



Elementary Facility Master Plan


Governing Board Meeting

20 OCTOBER 2015

Elementary Facility Master Plan

- The Elementary Facility Master Plan - Outlines the current status of facilities and the development of future capital improvements.
- The Guiding Principles are:
 - **Health, Safety and Security**
 - **Academics and Co-Curricular Supports**
 - **Equity in Facilities**
 - **Optimal Utilization**
 - **Protection of Financial Investment and Sustainability**
 - **Community Engagement and Communication**
 - **Transforming Schools into Community Assets**
- Geographic Assessment identifies where the needs are the greatest
(Current State of School Facilities)
- The Community Engagement process will.....
Identify ideas to solve the current status and subject those ideas to critical analysis and feedback.

Facility Master Planning

- This has been a **continuing** conversation
- SUSD has been looking at Elementary Facilities and Configurations since 2006
- Historical Review  Following Slides

BRAC - Work

- 2007/2008: Defined the concept of a “neighborhood school” and impact on facility utilization
- 2008/2009: Learned about the budget and reviewed elementary and middle school facility needs

SUSD ELECTION TIMELINES

	<u>Last Passed</u>	<u>Effective</u>	<u>Next Renewal</u>
M&O Override (10%)	NOV 2007	JUL 2008	NOV 2012
K-3 Override (5% K-8)	MAY 2005	JUL 2005	NOV 2009
BOND (HS Renov)	NOV 2004	JAN 2005	-----
Capital Override	NOV 2007	JUL 2008	NOV 2014
BOND (Elem/MS)	-----	-----	NOW

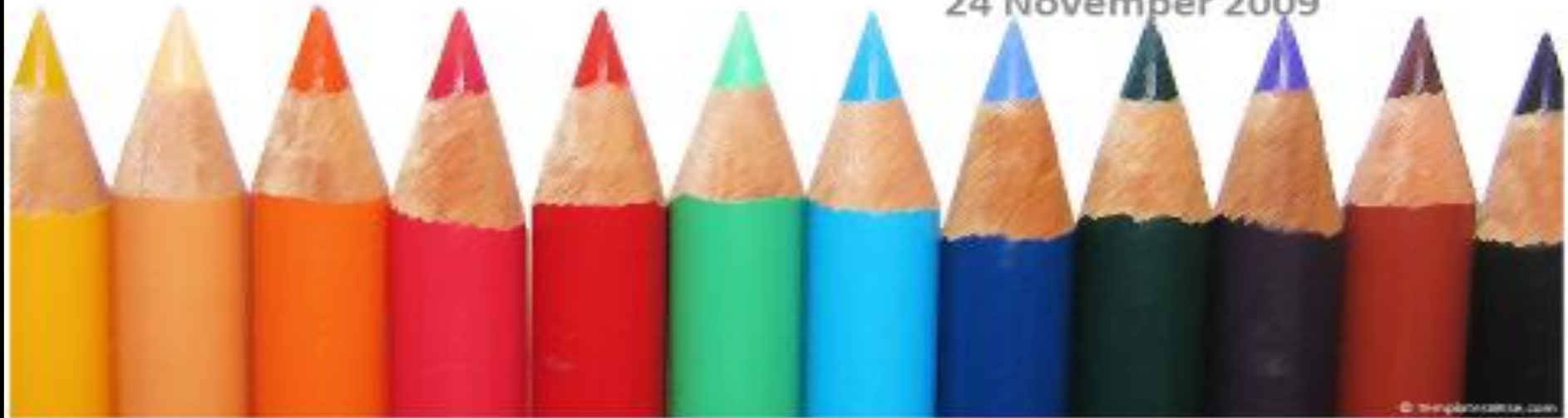
April 23, 2009

Planning For Success

Scottsdale Unified School District

Facility Plan Discussion – 2009

Presented By: David Peterson
Assistant Superintendent – Operations
Governing Board Meeting
24 November 2009



SUSD Bond & Tax Information

By David Peterson
Governing Board Session
24 NOV 09





2010 Bond Program

No Tax Increase Bond Issue


SUSD Governing Board Meeting

04 MAY 2010

By: David Peterson

Assistant Superintendent

Andi Furlis
Assistant Superintendent
Teaching & Learning
January 11, 2011



Middle School Configuration Grades 6-8

Consent Item:

Approve the Purchase of Assessment and Project Management Services through Mohave Educational Services Cooperative (Mohave)

Submitted by:

Rick Freeman, Interim Director Facilities & Operations

Funding:

2010 Bond

RECOMMENDATION:

It is recommended that the Governing Board approve the purchase of assessment and project management services through Mohave Contract to the vendor listed below, for an amount not to exceed \$45,000 for the fiscal year 2011-2012.

Vendor:

The H2 Group, LLC

BACKGROUND:

To assist with assessing future SUSD building needs, The H2 Group, LLC will meet with SUSD staff to ascertain the current and perceived capital needs for SUSD's elementary schools. The H2 Group, LLC will evaluate and document facility utilization and design versus program capacity, and it will evaluate various capital funding sources. The H2 Group, LLC will prepare their recommendations for project scope, budget and draft prioritization for the District administration. To perform these services, The H2 Group, LLC proposes \$7489.80 per month with a six month total of \$44,938.80.

The work will include coordinating with the Planning and Construction Department in regards to facility conditions and future recommendations.

The Governing Board has previously approved the use of Mohave Contracts, and staff has determined the use of this contract represents best value to the District.

IMPACT ON STUDENTS AND DISTRICT GOAL ALIGNMENT

Improvements to building functionality provide a clean, comfortable and safe learning environment for students.

This aligns to District Goal:

- 1 – Improving Student Achievement
- 2 – Improving Operations of District
- 3 – Improving Communication/Marketing Strategies and Effectiveness



Saguaro Community: Kiva K-8 Discussion

June 5, 2012

Dr. Milissa W. Sackos, Executive Director of Student Services

Dr. Dave McNeil, Executive Director Elementary Schools and
Assessment



Pueblo
Elementary School

Change in School Boundaries Pueblo FLI Proposal and Impact

Mrs. Michelle Marshall - General Counsel
Dr. Jeff Thomas – Associate Superintendent
Feb. 12, 2013

DESIGNING WITH STUDENTS IN MIND



SCOTTSDALE UNIFIED SCHOOL DISTRICT

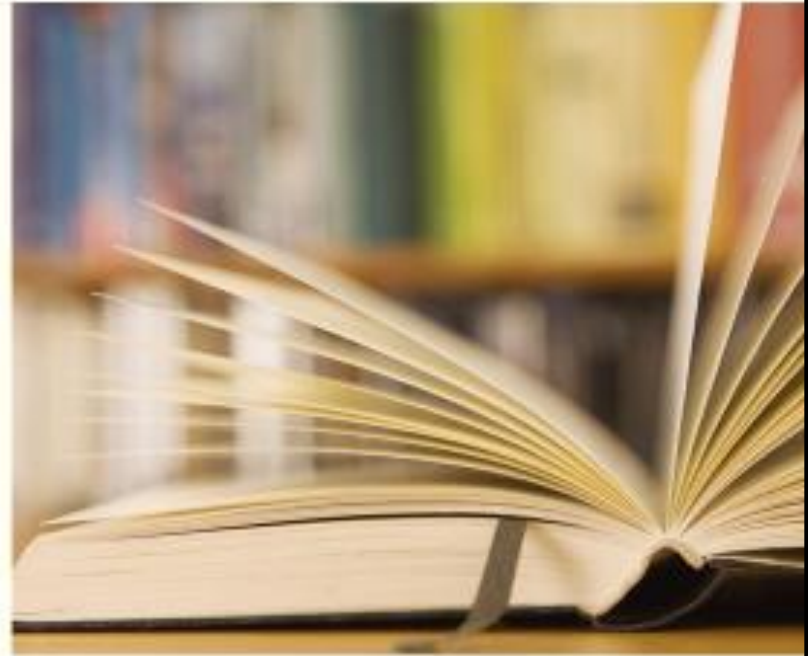
ELEMENTARY SCHOOL
MASTER PLAN

JANUARY, 2014



DISCUSSION HIGHLIGHTS FOR FACILITIES PLAN AND FUTURE REFERENDUMS

March 4, 2014
SUSD Governing Board Meeting





FACILITY CLOSURE AND RELOCATION DISCUSSION

March 18, 2014
SUSD Governing Board Meeting

Ballot Initiatives



DANIEL O'BRIEN CFO
MAY 08, 2014

Previous Considerations 2006 - 2014

- Close up to 5 schools
- Make all schools K-8
- Make Coronado Learning Community Schools K-8 and close Supai Middle School
- Develop several more Traditional Schools
- Convert all schools to District Sponsored Charter Schools
- Renovate and Rebuild Campuses
- Partner with Private Entities to implement Innovative Programs
- Develop Campuses under Az Achievement District Program
- Lease space to interested parties



SCOTTSDALE UNIFIED SCHOOL DISTRICT

**ELEMENTARY SCHOOL MASTER PLAN
COMMUNITY INPUT FORUMS**

JANUARY AND FEBRUARY, 2015



SCOTTSDALE UNIFIED SCHOOL DISTRICT

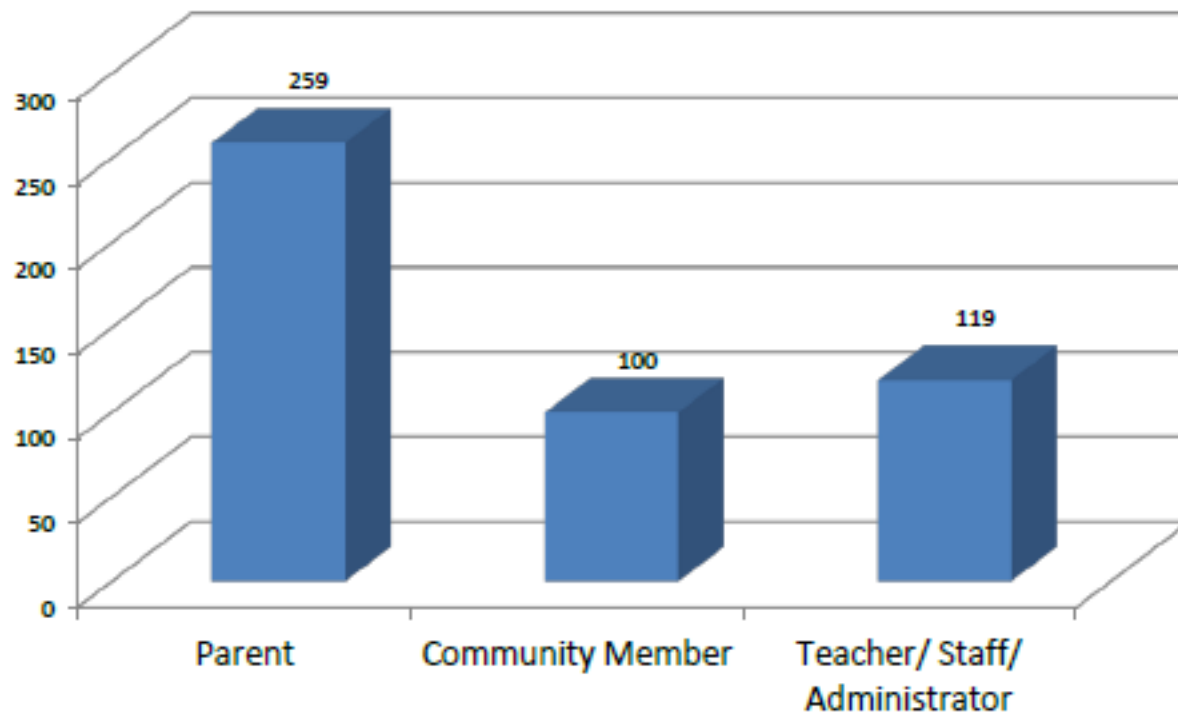
**ELEMENTARY SCHOOL MASTER PLAN
COMMUNITY INPUT RESULTS**

MARCH 24, 2015

PRESENTATION- COMMUNITY FEEDBACK

Survey Demographics

Which best describes you?

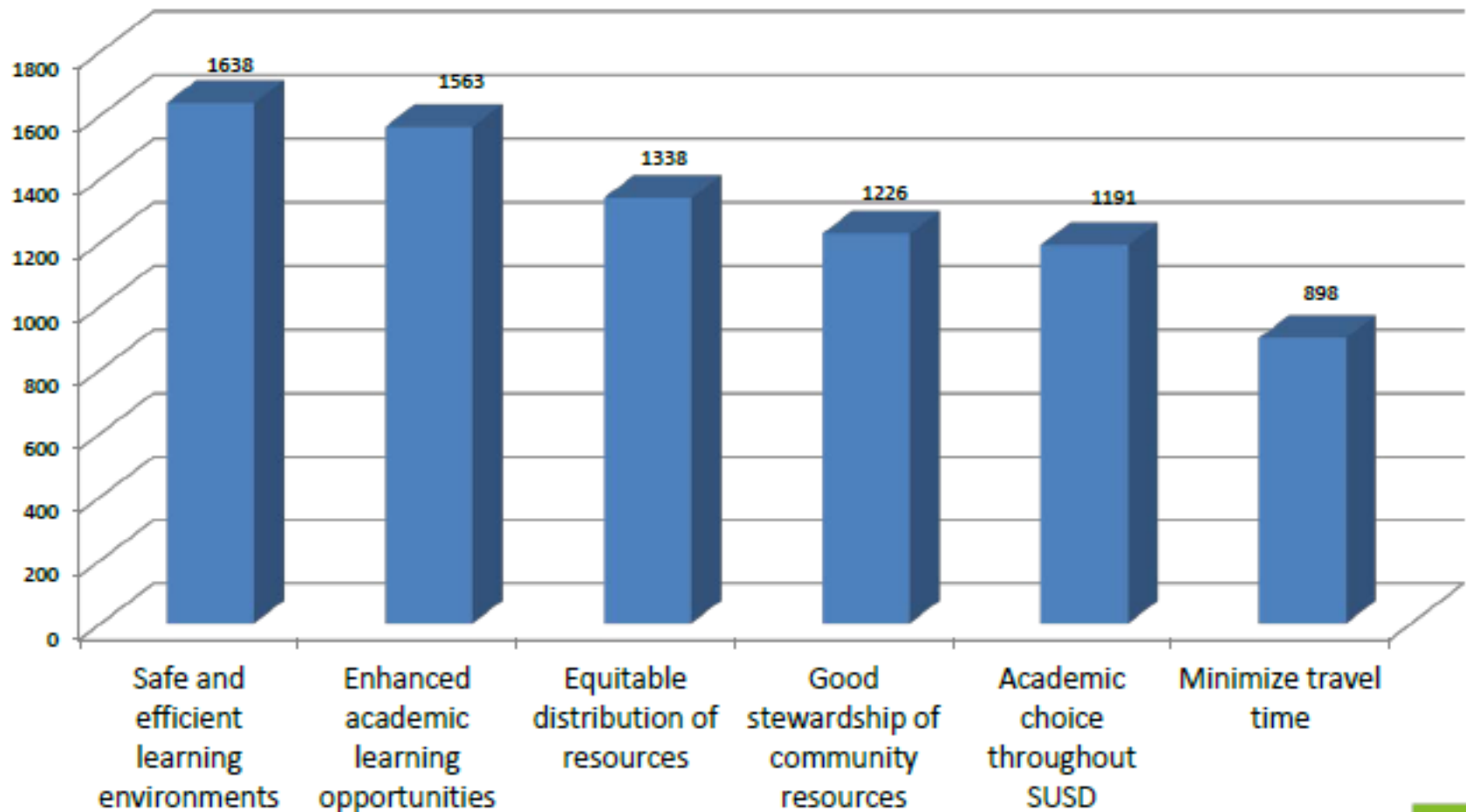


- **401 surveys and emails were received**
- **Every school facility was represented**
- **Some people identified as more than one of the categories above**
- **A few people attended multiple community meetings and filled out multiple surveys**

PRESENTATION- COMMUNITY FEEDBACK

Survey Results

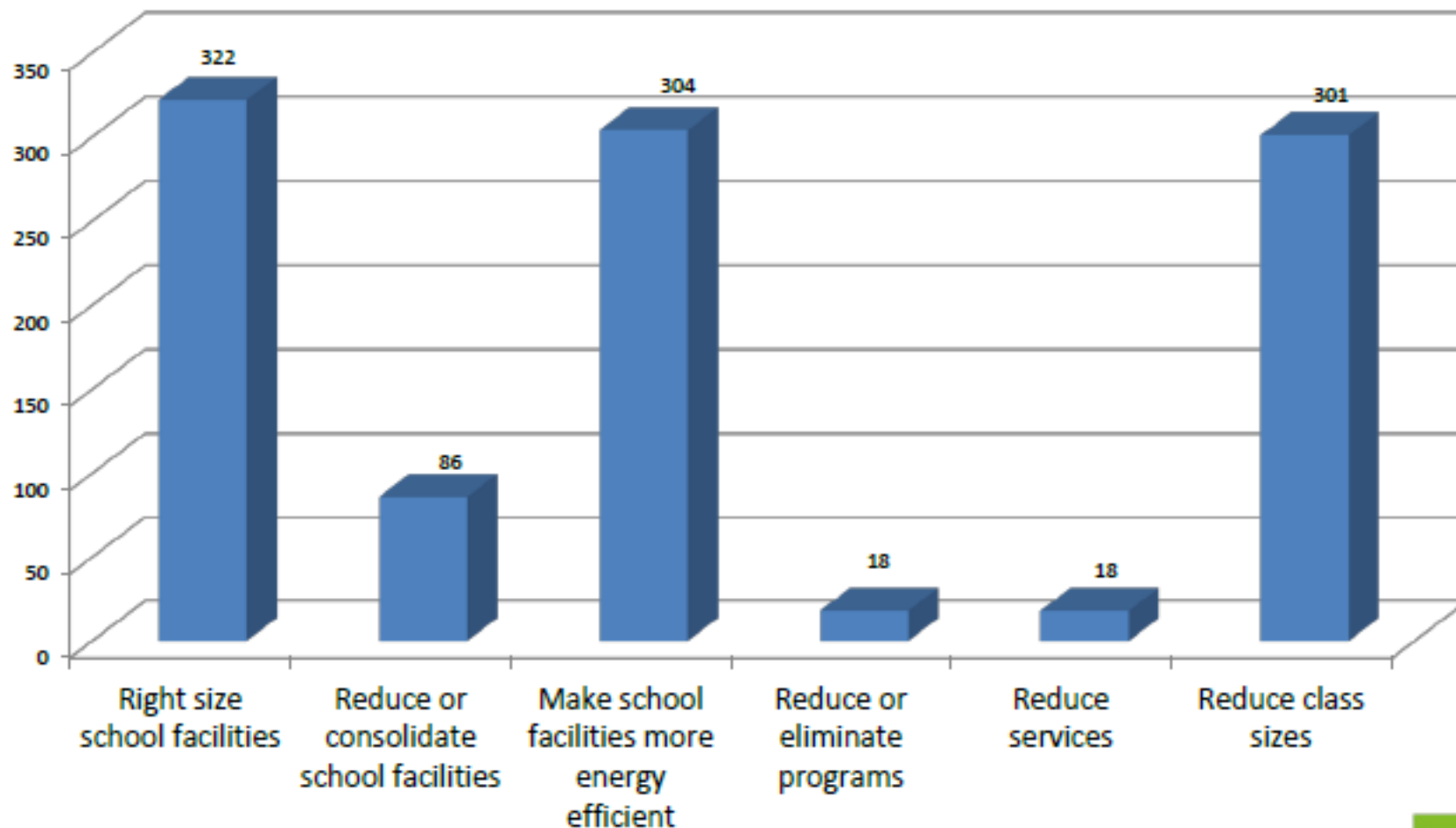
How important are each of these principals to you?
(Total, out of a maximum of 2005 points)



PRESENTATION- COMMUNITY FEEDBACK

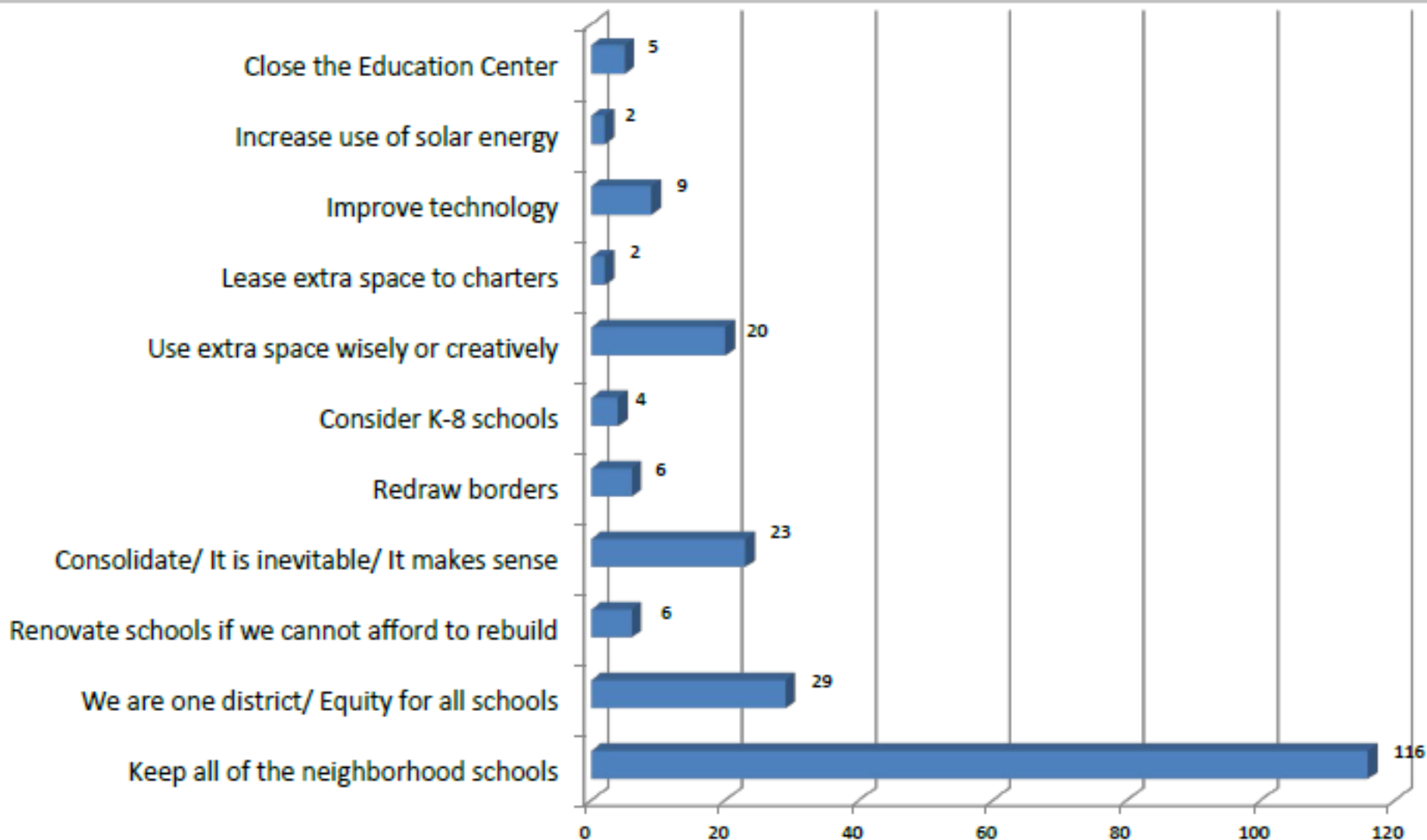
Survey Results

**Budget considerations- without sacrificing academic achievement
(Total, out of a maximum of 401 Points)**



PRESENTATION- COMMUNITY FEEDBACK

Write-in Comments: Options Feedback (Comments from 2 or more people shown)



2015 Community Dialogue

SUMMARY AND DISCUSSION

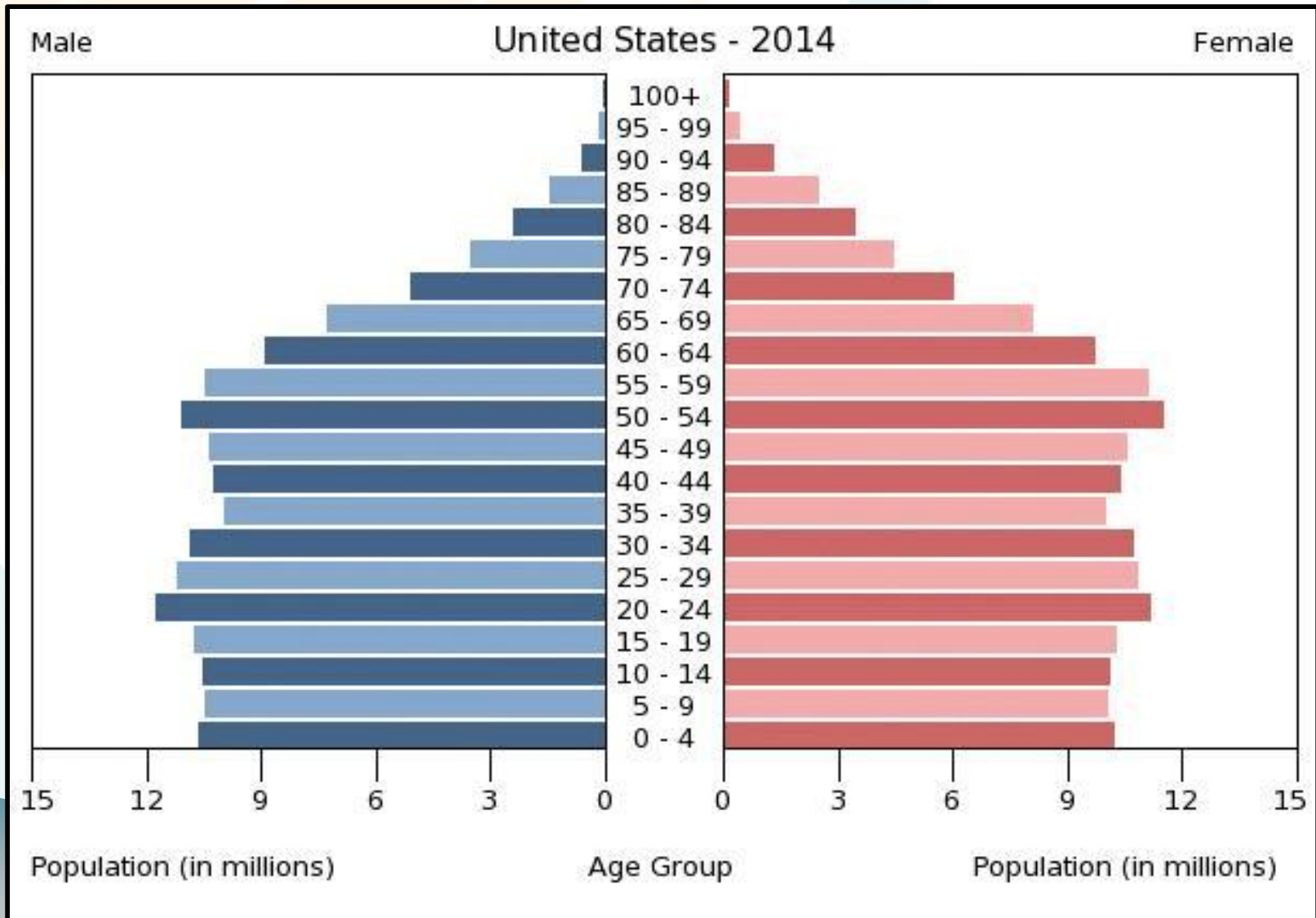
Main Points that We Heard

- Keep neighborhood schools, even if it means renovating rather than rebuilding
- We are one District, and the older facilities deserve to be improved
- Aggressively market students and parents on the positives of SUSD; focus more on competing and less on cutting costs
- The communities are eager to hear specifics on plans, costs and demographics



ELEMENTARY SCHOOL MASTER PLAN

Dynamic Environment



Dynamic Environment

- Arizonans are growing younger, older and more diverse
- We have a large population of dependent children and older Arizonans

Age of Population	U.S.	AZ
Under 18	23.1%	24.0%
Millennials (18 to 34)	23.4%	23.3%
35 to 49 years old	19.3%	18.5%
Baby Boomers (50 to 69)	24.5%	23.4%
70+	9.7%	10.8%
Median Age	37.7	36.9
Age Dependency Ratio	60.2	66.7
Child Dependency Ratio	37.0	40.2
Old-Age Dependency Ratio	23.2	26.5

Source: U.S. Census, 2014 American Community Survey

Dynamic Environment

Subject - Scottsdale	Scottsdale, Arizona	
	Estimate	Percent
SEX AND AGE		
Total population	221,283	221,283
Male	106,514	48.1%
Female	114,769	51.9%
Under 5 years	9,899	4.5%
5 to 9 years	10,409	4.7%
10 to 14 years	10,694	4.8%
15 to 19 years	11,860	5.4%
20 to 24 years	11,738	5.3%
25 to 34 years	26,087	11.8%
35 to 44 years	28,718	13.0%
45 to 54 years	33,206	15.0%
55 to 59 years	17,049	7.7%
60 to 64 years	16,219	7.3%
65 to 74 years	25,207	11.4%
75 to 84 years	13,888	6.3%
85 years and over	6,309	2.9%
Median age (years)	45.4	(X)

} **19.4%**

} **27.9%**

Source: U.S. Census Bureau, 2009-2013
5-Year American Community Survey

Dynamic Environment

Subject	Scottsdale city, Arizona	
	Estimate	Percent
HOUSING OCCUPANCY - 2013		
Total housing units	125,466	125,466
Occupied housing units	100,251	79.9%
Vacant housing units	25,215	20.1%
Occupied housing units	100,251	100,251
Owner-occupied	67,983	67.8%
Renter-occupied	32,268	32.2%
Average household size of owner-occupied unit	2.26	(X)
Average household size of renter-occupied unit	2.05	(X)

Source: U.S. Census Bureau, 2009-2013
5-Year American Community Survey

Dynamic Environment

SCHOOL ENROLLMENT		
Population 3 years and over enrolled in school	46,708	46,708
Nursery school, preschool	3,375	7.2%
Kindergarten	2,204	4.7%
Elementary school (grades 1-8)	16,676	35.7%
High school (grades 9-12)	10,554	22.6%
College or graduate school	13,899	29.8%

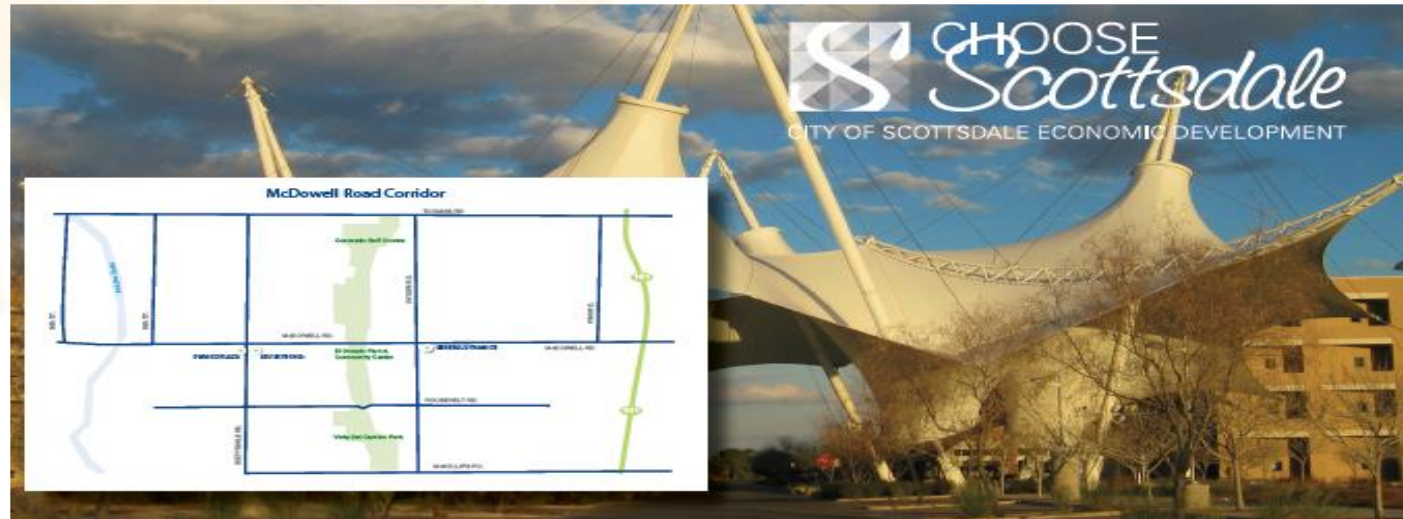
Source: U.S. Census Bureau, 2009-2013
5-Year American Community Survey

Dynamic Environment

RESIDENCE 1 YEAR AGO - 2013		
Population 1 year and over	219,386	219,386
Same house	178,865	81.5%
Different house in the U.S.	38,700	17.6%
Same county	26,951	12.3%
Different county	11,749	5.4%
Same state	1,857	0.8%
Different state	9,892	4.5%
Abroad	1,821	0.8%

Source: U.S. Census Bureau, 2009-2013
5-Year American Community Survey

Dynamic Environment



MCDOWELL CORRIDOR REVITALIZATION

The McDowell Road Corridor offers easy access to nearby residential and commercial centers, freeways, Phoenix Sky Harbor Airport, regional parks and shopping. Located along the McDowell Road Corridor is SkySong - the Arizona State University Scottsdale Innovation Center, which is home to a global business community that links technology, research, education and entrepreneurship to position Arizona State University and Greater Phoenix as global leaders in the knowledge economy. This 42 acre mixed use development will eventually house 1.2 million square feet of commercial space at completion, with on-site luxury residential apartments and retail/restaurant opportunities.

Technology companies and young professionals are attracted to the area because it provides a mix of specialty retail, art galleries, dining to suit every taste, legendary nightlife, and public art and cultural attractions with broad appeal. Also, these individuals and companies find that they can enjoy a higher standard of living for a fraction of the cost in other metropolitan areas in the U.S. and enjoy easy access to the 101 and Sky Harbor Airport. Because of this, the area is experiencing a renaissance and expecting significant demographic shifts with the influx of new millennial workers and residents in the next 3 years:

- **3,774 new multifamily and luxury multifamily units** are anticipated to be completed and occupied by the end of 2017
- By 2019, an additional multifamily units 1,034 are anticipated to be completed

2015 3-MILE RADIUS SNAPSHOT:

Total Jobs: 48,719
Households: 45,125
Average HH Income: \$55,227
Population: 94,017
Median Age: 34.1

SOURCE: ESRI Business Analyst; EMSI May 2015

2018 3-MILE RADIUS SNAPSHOT:

Households: 48,889
Average HH Income: \$56,432
Population: 103,819

SOURCE: ESRI Business Analyst; EMSI May 2015; staff research



Engage, Educate and Empower Every Student, Every Day



Dynamic Environment

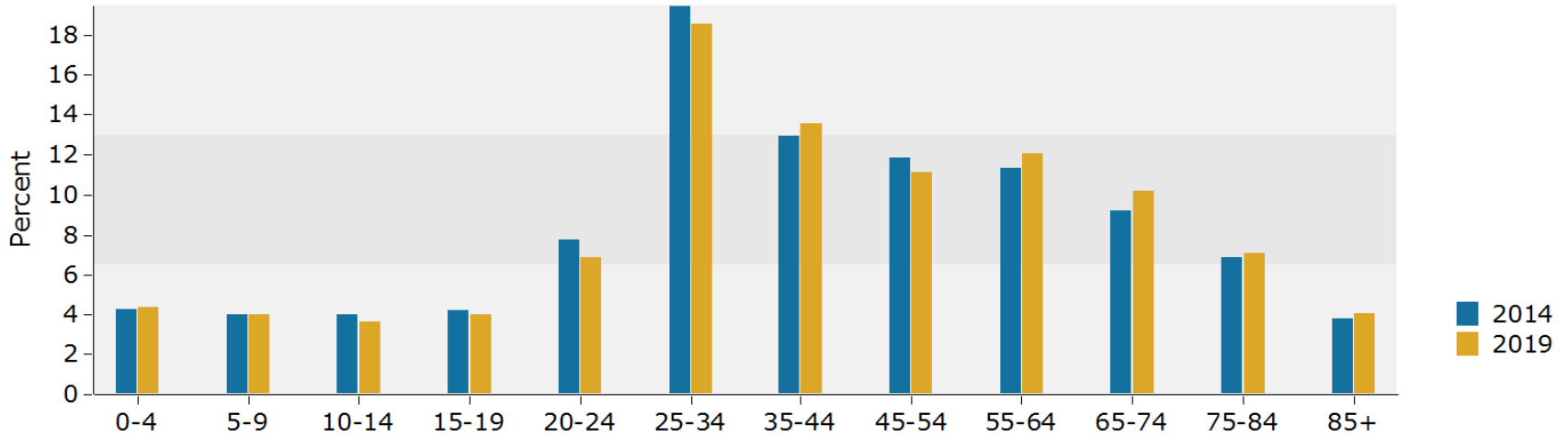
McDowell Corridor +15,835 Population

LOCATION	STATUS	Estimated Date of Completion	Average Rental Rate/ Monthly Mortgage	Estimated Average Monthly HH Income	Estimated Average Annual HH Income	# of Completed & Occupied Units:			Total Units
						2015	2016	2017	
7501 E. McDowell Road	In construction	2016	\$1,621	\$5,403	\$64,840		572		572
6640 E. McDowell Road	DR approval	2016/2017	\$1,600	\$5,333	\$64,000			154	154
1301 N. Scottsdale Road	Complete	2014	\$1,600	\$5,333	\$64,000	325			325
2565 East Thomas Rd.	In construction	2016	\$1,262	\$4,207	\$50,487		144		144
7025 E Via Soleri Drive	In construction	2015	\$2,000	\$6,667	\$80,000	259			259
6895 E. Camelback Road	In construction	2017	\$2,000	\$6,667	\$80,000			781	781
4848 N. Goldwater Drive	In construction	2016	\$2,000	\$6,667	\$80,000		369		369
7350 E. Stetson Drive	In construction	2016	\$2,000	\$6,667	\$80,000		132		132
7426 E. Stetson Drive	In construction	2016	\$2,000	\$6,667	\$80,000		188		188
4141 N. Granite Reef Road	Complete	2015	\$1,600	\$5,333	\$64,000	223			223
6901 E. 1st Street	DR approval	2016/2017	\$2,379	\$7,930	\$95,160			7	7
6825 E. Main Street	In construction	2016/2017	\$1,600	\$5,333	\$64,000			136	136
3520 N. 70th Street	In construction	2017	\$1,718	\$5,726	\$68,713			28	28
4422 N. 75th Street	In construction	2016/2017	\$1,439	\$4,796	\$57,547		89		89
7300 E. Earll	DR approval	2017/2018	\$1,417	\$4,724	\$56,688			97	97
3009 N. Scottsdale Road	In construction	2016/2017	\$1,600	\$5,333	\$64,000			270	270
						807	1,494	1,473	3,774
						Current Estimates		With New Units Considered	
2015 Pop Estimate ESRI						94,017			
Population 2018 (with new units included)								103,819	
Population 2020 ESRI (with new units)						100,140		109,852	

Dynamic Environment

Downtown Scottsdale +6,600 Population Projection

Population by Age



Housing Profile

Downtown Scottsdale
 3839 N Drinkwater Blvd, Scottsdale, Arizona, 85251
 Drive Time: 10 minute radius

Latitude: 33.49167
 Longitude: -111.92166

Population

2010 Total Population	128,672
2014 Total Population	131,636
2019 Total Population	138,207
2014-2019 Annual Rate	0.98%

Households

2014 Median Household Income	\$45,770
2019 Median Household Income	\$53,810
2014-2019 Annual Rate	3.29%



Dynamic Environment

- Scottsdale is adding many High Tech jobs
- Home Market in Downtown and Southern Scottsdale is the strongest since 2008
- State Farm campus on Tempe Town Lake to be populated by up to 15,000 employees
- New Infill is occurring in DC Ranch area

Considerations To-Date

- Taking extra time has helped see the revitalization occurring
- Must plan for the future
- Do not want to make choices that drive families away
- Possible Bond in November 2016 allows for adequate preparation – one year away

Current Recommendations Replace Elementary Schools

<u>School</u>	<u>Proposed SF</u>	<u>Design Capacity</u>	<u>2015 Enrollment</u>
Tonalea**	52,500	500	344
Hohokam	52,500	500	431
Hopi	81,000	810	864
Kiva	63,000	600	480
Navajo	52,500	500	352
Pima	63,000	600	528
Pueblo	63,000	600	495

****Building Recommended to be Completed with Certificates of Participation**

Current Recommendations

Facility Additions and Renovations

- Add new Multi-Purpose Room, indoor P.E. space
 - Anasazi
 - Cherokee
 - Laguna
 - Sequoya
 - Desert Canyon
 - Redfield
- New Gymnasium and Science Classrooms
 - Cheyenne Traditional School
- New Administration and Kindergarten Building
 - Tavan Elementary School

Recommendations To-Date

Districtwide System Renovations

- Roofing
- Parking Lots
- Pupil Transportation

2016 Bond Planning

• Anasazi	New P.E. Space and Interior Renovations	\$2,950,000
• Cherokee	Campus Renovations	\$8,200,000
• Cheyenne	Gym, Science Classrooms, Interiors	\$6,600,000
• Cochise	Interior Renovations	\$1,500,000
• Copper Ridge	Interior Renovations	\$1,900,000
• Desert Canyon	New P.E. Space and Interior Renovations	\$2,700,000
• Hohokam	Rebuild School and Proper Parking	\$10,700,000
• Hopi	Rebuild School and Proper Parking	\$15,800,000
• Kiva	Rebuild School and Drop-Off	\$12,500,000
• Laguna	New P.E. Space and Interior Renovations	\$3,900,000
• Navajo	Rebuild School and Proper Parking	\$11,400,000
• Pima	Rebuild School and Proper Parking	\$12,800,000
• Pueblo	Rebuild School	\$12,800,000
• Redfield	New P.E. Space and Interior Renovation	\$2,600,000
• Sequoia	New P.E. Space and Interior Renovation	\$3,400,000
• Tavan	New Administration and Kindergarten Space, Interior Renovations	\$5,800,000
<u>SUBTOTAL</u>		<u>\$115,550,000</u>
• Districtwide Roofing		\$5,000,000
• Districtwide Parking Lot Resurfacing		\$2,000,000
• Pupil Transportation		\$6,000,000
• High School Tracks and Field Turf	Renovate Tracks and Install Artificial Turf at 3 High Schools	\$5,000,000
• Technology	Infrastructure Upgrades	\$7,000,000
TOTAL		\$140,550,000

Tonalea – 68th Street Campus Rebuild

- Opportunity to Rebuild Existing 68th Street Complex
- Area is seeing significant revitalization
- Certificates of Participation
 - Similar to Lease Financing done for equipment
 - Simple and Efficient
 - Saves Money (2.1 – 2.3% Interest Rate)
 - Been used successfully by many Arizona School Districts since 1997
 - Does require a revenue stream (10 Years Max)

Tonalea – 68th Street Campus Rebuild

Lease Structures

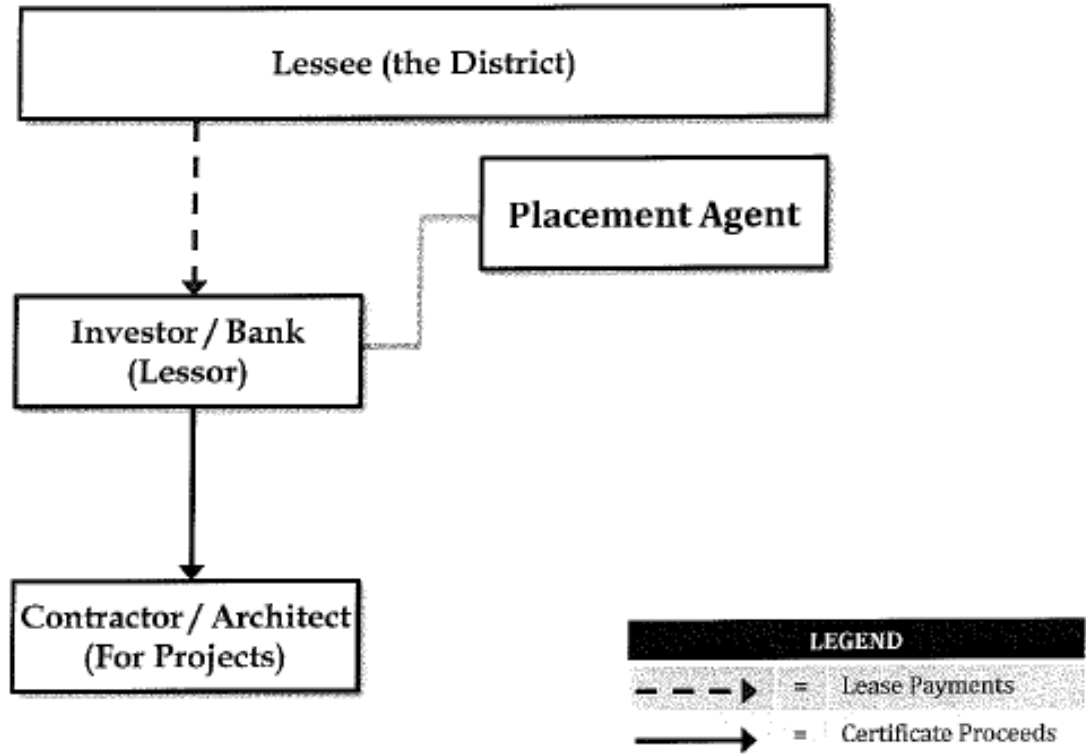
Typical Lease/Lease-back Financing

- District sets up a relationship with a third party
 - District leases the land/equipment under which the improvements will be constructed, to the third party
 - District leases the property and improvements back from the third party over an extended term
 - District makes lease payments to the third party - subject to Annual Appropriation
 - Upon completion of the lease period, title to the facility(s) automatically transfers to the District at no additional cost
 - Lease will typically have a Purchase Option (and prepayment provisions)
- Lease/lease-back structure is used to provide third party Leasehold Interest on Real Property, Buildings or Equipment
 - Real Property - Title Search / Phase I Environmental may be required
 - Election? < 10 Yrs = NO, ≥ 10 Yrs = YES
 - Repaid from any lawfully available funds - no new revenue source unless Capital Outlay Override
 - Less secure transaction than General Obligation Bonds resulting in slightly higher rates
 - Does not impact District's GO bonding capacity
 - Lease may be privately placed or publicly offered, depending upon size, term, project, credit profile, market conditions



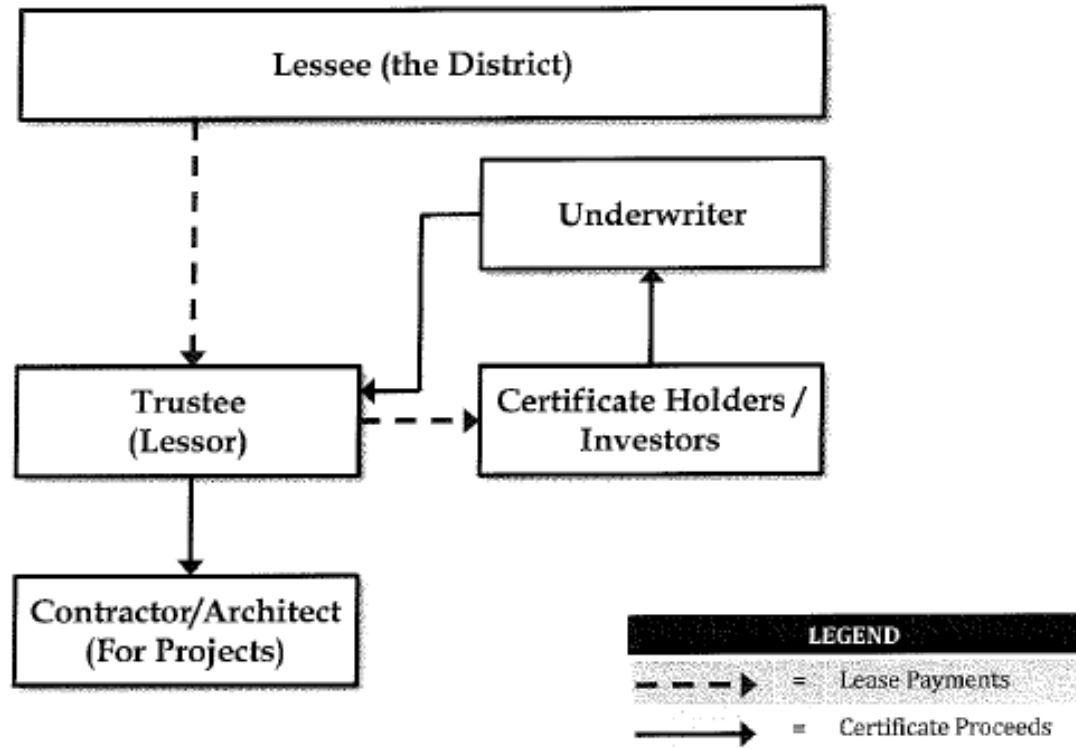
Tonalea – 68th Street Campus Rebuild

Typical Flow of Funds – Private Placement



Tonalea – 68th Street Campus Rebuild

Typical Flow of Funds – Public Sale



Future Decisions

- Working from Previous Input Back to 2006
- BRAC to Consider (Oct, 2015 – March, 2016)
- Conducting Community Engagement (Nov '15 – March '16)
 - Authentic engagement with Online Platform
 - Two-way dialogue with stakeholders
 - Uncover the community's priorities
- Final Board Recommendation – March/April 2016



DISCUSSION