



West Linn – Wilsonville Schools

LONG RANGE PLANNING COMMITTEE

AGENDA

October 25, 2011

7:00 pm, District Board Room

1. Check-In
2. Position Vacancy Tim
3. LRPC Financial Report Mike (handout)
4. Capital Program Review Tim
 - a. Trillium Creek Primary
 - b. Lowrie Primary
5. Active Project Status/Strategy Tim
 - a. +/- 32 projects
6. Update the Long Range Plan Tim/Keith
7. Sept 30 Enrollment Report Tim (handout)
8. Art Tech HS facility update Tim
9. Primary Boundary update Tim/Doris
10. Anything else?

Next LRPC Meeting: Tuesday, November 29th, Admin Board Room

Department of Operations

Mail: P.O. Box 35 • West Linn, Oregon 97068 • 503-673-7995 Fax 503-638-9143 • www.wlww.k12.or.us

Location: 2755 SW Borland Road, Tualatin, Oregon 97062

WEST LINN-WILSONVILLE SCHOOL DISTRICT

STUDENT ENROLLMENT REPORT

Enrollment Totals from Schoolmaster

9/30/11

School	K	1	2	3	4	5	6	7	8	9	10	11	12	Total Ct.
Athey Creek							191	208	203					602
Inza Wood							223	239	244					706
Rosemont Ridge							225	209	258					692
Boeckman Creek	84	102	114	120	95	116								631
Bolton	29	50	46	50	51	43								269
Boones Ferry	139	136	151	135	114	148								823
Cedaroak Park	59	75	66	73	68	72								413
Stafford	70	88	87	86	88	106								525
Sunset	48	76	73	69	68	75								409
Willamette	86	99	87	117	98	122								609
Art Tech High S.										11	27	24	24	86
West Linn High S.										362	406	349	389	1506
Wilsonville High S.										283	285	255	261	1084
Three Rivers Chrt S.					19	21	22	19	23					104
Total	515	626	624	650	601	703	661	675	728	656	718	628	674	8459
9/30/2010	570	648	634	602	687	663	669	723	627	711	632	688	643	8497
6/30/2011	563	635	644	604	693	656	675	710	629	695	625	664	621	8414
9/30/2009	585	602	580	688	646	650	718	628	691	652	685	654	627	8406
6/30/2010	589	608	579	680	654	657	714	617	687	637	668	634	610	8334

DISTRICT CAPACITY VS ENROLLMENT

This chart shows district-wide actual enrollment to date, projected enrollment at the growth rate(s) as shown, and capacity based on the class-size model described above.

Capacity		Enrollment		Projections						
Primary	CAP	2006	2007	2008	2009	2010	2011	2012	2013	2014
BOECKMAN	498	584	560	572	584	596	609	621	634	648
BOONES	633	778	774	790	807	824	841	859	877	895
Total WV		1362	1334	1362	1391	1420	1450	1480	1511	1543
Avail Cap	1131	-231	-203	-231	-260	-289	-319	-349	-380	-412
BOLTON	282	282	282	283	285	286	288	289	291	292
CEDAROAK	409	392	403	405	407	409	411	413	415	417
STAFFORD	520	559	572	575	578	581	584	586	589	592
SUNSET	479	462	429	431	433	435	438	440	442	444
WILLAMETTE	495	608	615	618	621	624	627	631	634	637
Total WL		2303	2301	2313	2324	2336	2347	2359	2371	2383
Avail Cap	2185	-118	-116	-128	-139	-151	-162	-174	-186	-198
Tot. K-5	3316	3665	3635	3675	3715	3756	3797	3839	3882	3926
Total Avail Cap		-349	-319	-359	-399	-440	-481	-523	-566	-610

Footnotes:

1. Wilsonville annual enrollment growth is projected at 2.1%
2. West Linn annual enrollment growth is projected at .5%.
3. Preschools are calculated at one or two per school.
4. Stafford preschool would be in Annex and will not change current capacity.
5. ELL classrooms are: one at BC; two at BF; one at Wood.

Capacity		Enrollment		Projections						
Middle	CAP	2006	2007	2008	2009	2010	2011	2012	2013	2014
WOOD	640	664	685	699	714	729	744	760	776	792
Avail Cap	640	-24	-45	-59	-74	-89	-104	-120	-136	-152
ATHEY	624	585	568	571	574	577	579	582	585	588
ROSEMONT	668	660	674	677	681	684	688	691	694	698
Tot. Cap	1292	1245	1242	1248	1254	1261	1267	1273	1280	1286
Avail Cap		47	50	44	38	31	25	19	12	6
Tot. M.S.	1932	1909	1927	1948	1969	1990	2011	2033	2056	2078
Total Avail Cap		23	5	-16	-37	-58	-79	-101	-124	-146

Capacity		Enrollment		Projections						
High	CAP	2006	2007	2008	2009	2010	2011	2012	2013	2014
WHS	1472	1013	1036	1058	1080	1103	1126	1149	1174	1198
Total Cap.	1472									
WLHS	1748	1549	1558	1566	1574	1581	1589	1597	1605	1613
Tot. Cap.	1748			182	174	167	159	151	143	135
Tot. H.S.	3220	2562	2594	2624	2654	2684	2715	2747	2779	2812
Total Avail Cap		658	626	596	566	536	505	473	441	408
Tot. Dist.Enrol.		8136	8156	8246	8337	8429	8524	8619	8717	8816

To interpret this chart, as an example; this Fall 2007, primary schools in Wilsonville were 203 students over capacity; and in West Linn, 116 students over capacity for a total district over-capacity of 319 primary students.

WEST LINN-WILSONVILLE SCHOOL DISTRICT LONG RANGE PLANNING COMMITTEE

2008 BOND PROGRESS REPORT FOR THE THIRD QUARTER, 2011

In November 2008 the voters of the West Linn-Wilsonville School District passed a \$98,000,000 capital improvement bond to finance school construction, remodeling and various upgrades throughout the district. This report measures what we said we would spend and what we have actually spent. The School District is currently projecting expenses equal to our budget.

FUNDING SOURCES

Funding Sources	Original Funding	Prior Funding	Current Funding
Bond Proceeds	98,000,000.00	98,000,000.00	98,000,000.00
Bond Premium	0	2,355,736.85	2,355,736.85
Interest Revenue	0	1,300,000.00	1,000,000.00
Partnerships	0	108,000.00	112,041.00
Grand Totals	98,000,000.00	101,763,736.85	101,467,777.85

DISCUSSION

We have more money than the \$98,000,000 because the bond was sold at a premium of \$2,355,736.85. This is the difference between the "coupon" interest rates and the market interest rates when the bond was sold. In addition, we expect to earn interest of \$1,000,000 (Note: Interest Revenue is lower than initially expected because of current market conditions). Partnerships increased to \$112,041 this quarter because of work with the Energy Trust of Oregon in the area of sustainability.

PROJECT SOFT COSTS

Soft Costs are those costs associated with the bond work but not directly associated with capital equipment and "bricks and mortar"; that is, they are costs such as consulting services which might include outside planning, engineering, architectural, environmental and a host of other consulting services needed when the school district does not have the in-house expertise to complete complex projects. Soft costs also include expenses for permits, insurance, printing, advertising, and office expenses (among others).

	Original Budget	Current Budget	% Over / (Under) Original Budget	Estimate At Completion (Q3 2011)	Over / (Under) Budget	% Over / (Under) Current Budget
Project Hard Cost						
Subtotal	78,400,000.00	80,802,036.36	3.1%	80,802,036.36	0	0
Percentage of						
Total	80.00%	79.63%		79.63%		
Project Soft Cost						
Subtotal	19,600,000.00	20,665,741.49	5.4%	20,665,741.49	0	0
Percentage of						
Total	20.00%	20.37%		20.37%		

Grand Totals	98,000,000.00	101,467,777.85	3.5%	101,467,777.85	0	0
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DISCUSSION

In 2007/08, during Bond planning, the accepted standard for soft costs as a percent of total costs was 20%. There is every reason to now believe that soft costs will be 20% of total cost.

PROJECT HARD COSTS

Hard costs are the costs of capital equipment and "bricks and mortar". They include those things you can see, touch, and feel including buildings, equipment, pipes, books, school furniture, and many other tangible items.

	2008 Estimate	Current Budget	% Differenc e Current Budget to 2008 Estimate	Estimate At Completion (Q3 2011)	Current Over / (Under) Budget	% Over / (Under) Budget
New Wilsonville Primary School	27,000,000.00	26,862,513.45	(0.5%)	26,862,513.45	0.00	0.0%
New West Linn Primary School	28,000,000.00	26,099,435.90	(6.8%)	26,099,435.90	0.00	0.0%
New Library at Stafford Primary	2,000,000.00	1,556,501.21	(22.2%)	1,556,501.21	0.00	0.0%
New Library at CedarOak Park Primary	2,000,000.00	1,556,501.21	(22.2%)	1,556,501.21	0.00	0.0%
Site Athletic Improvements	4,000,000.00	4,285,080.88	7.1%	4,285,080.88	0.00	0.0%
New District Storage/Freezer	2,000,000.00	1,692,250.65	(15.4%)	1,692,250.65	0.00	0.0%
Library Renovations	2,000,000.00	1,644,813.99	(17.8%)	1,644,813.99	0.00	0.0%
Kitchen Remodels	3,000,000.00	2,387,739.49	(20.4%)	2,387,739.49	0.00	0.0%

Remodels at Bolton Primary	2,000,000.00	1,556,501.21	(22.2%)	1,556,501.21	0.00	0.0%
New School Planning and Design	4,000,000.00	2,305,955.70	(42.4%)	2,305,955.70	0.00	0.0%
District-Wide Technology	7,000,000.00	7,000,000.00	0.0%	7,000,000.00	0.00	0.0%
Deferred Maintenance	15,000,000.00	24,520,484.15	63.5%	24,520,484.15	0.00	0.0%
Totals	98,000,000.00	101,467,777.85	3.5%	101,467,777.85	0.00	0.0%

DISCUSSION

1. It should be noted that all Component's "Current Budget" and "Estimate to Completion" are now the same. We are at that point in the Bond Cycle where both final budgets (based on greater knowledge regarding interest income) and final costs can be accurately estimated.
2. Work on the two new Primary Schools is proceeding according to plan. The bids for these schools were very favorable and both schools should be completed at a cost lower than originally budgeted.

West Linn-Wilsonville School District
LONG RANGE SCHOOL FACILITIES PLAN UPDATE
Discussion Draft – 10.25.11

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District Boundaries and Facilities

PURPOSE OF THE PLAN

Capital Improvement Planning
Agency Coordination
Public Information

COMMITMENT TO EXCELLENCE

Vision Themes

District Programs

- Basic Curriculum
- Early Childhood Education
- Optional All-day Kindergarten
- Alternative Education
- Personalized Special Need Education
- Teaming
- Innovative and Accommodating Facilities

PRIMARY PLANNING CONSIDERATIONS

Growth: The Key Challenge

- Long Range Planning Committee
- Understanding Future Development Trends
- Anticipating Future Facility Needs

Balancing Enrollment Growth and Capacity

PLANNING FOR FUTURE SCHOOL FACILITIES NEEDS

Summarize in plan/detail in Appendix A

Evaluating School Facilities

- Educational Capacity
- Current Enrollment
- School Capacity and Design

Existing District Facilities

- Primary Schools
- Middle Schools
- High Schools (including Art Tech)
- Three Rivers Charter School

Alternative Educational Facilities or Programs?

- K – 8
- Magnate schools

UNDERSTANDING FUTURE LAND USE AND REDEVELOPMENT

Summary in plan/detail in Appendix B

Metro and the Urban Growth Boundary

- Region 2040
- Future Urban Expansion

City of West Linn

- Comprehensive Plan
- Development Potential

City of Wilsonville

- Comprehensive Plan
- Development Potential

Clackamas County

- Comprehensive Plan
- Development Potential

SCHOOL NEEDS AT FULL DEVELOPMENT

Summary in plan/detail in Appendix C

Future Growth Assumptions

Full Development – Existing Zoning and UGB

Full Development – Existing Zoning and UGB Expansion in Stafford Basin (perhaps focus on Wilsonville instead)

Full Development – Existing Zoning and All UGB Expansion Areas

METHODS FOR PROVIDING ADDITIONAL SCHOOL CAPACITY

Permanent Alternatives for Addressing Long Term Capacity Needs

Transition Alternatives for Addressing Short Term Capacity Needs

Potential Alternatives

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NEXT STEPS

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Appendix A – Planning for future School Facility Needs

Appendix B – Understanding Future Land Use and Redevelopment

Appendix C – School Needs at Full Development

Appendix D - School Site Selection Process

Appendix E - School Bond Process

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