

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

**Overview**

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

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

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

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

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

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

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

## **Review of Completed and Scheduled Projects:**

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

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

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

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

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

## **Review of Changes from the Original Proposed Projects:**

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

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

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

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

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

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

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

### **Description of Task Force Activities:**

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

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

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

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

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

### **Summary of Task Force Options**

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

#### **Option A (17 campuses)**

2 High Schools

3 Middle Schools (6-8)

1 K-8 School (Ruch), and

11 Elementary Schools (K-5)

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

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

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

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

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

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

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

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

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

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

**Option B (16 campuses)**

2 High Schools

14 "Elemiddle" Schools (K-8)

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

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

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

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

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

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

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

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

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

**Option C** (17 campuses)

2 High Schools

1 Middle School (6-8)

7 "Elemiddle" Schools (K-8)

7 Elementary Schools (K-5)

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

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

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

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

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

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

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

**Option D** *(current configuration, 18 campuses)*

2 High Schools

2 Middle Schools (7-8)

14 Elementary Schools (K-6)

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

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

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

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

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

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

**Comment on Task Force Options:**

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

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