates are still near historical lows. Failure to act now may make implementation very difficult in the future when a high interest rate environment could dramatically escalate the total cost of this major expense.
- The enrollment risk of losing students due to poor high school facilities is real, especially in today’s “open enrollment” and “charter school” environments. The lost revenue is a significant potential problem for the District. Falling further behind neighboring facilities is too great a risk to the District’s future.
- The bond request was a major political effort. The Reconfigured High School represented a major tangible benefit that would accrue to the District’s tax payers from its passage versus the many other improvements that have benefits that are less tangible to the average tax payer – like seismic retrofitting.

In addition to the High School Reconfiguration, the planning process identified additional projects with combined costs estimated to be near \$50 million. The District received preliminary Levy Rate Analysis from their bond counsel at PiperJaffray. This preliminary analysis indicated that the full-build of all the project components would result in substantial levy increases on the property taxes of the typical homeowner. The District's objective was to give the bond measure the best chance for success by making it a more modest increase and building the most critical components at the other school campuses.

To this end, the District first looked at which project components could be removed from the preferred plan without damaging the core integrity of the planned projects. The District identified approximately \$13.5 million of beneficial projects but ones that were not absolutely necessary within the planning period. The potential projects removed from this facility improvement planning round were those that would enclose corridors at the elementary schools (instead using fencing for security), not replace the modular classrooms with new construction, and not build a new maintenance building at Colver Road. All these projects are needed, but it was determined that the District could function without them over the next 15 to 20 years. None of the investments that will occur under the preferred plan will escalate the costs of these projects in the future and very little of the alternative investments under the preferred plan will be stranded by the elimination of these components.

The remaining prioritization process focused on a more broad policy distinction and some practical realities. The District decided to make a policy distinction that asked the tax payers to bond for new capital construction and improvements that can be most efficiently coordinated with new capital construction. The idea was to parse the planned improvements according to this distinction and use the bond funding for the portion of the improvement plan to address the security, safety, functional issues, and critical building integrity issues like failing roofs. Planned improvements are depicted in Atlas Figures 5-11.

The planned improvements that were not scheduled to be bond funded are essentially deferred maintenance issues. There is a lot of this type of work but it can be completed through incremental improvements and funded from multiple sources. The work can be done by in-house maintenance staff or completed through relatively small and easy to manage contracts as time and resources allow. The planned improvements to address deferred maintenance issues total almost \$11.5 million at the non-High School campuses. This planned work essentially includes interior and exterior painting and surface refurbishing, new floor coverings, and high efficiency relamping of existing lighting fixtures. Funding for this component of the plan will come from a variety of sources such as the Construction Excise Tax, operations savings from more efficient buildings, surplus property liquidation and special targeted state grant opportunities.

The planned improvements that are scheduled to be bond funded total a little under \$72 million with \$68 million of that coming from the approved bond and the remaining \$4 million coming from a State matching grant. The planned improvements are identified below by school:

**Orchard Hill Elementary School Bond-Funded Planned Improvements:**

**Bond Budget includes:** **\$5,212,328**

- 1 Remodel administration for security
- 2 New cafeteria addition
- 3 Remodel old cafeteria
- 4 Seismic upgrade throughout structure
- 5 Replace existing HVAC equipment
- 6 New roof where not already replaced
- 7 New security entrance hardware & electronics
- 8 Replace all handles throughout with ADA compliant
- 9 Reconfigure playground as required for new cafeteria

**Phoenix Elementary School Bond-Funded Planned Improvements:**

**Bond Budget includes:** **\$5,405,564**

- 1 Remodel administration for security
- 2 Seismic upgrade throughout structure
- 3 Replace existing HVAC equipment
- 4 Remove & Replace roof
- 5 New security entrance hardware & electronics
- 6 Replace all handles throughout with ADA compliant
- 7 New divider wall at classrooms in round building
- 8 New windows in Primary Wing
- 9 Renovate Art Room
- 10 Upgrade fire alarm system
- 11 New gated entry court and decorative security fencing at classrooms
- 12 Replace parking lot

**Talent Elementary School Bond-Funded Planned Improvements:**

<b>Bond Budget includes:</b>	<b>\$5,465,837</b>
1	Remodel administration for security
2	Seismic upgrade throughout structure
3	Replace existing HVAC equipment
4	Remove & Replace roof
5	New security entrance hardware & electronics
6	Replace all handles throughout with ADA compliant
7	New divider wall at classrooms in round building
8	New windows in Primary Wing
9	Upgrade plumbing in Primary Wing
10	Remodel Restrooms
11	Renovate Art Room
12	New gated entry court and decorative security fencing at classrooms

**Talent Middle School Bond-Funded Planned Improvements:**

<b>Bond Budget includes:</b>	<b>\$6,792,604</b>
1	Remodel administration and entrys for security
2	Expand existing cafeteria
3	Repair Roof as needed
4	Seismic upgrade throughout structure
5	Replace existing HVAC equipment
6	Replace Fire alarm & Intercom systems
7	Replace all handles throughout with ADA compliant
7	Add accessible ramp at main entry & improve accessibility at northern entries
8	Extend sidewalk along eastern bus loop

### Reconfigured Phoenix High School Bond-Funded Planned Improvements

*Gym Core includes- athletic facilities, theater, culinary room and band room*

**Bond Budget includes:** **\$48,332,647**

- 1 Replace existing HVAC equipment for Gym Core
- 2 Seismic upgrade Gym Core
- 3 Remove & Replace roof of Gym Core
- 4 Remodel Existing Band Room to Choir Room
- 5 Remodel existing theater
- 6 Remodel all athletic facilities
- 7 Upgrade locker rooms
- 8 Relamp or replace existing lighting
- 9 Construct new academic wing with dining & commons
- 10 Construct new Fine and Industrial Arts wing
- 11 New communications/fire alarm connecting new & existing buildings
- 12 New security system
- 13 Expand existing parking lot
- 14 New track facility
- 15 Upgrade existing bleachers
- 16 New softball and soccer fields

A Bond Levy Rate Analysis was prepared by PiperJaffray for a \$72 million bond to pay for the above identified improvements to each school, see Appendix 10.2.3. That analysis indicated a 30-year bond for that amount would require a combined millage of \$1.76 per \$1,000 of assessed value. This rate is comparable to rates in other Districts in Jackson County and will result in an increase in property tax payments of around \$140 to \$260 annually for typical homeowners with homes with assessor's real market values from \$175,000 to \$325,000.

## 8.2 Bond Measure Implementation

On November 7<sup>th</sup>, 2017, the electorate in the Phoenix-Talent School District approved a 30-year bond measure for \$68 million to fund improvements consistent with the preferred plan described in Section 7 and Section 8.1 above. Fifty-four percent of voters approved the bond measure. The ultimate bond rate that was approved by the voters was to \$1.49 per thousand dollars of assessed value to fund the \$68 million in bonded improvements.

As of Spring 2018, the construction projects at Orchard Hill Elementary School and Phoenix High School are in the design process. ORW Architecture was the selected firm for design of these projects, as well as the minor remodel at Talent Middle School. ORW expects to be finished with the Design Development process for the High School by the fall of 2018.

ORW is going through the public involvement process for the High School design in the spring of 2018. They are taking the following steps to obtain community guidance on the design process:

1. Develop vision statements and key goals to guide the design. Facilitate discussions with Design Committee composed of Key decision-makers (teachers, administrators, Board member, student)
2. Convene Task forces around focused program areas with key staff and stakeholders (STEM, CTE, SpEd, Performing & Fine Arts, Career Services & Library, Athletics, Educational Models) and provide relevant examples and exercises to build a list of recommendations that will inform the area program and master plan.
3. Take Design Committee on physical tours of comparable school projects elsewhere in Oregon. Supplemented by virtual tours.
4. Staff Presentation, Student Workshop, Staff & Parent Meeting
5. Community Workshop to discuss community goals, and Open House to share planning progress
6. Two area program meetings to share options, modified through in-person discussions with Design Committee
7. Facilitate meeting with Design committee to create Adjacency Diagrams for building & site components
8. Site Master Planning explorations
9. Professional Cost Estimate for two site master plan options
10. EcoCharette with Energy Trust of Oregon (owner, architect, engineers)
11. Provide site plans and attend 1 neighborhood meeting (CSA to submit application, and perform City coordination)
12. Zoning ordinance analysis collaboration with CSA.

## **9 FACILITY POLICIES AND ASSET STRATEGIES**

The section sets for the Long-Range Facilities Master Plan policies and Asset Strategies.

**POLICY 9.1: STRIVE TO ACHIEVE THE OPTIMUM BALANCE BETWEEN COST-EFFECTIVE FACILITIES AND FACILITIES THAT ADVANCE THE EDUCATIONAL OBJECTIVES OF THE DISTRICT OVER TIME.**

Strategy 9.1.1 – Develop a financial plan that dedicates operational and maintenance savings from the new construction back into facility maintenance programming.

Strategy 9.1.2 – Continue to apply the District’s policy to identify needed vacant land for future schools well in advance of any need for potential future construction.

Strategy 9.1.3 –Direct the architectural design teams to identify flexible space opportunities. Flexible space designs will allow some of the new areas to be reconfigured to meet future needs in a cost-effective manner. This will allow the District to continue providing unique educational opportunities based upon new demand expressed by students and parents.

**POLICY 9.2: CONTINUE TO ADDRESS FACILITY ISSUES THAT ARE NOT RESOLVED WITH SPECIFIC IMPROVEMENT ACTIONS IN THE LONG-RANGE FACILITIES MASTER PLAN.**

Strategy 9.2.1 – Continue to work on a permanent solution for the Outdoor Discovery Program School in Talent. The Talent Elementary School capacity analysis assumes the ODP classroom space is available but the current location is less than optimal. Continue to work to find an appropriate long-term location for the Outdoor Discovery Program as part of the bond implementation.

Strategy 9.2.2 – The Talent Middle School locational issue is going to continue to create enrollment risk for the District and inconvenience for many Medford families going forward. This locational issue should be revisited shortly after the improvement projects in the bond are constructed and every three to four years thereafter. Develop a strategy to address this issue as a minor update to this plan by 2025.

Strategy 9.2.3 – Capacity at Orchard Hill is projected to be an issue at some point in the future. Consider acquiring additional land from Rogue Valley Manor before final development plans are approved for that land by the City. Develop a strategy to address this issue as a minor update to this plan by 2025.

Strategy 9.2.4 – The future use of the Coal Mine Road property should be coordinated with the strategies to deal with the Talent Middle School geography issue and the future capacity issues at Orchard Hill. This property could be surplus property to be used to help fund solutions to one or both of those issues or it could be a development opportunity site to address one or both of those issues.

Strategy 9.2.5 – The District’s Colver Road property is larger than is anticipated to be needed into the distantly foreseeable future for any contemplated use. The School Board has declared up to 12 acres on the easternmost portion of the property as surplus property

at the Colver Road site, see Resolution 17-8. In order to achieve the highest and best price for this surplus property the land must be brought into the Urban Growth Boundary and be made available for residential development. This would require an amendment to the Regional Problem Solving Plan (a regionally adopted land use policy plan to allow residential use of that portion of the property following UGB inclusion). Resolution 17-8 directs staff to take appropriate actions for the benefit of the property to make the property suitable to support the highest and best future uses so that a future liquidation action of the surplus property will achieve the highest and best real property market returns to the District.

Strategy 9.2.6 – Look for ways to fund needed projects that were not included in the preferred plan in the future. The new maintenance building, enclosing corridors at the elementary schools and replacing the modular classrooms with permanent classrooms are all needed and important projects but were determined to too expensive and not worth the risk to plan implementation for the other identified projects. Nevertheless, these are needed projects and the District should look for opportunities to fund these needed improvements.

Strategy 9.2.7 – In performing site analysis at Phoenix Elementary School, it appears there is an existing right-of-way that actually projects into the main campus. This is potentially a major safety problem because stopping public access from an existing public right of way is difficult and is outside the District’s sole control. The District has requested the City of Phoenix and Jackson County vacate this right-of-way.

**POLICY 9.3: COORDINATE THE LONG-RANGE FACILITIES MASTER PLAN WITH STATE AND LOCAL PLANNING EFFORTS TO ASSURE PLANS ARE WELL COORDINATED.**

Strategy 9.3.1 – Coordinate with ODOT, the City of Phoenix and the Area Commission on Transportation to support the completion of the sidewalk network on Highway 99 in Phoenix north of Fern Valley Road.

Strategy 9.3.2 – Request the City of Medford, the City of Phoenix, the City of Talent and Jackson County adopt the Long-Range Facilities Master Plan into their respective comprehensive plan land use plans pursuant to the authority established in ORS 195.110.

Strategy 9.3.3 – Participate in local jurisdictions’ UGB amendment proceedings as necessary to ensure the District’s positions with respect to growth are understood by local government and State agencies.

Strategy 9.3.4 – Strategies 9.2.3 through 9.2.5 are interrelated and direct future District master planning actions to address expected future capacity issues at Orchard Hill and the geographic dislocation issues associated with Talent Middle School. These District actions should be well coordinated with local land use plans for this area. When the District undertakes facility planning to implement these strategies, it will contact Medford and Phoenix and provide coordination opportunities early in the site analysis and selection process. When either city is doing land use planning for these areas, especially UGB planning or neighborhood planning, the District will participate and provide comments to coordinate local land use plans with the the Districts expected facility needs on these issues.

Strategy 9.3.5 – The Cities and the County are required by ORS 195.115 to work with the District to identify barriers and hazards to children walking or bicycling to and from school. The District will support the Cities and County in this regard with cooperative data collection for local government TSP preparation efforts to satisfy the transportation planning requirements of OAR 660 Division 12 and implementation of ORS 195.115; such support would typically begin with a request from the applicable City or the County. Examples of such cooperation may include providing bicycle counts on bike racks at applicable schools, student and staff travel surveys, and soliciting comments from students, staff and parents to identify physical transportation barriers for bicyclists and pedestrians. The District will cooperate in funding opportunities by providing readily producible data and/or policy support for local government state or federal funding requests for improvements designed to reduce identified the barriers and hazards for pedestrian and bicycle access to District schools.

## **10 APPENDICES (ON CD-ROM)**

The appendices are not attached to the document in hard copy form. Full hard copies of the plan have a CD-ROM with the back cover with a jacket that includes the CD-ROM with all appendices. The file names and folders are organized according to the outline below.

### ***10.1 Existing Conditions Reports (Facilities Assessment Documents)***

- 10.1.1 Existing Conditions List**
- 10.1.2 Facility Condition Assessment Checklists**
- 10.1.3 Structural Evaluations Summary**
- 10.1.4 HVAC Assessment Reports**

### ***10.2 Cost Estimating and Financing Items***

- 10.2.1 Proposed Bond-Budget Improvements**
- 10.2.2 Conceptual Cost Estimate**
- 10.2.3 Bond Levy Analysis**

## ***10.3 Project Advisory Team Materials***

- 10.3.1 Tech Memo #1**
- 10.3.2 Powerpoint Tech Memo 1**
- 10.3.3 PAT Meeting #1 Minutes**
- 10.3.4 Tech Memo #2**
- 10.3.5 Tech Memo #3**
- 10.3.6 Powerpoint Tech Memos 2 & 3**
- 10.3.7 PAT Meeting #2 Minutes**
- 10.3.8 Tech Memo #4**
- 10.3.9 Design Solution Concepts**
- 10.3.10 PAT Meeting #3 Minutes**
- 10.3.11 Tech Memo #5**
- 10.3.12 Powerpoint Tech Memos 5 & 6**
- 10.3.13 PAT Meeting #4 Minutes**
- 10.3.14 PAT Meeting #5 Minutes**
- 10.3.15 Tech Memo #6**
- 10.3.16 Powerpoint School Board Meeting**

## ***10.4 School Board Resolutions***

- 10.4.1 Resolution 17-8**
- 10.4.2 Resolution Adopting Long-Range Facilities Master Plan**