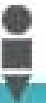


Long-Range Facilities Plan Update:

Community growth projections
and
Understanding value through
community engagement

Operations Work Group

July 18, 2016



Today's Agenda

1. Review **purpose of long-range enrollment projections**
2. Long-range projection **findings**
3. Review a few long-range projection **case studies**
4. Highlights of **recent community input** and engagement sessions
5. Outlining future **plans for community input** and engagement
6. Long-range **implications for facility planning**



Long Range Facility Plan Components

Community engagement informs the entire working process and plan

Understanding Values through Community Engagement

Attendance Areas Review

- Review policy
- Review boundaries
- Feeder Patterns
- Neighborhood schools
- Paired Schools
- Grade Configurations
- Transportation

Community Growth Projections

- School capacities
- Enrollment History
- Future projections
- Demographic changes
- Open enrollment
- Private/Parochial
- Charter schools
- Vouchers

Building Assessments

- Facility Condition
- Accessibility
- Safety & Security
- Air Conditioning & Energy efficiency
- Athletic facilities
- Community Use

Instructional Design

- HS Pathways
- Locations (DLI, 4K) & Alternative School Sites
- Schedule and Calendar
- Technology Readiness
- Personalized Learning

Long-range Facility Plan

Big Takeaways

1. District-wide enrollments will go up slightly and gradually over 20 years

- Increase by about **1,670 (or 6.2%)**
- Without more annexations, MMSD will reach **build-out after 20 years**

2. Memorial attendance area will gain about 1,120 students over the next 20 years

- La Follette area will gain about 460 students
- West area will gain about a 35 students,
- East area will decline slightly by about 20 students

3. A few elementary schools will see large increases over 20 years

- **Olson (+482), Kennedy (+130), Stephens (+125), Elvehjem (+83)**
- Others are stable with declining household size offsetting gains through new development
- No elementary schools will see major enrollment losses

Big Takeaways

4. Some student demographics will change over 20 years

- Based on five most recent years of actual change...
- **Students of color** will increase from **57% today to 62% in 2036-37**
- Most of this growth will be among Hispanic students (from 20.5% to 29.8%)
- **ELLs** will decrease slightly from **23% today to 19% in 2036-37**
- Low income students will remain steady around 48%
- While percentages may decrease or remain steady, the **number of students in these groups will increase**

5. Unknowns can have big impacts

- **Isthmus neighborhoods** could get hot and market shift could cause young families to stay in or close to infill development
- Big **neighborhood turnover** is possible as older families are replaced by younger ones
- Student **generation rates of new peripheral neighborhoods may be higher** and generate more students than projected

Projections: Overall and by Attendance Area

Area	2015-16 Baseline	2021-22	2026-27	2031-32	2036-37
East	6065	6121	6095	6078	6043
La Follette	5438	5637	5705	5744	5899
Memorial	6947	7153	7396	7677	8067
West	7357	7381	7423	7384	7394
Alternatives	1305	1328	1343	1355	1379
TOTALS	27,112	27,620	27,962	28,238	28,782



Implications for MMSD Facilities

- We need to **sustain our 50+ schools**
- We need to **maintain them**
- We likely will **not be scaling down** locations
- Some **pressure points** over the long haul
- A few **expansions and new construction** will be likely
- Only MMSD-owned property currently available is on **Sprecher Road**
- **Need to engage** community, city planners, developers, land owners



Purpose of long-range enrollment projections

How will Madison **change in the next 5-10-15-20 years?**

Seeking the **clearest possible picture** of what is likely to be built, who will live there, and when

What might that mean for:

- Facility Needs
- Financial Modeling
- Instructional Design
- Operational Planning

Seven key questions:

1. Why is enrollment **stable**?
2. Will it **remain stable**?
3. When and where will **new development** occur?
4. When will we reach **build-out**?
5. What is the impact of **redevelopment**?
6. How will our **demographics change**?
7. Which **schools will be impacted** the most?



Purpose of long-range enrollment projection tool

New Enrollment Projection Tool

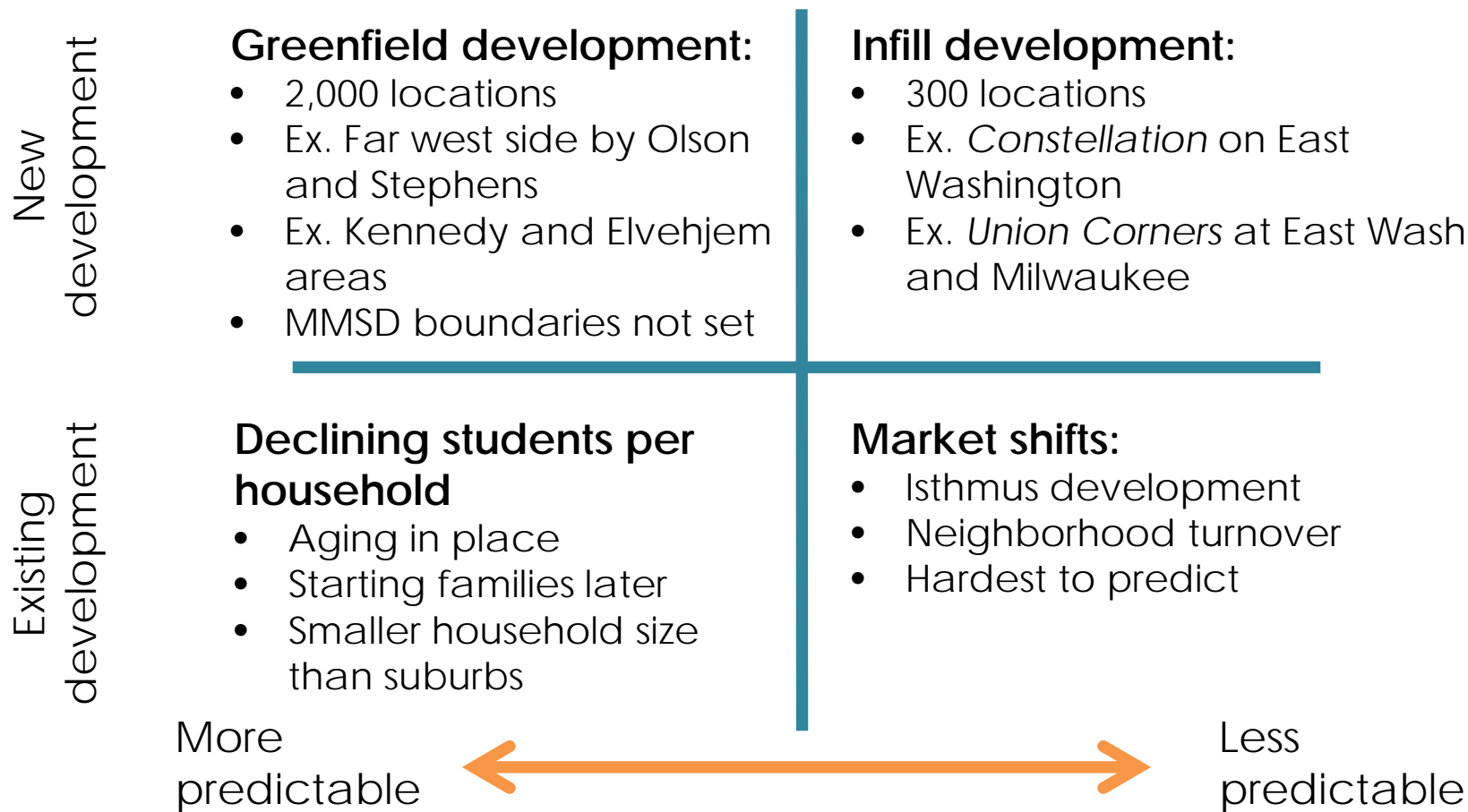
- Beyond annual five-year **cohort survival ratio** projections
- **External party** to help build
- **Parcel-by-parcel review** of location, density, timing
- **Maintain/update every 3-5 years** to adjust sequencing

No decisions today

- Future **scenario building** for annexation, boundary changes, land acquisition, construction projects
- Prepares **MMSD for proactive role in area development**

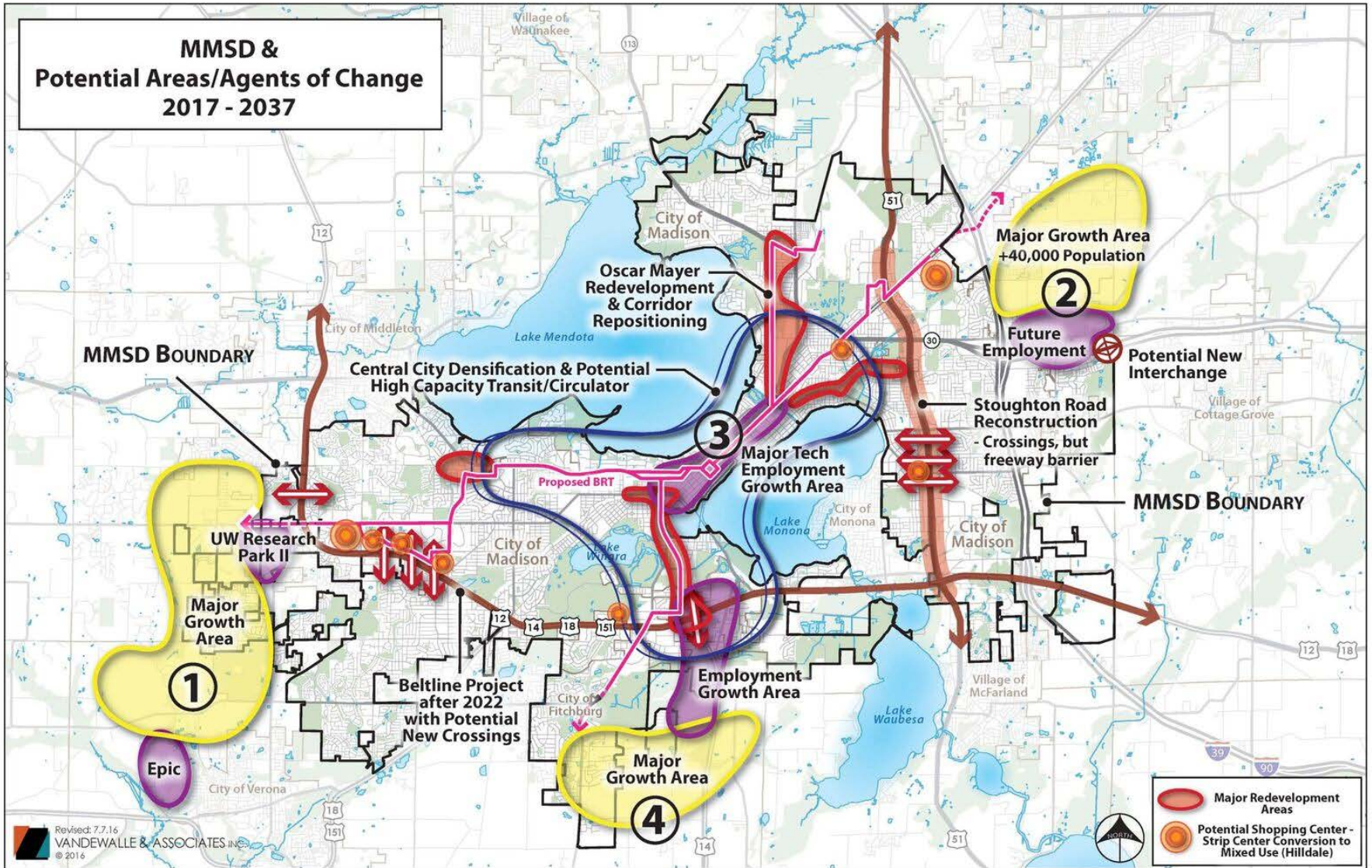


Major Levers for Enrollment Changes

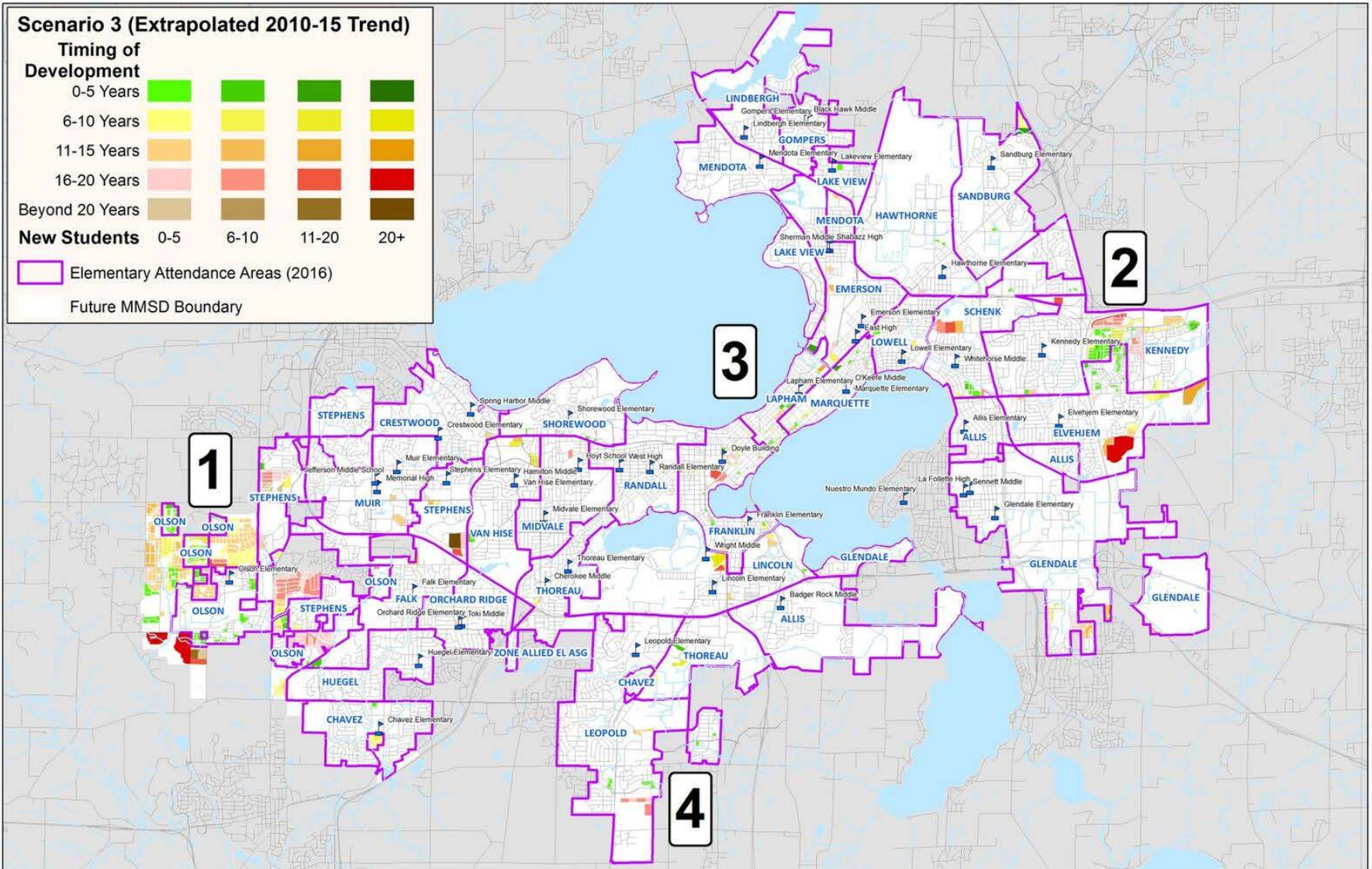


1. **Greenfield** development will have **greatest impact** on enrollments over next 20 years, but at only a few schools
2. **Market changes and household size** will have greatest impact after 20 years (after build-out)
3. **Declining students per household will offset** additional students coming from **infill** development

Potential Areas of Change



Parcel Map of Change



School-by-School Growth



Projected Enrollment by School at Extended 2010-2015 Rate of Household Growth (Scenario Three)

School/Program	2015-16 Cardinal PPSSD Enrollment	Enrollment Change within Existing Development, 2011-2017	Enrollment Change from New Development, 2011-2017	2017 Total Projected Enrollment	Enrollment Change within Existing Development, 2017-2037	Enrollment Change from New Development, 2017-2037	2037 Total Projected Enrollment	Enrollment Change within Existing Development, 2017-2037	Enrollment Change from New Development, 2017-2037	2037 Total Projected Enrollment	Enrollment Change within Existing Development, 2037-2057	Enrollment Change from New Development, 2037-2057	2057 Total Projected Enrollment	Enrollment Change within Existing Development, Beyond 2037	Enrollment Change from New Development, 2037-2057	Beyond 2037 Total Projected Enrollment
East Attendance Area Totals	6865	-39	85	6131	-48	43	6095	-57	49	6046	-54	31	6043	-48	0	5994
Alis Elementary	510	-2	0	508	-6	0	502	-5	0	497	-5	0	492	-4	0	488
Berkeley Elementary	304	-2	43	344	-6	14	352	-5	21	368	-5	24	387	-5	0	382
Bentley Elementary	492	-2	1	491	-5	20	505	-5	8	509	-5	11	515	-4	0	511
Brookside Elementary	331	-3	60	388	-6	32	414	-6	4	412	-6	32	441	-5	0	436
Harmon Middle Elementary*	314	-2	2	314	-3	3	314	-3	3	314	-3	3	314	-3	3	314
Johnson Elementary	420	-2	0	418	-5	0	413	-4	6	419	-4	3	421	-4	0	417
Kelley Road Middle*	73	0	0	73	-1	1	73	-1	1	73	-1	1	73	-1	1	73
Lawrence Middle	647	-3	16	660	-7	12	665	-6	18	678	-6	12	684	-5	0	679
Whitaker Middle	434	-2	20	452	-5	12	459	-4	7	472	-4	21	499	-4	0	495
La Follette High	1304	-9	55	1350	-17	34	1367	-15	25	1379	-15	54	1418	-13	0	1405
La Follette Attendance Area Totals	5418	-36	235	5437	-42	129	5395	-53	93	5344	-53	206	5099	-47	3	5052
Chambers Elementary	470	-3	3	470	-7	15	485	-6	0	478	-6	0	472	-5	0	467
Creswood Elementary	392	-2	0	390	-4	0	386	-4	0	382	-4	0	379	-3	0	376
Dick Elementary	351	-2	4	353	-4	9	358	-3	0	355	-3	1	352	-3	0	349
Harper Elementary	463	-2	0	461	-5	0	456	-4	0	451	-4	0	447	-4	0	444
Hart Elementary	430	-2	0	428	-3	0	425	-4	1	426	-4	0	426	-3	0	423
Olson Elementary	432	-2	105	535	-6	126	655	-6	140	799	-7	133	934	-7	14	921
Orchard Ridge Elementary	366	-2	0	364	-4	0	360	-3	0	357	-3	0	354	-3	0	351
Stephens Elementary	555	-3	15	567	-6	19	580	-5	10	584	-5	101	680	-5	30	704
Telford Middle	522	-3	6	525	-6	12	532	-6	5	536	-5	44	575	-5	11	582
Spring Harbor Middle*	350	-1	0	349	-3	3	349	-2	3	350	-2	3	350	-2	3	350
Trotter Middle	585	-3	29	611	-7	49	663	-6	66	724	-7	42	769	-6	4	767
Remond High	1963	-9	67	1961	-22	89	2028	-19	121	2131	-20	136	2247	-18	20	2229
Memorial Attendance Area Totals	6947	-33	349	7153	-79	223	7296	-89	251	7477	-71	169	8067	-64	81	8003
Franklin Elementary	399	-2	7	404	-7	10	407	-6	7	412	-6	7	415	-5	0	412
Langford Elementary	667	-2	11	675	-4	0	671	-4	0	667	-4	13	671	-3	0	668
Lincoln Elementary	400	-2	0	398	-4	34	428	-4	1	425	-4	34	459	-4	0	455
Middle Elementary	508	-2	0	506	-5	0	500	-5	0	495	-5	5	496	-4	0	492
Randall Elementary	394	-2	1	393	-4	0	389	-4	0	385	-4	0	379	-3	0	376
Stonewood Elementary	437	-2	4	439	-5	0	434	-4	0	430	-4	0	425	-4	0	421
Thomas Elementary	454	-2	6	458	-5	10	463	-4	0	459	-4	0	455	-4	0	451
Van Hise Elementary	395	-2	0	394	-4	16	405	-4	0	401	-4	0	398	-3	0	394
Charlotte Middle	447	-2	6	451	-5	13	469	-4	2	472	-4	10	482	-4	0	478
Harrison Middle	869	-4	7	872	-10	11	873	-8	7	872	-8	12	876	-7	0	869
Wright Middle*	356	-1	1	356	-3	3	356	-2	3	356	-2	3	356	-2	3	356
West High	3111	-10	16	3117	-23	25	3119	-20	19	3108	-19	21	3109	-17	0	3092
West Attendance Area Totals	7267	-35	69	7281	-81	123	7423	-91	31	7384	-78	78	7294	-69	3	7227
W. PK. Off Site	83	-4	19	88	-10	19	87	-8	16	86	-8	24	92	-7	3	87
Innovative & Air Middle	8	0	0	8	0	0	8	0	0	8	0	0	8	0	0	8
Innovative & Air High	310	-1	7	316	-3	7	319	-3	6	322	-3	9	328	-3	1	326
Piero School Middle and High	18	0	0	18	0	0	18	0	0	18	0	0	18	0	0	18
Proctor High	116	-1	3	118	-1	3	119	-1	3	120	-1	3	120	-1	3	120
Other School Totals*	1365	4	89	1358	-18	38	1343	-18	37	1335	-18	37	1329	-11	4	1322
2015-2057 Grand Totals	27112	-131	439	27421	-205	340	27961	-242	340	28239	-240	543	28702	-220	90	28482
Net change per student			5.9%			1.9%			2.8%		1.6%				-1.3%	

1. Percent change in number of persons per City of Madison household per five-year lifespan, or portion thereof, interpolated from "Household Projections for Wisconsin Municipalities: 2010 - 2043," Wisconsin Department of Administration, vintage 2013.
 2. Derived by "inserting" Vandewalle & Associates and municipal staff estimates of new development by typology and anticipated vacancy, assuming the number of dwelling units added to the District per year through 2037 and beyond continue at the observed annual rate for the period 2010-2015.
 3. Estimates for enrollment growth for schools and alternative programs without a defined geographic attendance area are assumed to grow at the overall pace for all new development in the four high school attendance areas.
 4. Charter/higher schools that draw students from across the entire District are assumed to fill to capacity, with future changes in enrollment due to new development or redevelopment offsetting anticipated declines from demographic change (resulting in no net change in enrollment during the 26-year study period).

Case Studies

1. Olson Elementary

- Big impact from **near-term greenfield** development

2. Elvehjem Elementary

- Big impact from **longer-term greenfield** development

3. Lapham Elementary

- Watch for **market shifts** driven by infill developments and neighborhood turnover

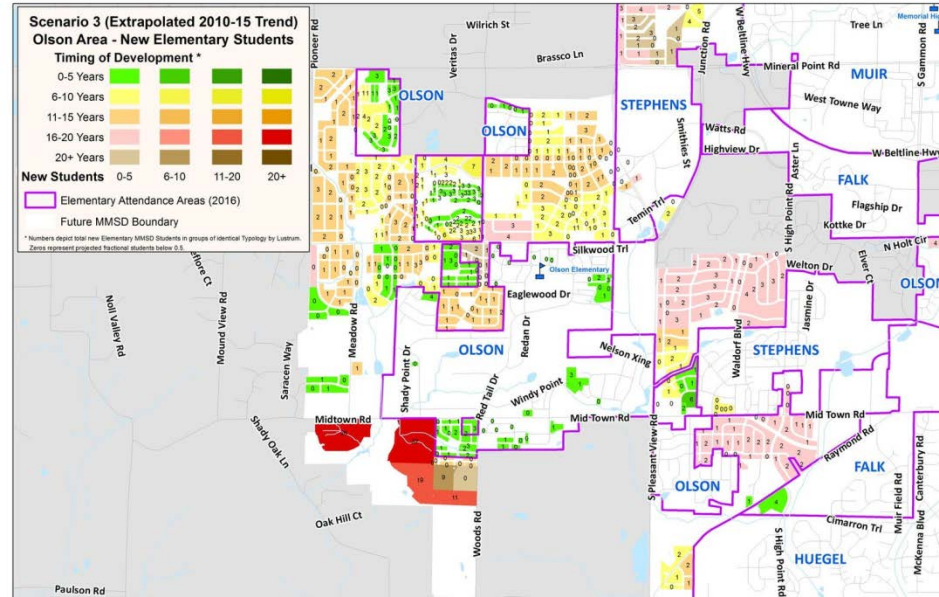
4. Leopold Elementary

- Watch for development **along district boundaries**



1. Olson Elementary

- Large and dense areas of **greenfield** development in the next 15 years
- Negligible infill development
- Students per household declining
- Negligible market shifts

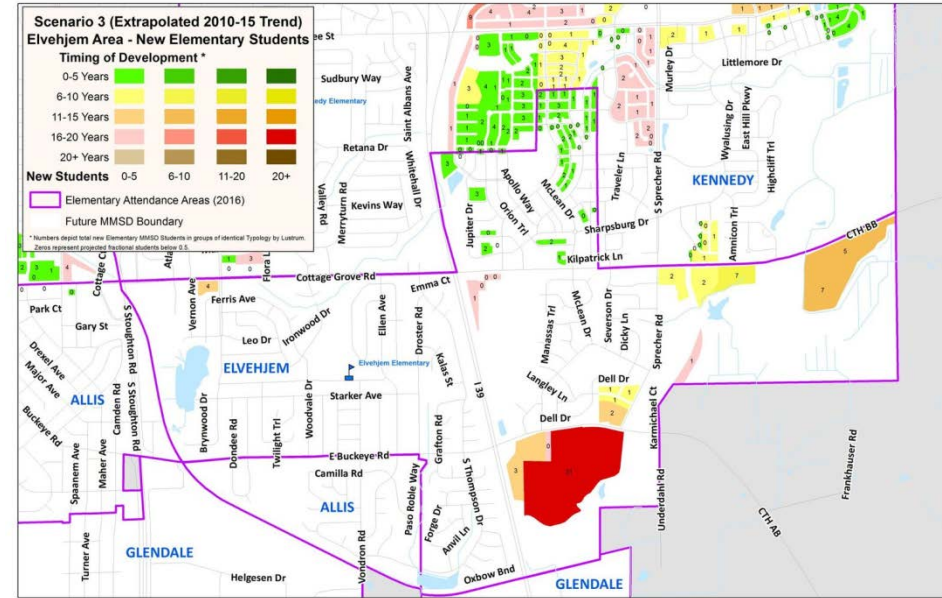


	2015-16 Baseline	2021-22	2026-27	2031-32	2036-37
Cumulative change	0	103	223	357	482
Capacity rate	64%	78%	96%	115%	134%

Central issues: How will we avoid crowding? How do we assign newly annexed land?

2. Elvehjem Elementary

- Areas of **greenfield** development in the next 10 years and again in 15 to 20 years
- Negligible infill development
- Students per household declining
- Negligible market shifts

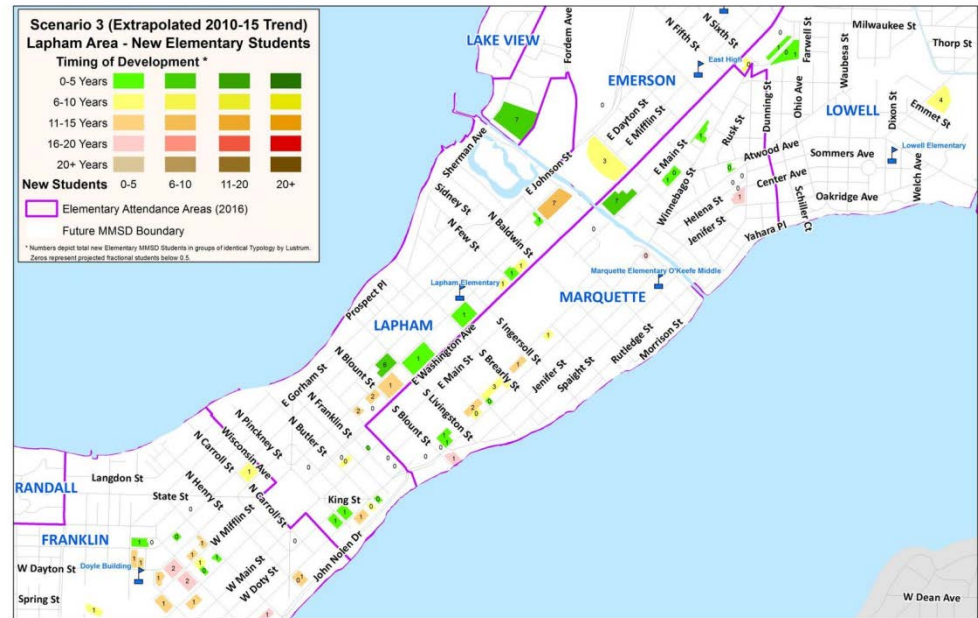


	2015-16 Baseline	2021-22	2026-27	2031-32	2036-37
Cumulative change	0	40	48	64	83
Capacity rate	95%	102%	104%	107%	110%

Central issues: How will we avoid crowding? When do we develop the Sprecher Road site?

3. Lapham Elementary

- No greenfield development
- Fair amount of **infill development**
- Students per household declining
- **Market shifts** are big unknown

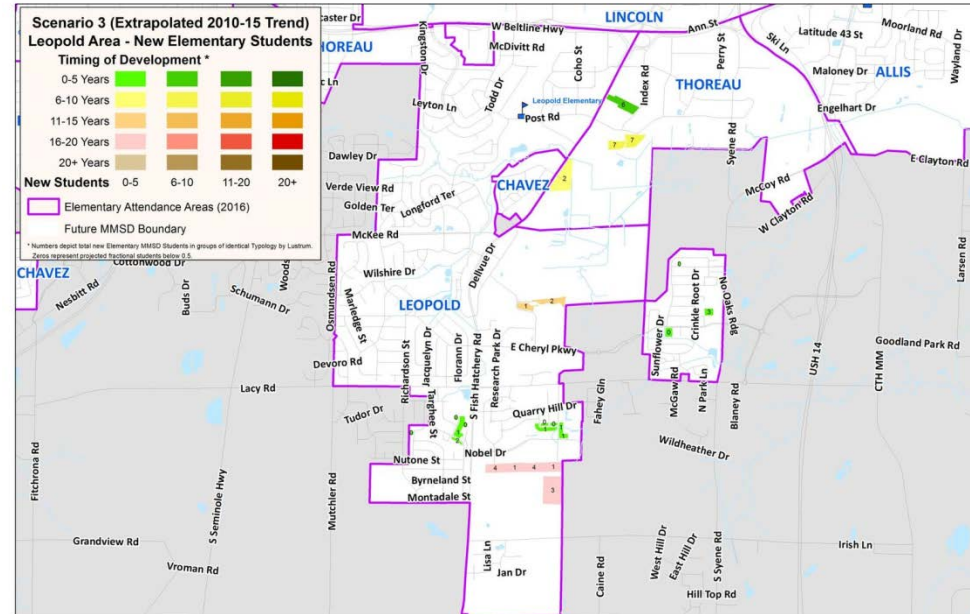


	2015-16 Baseline	2021-22	2026-27	2031-32	2036-37
Cumulative change	0	11	11	21	18
Capacity rate	81%	85%	85%	88%	87%

Central issues: What is the long-term impact of infill and market changes on enrollment at Lapham/Marquette?

4. Leopold Elementary

- No greenfields in district (but a lot of development southeast)
- Negligible infill development
- Students per household declining
- Negligible market shifts



	2015-16 Baseline	2021-22	2026-27	2031-32	2036-37
Cumulative change	0	8	0	-3	4
Capacity rate	87%	88%	87%	87%	88%

Central issues: Could a school in southern Fitchburg capture residential growth in the area and reduce open enrollment leavers? What may be our concerns with the size of Leopold as an elementary location?

Long Range Facility Plan Components

Community engagement informs the entire working process and plan

Understanding Values through Community Engagement

Attendance Areas Review

- Review policy
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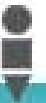
Instructional Design

- HS Pathways
- Locations (DLI, 4K) & Alternative School Sites
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- Technology Readiness
- Personalized Learning

Long-range Facility Plan

Purpose of Engagement

- Community voice to guide decision making
 - Reflect our community's priorities and values
- Community feedback and input on other project areas; examples include:
 - Project Area C: Report on Enrollment Projections
 - Project Area B: Facility Condition Index
- More details available in *Long-Range Facilities Plan Engagement Plan* – will walk through the major components today



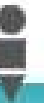
Guiding Principles for Engagement Plan

- Keeping equity at the forefront
- Grounded in qualitative research design
- Giving voice to most affected
- Striving for representative feedback
- Providing flexibility
- Balancing quantity with quality
- Paying attention to specialized knowledge
- Asking questions that lead to actionable answers



Structure of Engagement

- Phase 1: **Perceptions of and Vision for Facilities** (Spring-Summer 2016)
- Phase 2: **Guiding Principles and Focus Area Identification** (Fall 2016)
- Phase 3: **Focus Area Discussions and Review of Products** (Spring 2017)



Phase 1: Spring-Summer 2016

- Purpose
 - **Initial conversations** to help gather information and plan for future engagement
 - Compile previous facilities-related feedback
- Guiding Questions
 1. What are your **perceptions** of MMSD facilities?
 2. What is your **vision** for MMSD facilities?
- Data Collection
 - Visited **17 school sites, 11 focus groups** (high school students, staff at all levels, and LMTSS) and **13 building tours/informal conversations**
 - Creating secondary dataset; **compilation of all facilities-related feedback** over 3 years (approx. 4,500 comments)
- Products
 - *Interim Research Report: Perceptions of and Vision for MMSD Facilities (Spring 2016 Engagement)*
 - Secondary Dataset

Early Lessons

- Those who chose to participate were **emotional, highly engaged, and appreciated** being heard.
- Students, teachers, LMTS were **understanding of the current constraints** (e.g., budget, time).
- They want a long-range facility plan that **outlines when things will happen**.
- They recognize that **issues of equity are at play**, but disagree on what that means.
- Their **perceptions of current facilities** (i.e., status and problem areas) and their vision for the future largely **fit with what we would expect/already know**.

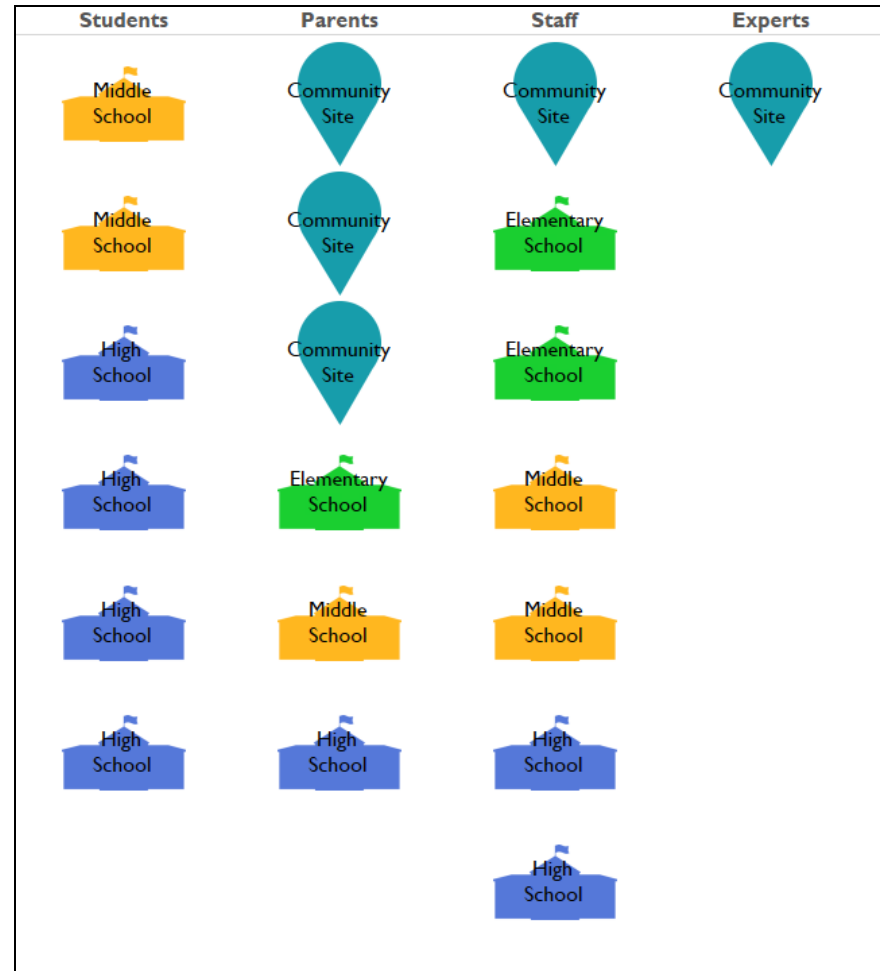


Phase 2: Fall 2016

- Purpose
 - Create **guiding principles for facilities decision making**—conversations focused on district level
 - **Identify focus areas** to drive spring engagement
- Guiding Questions
 1. What **principles should guide our decision making** to ensure MMSD facilities support our Strategic Framework?
 2. Given what we know about our student population trends, what **policies, practices, and locations** need attention during the development of the long-range facilities plan?
- Data Collection
 - **Focus groups, interviews, and feedback form** on website
- Products
 - *Guiding Principles for MMSD Facilities Decisions*
 - List of Focus Areas for Spring Engagement
 - *Interim Research Report: Guiding Principles and LRFP Implications (Fall 2016 Engagement)*

Highlight – Phase 2 Focus Groups

- Data Collection
 - Approximately 20 focus groups between Sept-Oct
 - Various stakeholders, including students, staff, parents, and experts
 - Organized to achieve representation across levels and locations

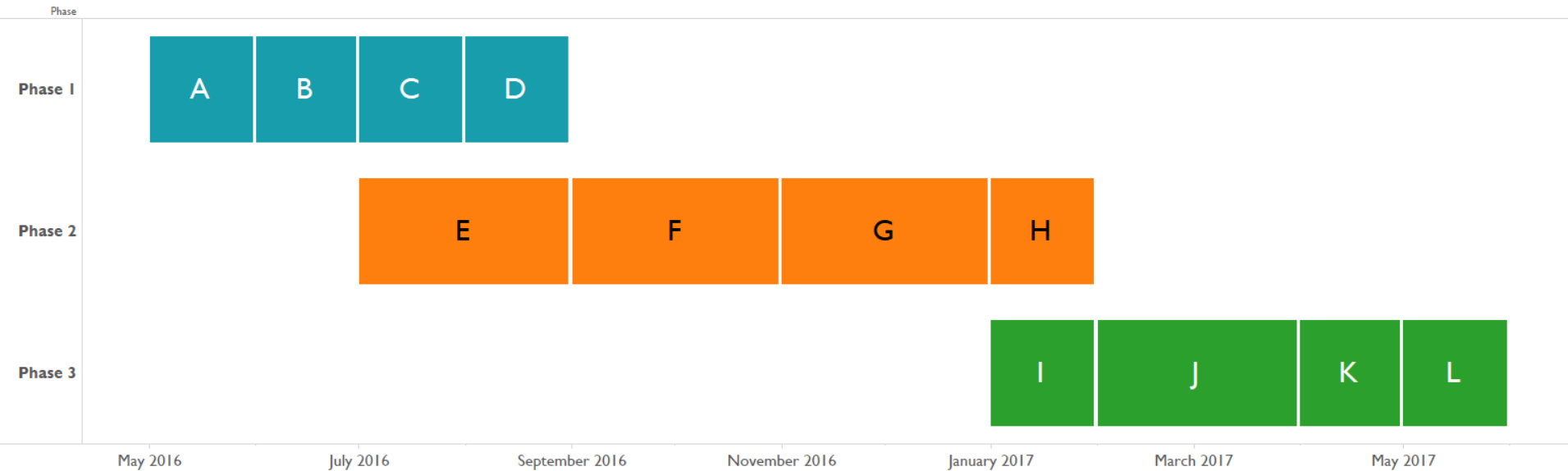


Phase 3: Spring 2017

- Purpose:
 - Generate **short list of key focus areas** to drive facilities decision making
 - **Feedback on products** from Project Area A, B, C, and D
- Guiding Questions:
 1. What are the **key policies, practices, and locations** that the district should focus its attention on over the next 20 years?
 - Additional question(s) determined by Phase 2 analysis
- Data collection:
 - TBD, but likely will include focus groups, interviews, and feedback form on website
- Product
 - *Research Report: Engagement in the LRFP*



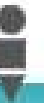
Planned Timeline



Text Key	Item
A	Developed Phase 1 protocols; reached out to schools to set up sessions
B	Conducted Phase 1 focus groups, interviews, and building tours
C	Complete analysis of Phase 1 spring data; begin compilation of secondary data
D	Final report on Phase 1 Spring 2016 Engagement; Secondary dataset built
E	Develop Phase 2 protocols; create webform; schedule and advertise focus groups and interviews
F	Collect Phase 2 data via webform, focus groups, and interviews
G	Analyze Phase 2 data
H	Phase 2 report and supporting resources available
I	Identify locations for Phase 3 focus groups, based on fall list and other project area findings; develop Phase 3 protocols; schedule sessions; modify webform with new guiding questions
J	Collect Phase 3 data
K	Analyze Phase 3 data; provide feedback to project area leads to inform final revisions to resources
L	Create final report

Final Thoughts

- Our approach to long-range facility plan engagement aligns with the core values and ways of working outlined in our Strategic Framework
- It will make the plan more robust and inclusive
- We will keep you informed throughout its development with what we have learned and where we are headed



Long-Range Facility Plan: A useful fact-based resource for future facility-related decision making

This Fall:

- **A**ttendance Areas Review
- **B**uilding Conditions Report –Updated
- **E**ngagement – Ongoing Input from Stakeholders

