



Seattle Public Schools



School Board Work Session
Demographics, Capital and Capacity Planning
June 29, 2011

Study Session Content

- **Demographic Task Force Report** 15 mins.
- **CSG Report on Capital Department** 15 mins.
- **CSG Report on Capacity Planning** 60 mins.



Questions to Keep In Mind

1. Do the Demographic Task Force and Capital Department recommendations, along with the Intermediate Planning methodology, provide an acceptable framework for an “integrated facilities planning process” ?
2. Is this “data driven” approach to facilities planning the correct basis on which to move forward?



Capacity Planning Content

1. Planning/Timeline
2. Enrollment Assumptions
3. Areas of Projected Overcrowding
4. Options/Solutions
5. Next Steps



Context Reminder

1. Significant changes in key SPS staff
2. New Student Assignment Plan
3. New computer software platform
4. Enrollment growth after years of historical decline
5. Economic factors and changing demographics
6. Lack of integrated planning



What We've Done ...

Hired Construction Services Group/ESD 112 to ...

1. Provide interim capital department management
2. Assess department staffing and organization
3. Assess project delivery methods
4. Develop standardized definition of capacity
5. Integrate enrollment projections with facilities capacity
6. Place highest priority on intermediate capacity management --- options and solutions



What We've Done ... (continued)

Created a Demographics Task Force to ...

1. Address key issues in regard to enrollment planning and program placement
2. Do an initial review of enrollment modeling at SPS and changing demographics of Seattle area
3. Assess and recommend changes for community engagement and communications surrounding enrollment projections and capacity planning





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Demographic Task Force Report

Demographics Task Force Background

- Given the New Student Assignment Plan, projected enrollment growth, and need for community engagement and enhanced capacity management, the Demographic Task Force was formed.
- Approximately 24 community members, representing regional and program interests were actively involved in 4 work sessions to develop and reach consensus on recommendations. Support was provided by Superintendent's Leadership Team, Enrollment Planning, Capital Program Department, Technical Experts, and SCPTSA.



Goals

1. To understand, analyze and recommend methodologies and validity of SPS demographic data/projections
2. To understand, evaluate, and recommend any changes if needed in the communication strategies of the data.



Task Force Process

Meeting 1: Demographics 101

Meeting 2: Review of current Regional Data
and SPS Practices

Meeting 3: Creation of Draft
Recommendations

Meeting 4: Review and Consensus Building

Consensus Model:

1 = strongly disagree

2 = disagree

3 = agree

4 = strongly agree



Area 1: Communications

Recommendation:

Engage the community and staff in a transparent manner regarding demographic data, facilities planning, capacity management and program placement information.

Provide more purposeful communication to stakeholders at a local school, regional and district-wide level regarding student assignment plan demographics and enrollment.

Score: 4.0



Area 2: Demographics/Capacity Management

Recommendation:

Form a District Capacity Management Advisory Committee with regional community representation to review (on a regular basis) current and projected demographics modeling, resulting data trends, and capacity management recommendations.

Score: 3.8



Area 3: *Facilities & Program Placement*

Recommendation:

Develop and follow an integrated facilities utilization planning process based upon the most recent quality data possible. The district should form a standing cross-functional (internal) team comprised of key departmental representatives to monitor and recommend actions related to the integration of program placement and facilities utilization.

Score: 3.7



Area 4: *Open Enrollment*

Recommendation:

Begin the Open Enrollment timeline process earlier in the year with completion targeted by mid-February to allow for improved decision-making in regard to staffing, budget, and facilities decisions.

Score: 3.8



Area 5: *Guiding Principles*

Recommendation:

Review, clarify, and reinforce guiding principles in the areas of facilities and program placement that conveys a high premium on equity and closing the achievement gap.

Score: 3.7



Area 6: *Assessment of Guiding Principles*

Recommendation:

Develop an annual process and report that formally assesses the student assignment plan including successes, failures, omissions, and lessons learned. This annual assessment should be communicated to all stakeholders including the District Capacity Management Advisory Committee.

Score: 3.7



Next Steps

- *Develop and Implement a plan to place into operation the Task Force Recommendations.*
- *Provide Quarterly reports to the Superintendent and School Board on implementation of recommendations.*





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School Board Briefing Capital Program Review

Overview

- Capital Program Areas of Review
 - Financial management
 - Short term program placement/capacity management
 - Intermediate term capacity management
 - Long term capital planning
 - Project delivery methodology
 - Departmental organization



Financial Management

1. Enhance consistency of reporting format and content
2. Increase accuracy of financial projections
3. Additional scrubbing of change orders
4. Reduced reliance on Construction Change Directives
5. Decrease reliance on external vendors
6. Review capital funding of staff



Short Term Program Placement/Capacity Management

1. Confirm capital vs. general funding for staffing
2. Establish formal Program Placement procedure/staff
3. Process clarification and predictability



Intermediate Term Capacity Management

1. Staff roles and responsibilities – stronger leadership
2. Integrated approach with strong linkage to non-capital departments
3. Intra-capital department coordination
4. Process clarification and predictability
5. Timing – regular calendar of events
6. Continue good communications



Long Term Capital Planning

1. Staff roles and responsibilities – stronger leadership
2. Improve linkage to non-capital departments
3. Improve intra-capital department coordination
4. Process clarification
5. Timing – regular calendar of events



Long Term Capital Planning (cont.)

6. Continue strong communications
7. One definition of building capacity analysis
8. Revise prototypical educational specifications
9. Building condition and educational adequacy evaluations for both capital and maintenance



Project Delivery Methodology

1. Increase internal versus contract staffing
2. Use GC/CM judiciously
3. Investigate automated project control systems
4. Develop standardization of building materials and systems
5. Documentation of lessons learned
6. Project closeout procedures



Departmental Organization

1. Combine BEX/BTA program delivery
2. Clarification of staffing roles and levels resulting as BEX III projects conclude



Discussion





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Photos by Susie Fitzhugh

Intermediate Term Capacity Planning Board Work Session

Purpose

1. Show Intermediate Planning in the context of BEX IV planning
2. Review Intermediate planning methodology
3. Show areas of projected overcrowding 2012 – 2016
4. Explain some options to accommodate projected student enrollment for the 2012-2016
5. Identify critical dates and next steps

Planning Timeline

ID	Task Name	Q2 11			Q3 11			Q4 11			Q1 12			Q2 12			Q3 12			Q4 12			Q1 13					
		Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb				
1	Intermediate Term Planning	█																										
2	Review of Board Facilities Policies							█																				
3	Enrollment Forecasts and Facilities Condition Database							█																				
4	Stuctured Community Input							█																				
5	Staff Ranking of Potential Projects										█																	
6	Board Workshops – Initial Projects and Costs													█														
7	Community Input													█														
8	Board Workshop – Final Projects and Costs																█											
9	BEX IV Environmental Impact Statement																			█								
10	Levy Calendar and Ballot Authorization																									█		
11	Public Vote																									█		

Enrollment Projections

- Annual School Enrollment Projections
 - Data source: October enrollment data
 - Purpose: school staffing and budgeting

- Five-Year School Enrollment Projections
 - Data source: annual February school projections
 - Purpose: capacity management decisions

2012-13

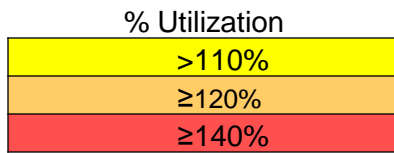
Projected Elementary School Utilization (With Existing Portables as of Fall 2011)

120% - 140%

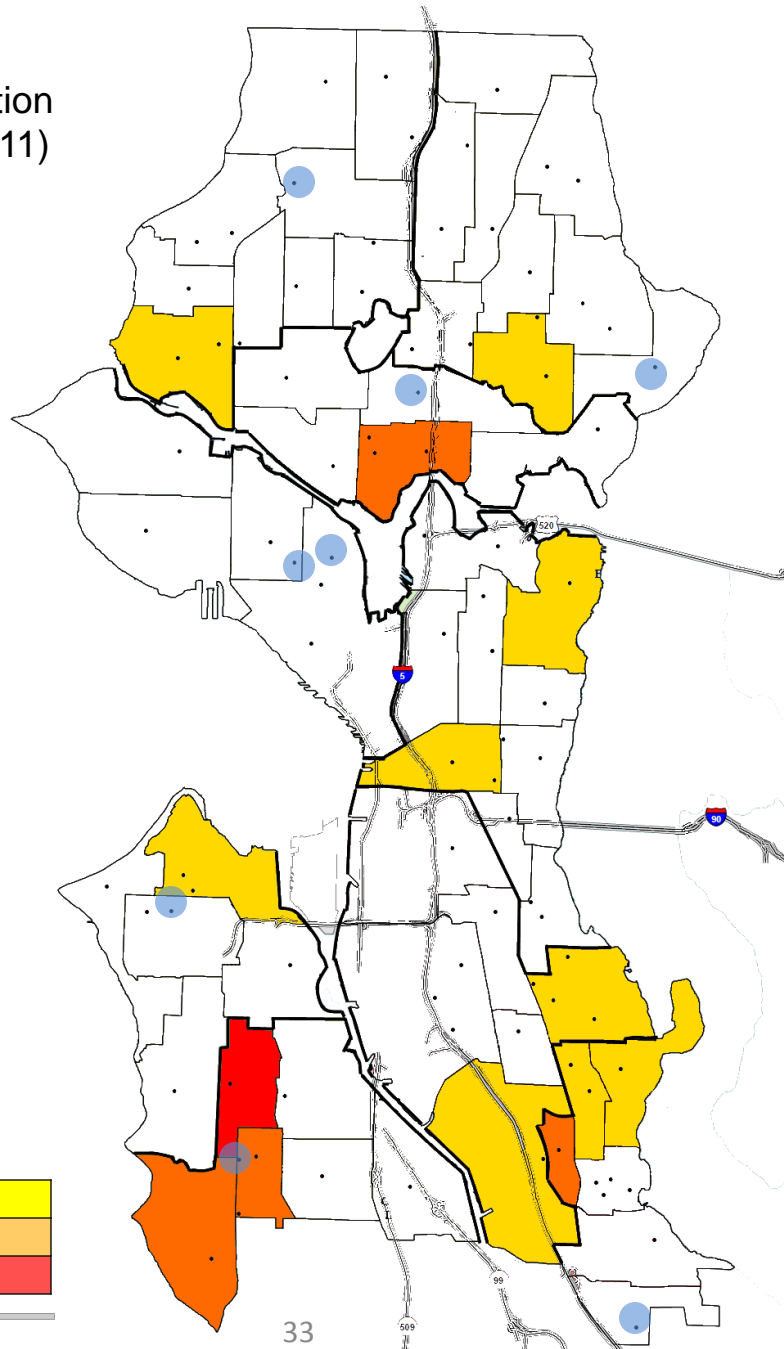
- Wing Luke
- Arbor Heights
- Roxhill
- John Stanford Int'l

140% +

- West Seattle E.S.



2 Miles



Blue circle = < 85% Utilized

2013-14

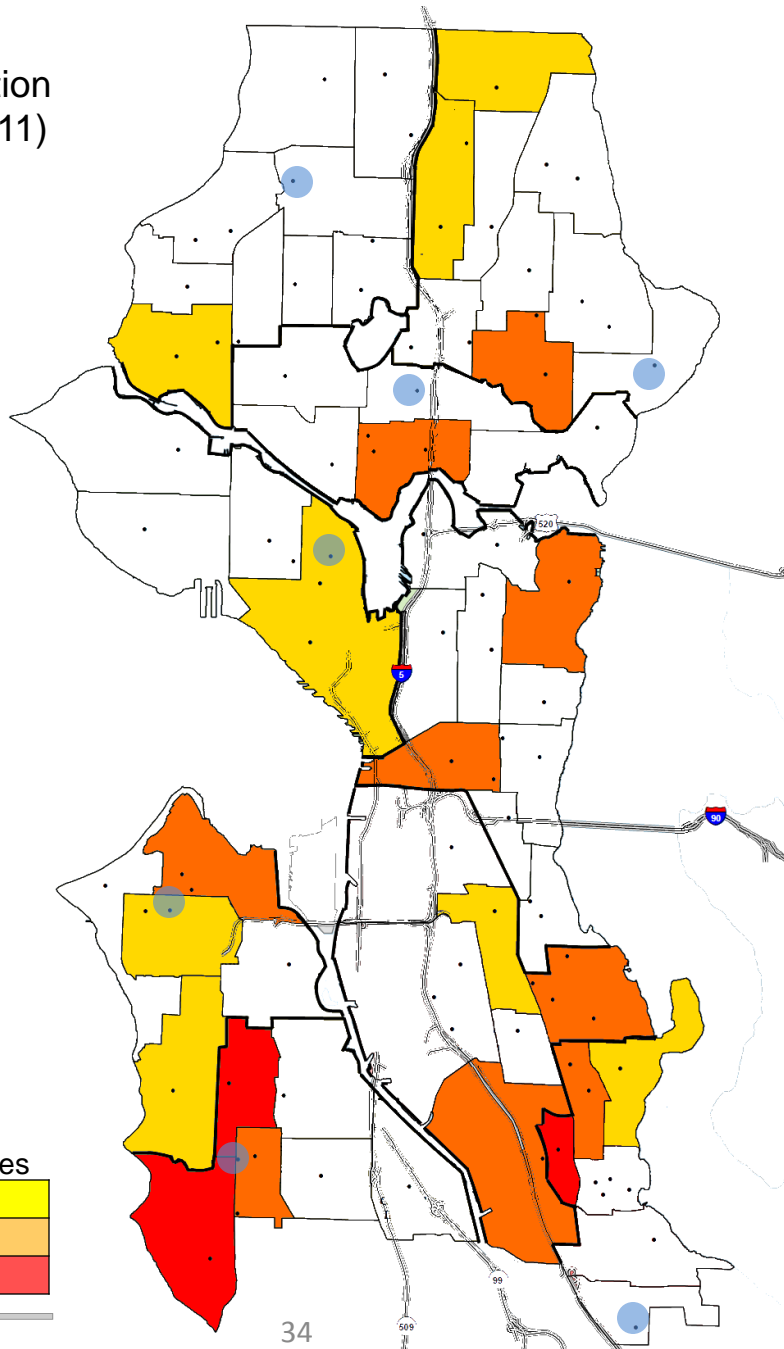
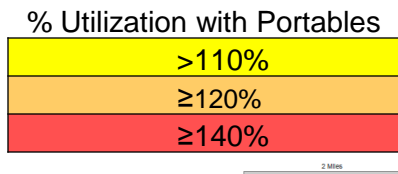
Projected Elementary School Utilization (With Existing Portables as of Fall 2011)

120% - 140%

- ML King Jr
- Roxhill
- Bryant
- John Stanford Int'l
- Lafayette
- Van Asselt (New)
- Hawthorne
- Gatzert
- McGilvra

140% +

- Wing Luke
- Arbor Heights
- West Seattle Elementary



● = < 85% Utilized

2014-15

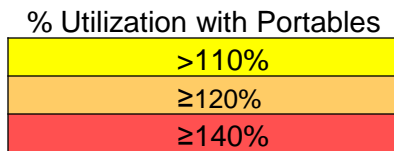
Projected Elementary School Utilization (With Existing Portables as of Fall 2011)

120% - 140%

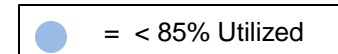
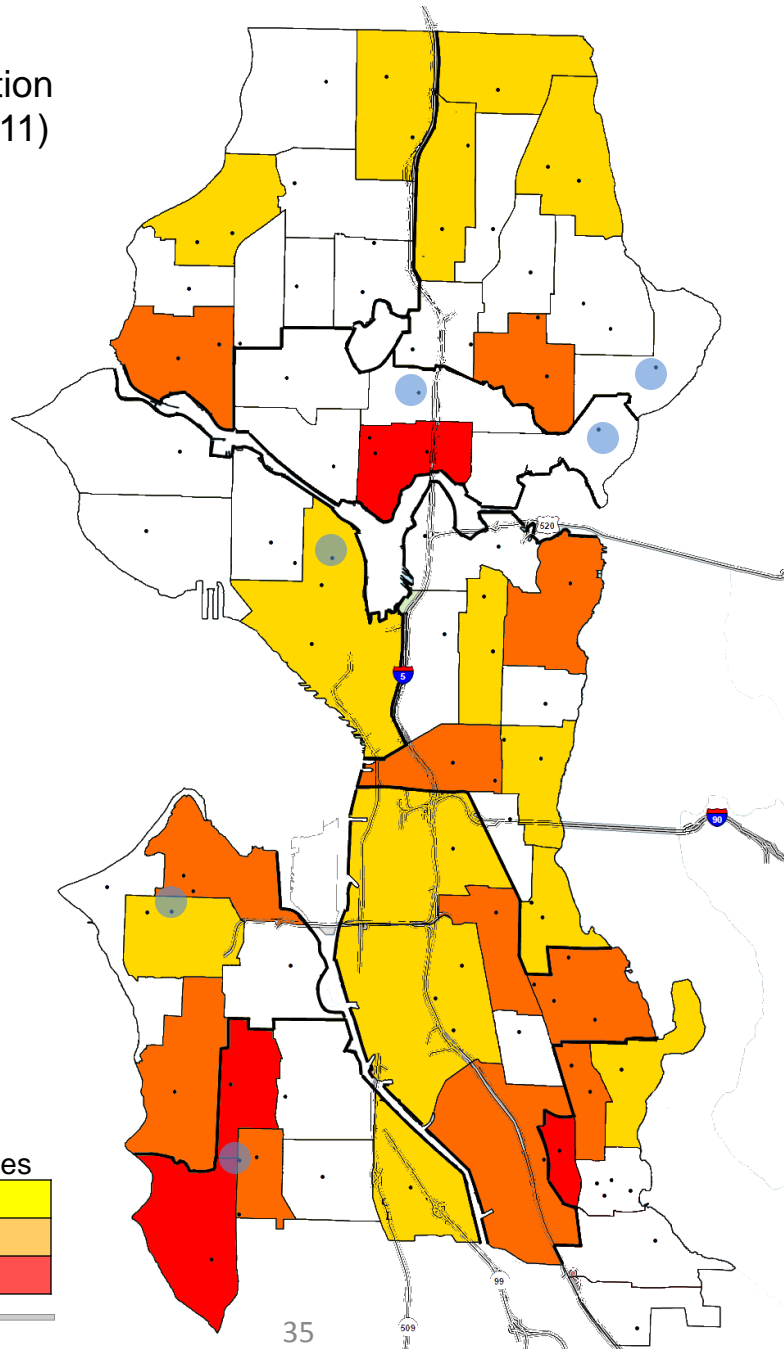
- ML King Jr
- Roxhill
- Bryant
- Gatewood
- Lafayette
- Van Asselt (New)
- Kimball
- Leschi
- McGilvra
- Stevens
- Adams
- Northgate

140% +

- Wing Luke
- Arbor Heights
- West Seattle Elementary
- John Stanford Int'l
- Hawthorne
- Gatzert



2 Miles



2015-16

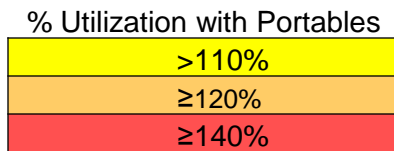
Projected Elementary School Utilization (With Existing Portables as of Fall 2011)

120% - 140%

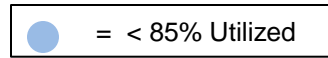
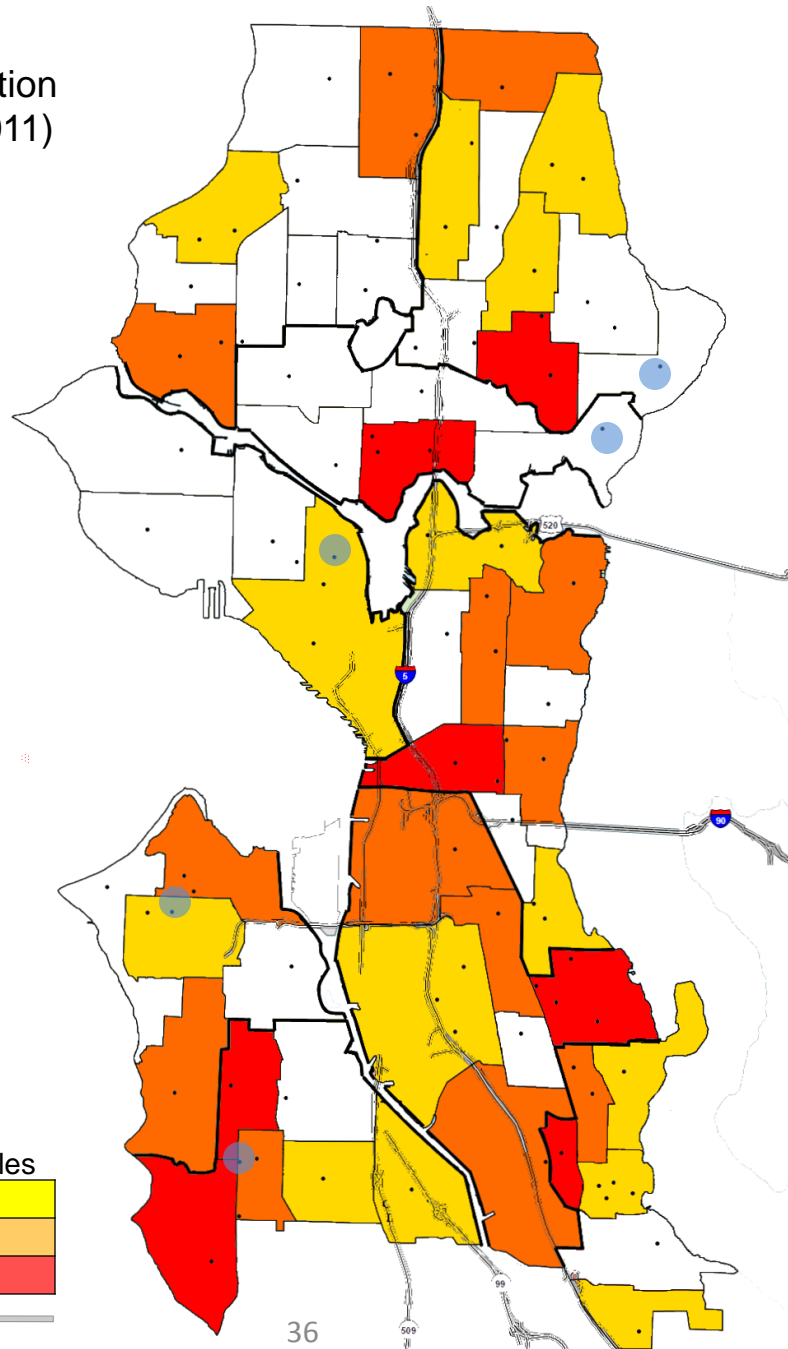
- ML King Jr
- Roxhill
- Bryant
- Olympic Hills
- Gatewood
- Lafayette
- Van Asselt (New)
- Beacon Hill International
- Kimball
- McGilvra
- Northgate
- Adams

140% +

- Wing Luke
- Arbor Heights
- West Seattle Elementary
- John Stanford Int'l



2 Miles



Solutions Toolkit

- Construction Solutions
 - Opening of closed, leased facilities
 - Portables
- Non-Construction Solutions (such as)
 - Grade configuration changes
 - Programmatic changes/enhancements
 - Change elementary to middle school feeder patterns
 - Geographic priority zones for option schools
 - School boundary adjustments

Solution Filters

- Addresses time frame
- Provides needed student seats in appropriate locations
- Has quantifiable cash flow implications
- Integrates with future capital planning

Definition of “Cost”

- Construction
- Design and permits
- Equipment
- Technology
- Furniture
- Curriculum & library materials
- (Not including general fund costs)
- (Not including transportation costs)

Possible Intermediate Capacity Management Solutions 2012-2016

Whitman Attendance Area (97)

Elementary
 Construction:
 • Add portables

And/or Non-Construction options

Eckstein Attendance Area

Middle School (452)
 Construction
 John Marshall-open 2013
 Cost \$5.1M
 Capacity: 760

And/or Non-Construction options

Elementary Schools (236)
 Construction
 • Add portables

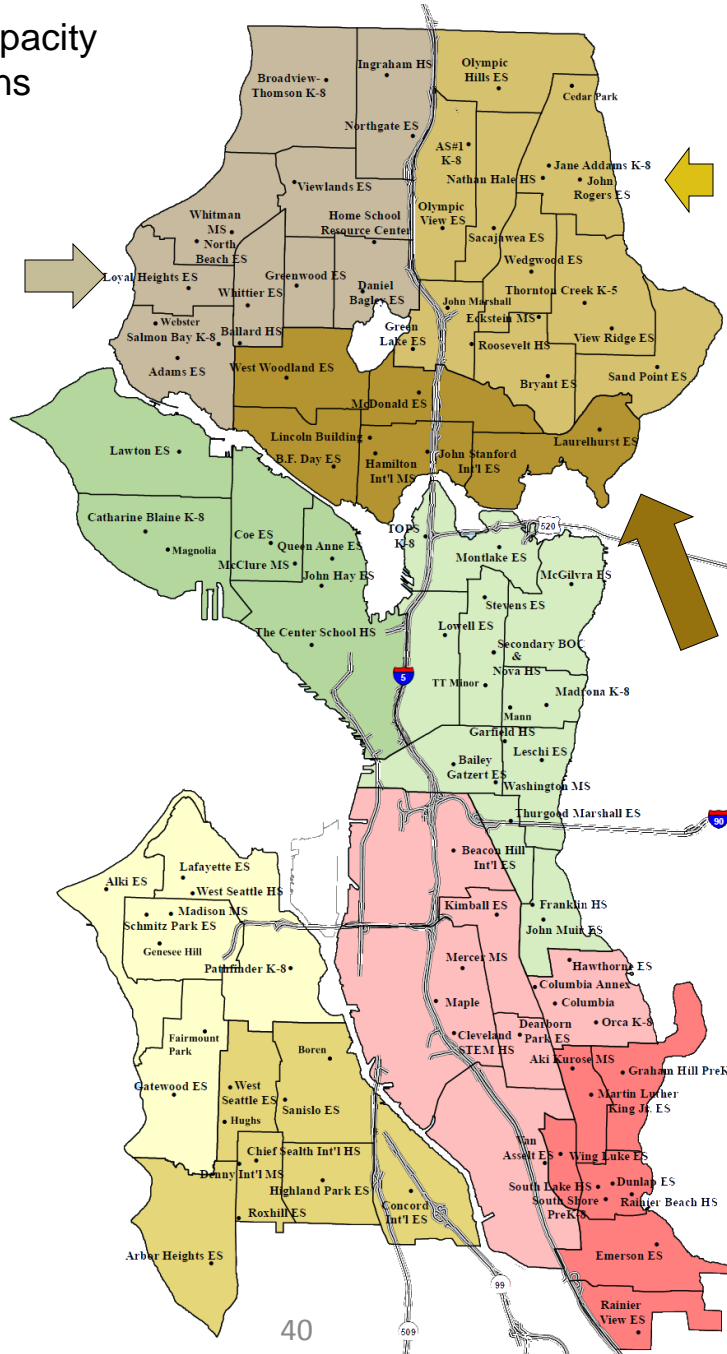
And/or Non-Construction options

Hamilton Attendance Area (46)

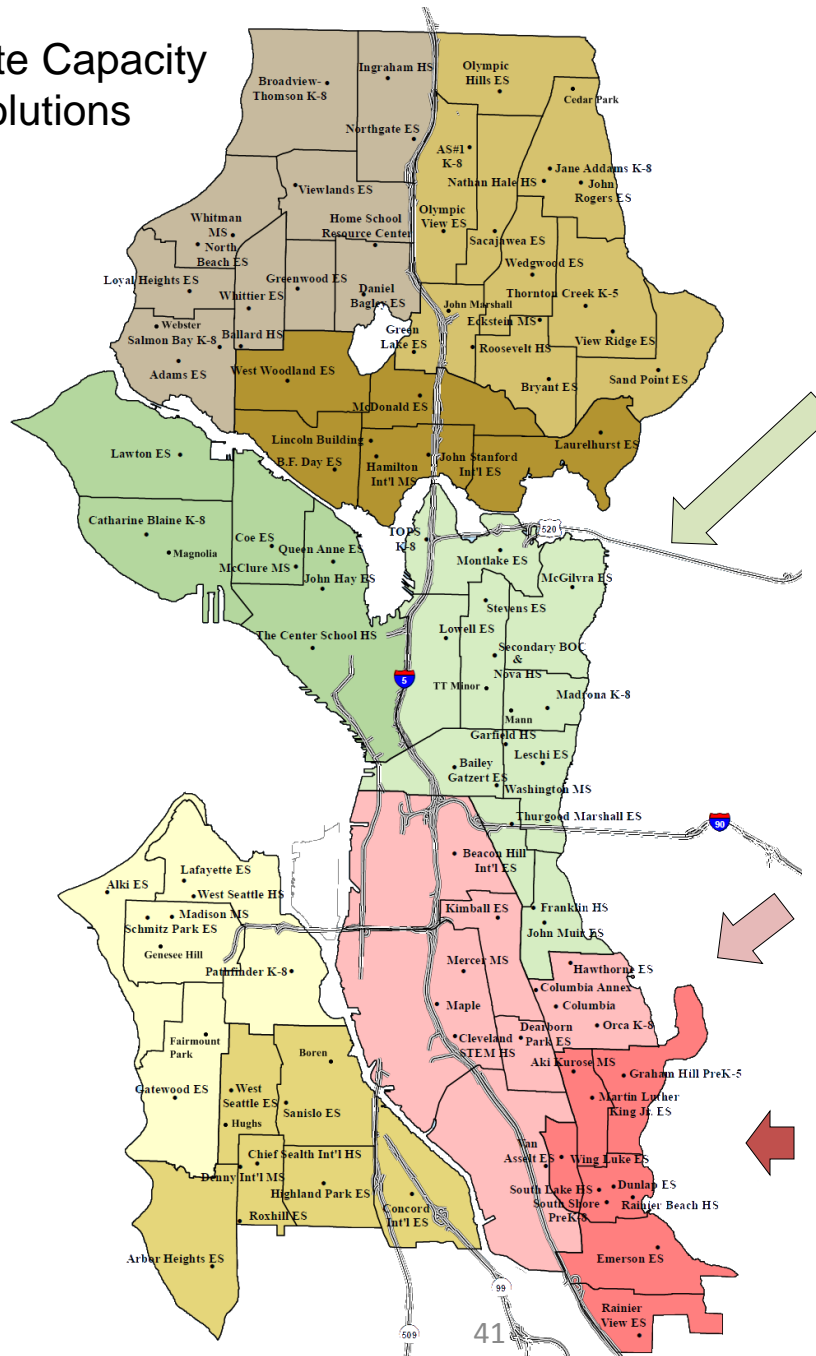
Elementary
 Construction
 • Add portables

And/or Non-Construction options

- Middle School Attendance Area**
- Eckstein MS
 - Whitman MS
 - Hamilton International MS
 - McClure MS
 - Washington MS
 - Mercer MS
 - Aki Kurose MS
 - Madison MS
 - Denny International MS



Possible Intermediate Capacity Management Solutions 2012-2016



- Middle School Attendance Area**
- Eckstein MS
 - Whitman MS
 - Hamilton International MS
 - McClure MS
 - Washington MS
 - Mercer MS
 - Aki Kurose MS
 - Madison MS
 - Denny International MS

Washington Attendance Area (530)

- dependent upon APP decision

Elementary

Construction

- T.T. Minor-open 2015
- Cost \$3.2M
- Capacity: 329
- Add portables (?)

And/or Non-Construction options

Mercer Attendance Area (683)

Elementary

Construction:

- Van Asselt-open 2012
- Cost \$2.9M
- Capacity: 354
- Columbia-open 2013
- Cost \$2.8M
- Capacity : 329
- Add portables

And/or Non-Construction options

Aki Kurose Attendance Area (436)

Elementary

Construction:

- Add portables
- Van Asselt

And/or Non-Construction options

Schedule Items for School Year 2012-13

- Community engagement: July – Sept 2011
- Lease notices: Nov/Dec 2011
- A/E contracts related to opening schools more than \$250k: Sept/Oct 2011
- Evaluate Non-Construction solutions: July - Oct 2011
- Board action on Intermediate Term Capacity Plan: Nov 2011

Closing Questions

1. Do the Demographic Task Force and Capital Department recommendations, along with the Intermediate Planning methodology, provide an acceptable framework for an “integrated facilities planning process” ?
2. Is this “data driven” approach to facilities planning the correct basis on which to move forward?



Discussion