



West Linn-Wilsonville School District
Joint Board Work Session with Long Range Planning Committee
March 15, 2017 @ 5:00 p.m.
Administration Building
22210 S.W. Stafford Road, Tualatin, Oregon
Minutes

A Joint Board Work Session with the Long Range Planning Committee was held Wednesday, March 15th, 2017 beginning at 5:00 p.m. in the Administration Building at 22210 S.W. Stafford Road, Tualatin.

1. Call to Order

Vice Chair Molatore called the meeting to order at 5:10 p.m.

2. Roll Call

West Linn-Wilsonville School District Board Members Present:

Keith Steele, Chair
Regan Molatore, Vice Chair
Betty Reynolds, Board Member
Rob Fernandez, Board Member
Board Members absent: Chelsea Martin

Long Range Planning Committee Members Present:

Michael Jones
Samy Nada
David Lake
Doris Wehler
Grady Nelson
Absent: Kent Wyatt and R.B. Brandvold

3. Welcome and Introductions

A. Brief Overview of the School Board's Long Range Planning Committee

Superintendent Dr. Kathy Ludwig thanked the Long Range Planning Committee for attending the joint work session with the School Board for continued planning and support of the district's growth.

Dr. Ludwig and Tim Woodley, Director of Operations provided a detailed overview of the district's history and work with the Long Range Planning Committee.

4. Addressing the Long Range Plan

A. Where We Are Today - Current Bond Status and Work of the LRPC

Tim Woodley provided history and narrative about what drives our district and the planning that is required to build facilities to support students. Tim also explained that the LRPC is a Board appointed committee which has advised the Board for many years and will continue to do so.

A brief discussion ensued regarding:

First Long Range Plan was created in 1996.

Most recent Long Range Plan was created in 2014.

Review of prior bonds the district initiated beginning in 1979.

The discussion to build a new middle school/rebuild Sunset Primary began in 2002 and has come to fruition in 2017.

LRPC is also the Bond Oversight Committee which provides a citizen view of the work.

Transparency with reporting, very accurate and timely.

Modern public education including technology and supported education.

Energy conservation, open libraries and porches.

Partnership with the City of Wilsonville and the 10 acres the district is donating to them in exchange for the Lowrie Primary property.

Quality construction at good pricing, currently buying furniture for Meridian Creek MS and making sure there is equity across all 4 middle schools.

Discussions can come later for any additional projects with extra funds.

History has shown the Superintendent's team is capable of starting up a new school based on the district mission and goals.

B. Where We Are Going - Looking Ahead

1. Planning Ahead for Possible Next Bond and Capital Improvement Program (11/2019)

Tim Woodley provided an update to the Board on the fact that we are nearing a bond completion. We are a quickly growing district as we have recently added two new primary schools, one new middle school and now need to look at high school space.

a. Timeline

Tim Woodley stated that since 1997 and the iteration of bonds therein, we have a process in which we update the Long Range Plan, create a capital improvement list and communicate with our community. A Bond Summit allows a large collection of community members across West Linn and Wilsonville to assist in creating a capital improvement list for the Board.

Tim distributed page 47-49 of the current Long Range Plan.

A brief discussion ensued regarding:

Capital Improvement Plan timing and sequence.

Developing a New Capital Improvement Plan.

Capital improvements benefit from having a Long Range Plan.

Safety committee conversations leading up to Bond Summit.

Staff working in tandem with LRPC to engage the community.

Commitment to our community of \$3 per \$1,000 to renew a bond, replacing the one that is coming off.

Important that taxes will not be raised as it is a replacement.

2019 we can go out for another bond so we need to begin the process now.

Local Option expires in the end of June 2020.

Board Chair Keith Steele thanked the Long Range Planning Committee for their work and commitment to our students stating we are a high growth district and need to look out 15 years into the future.

A brief discussion ensued regarding:

Growth projections and how a responsible community member could participate.
Davis Demographics' accurate projections.
Confidence in what we communicate to the public.
How frequently we do this type of a study.
History of how we collect and analyze data.

b. Enrollment Projections and Demographic Data

Tim Woodley distributed a draft report: 5-year Student Population Projections Fall 2016-2020 based on Fall 2015 data. Tim stated we cannot build outside of the Urban Growth Boundary, however Athey MS and Stafford PS are grandfathered and have conditional use permits in order. This report includes study areas, and recommendations based on the most recent information available to us by Davis Demographics. Tim also stated that the Board and leadership has been very successful in having school sites ready in the right places as growth develops.

c. Superintendent's Task Force to Study High School Options

Dr. Ludwig thanked the Long Range Planning Committee for meeting with the Board and said the next steps will be to update the Long Range Plan and to create a task force to study high school options.

A brief discussion ensued regarding:

Budgeting and bonding capacity.
WLWV credit rating is AA+
Superintendent initiates a task force to study high school options including Arts & Technology High School's permanent location.
As a result of the middle school boundary adjustment, community expressed concern over capacity at the high school level.
West Linn HS site is constrained, no place to build another wing.
Superintendent would like one person from the Long Range Planning Committee to be a part of this task force.

Chair Steele thanked everyone for coming together on behalf of our community and our students.

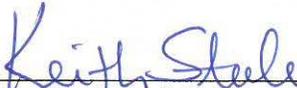
5. Board Meeting and Important Dates

- A. 4-10 @ 6:00 p.m. Regular Board Meeting
- B. 4-17 @ 5:00 p.m. Board Work Session
- C. 5-1 @ 6:00 p.m. Regular Board Meeting
- D. **5-1 @ 6:00 p.m. Budget Committee Meeting**
- E. 5-15 @ 5:00 p.m. Board Work Session

- F. 5-15 @ 6:00 p.m. Budget Committee Meeting w/Public Comment
- G. 5-22 @ 6:00 p.m. Tentative Budget Committee Meeting (if needed)
- H. 6-5 @ 6:00 p.m. Regular Board Meeting
- I. 6-5 @ 6:00 p.m. Budget Committee Meeting
- J. 6-13 @ 7:00 p.m. Arts & Technology High School Graduation
- K. 6-14 @ 7:30 p.m. West Linn High School Graduation
- L. 6-15 @ 7:00 p.m. Wilsonville High School Graduation
- M. 6-19 @ 5:00 p.m. Board Work Session

6. Adjourn

Chair Steele adjourned the meeting at 7:16 p.m.



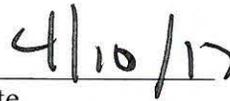
Keith Steele, Board Chair



Date



Kelly Douglas, Board Secretary



Date



West Linn-Wilsonville School District
Work Session
Administration Building 22210 SW Stafford Road, Tualatin, OR
Wednesday, March 15, 2017

Agenda

- 1. Call to Order**
- 2. Roll Call**
- 3. Welcome and Introductions**
 - A. Brief Overview of the School Board's Long Range Planning Committee
Presenter: Keith Steele, Board Chair
- 4. Addressing the Long Range Plan**
 - A. Where We Are Today - Current Bond Status and Work of the LRPC
Presenter: Tim Woodley, Director of Operations
 - B. Where We Are Going - Looking Ahead
 1. Planning Ahead for Possible Next Bond and Capital Improvement Program (11/2019)
 - a. Timeline
Presenter: Tim Woodley, Kathy Ludwig
 - b. Enrollment Projections and Demographic Data
Presenter: Tim Woodley
 - c. Superintendent's Task Force to Study High School Options
Presenter: Dr. Kathy Ludwig, Superintendent
- 5. Board Meeting and Important Dates**
 - A. 4-3 @ 6:00 p.m. Regular Board Meeting
 - B. 4-17 @ 5:00 p.m. Board Work Session
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6. Adjourn

Vision

How do we create learning communities for the greatest thinkers and most thoughtful people...for the world?

Vision Themes

Academic Excellence Personalized Education Community Partnerships Circle of Support
The Whole Person Integrated Technology

2016-2017 Board Goals

The Board is responsible for establishing educational goals which will guide both the board and staff in working together toward the continuing improvement of the educational program. The School Board invites the community voice in guidance of the work on these four goals. Strategically, the West Linn-Wilsonville School Board intends to communicate interactively in seeking common ground to continually define the district's values and strengths. As a Board we have established district goals to:

- 1. Grow student achievement, through the use of high leverage instructional strategies that raise rigor and generate equitable outcomes for all students while eliminating opportunity and achievement gaps.**
- 2. Align integrated systems of professional growth, assessment, accountability, feedback and growth mindset that build competence, confidence and self-efficacy at all levels.**
- 3. Engage our families and community partners in support of the district vision and values of equity, access and excellence in education.**
- 4. Successfully open one new school, Meridian Creek Middle School, and one re-imagined Sunset Primary School, while attending to bond projects and addressing safety, staffing adjustments, program alignment, boundary transitions, and equitable outcomes for students, thereby strengthening all schools across the district.**



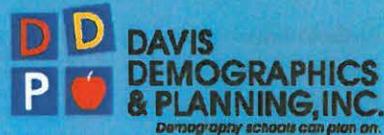
**West Linn-Wilsonville
School District**
Tualatin, Oregon

**“DRAFT”
5-Year
Student Population Projections
By Residence**

Fall 2016-2020
(Based on Fall 2015 Data)

December 15, 2015

Prepared by



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www.DavisDemographics.com

**5-Year Projections by “Residence”
for the
West Linn-Wilsonville School District**
(Based on Fall 2015/2016 K-12 Student Data)

The West Linn-Wilsonville School District (WLWSD, or the District) has requested Davis Demographics & Planning, Inc. (DDP) to assist in preparing a District-wide enrollment forecast based upon student residence. The projected student enrollments generated by DDP cover a five-year period that are based upon the actual Fall 2015 student enrollment figures. The projections conducted by DDP were calculated at the smallest level possible, the Study Area. The WLWSD has been broken up into 177 individual “study areas.” No study area straddles two District attendance areas. Therefore, the projected number of students in each of the District’s current attendance areas are derived by the simple addition of all of the study areas that comprise that particular region. The District-wide projections is the summary of all 177 study areas.

The concept of running projections at the “study area” level is ideal for a school district that plans on re-adjusting its current attendance areas. This then gives the District the ability to determine a variety of new attendance area scenarios and know approximately what the future number of students will be living in the proposed areas.

A variety of factors go into the calculation of the “study area” projections. These components include the following: (1) examining the current and planned residential development over the next seven years; (2) calculating Student Yield Factors to apply to this new development; (3) determining birth factors for this District area; and (4) calculating Mobility Factors, which examine the in/out migration of students within existing housing units (this factor, for example, takes the “resale” of units into account).

SOURCES OF DATA

| | |
|--|---|
| Historical Enrollment: | Obtained verified K-12 student data files downloaded by the District to DDP for each October from Fall 2012 to Fall 2015. |
| Housing Information: | Obtained by DDP through information provided by District staff. In addition to data provided by city and county planning departments, various site visits were made and certain developers were contacted. The use of aerial imagery and county parcel data in a GIS format were also used in this process. |
| Birth Data: (used for estimating incoming Kindergarten) | Live birth counts for the West Linn-Wilsonville area (by zipcode) were obtained from the State of Oregon, Center for Health Statistics Department. |

METHODOLOGY

1. Graduate 12th grade: move up other grades.
2. New residential development information was gathered by District staff by contacting city and county planners, site visits and individual developers. A listing of all residential development (by Study Area) used in these projections can be found in the enclosed Residential Development Summary Report. The use of aerial imagery and county parcel data in a GIS format were also used in this process.
3. Student Yield Factors were calculated for by geographically linking assessor parcel data with student data. These rates were organized by using the District’s predominant grade configurations (K-5, 6-8 and 9-12). The Student Yield Factors used in these projections were a result of a large sampling of residential units built within the District’s boundaries over the past seven years (2007-2013). The use of aerial imagery and county parcel data in a GIS format were also used in this process.

STUDENT YIELD FACTORS USED IN THE FALL 2014 PROJECTIONS
(from a large sampling of units built between 2007-2013)

| Single-Family Detached (SFD) Units [850 units built] | | | | |
|---|-------|-------|-------|-------|
| Grade Ranges | K-5 | 6-8 | 9-12 | K-12 |
| Student Yield Factor | 0.307 | 0.120 | 0.135 | 0.562 |

| Multi-Family Units [605 units built] [apartments, condos, townhouses, etc.] | | | | |
|---|-------|-------|-------|-------|
| Grade Ranges | K-5 | 6-8 | 9-12 | K-12 |
| Student Yield Factor | 0.096 | 0.048 | 0.061 | 0.205 |

4. Incoming Kindergarten estimates were calculated by gathering live birth counts by the District’s three main zipcodes (97062, 97068 and 97070) and annual comparisons were made to the Fall 2015 Kindergarten class (born in 2010) as the base year.

District-Wide Birth Factors

2016 K = 97.9% of 2015 K
 2017 K = 107.5% of 2015 K
 2018 K = 106.6% of 2015 K
 2019 K = 107.5% of 2015 K
 2020 K = 107.2% of 2015 K

5. Modify enrollment further by using student Mobility Factors as follows:

Mobility refers to the in-out migration of students from existing housing. This variable reflects the percentage of students progressing through the grade ranges. The Mobility Factors help account for the following trends occurring throughout the District: existing housing resales, foreclosures, apartment migration and high school dropout rates. Student counts for each study area are available for the last four school years (Fall 2012 through Fall 2015). A sample of 150 study areas (from a total of 177) were chosen within the District’s boundaries that had no new residential development over the last five years. The Mobility Factors were conducted at the current primary school attendance boundary level. There was a total of 21 study areas were chosen from the Boeckman Creek Primary attendance area; 8 study areas from the Bolton Primary attendance area; 18 from the Boones Ferry Primary area; 10 study areas from Cedar Oak Primary’s area; 11 from the Lowrie Primary area; 28 from the Stafford Primary area; 9 from the Sunset Primary

boundary; 19 from Trillium Creek Primary area; 17 from the Willamette Primary Attendance Area and 9 study areas in the Stafford/Boeckman Option area were chosen for this study. The Mobility Factors that show no net increases or decreases (zero change in the number of students) over time is represented by a factor of 1.00 (blue). A net student loss is represented by a factor less than 1.00 (red) and a net gain by a factor greater than 1.00 (green).

When the data is available, the typical method that DDP uses to calculate Mobility Factors is using four consecutive years of mapped student data which results in three years of change and then average it out to even out any anomalies. A comparison was made for the Fall 2012 K student population to the Fall 2013 1st grade students within a specific study area. This comparison was also conducted for the following pairings: Fall 2013 & Fall 2014 and the Fall 2014 & Fall 2015 school-years. In addition, middle school and high school grades were also looked at in this manner (all transitions from Kindergarten through 12th grade).

Student Mobility Factors

(used in the Fall 2015 Projections)

“3 Years of Change” (Using Fall 2012 through Fall 2015 students)

West Linn-Wilsonville SD Mobility (Using Fall 2012 through Fall 2015 Student Data)
(Excluding Study Areas that Have Had Development and Ones that Contain Low Student Counts)

| | G1 | G2 | G3 | G4 | G5 | G6 | G7 | G8 | G9 | G10 | G11 | G12 | City |
|---------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|------|
| Boeckman Creek Primary | 1.000 | 0.950 | 1.000 | 1.020 | 1.020 | 0.970 | 1.020 | 1.040 | 1.050 | 1.030 | 0.940 | 1.090 | W |
| Bolton Primary | 1.070 | 1.080 | 1.020 | 1.020 | 1.000 | 1.000 | 1.020 | 1.040 | 1.030 | 0.990 | 0.980 | 1.000 | WL |
| Boones Ferry Primary | 1.050 | 0.910 | 0.980 | 0.980 | 0.970 | 0.970 | 0.990 | 0.990 | 1.040 | 0.950 | 1.000 | 1.020 | W |
| Cedaroak Primary | 1.070 | 0.980 | 1.030 | 1.010 | 1.050 | 1.030 | 1.000 | 1.010 | 0.960 | 1.040 | 0.990 | 1.030 | WL |
| Lowrie Primary | 0.900 | 1.070 | 1.000 | 0.900 | 0.910 | 0.860 | 1.030 | 0.960 | 0.960 | 0.990 | 0.920 | 1.120 | W |
| Stafford/Boeckman Choice* | 1.250 | 0.900 | 1.040 | 1.120 | 1.070 | 1.200 | 1.030 | 1.110 | 1.020 | 1.120 | 1.090 | 1.000 | W |
| Stafford Primary | 1.260 | 1.020 | 1.120 | 1.060 | 1.030 | 1.020 | 1.080 | 1.020 | 1.000 | 0.950 | 0.990 | 0.980 | WL |
| Sunset Primary | 1.190 | 1.080 | 1.030 | 1.030 | 1.030 | 1.070 | 1.010 | 1.050 | 0.970 | 0.950 | 0.980 | 0.990 | WL |
| Trillium Creek Primary | 1.230 | 1.070 | 1.070 | 1.120 | 1.070 | 1.110 | 1.090 | 1.030 | 1.030 | 0.980 | 1.010 | 1.000 | WL |
| Willamette Primary | 1.040 | 1.130 | 1.020 | 1.020 | 1.080 | 1.040 | 1.040 | 1.000 | 1.040 | 0.960 | 0.960 | 1.030 | WL |

* The Boeckman Creek Primary Mobility Factors were used for the Choice area due to too small a sample size.

- Each of the 177 Study Areas are then projected out over the next five years (Fall 2016 through Fall 2020). From these study areas, individual Attendance Area reports are generated (see enclosed Attendance Area and Study Area Projections). Please refer to the attached map (11" X 17") to see the individual study area locations as well as determining the study areas that comprise each Attendance Area.

These projections are based on where the students live and where they should be attending school. DDP uses the actual location of where the students reside, as opposed to their school of enrollment, in order to provide the most accurate depiction of where future schools (if necessary) should be located. The concept of running projections at the “study area” level is ideal for a school district that plans on re-adjusting its current attendance areas. The best way to plan for future schools is to know where the next group of students will be coming from, not necessarily which school they are currently attending.

District-Wide 5-Year Forecast

Projection Date 10/5/2015

| | Actual | Projected Student Counts | | | | | | | |
|----------------------------|------------------|--------------------------|------------------|------------------|------------------|------------------|------------------------------|--------------|-------------|
| | Fall 2015 | Fall 2016 | Fall 2017 | Fall 2018 | Fall 2019 | Fall 2020 | # | % | |
| K | 567 | 580.1 | 645.5 | 639.4 | 644.9 | 645.8 | | | |
| 1 | 605 | 633.8 | 642.1 | 698.1 | 687.2 | 693.0 | | | |
| 2 | 631 | 650.9 | 679.7 | 675.1 | 728.3 | 717.1 | | | |
| 3 | 679 | 671.9 | 692.1 | 707.3 | 697.6 | 752.6 | | | |
| 4 | 692 | 712.1 | 699.4 | 709.8 | 720.4 | 710.1 | | | |
| 5 | 727 | 726.9 | 742.7 | 717.3 | 723.5 | 735.9 | | | |
| 6 | 737 | 755.7 | 748.4 | 752.2 | 723.2 | 733.3 | | | |
| 7 | 751 | 784.9 | 803.3 | 782.6 | 783.2 | 751.8 | | | |
| 8 | 699 | 786.5 | 816.4 | 821.9 | 795.6 | 796.7 | | | |
| 9 | 774 | 725.8 | 812.0 | 831.9 | 834.0 | 808.1 | | | |
| 10 | 701 | 777.1 | 728.8 | 803.5 | 819.8 | 819.6 | | | |
| 11 | 672 | 700.8 | 771.5 | 715.5 | 783.6 | 798.8 | | | |
| 12 | 717 | 715.3 | 740.6 | 807.0 | 744.3 | 813.7 | | | |
| <hr/> | | | | | | | | | |
| K-5 | 3,901 | 3,975.7 | 4,101.5 | 4,147.0 | 4,201.9 | 4,254.5 | | | |
| 6-8 | 2,187 | 2,327.1 | 2,368.1 | 2,356.7 | 2,302.0 | 2,281.8 | | | |
| 9-12 | 2,864 | 2,919.0 | 3,052.9 | 3,157.9 | 3,181.7 | 3,240.2 | | | |
| Sub Total: | K-12 | 8,952 | 9,221.8 | 9,522.5 | 9,661.6 | 9,685.6 | 9,776.5 | | |
| <hr/> | | | | | | | | | |
| Out-of-District: | K-5 | 303 | 303.0 | 303.0 | 303.0 | 303.0 | 303.0 | | |
| | 6-8 | 94 | 94.0 | 94.0 | 94.0 | 94.0 | 94.0 | | |
| | 9-12 | 177 | 177.0 | 177.0 | 177.0 | 177.0 | 177.0 | | |
| | K-12 | 574 | 574.0 | 574.0 | 574.0 | 574.0 | 574.0 | | |
| <hr/> | | | | | | | | | |
| Unmatched: | K-5 | 0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | | |
| | 6-8 | 1 | 1.0 | 1.0 | 1.0 | 1.0 | 1.0 | | |
| | 9-12 | 2 | 2.0 | 2.0 | 2.0 | 2.0 | 2.0 | | |
| | K-12 | 3 | 3.0 | 3.0 | 3.0 | 3.0 | 3.0 | | |
| <hr/> | | | | | | | | | |
| Totals: | Fall 2015 | Fall 2016 | Fall 2017 | Fall 2018 | Fall 2019 | Fall 2020 | Change from 2014-2019 | | |
| | | | | | | | # | % | |
| Totals: | K-5 | 4,204 | 4,278.7 | 4,404.5 | 4,450.0 | 4,504.9 | 4,557.5 | 353.5 | 3.2% |
| | 6-8 | 2,282 | 2,422.1 | 2,463.1 | 2,451.7 | 2,397.0 | 2,376.8 | 94.8 | 6.0% |
| | 9-12 | 3,043 | 3,098.0 | 3,231.9 | 3,336.9 | 3,360.7 | 3,419.2 | 376.2 | 4.5% |
| | K-12 | 9,529 | 9,798.8 | 10,099.5 | 10,238.6 | 10,262.6 | 10,353.5 | 824.5 | 1.4% |
| <hr/> | | | | | | | | | |
| | Fall 2015 | Fall 2016 | Fall 2017 | Fall 2018 | Fall 2019 | Fall 2020 | | | |
| K-5 Annual Change: | | 74.7 | 125.8 | 45.5 | 54.9 | 52.6 | | | |
| 6-8 Annual Change: | | 140.1 | 41.0 | -11.4 | -54.7 | -20.2 | | | |
| 9-12 Annual Change: | | 55.0 | 133.9 | 105.0 | 23.8 | 58.5 | | | |
| K-12 Annual Change: | | 269.8 | 300.7 | 139.1 | 24.0 | 90.9 | | | |

The above projections are based upon a student data file provided to DDP by the WLWSD representing early October 2015.

100 Pre-K students were given to DDP in the original student data file and were excluded from the above projections.

Fall 2015/2016 K-5 (Elementary School) Attendance Matrix
"Open Enrollment" Patterns

SCHOOL OF RESIDENCE
(BASED ON CURRENT ATTENDANCE
AREAS)

| Attendance Area | K-5 Students | SCHOOL OF ATTENDANCE (CODE) | | | | | | | | | | Transfer Out Rates | |
|--|--------------|-------------------------------|------------------------|-----------------------------|--------------------------|----------------------|---------------------------|------------------------|-------------------------------|---------------------------|------------------------------------|--------------------|-----------|
| | | Boeckman Creek Primary (BCPS) | Bolton Primary (BOLPS) | Boones Ferry Primary (BFPS) | Cedar oak Primary (CPPS) | Lowrie Primary (LPS) | Stafford Primary (STAFPS) | Sunset Primary (SUNPS) | Trillium Creek Primary (TCPS) | Willamette Primary (WLPS) | Three Rivers Charter School (3RCS) | | Undefined |
| Boeckman Creek Primary | 424 | 352 | 0 | 17 | 1 | 23 | 15 | 0 | 3 | 7 | 6 | 0 | 17.0% |
| Bolton Primary | 255 | 0 | 219 | 0 | 5 | 0 | 4 | 5 | 12 | 4 | 5 | 1 | 14.1% |
| Boones Ferry Primary | 529 | 31 | 0 | 412 | 0 | 84 | 2 | 0 | 0 | 0 | 0 | 0 | 22.1% |
| Cedar oak Primary | 260 | 0 | 10 | 0 | 216 | 0 | 3 | 1 | 25 | 1 | 3 | 1 | 16.9% |
| Lowrie Primary | 543 | 14 | 1 | 41 | 0 | 481 | 2 | 0 | 2 | 1 | 0 | 1 | 11.4% |
| Stafford Primary | 355 | 1 | 3 | 0 | 6 | 0 | 310 | 4 | 18 | 10 | 3 | 0 | 12.7% |
| Sunset Primary | 391 | 0 | 22 | 0 | 9 | 2 | 4 | 274 | 50 | 16 | 14 | 0 | 29.9% |
| Trillium Creek Primary | 521 | 0 | 19 | 0 | 14 | 0 | 16 | 8 | 440 | 17 | 7 | 0 | 15.5% |
| Willamette Primary | 563 | 0 | 5 | 1 | 2 | 2 | 49 | 4 | 30 | 462 | 7 | 1 | 17.9% |
| Stafford / Boeckman Choice Zone | 60 | 25 | 0 | 0 | 1 | 4 | 27 | 0 | 0 | 3 | 0 | 0 | -- |
| K-5 Sub-Totals: | 3,901 | 423 | 279 | 471 | 254 | 596 | 432 | 296 | 580 | 521 | 45 | 4 | |
| Out of District: | 303 | 28 | 95 | 55 | 20 | 5 | 47 | 10 | 1 | 42 | 0 | 0 | |
| Pre-K Students: | 100 | 0 | 46 | 54 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Unmatched: | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| K-5 Totals: | 4,304 | 451 | 420 | 580 | 274 | 601 | 479 | 306 | 581 | 563 | 45 | 4 | |
| # Enrolled, But Not Living in Attendance Area: | 916 | 99 | 155 | 114 | 58 | 120 | 167 | 20 | 110 | 39 | 31 | 3 | |
| Open Enrollment %: | 23.5% | 23.4% | 55.6% | 24.2% | 22.8% | 20.1% | 38.7% | 6.8% | 19.0% | 7.5% | -- | -- | |
| | | District-wide | | | | | | | | | | | |

The above data is based upon a database download provided to DDP by the WLWSD representing enrollment in early October 2015.

35 = Large grouping of students attending a school outside of their assigned area.

21.2% = Transfer In or Out rates greater than 22%.

Fall 2015/2016 6-8 (Middle School) Attendance Matrix "Open Enrollment" Patterns

| SCHOOL OF RESIDENCE CURRENT ATTENDANCE AREA | SCHOOL OF ATTENDANCE | | | | | | Transfers Out Rate | |
|--|--|--------------|-------------------|----------------------|----------------|-------------------------------|-----------------------|-------|
| | Attendance Area | 6-8 Students | Athey Creek MS | Inza R Wood MS | Rosemont MS | Three Creek Charter School | | BFPS |
| | Athey Creek Middle School | 549 | 474 | 1 | 67 | 7 | 0 | 13.7% |
| | Inza R. Wood Middle School | 828 | 63 | 742 | 4 | 18 | 1 | 10.4% |
| | Rosemont Ridge Middle School | 810 | 79 | 1 | 687 | 43 | 0 | 15.2% |
| | 6-8 Sub Totals: | 2,187 | 616 | 744 | 758 | 68 | 1 | |
| | Out of District: | 94 | 40 | 35 | 19 | 0 | 0 | |
| | Unmatched: | 1 | 1 | 0 | 0 | 0 | 0 | |
| | 6-8 Totals: | 2,282 | 657 | 779 | 777 | 68 | 1 | |
| | # Enrolled Not Living in Attendance Area: | 216 | 143 | 2 | 71 | -- | -- | |
| | Open Enrollment %: | 9.9% | 23.2% | 0.3% | 9.4% | N/A | N/A | |
| | District-wide | | | | | | | |

The above data is based upon a database download provided to DDP by the WLWSD representing enrollment in early October 2015.

34 = Large grouping of students attending a school outside of their assigned area.

21.2% = Transfer In or Out rates greater than 20%.

Fall 2015/2016 9-12 (High School) Attendance Matrix
 "Open Enrollment" Patterns

| SCHOOL OF RESIDENCE CURRENT ATTENDANCE AREA | Attendance Area | SCHOOL OF ATTENDANCE | | | | Transfer Out Rates |
|--|---|----------------------|--------------|----------------|---------------------|--------------------|
| | | 9-12 Students | West Linn HS | Wilsonville HS | Art Tech Charter HS | |
| | West Linn High School | 1,643 | 1,566 | 36 | 41 | 4.7% |
| | Wilsonville High School | 1,221 | 125 | 1,043 | 53 | 14.6% |
| | 9-12 Sub Totals: | 2,864 | 1,691 | 1,079 | 94 | |
| | Out of District: | 177 | 79 | 93 | 5 | |
| | Unmatched | 2 | 1 | 0 | 1 | |
| | 9-12 Totals: | 3,043 | 1,771 | 1,172 | 100 | |
| | # Enrolled, But Not Living in Attendance Area: | 162 | 126 | 36 | -- | |
| | Open Enrollment %: | 5.7% | 7.5% | 3.3% | N/A | |
| | District-wide | | | | | |

The above data is based upon a database download provided to DDP by the WLWSD representing enrollment in early October 2015.

= Large grouping of students attending a school outside of their assigned area.



CIP TIMING AND SEQUENCE

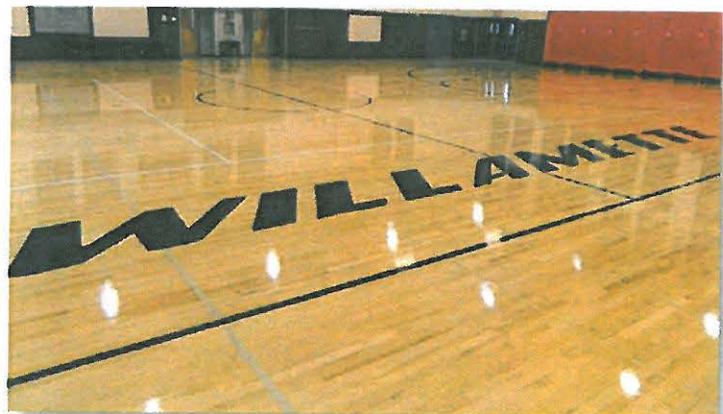
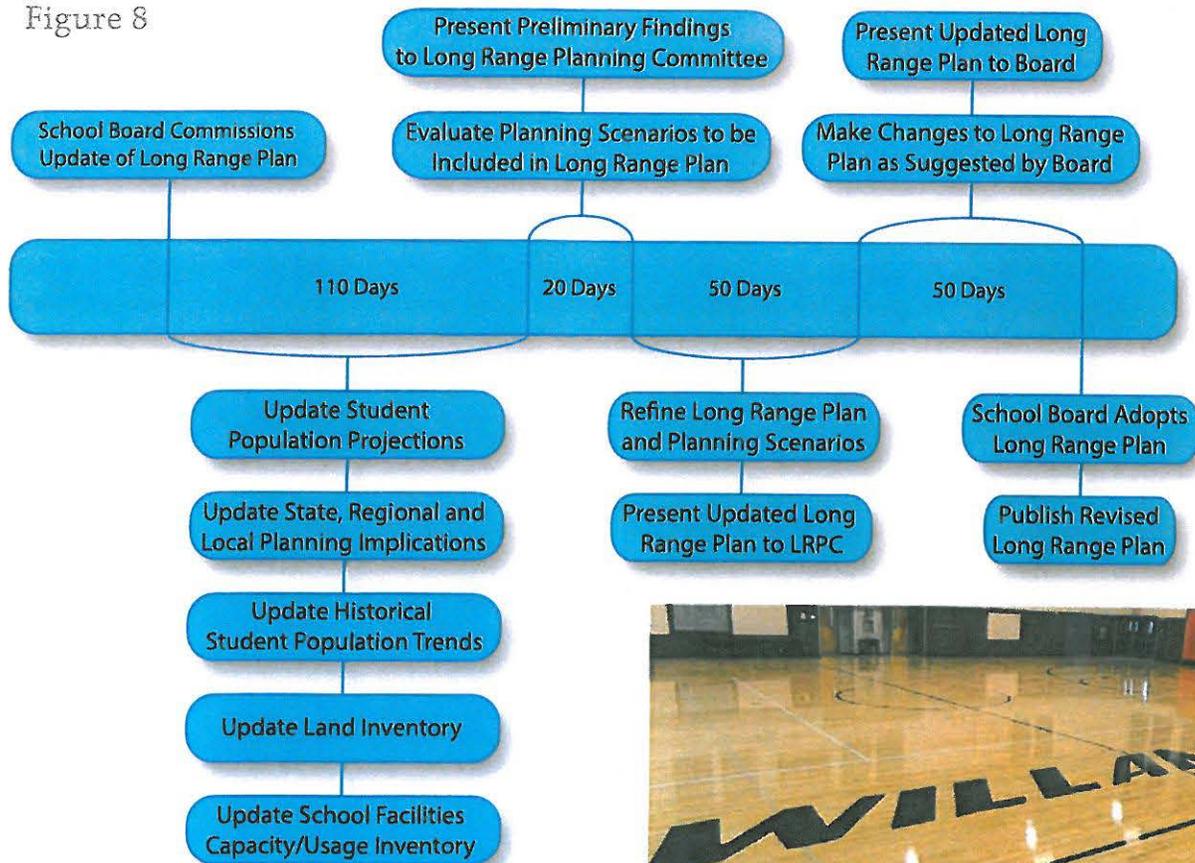
While only the School Board can initiate and implement a Capital Bond election, the LRPC remains engaged year-round in examining facility needs and contemplating next steps. One component of this on-going stewardship is recognition of the process the District has historically established leading up to successful passage and funding of Capital Bond Programs.

This process and timeline is designed to solicit interest and feedback from internal and external stakeholders throughout the District in a very measured, deliberate and inclusive way. Over time District staff, students, parents, and patrons are introduced to the facility needs of the District with increasing detail, building consensus, and purpose toward successful funding outcomes.

Updating the Long Range Plan

The process of assessing the need for a Capital Bond Program is initiated when the School Board commissions an update of the Long Range Plan. District staff then gather the latest data and projections for student population, facility needs and land inventory. This information allows staff to develop a draft revision of the Long Range Plan. This draft is then reviewed with the LRPC, refined, and presented again for approval. The approved Long Range Plan is then presented to the School Board for final review, changes and adoption.

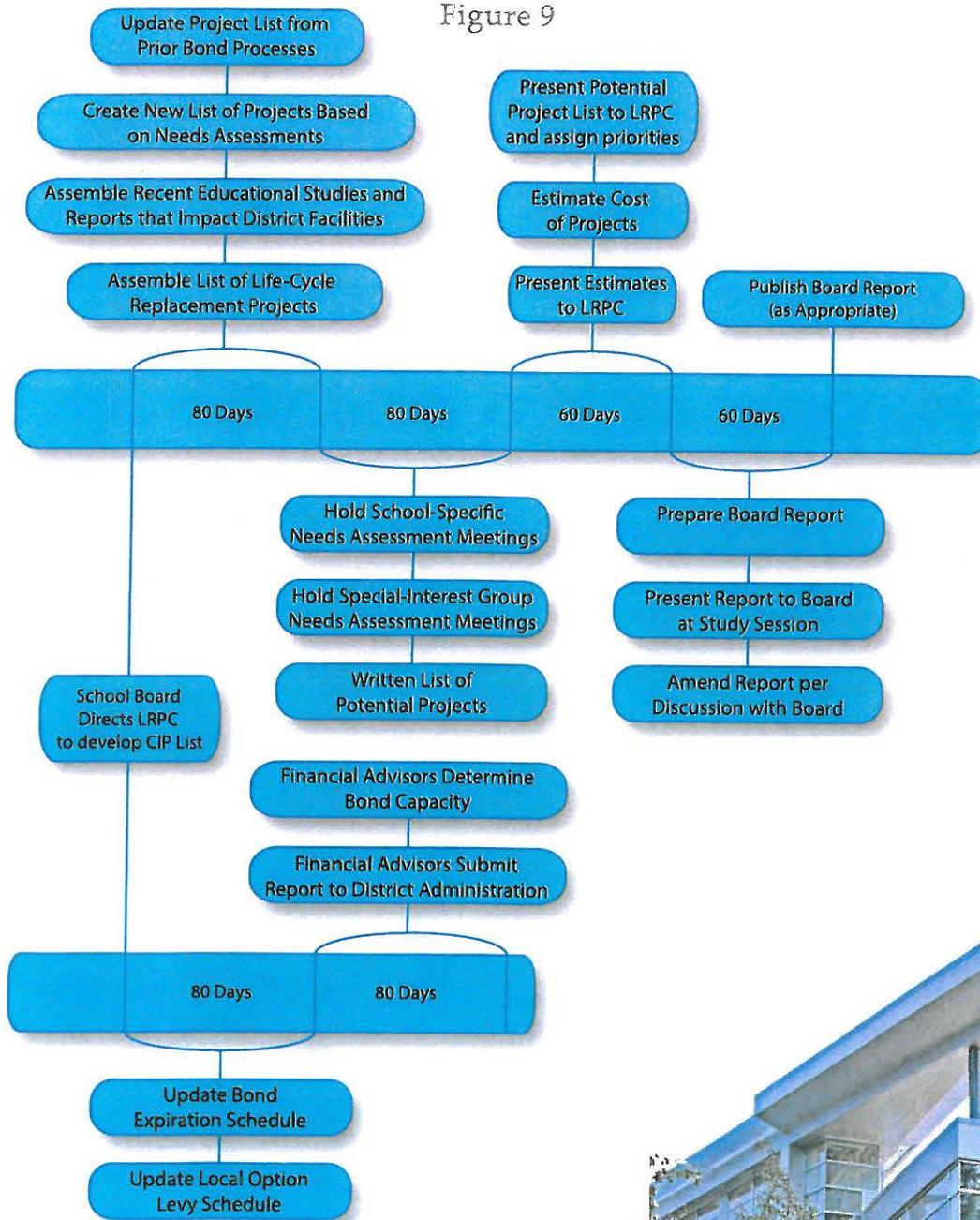
Figure 8



Developing a New CIP

If the updated Long Range Plan demonstrates the need for significant capital improvements the School Board directs the LRPC to develop a new CIP. Improvements added to the new list include legitimate uncompleted projects from prior bond processes and projects discovered over time that await funding. Additional projects may be identified based on impacts to facilities due to enrollment projections, educational program changes and “needs assessment” meetings with each school and special-interest groups to discuss desired improvements. This list, and associated conceptual cost estimates, are brought to the LRPC for review and inclusion on the capital improvement list. Amendments are made to the CIP based on discussion with the School Board, after which, the new CIP is published.

Figure 9

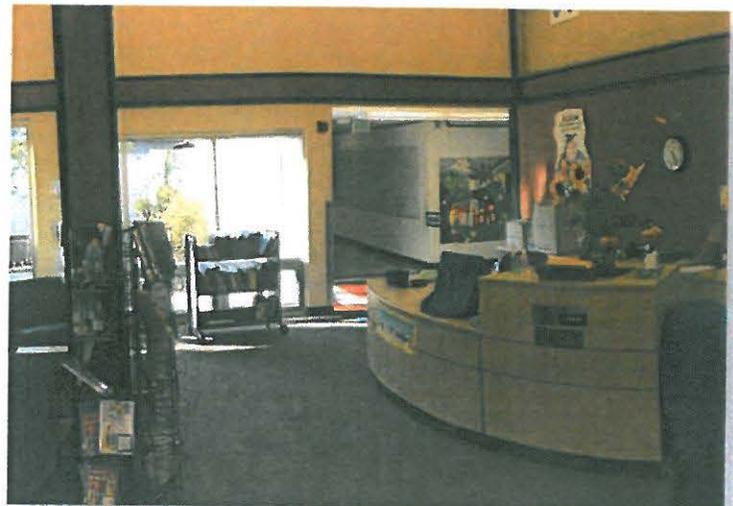
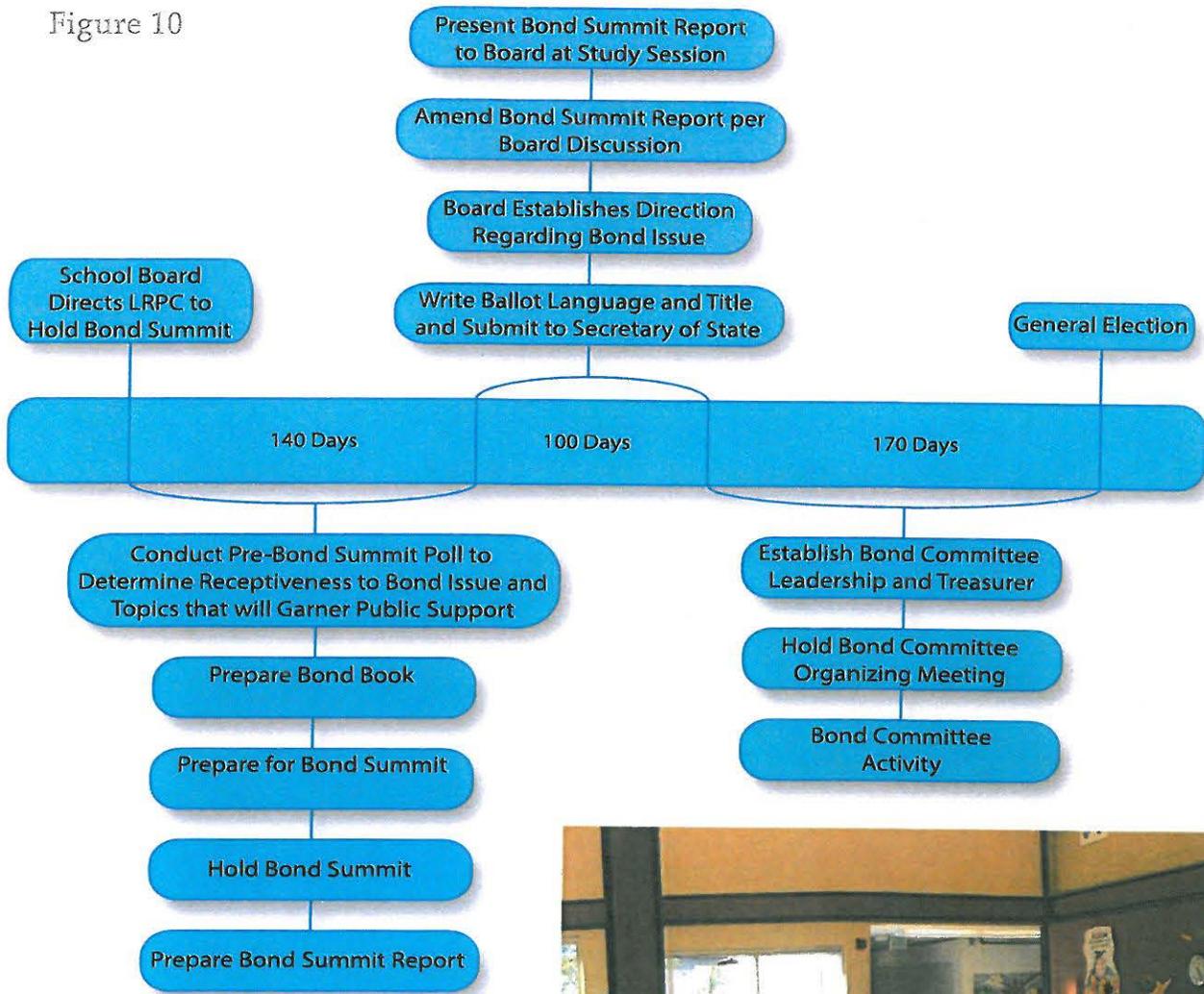




Bond Summit and General Election

In response to the published CIP, the School Board may direct the LRPC to hold a bond summit. The purpose of the bond summit is to provide stakeholders an opportunity to discuss the facility needs of the District and to voice preferences for what needs should be prioritized in the event of a bond election. After the bond summit, staff prepares a report of the findings which is brought to the School Board for review. The amended report is then used as the basis for determining direction regarding a bond issue. If the School Board decides to proceed with a bond measure, the language is drafted and submitted to county election officials. A bond committee is then established and the election process proceeds towards the vote.

Figure 10



January 2017



WEST LINN - WILSONVILLE SCHOOL DISTRICT

2014 Capital Bond Program

Quarterly Report

Q4 2016

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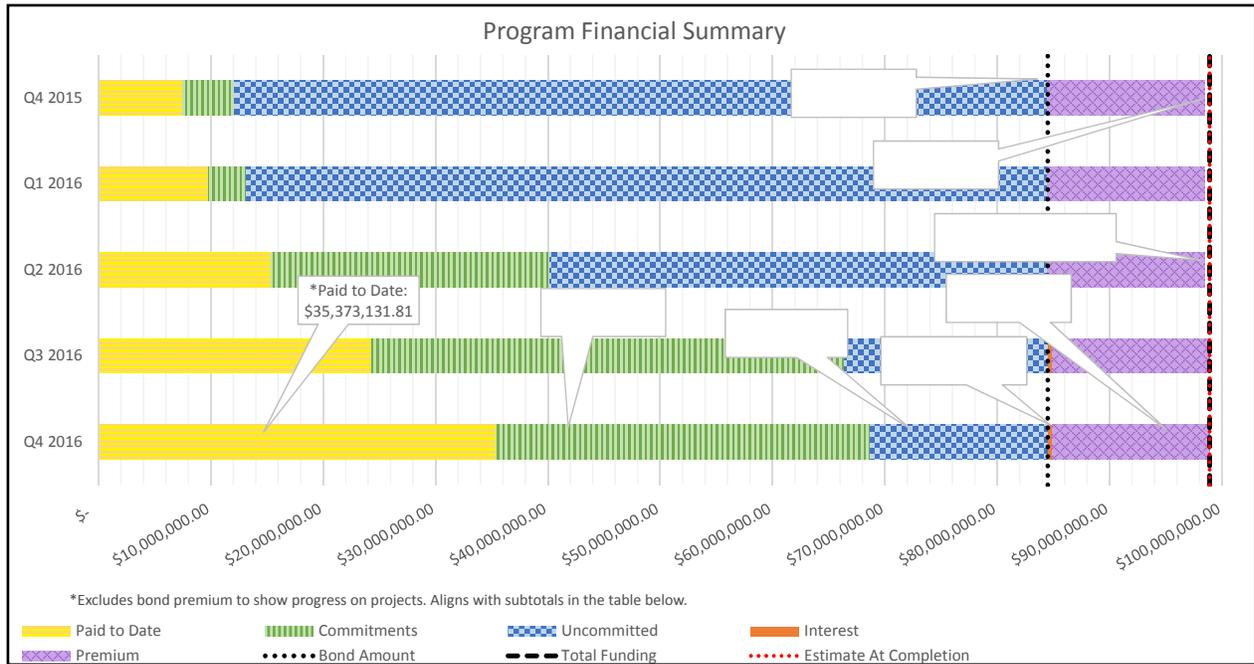
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| | | |
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PROGRAM SUMMARY

Q4 2016



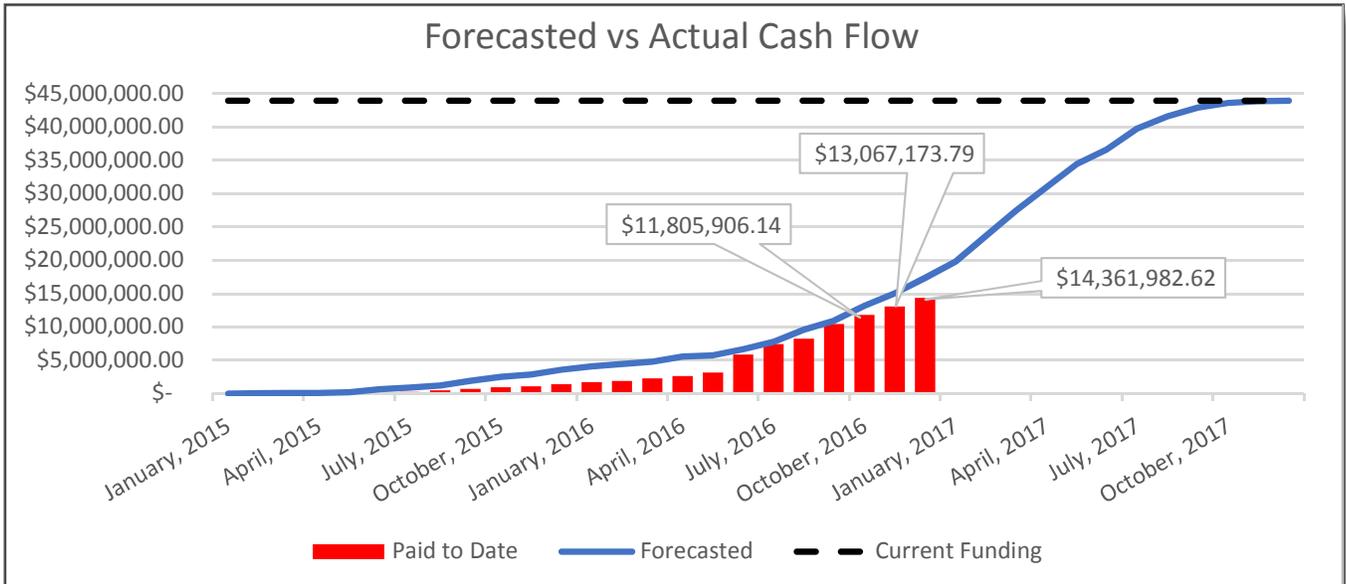
| | Original Funding | Approved Changes | Current Funding | Current Commitments | Paid to Date | Estimate At Completion | Forecasted Over/(Under) |
|---|----------------------|-----------------------|----------------------|----------------------|----------------------|------------------------|-------------------------|
| New Middle School in Wilsonville | 40,000,000.00 | 3,924,037.61 | 43,924,037.61 | 32,764,239.36 | 14,361,982.62 | 43,924,037.61 | 0.00 |
| Sunset Primary School Replacement | 24,000,000.00 | 3,954,498.96 | 27,954,498.96 | 21,901,675.19 | 8,759,954.32 | 27,954,498.96 | 0.00 |
| 700 Building Renovation & Addition @ WLHS | 3,000,000.00 | 780,344.24 | 3,780,344.24 | 3,469,748.42 | 2,823,884.47 | 3,780,344.24 | 0.00 |
| Performing Arts Renovation & Addition @ WHS | 3,000,000.00 | 294,000.97 | 3,294,000.97 | 3,016,355.76 | 2,210,357.98 | 3,294,000.97 | 0.00 |
| Technology @ D-W | 7,000,000.00 | 0.00 | 7,000,000.00 | 4,147,222.76 | 4,121,642.76 | 7,000,000.00 | 0.00 |
| Safety & Security @ D-W | 500,000.00 | 1,500,000.00 | 2,000,000.00 | 465,909.63 | 411,611.42 | 2,000,000.00 | 0.00 |
| Improvements @ D-W | 7,000,000.00 | 3,500,000.00 | 10,500,000.00 | 2,888,700.93 | 2,683,698.24 | 10,500,000.00 | 0.00 |
| Subtotals | 84,500,000.00 | 13,952,881.78 | 98,452,881.78 | 68,653,852.05 | 35,373,131.81 | 98,452,881.78 | 0.00 |
| *Bond Premium | 14,005,901.02 | -13,652,881.78 | 353,019.24 | 257,464.42 | 257,464.42 | 353,019.24 | 0.00 |
| Estimated Interest Earnings | 400,000.00 | -300,000.00 | 100,000.00 | 0.00 | 0.00 | 100,000.00 | 0.00 |
| Subtotals | 14,405,901.02 | -13,952,881.78 | 453,019.24 | 257,464.42 | 257,464.42 | 453,019.24 | 0.00 |
| Grand Totals | 98,905,901.02 | 0.00 | 98,905,901.02 | 68,911,316.47 | 35,630,596.23 | 98,905,901.02 | 0.00 |

*Includes \$4,505,000.00 in as-yet unsold bonds

- All four major construction projects are under construction.
- Expenditures during this quarter exceeded eleven million dollars with all four major projects underway.
- Over 35% of current funding has been spent.
- The Bond Management Team continues to have confidence in the new school project budgets.
- Estimates were received for several projects targeted for construction in summer 2017. These projects are:
 - Enclosure @ TCPS
 - Roofing Replacement @ D-W
 - Lighting Replacement @ D-W
 - Middle School Refresh
 - Entry @ WHS
 - Fencing @ COP
 - Renovation @ DOC

MERIDIAN CREEK MIDDLE SCHOOL

Q4 2016



| | 2014 | 2015 | | | | | | | | 2016 | | | | | | | | 2017 | | | | | | | | |
|-----------|---------|--------|-------|-------|-------|-------|-------|-------|-------|---------|--------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--|
| | Q4 | Q1 | | Q2 | | Q3 | | Q4 | | Q1 | | Q2 | | Q3 | | Q4 | | Q1 | | Q2 | | Q3 | | Q4 | | |
| | N D J | F M A | M J J | A S O | N D J | F M A | M J J | A S O | N D J | F M A | M J J | A S O | N D J | F M A | M J J | A S O | N D J | F M A | M J J | A S O | N D J | F M A | M J J | A S O | N D J | |
| Design | PLANNED | ACTUAL | | | | | | | | | | | | | | | | | | | | | | | | |
| Permit | PLANNED | ACTUAL | | | | | | | | | | | | | | | | | | | | | | | | |
| Construct | | | | | | | | | | PLANNED | ACTUAL | | | | | | | | | | | | | | | |

Recent Activities:

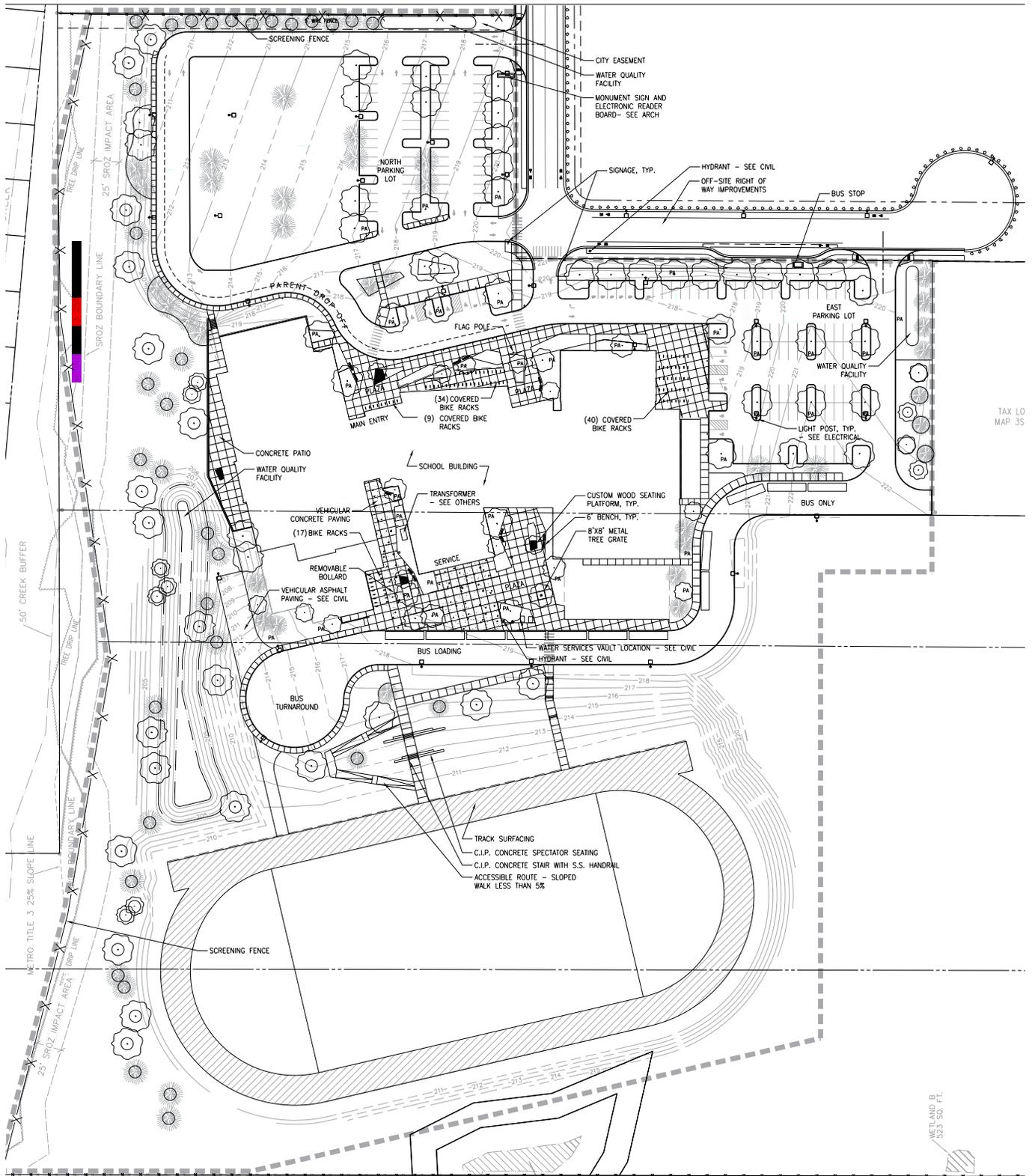
- The Right of Way easements and acquisitions associated with required Right of Way work have been completed.
- Bids for the Public Improvements Project were received December 20, 2016. The low bidder was K&E Excavating Inc. The bids came in under the engineers estimated value.
- Robinson Construction has continued construction of the Middle School building.
- Concrete floor slab pours were completed.
- Structure is proceeding with the main gym, auxiliary gym and band/choir areas nearly framed.
- Framing of the classroom wing has started.
- Building electrical and plumbing rough-in has started throughout the building and is following structure.

Upcoming Activities:

- Excavation and utilities installation along advance road.
- Framing of the classroom wing and administration/commons.
- FF&E Procurement.

NEW MIDDLE SCHOOL IN WILSONVILLE

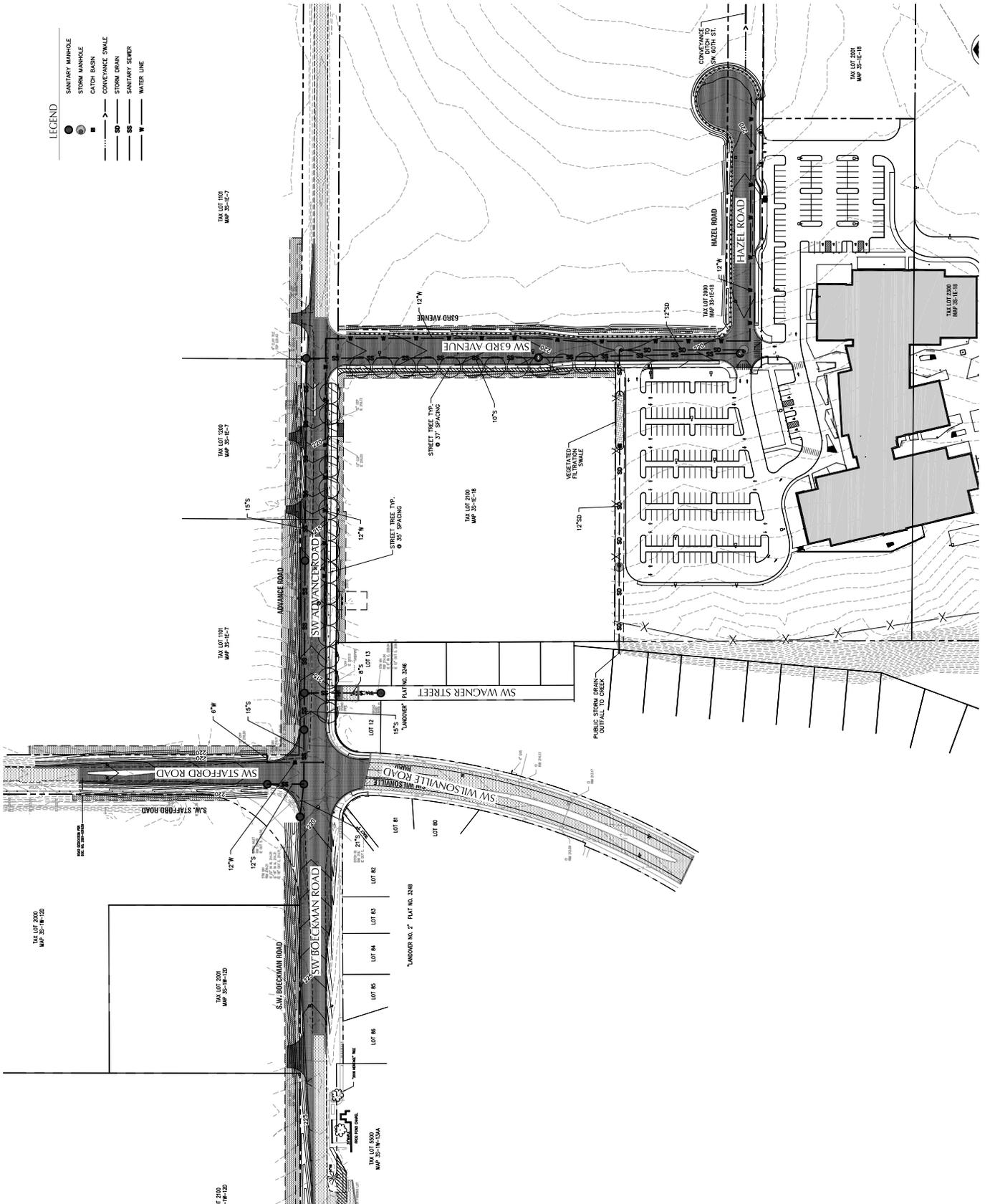
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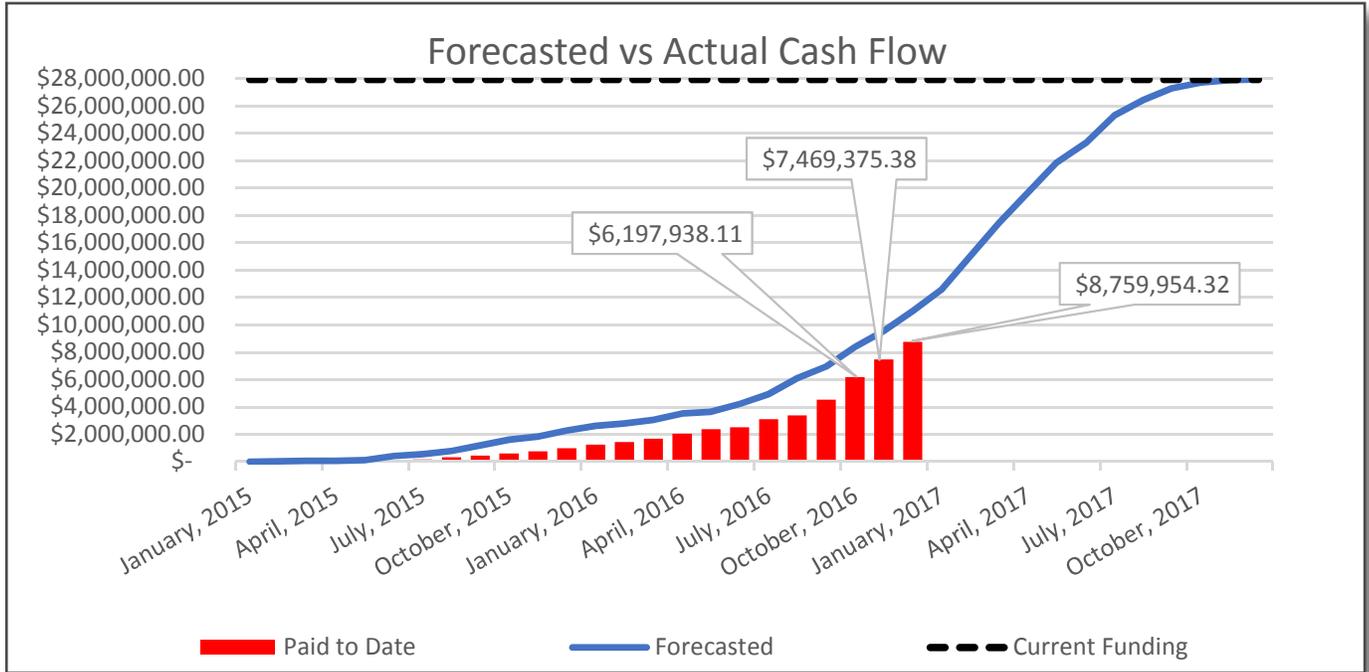
LEGEND

- SANITARY MANHOLE
- STORM MANHOLE
- CATCH BASIN
- CONCRETE SWALE
- STORM DRAIN
- SANITARY SEWER
- WATER LINE



SUNSET PRIMARY SCHOOL REPLACEMENT

Q4 2016



| | 2014 | 2015 | | | | | | | | | | | | 2016 | | | | | | | | | | | | 2017 | | | | | | | | | | | |
|-----------|---------|------|---|---|----|---|---|----|---|---|----|---|---|------|---|---|----|---|---|----|---|---|----|---|--------|------|---|---|----|---|---|----|---|---|----|---|---|
| | Q4 | Q1 | | | Q2 | | | Q3 | | | Q4 | | | Q1 | | | Q2 | | | Q3 | | | Q4 | | | Q1 | | | Q2 | | | Q3 | | | Q4 | | |
| | N | D | J | F | M | A | M | J | J | A | S | O | N | D | J | F | M | A | M | J | J | A | S | O | N | D | J | F | M | A | M | J | J | A | S | O | N |
| Design | PLANNED | | | | | | | | | | | | | | | | | | | | | | | | ACTUAL | | | | | | | | | | | | |
| Permit | PLANNED | | | | | | | | | | | | | | | | | | | | | | | | ACTUAL | | | | | | | | | | | | |
| Construct | PLANNED | | | | | | | | | | | | | | | | | | | | | | | | ACTUAL | | | | | | | | | | | | |

Recent Activities:

- The appeal to the Oregon Land Use Board of Appeals by petitioners David Dodds and Save our Sunset Park remains in process. The record was settled, briefs filed and a hearing was held in Salem on December 8, 2016. The final opinion and order is expected in early January. Construction will continue while the appeal is in process.
- The contractor has made significant progress on the building. All concrete slabs are poured and much of the building is framed. Electrical and plumbing rough in is following the framing.
- The storm water pond has been excavated, lined and planted as planned.
- The contractor utilized the winter break to activate the new public water line and make paving repairs to the existing street.

Upcoming Activities:

- The final opinion and order for the land use appeal is expected in early January. Construction will continue while the appeal is in process.
- Roofing is expected to begin in January.
- Mechanical, electrical and plumbing work is expected to begin in earnest in January once the roofing is underway.
- The abatement package was bid, the selected contractor was Rose City Contracting, Inc. The bid was within budget.
- FF&E procurement.

SUNSET PRIMARY SCHOOL REPLACEMENT

Q4 2016



SUNSET PRIMARY SCHOOL REPLACEMENT

Q4 2016



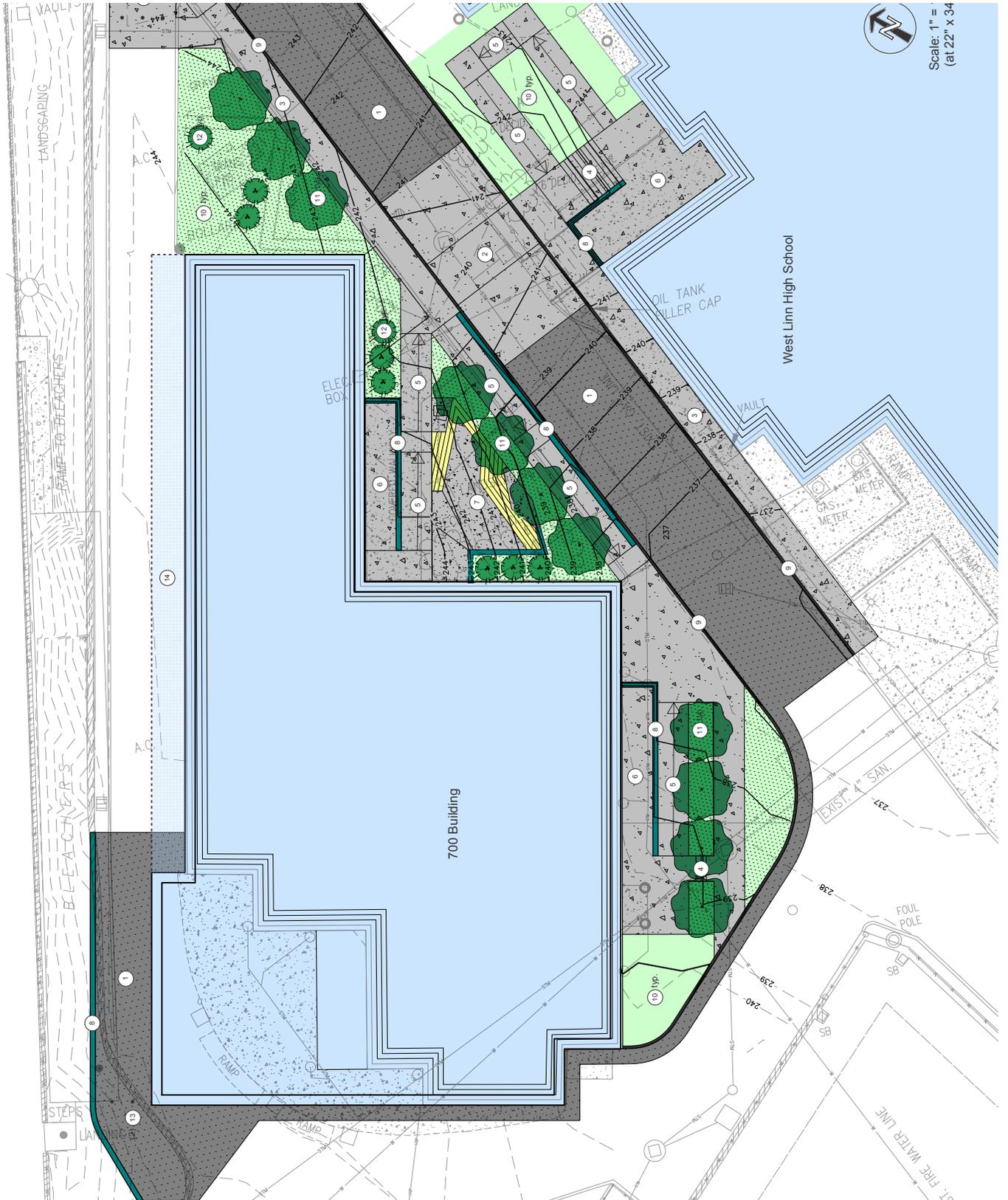
SUNSET PRIMARY SCHOOL REPLACEMENT

Q4 2016



700 BUILDING RENOVATION & ADDITION AT WLHS

Q4 2016



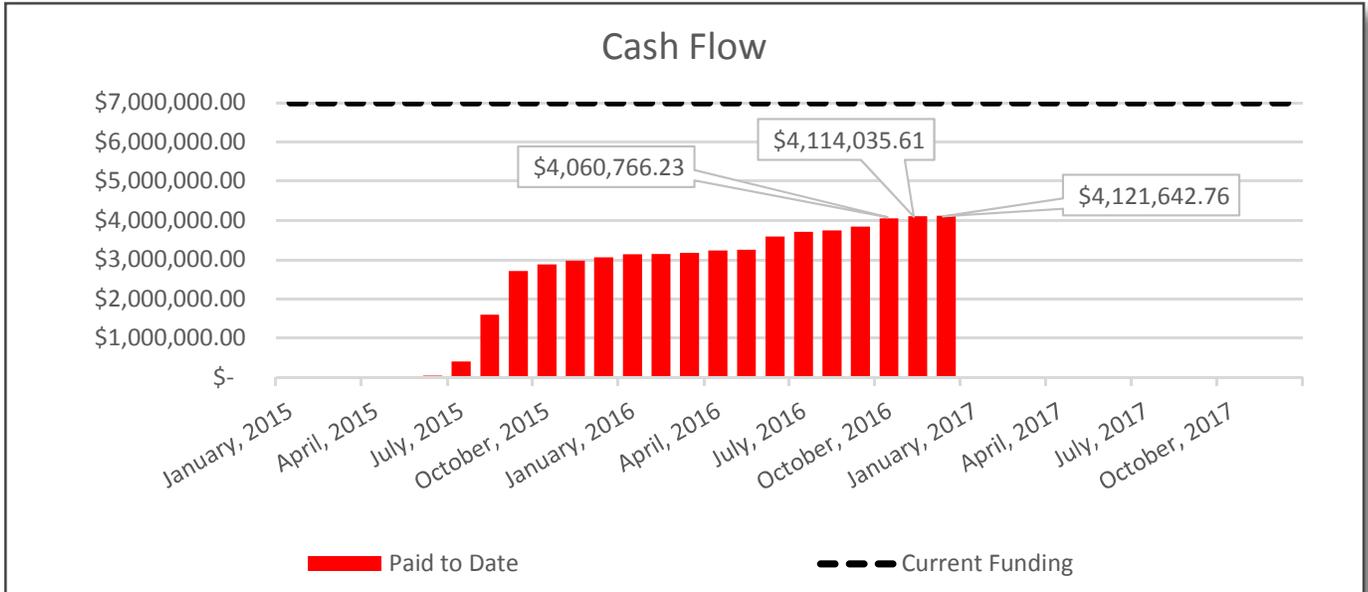
700 BUILDING RENOVATION & ADDITION AT WLHS
Q4 2016



PERFORMING ARTS RENOVATION & ADDITION @ WHS

Q4 2016





The first major wave of student device updates was completed in the summer of 2015. The next large-scale device update is currently planned for summer of 2017. The primary purpose of staggering these updates is to disperse the financial load of updating obsolete devices across multiple fiscal years. The second goal is to ensure that some current devices are available and in use at all times. The third reason is to balance staff time between installing new devices and routine summer maintenance operations.

Recent Activities:

- Server Updates
- County Fiberoptic Internet Upgrades
 - Sunset Primary
 - Athey Creek Middle
 - Stafford Primary
 - Rosemont Ridge Middle
 - Lowrie Primary
- Device Updates
- WAN Updates

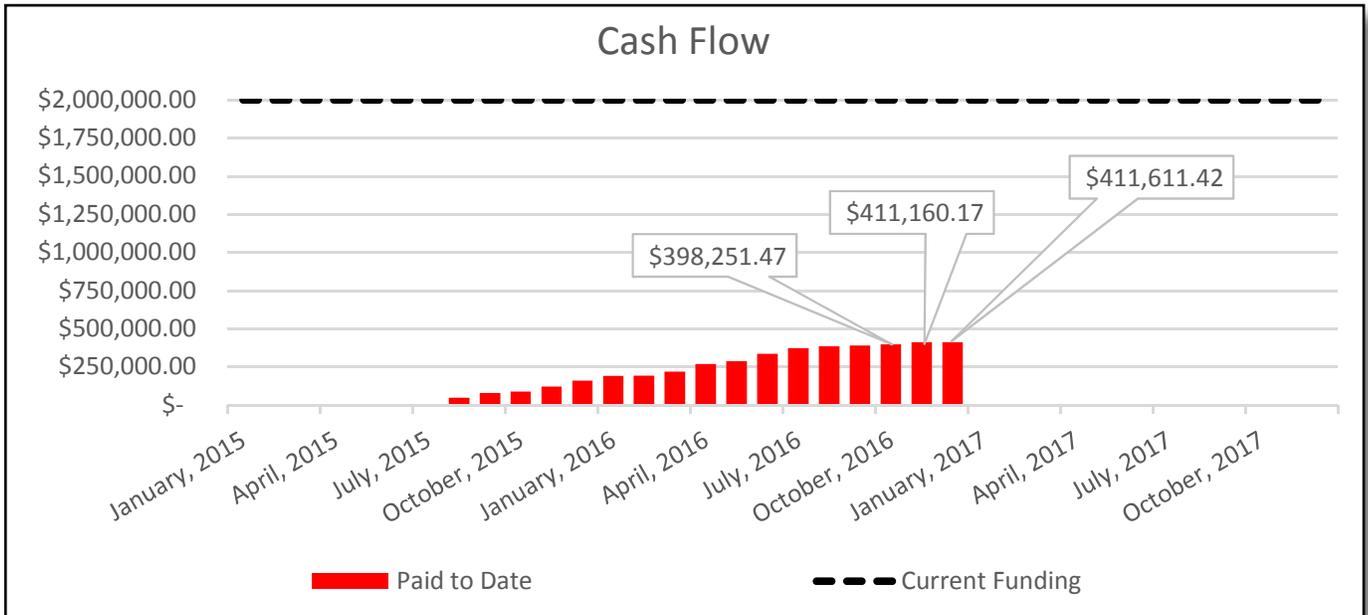
Upcoming Activities:

- WAN Updates
- Planning for summer 2017 district-wide rollout
- Planning for rollout at two new schools



SAFETY & SECURITY

Q4 2016



West Linn-Wilsonville School District is committed to creating and maintaining safe, secure facilities for students, staff and patrons as a partnership with our community, neighboring school districts, area law enforcement and emergency responders. Our schools have been assessed for safety related corrections and has identified the following specific improvements for each unique school facility.

- Building Communication Systems
- School Entrance Security
- Door Hardware and Locking
- Safe Classroom Accommodations
- School-grounds Exterior Security Measures
- Limited Video Surveillance
- Lighting and Controls

Recent Activities:

- The district-wide safety assessment provided by Elert & Associates recommended a number of safety improvements across the District. Bond premium and interest funds in the amount of \$1.5 million have been allocated to complete a number of the recommended improvements.
- A draft emergency response plan was received and is under review
- Review of Federal and State law and policy
- Safety reviews of new project designs

Upcoming Activities:

- Launch design for fencing at Cedaroak Park Primary
- Continue review of Federal and State law and policy around school safety.

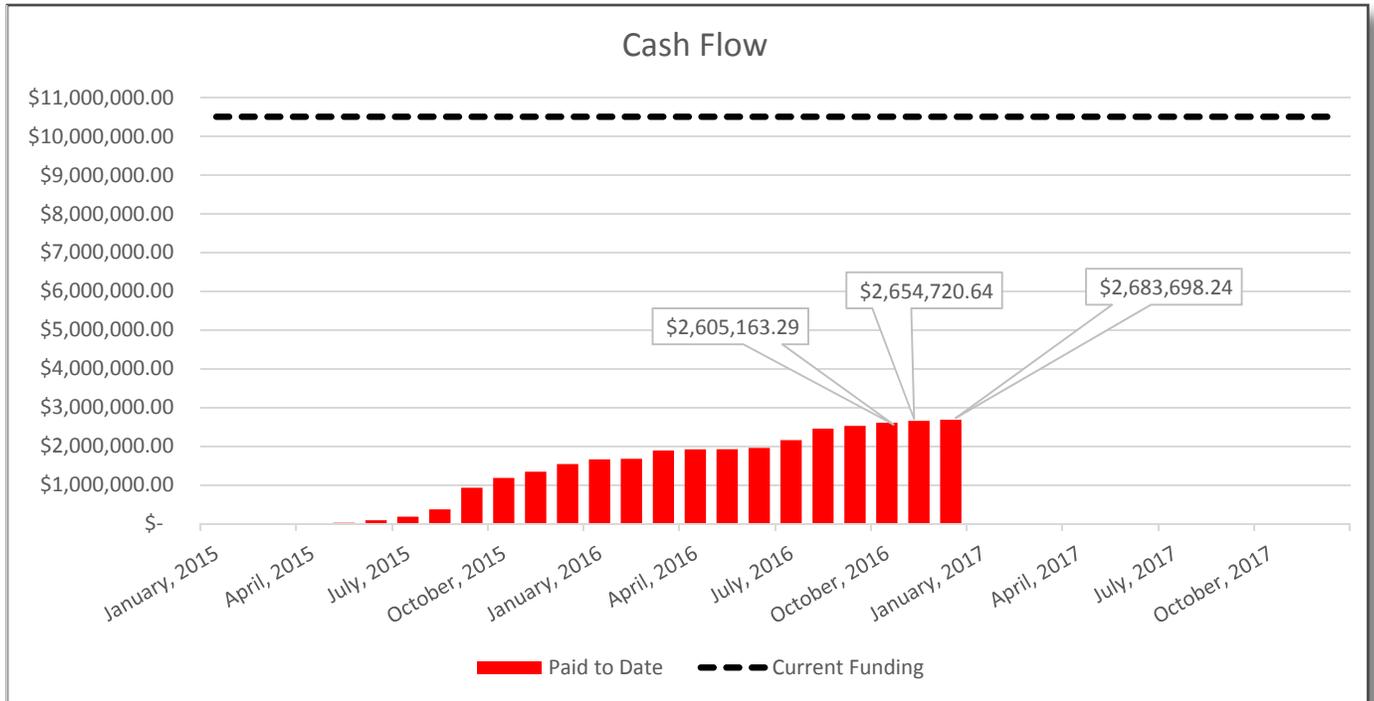


DISTRICT-WIDE IMPROVEMENTS

Q4 2016

This category of projects represents work at all district sites that has been identified over time as improvements that response to life-cycle replacement, upgrades required by code, changes in instructional models, growth in activity participation and obsolescence. Active and upcoming projects under this bond component will be listed below.

The construction market conditions that impacted the major projects have had a similar impact on the district-wide improvements. Additionally, some district-wide improvements weren't originally funded due to limited bonding capacity. Bond premium and interest funds in the amount of \$3.5 million have been allocated to adequately fund the promised projects as well as a number of additional projects.



15008 - Drainage & Play Equipment @ RR, ST, WM

| School | Task | Status |
|--------------------|-------------------------|----------|
| Rosemont Ridge | Baseball field drainage | Complete |
| Rosemont Ridge | Play equipment | Complete |
| Stafford Primary | Playground drainage | Complete |
| Stafford Primary | Play equipment | Complete |
| Willamette Primary | Play equipment | Complete |

Notes:

This project is complete.



DISTRICT-WIDE IMPROVEMENTS

Q4 2016

15011 – Select Restroom Renovation @ BC, ST, WLHS

| School | Task | Status |
|----------------|----------------------------|-----------|
| Boeckman Creek | Select Restroom Renovation | Complete |
| Stafford | Select Restroom Renovation | Complete |
| West Linn | Select Restroom Renovation | Postponed |

Project Status:

The work at West Linn High School will be more complex than anticipated and has been postponed pending completion of the new school projects.

16020 – Roofing Replacement @ D-W

Project Status:

This project includes roofing replacement at several schools across the school district. A professional building envelope consultant has been brought on board to coordinate review and design alongside district maintenance staff. The project will bid in the spring and be completed summer 2017.

16041 – Enclosure @ TCPS

Project Status:

This project includes the enclosure of two outdoor learning spaces to improve the usability of the spaces during inclement weather. The design is complete and the project will go out for bid in January 2017.

16044 – Middle School Refresh

Project Status:

This project includes a variety of interior finishes repairs and improvements at the three existing middle schools. The various improvements will be bid over the course of the spring and completed summer 2017.

16046 – Entry @ WHS

Project Status:

This project includes changes to the front entry and approach to the front entry for improved safety and security. The project is currently in design and may be constructed summer 2018.

17031 – Lighting Replacement @ D-W

Project Status:

This project includes energy efficient lighting replacements at several schools across the school district. The emphasis is on replacing outdated and inefficient gymnasium and commons lighting with new LED fixtures which have proven successful at the high schools. This project will bid in the spring and be completed summer 2017.

16043 – Renovation @ DOC

Project Status:

This project includes the relocation of the existing carpentry shop, and expansion of operations space to accommodate department needs.

CONSTRUCTION TERMINOLOGY

Q4 2016

Design Phases:

Education Specification Group Planning: This phase involves activities that focus on research and preliminary concept studies to develop a course for the project design to follow. Examples of activities include the Design Team developing an understanding of the District and needs of the project through:

Confirmation of existing conditions, preliminary concepts and visioning, Lessons learned, and refinement of project scope, space requirements, schedule and budgets.

The role of the Ed Spec Group is to provide input to the Design and Management Team during early Design phases on projects that involve significant changes to the existing facilities or are new construction. The Group is made up of both internal and external stakeholders such as Teachers, Parents, and community members.

Schematic Design (SD): Schematic Design centers around refinement of design options developed from conceptual ideas into preliminary designs. During SD, preliminary design elements are developed include general building orientation, gross square footage and initial internal configurations, and overall project scope continues to be refined.

Design Development (DD): The firming up of the design takes place during the DD phase. Major systems are thoroughly designed/engineered, internal elevations are developed, coordination between building systems and components are coordinated, major conflicts are identified and resolved, a detail cost estimate is developed, and schedule evaluations are conducted.

Construction Documents (CD): The purpose of CDs is to finalize all the technical aspects of the design. Major design changes should be complete at this point and the Design Team should be focused on the details in order to ensure conflicts in the design are resolved before the project is put out for public bidding.

Contractor Selection Methods:

Prequalification: Qualifications based selection is a method that allows a public agency to pre-select qualified contractors that will be allowed to participate in the competitive bidding process for a project. A qualifications based process will provide a select pool of bidders that demonstrate all the key qualities the District feels are critical to a successful contractor, such a K-12 experience, knowledgeable and skilled site staff and solid background in working on intricate and complex projects. This pool of bidders would then compete in a traditional bid process to select the firm to build the project.

Design-Bid-Build: The preferred procurement method of the District is a traditional method to select a general contractor. The contractor with the lowest complete bid will be awarded the project.

Permit Phases:

Permitting: The permitting phase of a project begins early in the project design and continues into construction.

Land Use Process: Major developments must go through a land use process. This phase of permitting typically involves a submittal of a planned development to a governing body such as a development review board through a land use or conditional use permit application. During this process the community is encouraged to comment in public session and staff creates recommendations and conditions for the approval.

General Building Permit: Following the land use process, the building permit will include compliance conditions received and accepted during land use process. The building design is reviewed for compliance with city building code and a permit is issued when comments have been addressed and the design approved.