

**Oakwood City School District
Master Facilities Plan Report
Submitted Oct. 8, 2018**

EXECUTIVE SUMMARY

The goal of the Oakwood City School District Master Facilities Plan is to ensure the District's facilities remain safe, dry and secure, and also support the educational and instructional needs of current and future generations of Oakwood students and staff.

Although academics are always first and foremost in Oakwood, District officials cannot ignore the growing needs of the facilities, which are, on average, more than 90 years old. The school buildings are well maintained, as two independent design and engineering firms verified, but the cost associated with continuing to maintain and to repair aging buildings and their mechanical systems continues to rise. In an effort to control those costs and prevent classroom funds from being diverted to cover the facilities' needs, the Oakwood Board of Education directed the administration in 2017 to engage in a community-centered facilities planning process.

The Oakwood City School District Master Facilities Plan Report documents the nearly two years of assessment, research, discussion and feedback that has taken place. The resulting recommendation to the Board of Education is a long-term, financially sensible plan, in which current facilities will be kept (not torn down), strategically maintained, updated and renovated in four phases during the next 20 years.

This four-phase plan provides the facilities that enable our students to have the best educational environment and Oakwood citizens to have the schools they want. We heard loud and clear our community's desire to keep the current buildings and we developed this plan by merging key aspects of the various proposed options. The Master Facilities Plan recommendation prioritizes renovation first, while continuing to encourage community input and feedback as the four phases are implemented.

The phases are:

- **Phase 1: 2019 - 2023 = Approximately \$19m+**
 - Focuses on prioritized foundational infrastructure (plumbing, electric, HVAC, roofing, ADA, security, etc.) at the JH/HS based on the Technical Building Assessment Report dated Sept. 4, 2018.
 - Includes targeted infrastructure at Smith and Harman to address critical upgrades
 - Allows for select performing arts upgrades
 - Funding is recommended to be through a combination of a reasonable bond levy and private donations

- **Phase 2: 2025 - 2028 = Approximately \$25m**
 - Focuses on renovations to Smith and Harman with prioritized infrastructure upgrades (mechanical, electrical, plumbing, security, ADA). Consider options to deal with space constraints in these buildings.
 - Continuing targeted infrastructure work at JH/HS

- Funding is recommended to be from a combination of local, state and private money, including permanent improvement funds and Ohio Facilities Construction Commission (OFCC) dollars.
- **Phase 3: 2030 - 2033**
 - Explore concept of Early Learning Center and shared community spaces
- **Phase 4: 2035 - 2038**
 - Investigate concept of major renovations and additions to JH/HS Campus

The details of the community-centered facilities planning process, the corresponding assessments, images, feedback and phasing recommendations are contained in this report.

We would like to thank everyone who participated in the planning process and demonstrated a commitment to Oakwood Schools and creating a Master Facilities Plan to enhance effective learning environments for the present and the future.

INTRODUCTION

The Oakwood City School District has reached the end of a nearly two-year, three-phase Master Facilities Plan process with the goal of using professional building assessments and community feedback to craft a long-term, financially sensible plan for dealing with aging school buildings.

The District's legacy is built on the principle of "doing what is best for students" and taking a leadership position in education around the region and state. Oakwood City School District focuses on continuous improvement and adapting to the changing needs of students, seeking to fulfill the District vision of creating graduates who are prepared, proud and poised.

Introductory Information

- District has beautiful old buildings that have served the District well
 - Harman 1908 (109 years old)
 - Lange 1922 (95 years old)
 - High School 1924 (93 years old)
 - Smith 1929 (88 years old)
 - Junior High School 1932 (85 years old)
- 2002 Bond issue primarily addressed space constraints. Tens of millions of dollars of infrastructure improvements were deferred at that time.
- District needs a long-term plan to ensure future utilization of buildings.
- All options were considered, ranging from building replacements or partial building replacements, transforming existing buildings and renovating existing buildings.
- A Request for Qualifications (RFQ) Process to engage professionals to help guide the process was utilized. The team of Ruetschle Architects/Emersion Design/Fanning Howey was selected.
- District's team of consultants plus OFCC engineering consultants were used as two sources for costs associated with replacement, maintaining, renovating and repairing.

BACKGROUND

The District's buildings have a cumulative appraised value of more than \$100 million. The buildings, which have an average age of 90 years old, are currently maintained on a year-by-year basis. Community members, staff, administration and Board members believe the District should take a proactive approach to allow for future efficiencies and long-term planning. The planning process identified significant deficiencies with deferred maintenance items and a limited capacity for flexibility in District buildings.

Programmatic Considerations and Goals

- School facilities to support educational and instructional needs of current and future generations
- Flexible educational spaces, including small group space
- Increase options for community use
- Increase performing arts practice/learning spaces

- ADA improvements
- Security upgrades
- Indoor athletic practice space

BOARD AND ADMINISTRATION COMMITMENT

The Board believes focusing on a Master Facilities Plan is essential to the long-term financial health of the District and the future learning opportunities for students. As a main area of focus for the District, the process needed an approach that would include a variety of aspects, including employing a comprehensive analysis model to ensure the District maximizes the tax dollars spent on facilities today and tomorrow.

The Board of Education directed, from the outset, the Master Facilities Plan process be grounded in clear and transparent communication, provide ample opportunities for community members to become engaged and provide feedback. The District launched a concerted effort to inform and to involve as many residents as possible using all of the tools at its disposal.

Board Expectations

- Community driven process with multiple opportunities for input
- Transparent and open process
- Taking the necessary time to develop the right plan
- Including valid data points from multiple sources
- Communicating through a variety of methods and techniques to share and to gather input
- Including credible data and assessments to produce the best outcomes

PROCESS

The Board of Education members' expectations inspired the design of a three-phase process, spanning from June 2017 through May 2019.

- **Assessment Phase (Summer of 2017 - Fall of 2017)**
 - Facility Assessments
 - Educational Adequacy Assessments
 - Enrollment Projection Studies (2x)
 - Visioning
- **Options Phase (Winter/Spring 2018)**
 - Created and revised multiple options
 - Shared and gathered feedback through option workshops
- **Final Master Facilities Plan Report (Fall of 2018)**
- **Phasing Recommendation (Fall of 2018)**

- **Project Organization**
 - Core Team Meetings

- Planning Team Meetings
- Facility Advisory Committee Meetings
 - Options Work Sessions
 - Community Meetings

- **Community Engagement**
 - Online Visioning Questions – Nov. 2017 thru Jan. 2018
 - Community Meeting 1 – Assessments/Process Nov. 2, 2017
 - Community Meeting 2 – Assessments/Process Jan. 16, 2018
 - Community Meeting 3 – Listening Session Jan. 29, 2018
 - Options Work Sessions (11 sessions) – Jan. thru Feb. 2018
 - Community Meeting 4 – Options Work Sessions Feb. 28, 2018
 - Community Meeting 5 – Listening Session March 21, 2018
 - Planning Team Meetings and Facility Advisory Committee Meetings – Sept. 2017 thru Feb. 2018
 - Multiple meetings with students (Principal/Superintendent's Advisory Council)
 - Multiple meetings with staff at each building Sept. 2017 - Present
 - District website via online questions/comments Nov. 2017 - Present
 - Online communication/satisfaction surveys May thru July 2018

- **Media Coverage**

The district has worked with *The Oakwood Register*, *The Dayton Daily News* and other area media to provide approximately 20 stories about or relating to the Master Facilities Plan process during the past two years.

- **Electronic Media**

The district has sent regular emails to district families and community members, as well as frequent updates on the District website and social media platforms. Master Facilities Plan documents, feedback and meeting videos are archived on the website at <https://www.oakwoodschoools.org/district/master-facility-plan> for the public to review.

ASSESSMENT PHASE

The Assessment Phase began with the launch of the Master Facilities Plan process in June 2017 and concluded seven months later.

The design team selection process started with a public Request for Qualifications which was sent to firms, with expertise in working with school districts and communities during a master planning process, across the state. The list of interested firms was narrowed and District administration and Board of Education members then interviewed representatives from four firms.

At the completion of the selection process, District leaders engaged the services of Ruetschle Architects, Emersion Design and Fanning Howey. Members of each firm came together to form the design team to help lead community members through the three-phase process.

Once selected, the design team began its own facilities assessments, comparing results to the OFCC assessment completed at no cost to the district in late 2017. Although the OFCC assessment was extremely valuable, it did not include several types of spaces essential to District operations, such as performing arts venues, athletic sites, parking lots and playgrounds. District officials asked the design team to verify and to expand on the OFCC findings to include these spaces, developing a complete picture of the District's facility needs.

In addition, the design team conducted an educational adequacy assessment of each school building. The team spent time observing qualities of the schools directly related to the student experience, such as security, classroom size, lighting, acoustics and collaborative space. Focus groups were held with Junior High and High School students and staff members, as well as Lange, Smith and Harman staff members, to better understand how district facilities were meeting the needs of students and staff.

The assessment phase also contained the first three community engagement sessions attended by more than 350 residents. Those in attendance were Oakwood Schools alumni, staff and students, parents and grandparents of current or future students, and community members without current connections to the schools. These events served as opportunities for community members to receive a firsthand update on the Master Facilities Plan process, ask questions and provide feedback.

Assessment Information

- OFCC Assessment, independent third-party evaluation of costs to renovate existing buildings to state standards
- Fanning Howey Assessment – 5, 10, 20 yr Renewal Index
 - Lange
 - Smith
 - Harman
 - Junior High/High School
 - Mack Hummon Stadium
 - Board Office
- Fanning Howey Detailed Assessment
 - Junior High/High School
- Educational Adequacy Assessment
 - Safety and security
 - Educational environment (ex. classroom size, lighting)
 - Site condition
 - Mechanical Systems
 - Plant maintainability

- Staff Meetings and Staff Survey
- Enrollment Projections projected thru 2027
- Existing Building Capacity Study
- Community Meeting 1 – Assessments/Process Nov. 2, 2017
- Community Meeting 2 – Assessments/Process Jan. 16, 2018
- Community Meeting 3 – Listening Session Jan. 29, 2018

- **Visioning Questions**

Visioning questions were born out of input received from teachers and District leaders during the early part of the Assessment Phase. The questions were intended to be provocative and to introduce key topics that emerged from the Assessment Phase, to ultimately lead to master plan options. The questions were introduced at Community Meeting 1 (Nov. 2, 2017) and posted online with the opportunity for stakeholders to post their comments. More than 600 comments were received. Those comments can be found in the attachments to this report.

The Visioning Questions were:

- Should Lange remain a stand-alone building, or should kindergarten be included with the other early elementary grades?
- Would you support separate primary and intermediate school buildings?
- Would you prefer a 6-8 Middle School or a 7-8 Junior High?
- What do you think about having a single PK-12 campus?
- What do you think about a new district performing arts center?
- Would you support enhancements to our athletic facilities and / or the development of a new health and wellness center?
- Would you support relocation of athletic fields and Mack Hummon stadium in order to address site constraints issues?
- Would you support partial or full demolition of our existing school buildings (s) in order to develop new facilities that support current best practices in education?

- **Assessment Phase Conclusions**

- **Lange**
 - Key Attributes
 - The “Lange Experience”
 - Energetic and child centered environment
 - Unintimidating and nurturing
 - Key Concerns
 - Site size/access

- Main entry security
- Classroom size
- Shared multipurpose space (PE, Music, Student Dining)
- Outdoor learning environment
- **Smith**
 - Key Attributes
 - Site location/access/adjacency to Wright Library
 - Architectural character
 - Gym size/flexibility
 - Large art and music rooms
 - Beautiful library
 - Key Concerns
 - Classroom size
 - Lack of varied sized spaces to accommodate large group and small group learning
 - Cafeteria size
- **Harman**
 - Key Attributes
 - Character/History/Warm and welcoming environment
 - Classroom size and storage
 - Dedicated performance space
 - Key Concerns
 - Site size/circulation/access
 - Lack of varied sized spaces to accommodate large group and small group learning
 - Gym size
 - Cafeteria size
 - Playground accessibility
- **Junior High/High School**
 - Key Attributes
 - Iconic frontage on Far Hills
 - Warm and welcoming environment
 - History/Character
 - Library
 - Dedicated performance space
 - Key Concerns
 - Site access
 - Heating, ventilation, air conditioning inconsistencies and reliability
 - Junior High classroom size

- Lack of varied sized spaces to accommodate large group and small group learning
- Size, volume and treatment of performing arts rehearsal spaces
- Size of student dining room, kitchen prep and serving area


OPTIONS PHASE

During the Options Phase, the design team worked with community groups, students, staff and other various stakeholders, representing a range of community voices, to create and to review a variety of options ranging from repair, to renovate, to rebuild. These options were presented for feedback during a number of meetings and refined throughout the process. Budget estimates and local tax impacts were given for each option to provide proper financial context for evaluating the options.

- **Options Work Sessions**
 1. Cabinet (Administrative Team), Jan. 5, 2018
 2. Board of Education Work Session 1, Jan. 8, 2018
 3. Athletic Boosters, Jan. 8, 2018
 4. JH/HS Staff, Jan. 16, 2018
 5. Lange, Smith, Harman Staffs, Jan. 16, 2018
 6. JH/HS Students, Principal/Superintendent's Advisory Committee, Jan. 19, 2018
 7. JH/HS PTO, Feb. 2, 2018
 8. Harman and Smith PTO, Feb. 5, 2018
 9. OBPA and Arts Bridge, Feb. 6, 2018
 10. Board of Education Work Session 2, Feb. 12, 2018
 11. Facility Advisory/Planning Team, Feb. 26, 2018
 12. Business Advisory Council Meetings, Jan. 22, 2018 & Feb. 26, 2018
 13. Open Community and Small Group Forum, Feb. 28, 2018
- The options shown in the figure below are the result of feedback received during the Options Phase. These options received the most support during the Options Work Sessions and are shown below as the Final Master Plan Options.

	Lange	Smith	Harman	JH/HS	Mack Hummon	concept budget range	mill range	\$/month per \$200K assessed home value
A	Renovate K, SC	Renovate PK,1-6	Renovate 1-6	Renovate 7-8, 9-12	Renovate	\$48M+	7.5+	\$44+
B1	-	*Add PK-K, Renovate 1-6	Renovate 1-6	Renovate 7-8, 9-12	Renovate	\$56M+	8.7+	\$51+
B2	-	*Add PK-1, Renovate 2-6	Renovate 2-6	Renovate 7-8, 9-12	Renovate	\$62M+	9.7+	\$57+
C1	Renovate K, SC	Renovate PK,1-5	Renovate 1-5	Renovate 6-8, BO	**New 9-12, New Stadium	\$94M+	14.7+	\$86+
C2	-	Renovate PK-4	Renovate K-4	Renovate 5-8, BO	**New 9-12, New Stadium	\$92M+	14.4+	\$84+
D1	-	*Add PK-K Renovate 1-5	Renovate 1-5	Renovate 6-8, BO	**New 9-12, New Stadium	\$102M+	16+	\$93+
D2	-	*Add PK-1 Renovate 2-6	Renovate 2-6	Renovate 7-9, BO	**New 10-12, New Stadium	\$97M+	15.2+	\$89+

Phasing to be determined



Master Plan Options

Master Facility Plan

* Wright Library / City of Oakwood approval
 ** Location of Softball and Baseball TBD
 millage: AV of \$336,353,170, 37 year term, 5% interest
 Costs in 2018 dollars




Figure 1 Final Master Facilities Plan Options

- During the options work sessions, additional options were presented and discussed but were eliminated due to substantive lack of support. Those options included grade banding at the elementary level, with Smith serving as PK-3 or PK-2 and Harman serving as a building with grades 4-6 or 3-5. While teachers and school leaders identified educational benefits with the grade banded options during the Assessment Phase, the community strongly opposed any options eliminating neighborhood elementary schools.

PHASING RECOMMENDATION

The recommendation calls for the Master Facilities Plan to be implemented in four phases during the next 20 years.

- **Phase 1: 2019 - 2023 = Approximately \$19m+**
 - The initial project will focus on the JH/HS in Phase 1, along with targeted infrastructure at Smith and Harman, and select performing arts upgrades:
 - The JH/HS is a larger building and has the greatest needs in terms of cost.
 - It has had the greatest expenses during the past several years for maintenance and repairs.
 - It serves the most students.
 - It serves all students eventually.

- There is a potential to earn OFCC credit to be used later in the process.

Phase 1 consists of:

- Prioritized foundational infrastructure (plumbing, electric, HVAC, roofing, ADA, security, etc.) at the JH/HS based on the Technical Building Assessment Report dated Sept. 4, 2018.
- Includes targeted infrastructure at Smith and Harman to address critical upgrades
- Allows for select performing arts upgrades

Funding for Phase 1 is recommended to be through a combination of a reasonable bond levy and private donations

- **Phase 2: 2025 - 2028 = Approximately \$25m**

- Focuses on renovations to Smith and Harman with prioritized infrastructure upgrades (mechanical, electrical, plumbing, security, ADA). Consider options to deal with space constraints in these buildings.
- Continuing targeted infrastructure work at JH/HS.

Funding is recommended to be from a combination of local, state and private money, including permanent improvement funds and OFCC dollars.

- **Phase 3: 2030 - 2033**

- Explore the concept of an Early Learning Center (PK-1) and shared community spaces
- During the Options Phase, there was support for relocating Lange (currently serving kindergarten) from its current location in the City of Kettering to Oakwood.
- Challenges in the current location include vehicular access, few walkers due to location and single grade level served in the building.
- The preferred site to relocate Lange was at Smith due to its location near Wright Library (supporting early childhood literacy) and most accessible public streets.
- The green space between Smith and Wright Library is one of the only remaining buildable locations in the City of Oakwood. The property is owned by the City of Oakwood, and currently leased to Wright Library.
- Future projects on this land would require a partnership between the City, Oakwood Schools and the library.

Funding for Phase 3 is recommended to be through a combination of public and private money.



Figure 2 Option B1 showing Concept for New Early Learning Center

- **Phase 4: 2035 - 2038**
 - Investigate concept of major renovations and additions to JH/HS Campus
 - During the Options Phase, there was support for constructing a new school building to address space constraints throughout the District.
 - In this option, 6th grade could move from Smith and Harman into a 6-8 Middle School located at the existing JH/HS. Moving 6th grade from the elementary schools would allow expansion of the academic space in those buildings. For example, Smith has many undersized classrooms in the 500+ sf range. This option would allow expanding classroom square footage.
 - The Board Office could move into excess space in the Middle School to eliminate the costs associated with renovating the existing Board Office on Rubicon Rd.
 - Mack Hummon Stadium could be reconstructed east of its current location on the site of the current baseball/softball fields. Since Lane Stadium has a brand new 8-lane all-weather track, a track is not shown at the future Mack Hummon Stadium site.
 - To address concerns about losing public walking space, a perimeter community walk/jog path could be located at the perimeter of the site.

- A new High School could be constructed and address current constraints in performing arts, student dining and flexible academic areas. The new building was envisioned to provide a new auxiliary gym, while the existing “Pit” would be used for varsity basketball games in the future.

Funding for Phase 4 is recommended to be funded through a combination of public and private money.

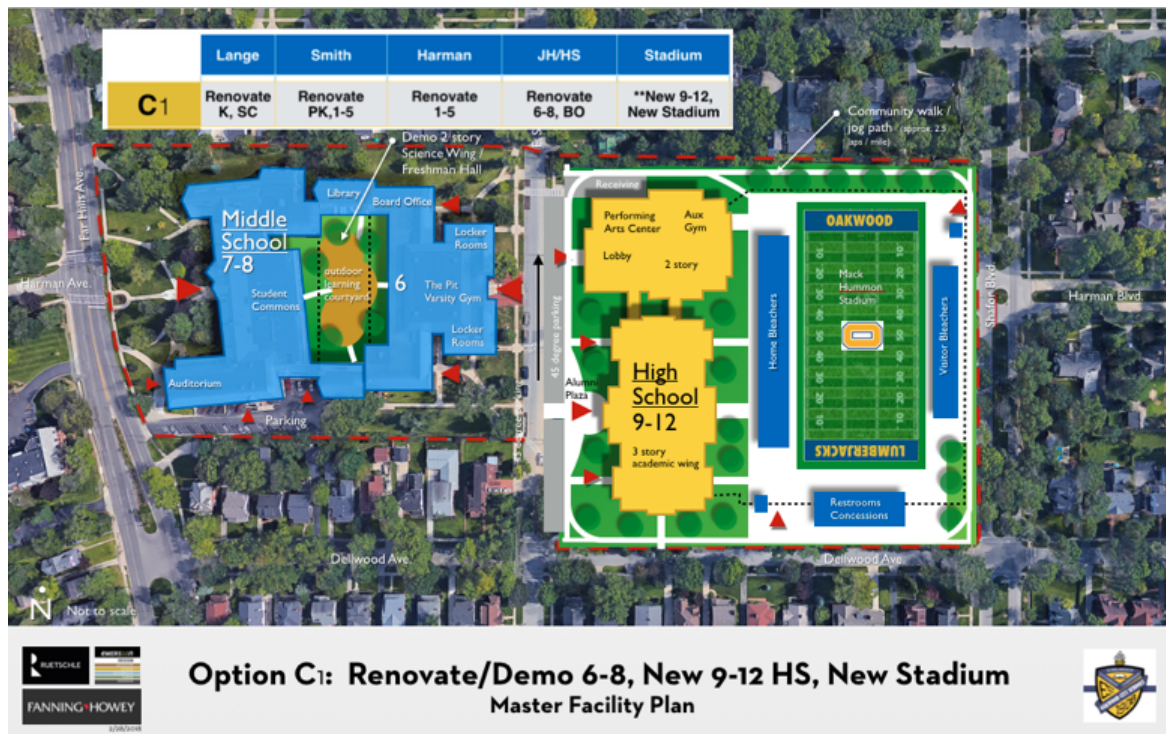


Figure 3 Option showing new JH/HS campus

CONCLUSION

By creating a community-driven process with multiple opportunities for input, providing valid data points from multiple sources and taking the necessary time to develop the right plan, we are confident this Master Facilities Plan, when implemented, will provide generations of Oakwood students with safe, secure, reliable and flexible spaces to learn and to develop the skills needed to achieve their life goals, take responsible risks and contribute to the greater good of the world.

Again, we would like to thank everyone who participated in the planning process and demonstrated a commitment to Oakwood Schools and creating a Master Facilities Plan to enhance effective learning environments for the present and the future.