



Lake Forest Community High School District 115

**LFHS Capital Facilities Plan Community Forum
November 14, 2022**



Beautiful from afar, but...



Facilities Master Plan Oversight Committee



Board of Education

Jenny Zinser (D115 President)
John Noble (D115 Member)

District and School Administration

Matthew Montgomery (Superintendent)
Jeff McHugh (Deputy Superintendent)
Jennifer Hermes (Chief Operating Officer/CSBO)
Melissa Oakley (Chief Communications Officer)
Jordan Salus (Chief Technology Officer)
Daniel Mortensen (Director, Buildings & Grounds)
Erin Lenart (Principal)
Patrick Sassen (Assoc. Principal of Educational Services)
Lane Linder (Director of Security and Operations)
Ashleigh Malec (Director of Student Activities)
Tim Burkhalter (Athletic Director)

Staff

Paul Goldstein (LFEA President)
John Wanninger (LFEA Vice President)
Melissa Doucette (LFEA Ex-Officio)
Laura Clegg (Dean)
Sara Dreiling (English/Theater)
Carolyn Bielski (FAA/Ed Technology)
Christine Jankovich (World Language)
Tia Rebecca (Math)
Candice Davenport (Science)
Cindy Collier (Social Studies)
Megan Miles (Student Services)
Kim Jones (Special Ed/Inst. Coaches)
Jim Matheson (Wellness)
Monica Wertz (SSA President)
Jennifer Gleason (SSA Vice President)
Jennifer Regan (Athletic Trainer)

Perkins & Will

Rick Young
Mark Jolicoeur

Pepper Construction

Lance Tritsch

Students

Ben Graves
Billy Douglass

District Parents/Guardians

Susan Morris
Eileen Swartout (LFHS Boosters Secretary)
Christine Farrell (LFHS APT President)
Pamela Hense
Monica Yaun (DPM APT President)
Suzanne Sands (D67 BOE President, President of LFHS Foundation)

Community Partners

Dr. Kurt Schneider (Superintendent, TrueNorth)
Joanna Rolek (Executive Director, LF/LB Chamber of Commerce)
Lisa Leali (Superintendent, District 65)
Marcy Kerr (Executive Director, Preservation Foundation)
Geoff Hanson
Prue Beidler
Joe Knesley

Facilities Oversight Committee Summer 2022 Meeting





Dr. Matthew L. Montgomery

Superintendent of Schools

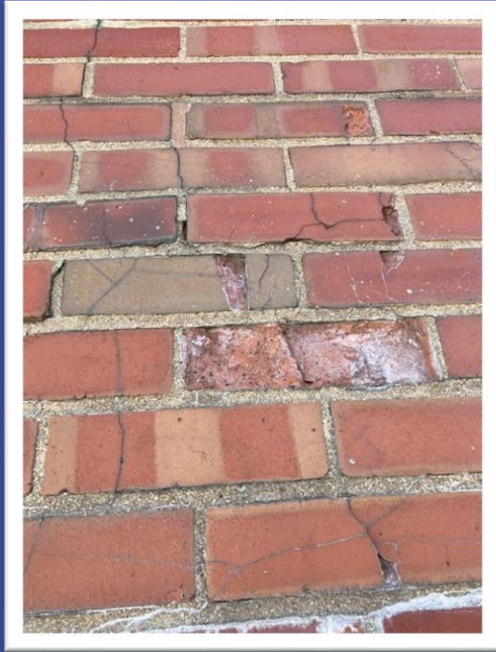
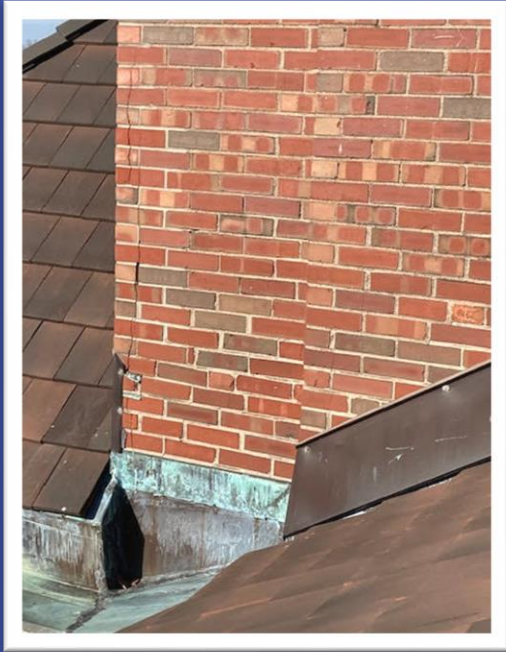
Lake Forest Community High School District 115

Lake Forest Elementary School District 67

November 14, 2022

"The time to fix the roof is when the sun is shining."

It's time.





Where We've Been

- ✓ Restoring the District's fund balance since 2008
- ✓ Prioritizing programming (students and teachers)
- ✓ Getting the most out of our existing mechanical systems



Where We'd Like to Go

- ✓ Address the absolute highest-priority LFHS facility needs
- ✓ Focus on both general infrastructure and unmet instructional space upgrades
- ✓ Position LFHS to remain a highly competitive, high-performing high school, benefiting both our students and taxpayers



What's Ahead Tonight

1. Snapshot of District 115
2. Planning process to date
3. Facility challenges, proposed solutions, and anticipated benefits
4. Proposed financing plan
5. Next steps
6. Q&A
7. Guided tours



Snapshot of District 115





LAKE FOREST COMMUNITY HIGH SCHOOL

DISTRICT 115



1,454

Student Enrollment

90%

of Students Score 3+ on AP Exams

103

Illinois State Scholars

8:1

Student-to-Certified-Staff Ratio

88%

Students Participating in Extracurricular Activities

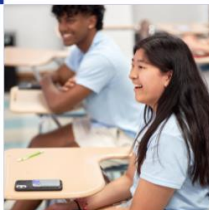
60

Club Offerings



6

of Students Score 3+ on AP Exams



25.5

ACT Composite Score

DEVELOPING COMPASSIONATE, CONFIDENT, AND ACCOMPLISHED STUDENTS

128

Full-Time Teachers

98%

Graduation Rate

32K

Expenditure per Student

132

College and Universities Attended



^20

One of the Top 20 Illinois High Schools

Aaa

Moody's Bond Rating

78%

Teachers with Master's Degree or Higher

33

Athletic Opportunities



95%

Students Attending College or University

805

Number of Students Taking Early College Coursework

184

Students Earning Dual High School and College Credit



567

Students Taking AP Classes



100%

9th Grade Students on Track

8

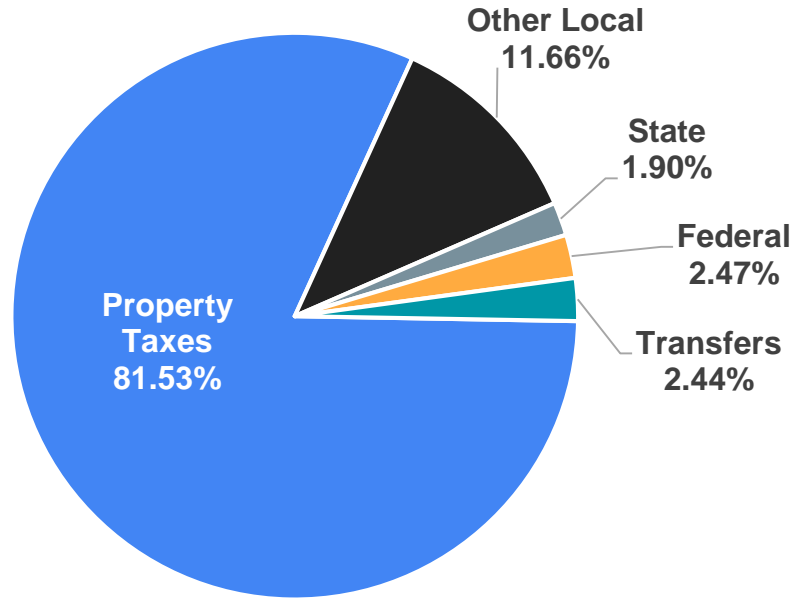
National Merit Scholarship Award Finalists

19

Average Class Size



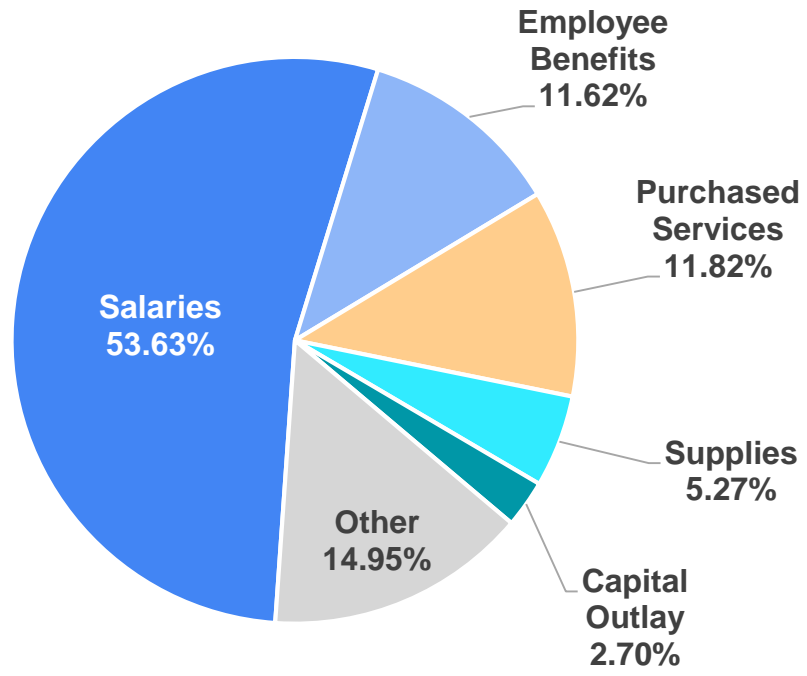
Revenues (2021-2022)



\$54.2M Budget



Expenditures (2021-2022)



\$54.2M Budget



Staff Full-Time Equivalents (FTEs)

2019-2020

Admin = 21.8
Teachers = 151.6
TAs/ESP= 124.15
Total = 297.55

2020-2021

Admin = 19.6
Teachers = 155.2
TAs/ESP= 126.33
Total = 301.13

2021-2022

Admin = 19.4
Teachers = 153.70
TAs/ESP = 126.24
Total = 299.34

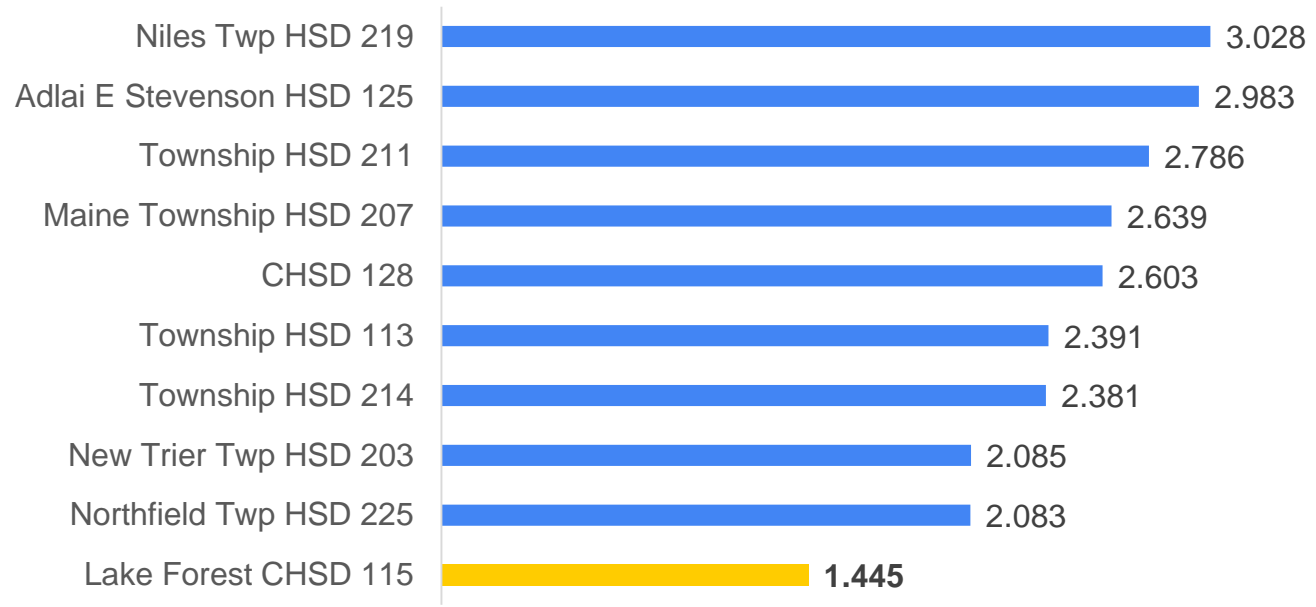
2022-2023

Admin = 18.20
Teachers = 156.7
TAs/ESP = 141.46
Total = 316.36

Administration = 5.8% of Staffing



Tax Rate Comparison



Source: ISBE General State Aid data



Planning Efforts and Facility Challenges

Rick Young
Senior Project Manager, Senior Associate
Perkins & Will



Fall 2006

Referendum passed.
Two-phase renovation plan
launched.

1

Spring 2008

PHASE 1
Created music wing and implemented
other minor building adjustments.

2

Fall 2008

PHASE 2 - MOST RECENT RENOVATIONS
Created academic renovations, new dining room,
large atrium (the Commons), library, admin. offices
and new varsity football field at West Campus.

3

Fall 2018/Spring 2019

Board of Education approved the creation of a
Facilities Master Plan, student and staff surveys
conducted, and community Open House conducted.

4

Spring 2020

COVID-19 shutdown. Facilities
Master Planning is paused.

5

Fall 2021/Winter 2022

Facilities Oversight Committee expanded and
reconvened, new staff and student surveys
conducted, and summer 2022 work scheduled.

6

Spring 2022

Community Forum hosted.
Reassessment of Facilities Master
Planning begins.

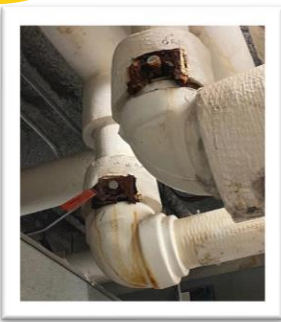
7



Infrastructure Challenges



1962 Main Switch Gear



Inoperable
Heating/Cooling Valves



1970s water main valves



1988 Air Handling Unit



Rusted Housing of
Heating Units

- ✓ Safety & Security
- ✓ Fire Protection
- ✓ HVAC
- ✓ Accessibility
- ✓ Electrical

- ✓ Plumbing
- ✓ Roofing
- ✓ Exterior Enclosure
- ✓ Technology

- ✓ Restrooms
- ✓ Finishes
- ✓ Building Support
- ✓ Site



Instructional Space Challenges



- ✓ Science Labs
- ✓ Other Labs
- ✓ Classrooms

- ✓ Special Education
- ✓ Student Services
- ✓ Collaboration Spaces

- ✓ Students Services
- ✓ Performing Arts
- ✓ Furniture



Proposed Facility Solutions

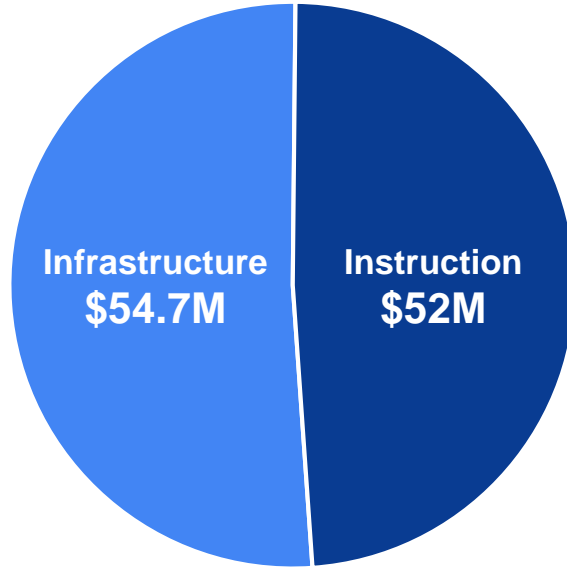




Almost 50:50 in Terms of Costs

INFRASTRUCTURE IMPROVEMENTS

- Safety & Security
- Fire Protection
- HVAC
- Accessibility
- Electrical
- Plumbing
- Roofing
- Exterior Enclosure
- Restrooms
- Finishes
- Building Support
- Site



INSTRUCTIONAL SPACE IMPROVEMENTS

- Science Labs
- Other Labs
- Classrooms
- Special Education
- Student Services
- Collaboration Spaces
- Student Services
- Performing Arts
- Furniture

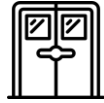


Five Main Categories of Improvements



Maintenance & Infrastructure

Repair or replace outdated roofing, plumbing, electrical, HVAC, historical windows, lighting/ controls, and masonry. Address exterior enclosure improvements.



Safety and Security

Update fire protection system. Install rapid lock-down system, door sensors at all exterior doors, and additional security cameras. Construct partition systems that will prevent facility-wide access during after-hours events.



ADA Accessibility

Address code issues and improve accessibility, including ADA upgrades to restrooms, drinking fountains, ramp slopes, handrails at stairs and ramps, and pull clearances at doors.



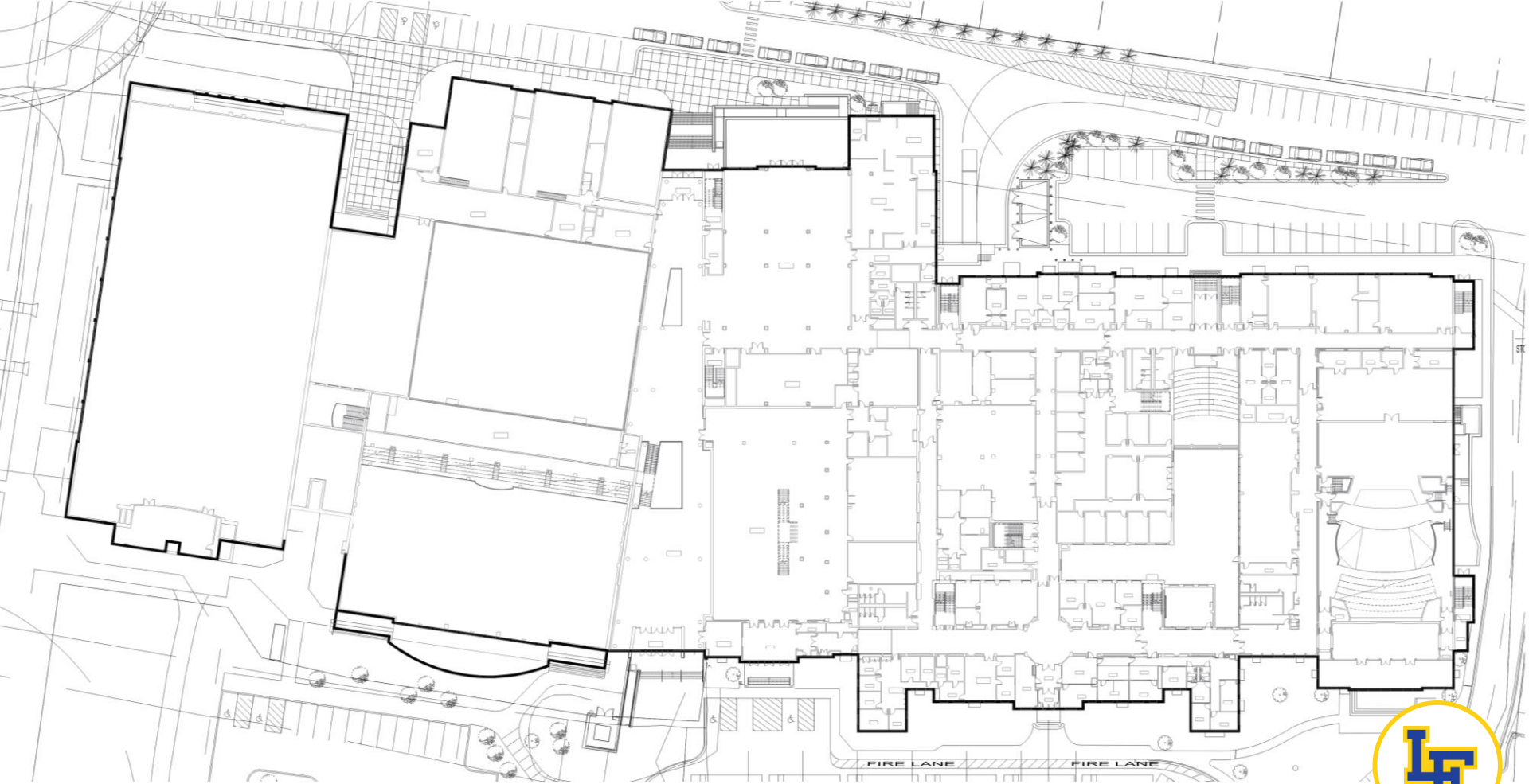
Student Support Spaces

Relocate, reconfigure and/or expand spaces for counselors, student psychologists, and other student support professionals and faculty. Better integrate instructional spaces for special education and transitions program.



Labs, Classrooms & Technology

Improve outdated labs and bring the last remaining classrooms in the facility to the same capabilities as those updated in 2006, including acoustics, lighting, instructional technology, flexible furniture, and related upgrades.



Lower Level



Updated Instructional Spaces for World Language, Business, Technology & Design Classes

- ✓ World Language Lab, Classrooms, Breakout/Collaboration Areas, and Office
- ✓ CAD Lab
- ✓ Maker Lab
- ✓ Business Incubator, Labs, Small Group Rooms & Breakout/Collaboration Areas, and Office
- ✓ Technology Spaces



Lake Forest HS – Existing Classroom



- 1) Outdated fluorescent lighting
- 2) Extreme swings in temperature between classrooms
- 3) Single ceiling mounted projector
- 4) Heavy, outdated furniture and size of many classrooms limits flexibility
- 5) Unable to leverage multiple writing surfaces
- 6) Not breakout spaces

New Trier HS – Classroom



- 1) Indirect LED lighting
- 2) Controllable room temperature
- 3) Multiple projectors per classroom
- 4) Flexible furniture
- 5) Multiple writing surfaces
- 6) Breakout spaces



Example of Collaborative Classroom Features





Updated Instructional Spaces for Science, Math & Media Classes

- ✓ Science Labs, Prep Areas, Classrooms, Breakout/Collaboration Areas & Office/Academic Resource
- ✓ Math Lab, Classrooms, Small Group Areas, Breakout/Collaboration Areas, & Office/Academic Resources
- ✓ Technology Spaces
- ✓ Media Studio, Classroom, Graphic Design Lab, Photo Lab
- ✓ Faculty Resources Area



Lake Forest HS – Existing Science Lab



- 1) Outdated fume heads and equipment
- 2) Window shades often closed due to glare and cold emanating from single-pane windows
- 3) Lab tables fixed to perimeter casework
- 4) Heavy tablet desks not suited for group work
- 5) Little modern technology integrated into labs
- 6) Limited flexibility overall

Example of Flexible Science Lab



- 1) Up-to-date equipment accommodates wider variety of projects
- 2) Thermally efficient windows
- 3) Adjacent project room allows for long-term projects to remain in place rather than taking them down repeatedly
- 4) Flexible lab tables/furniture
- 5) Central area can be cleared for larger projects



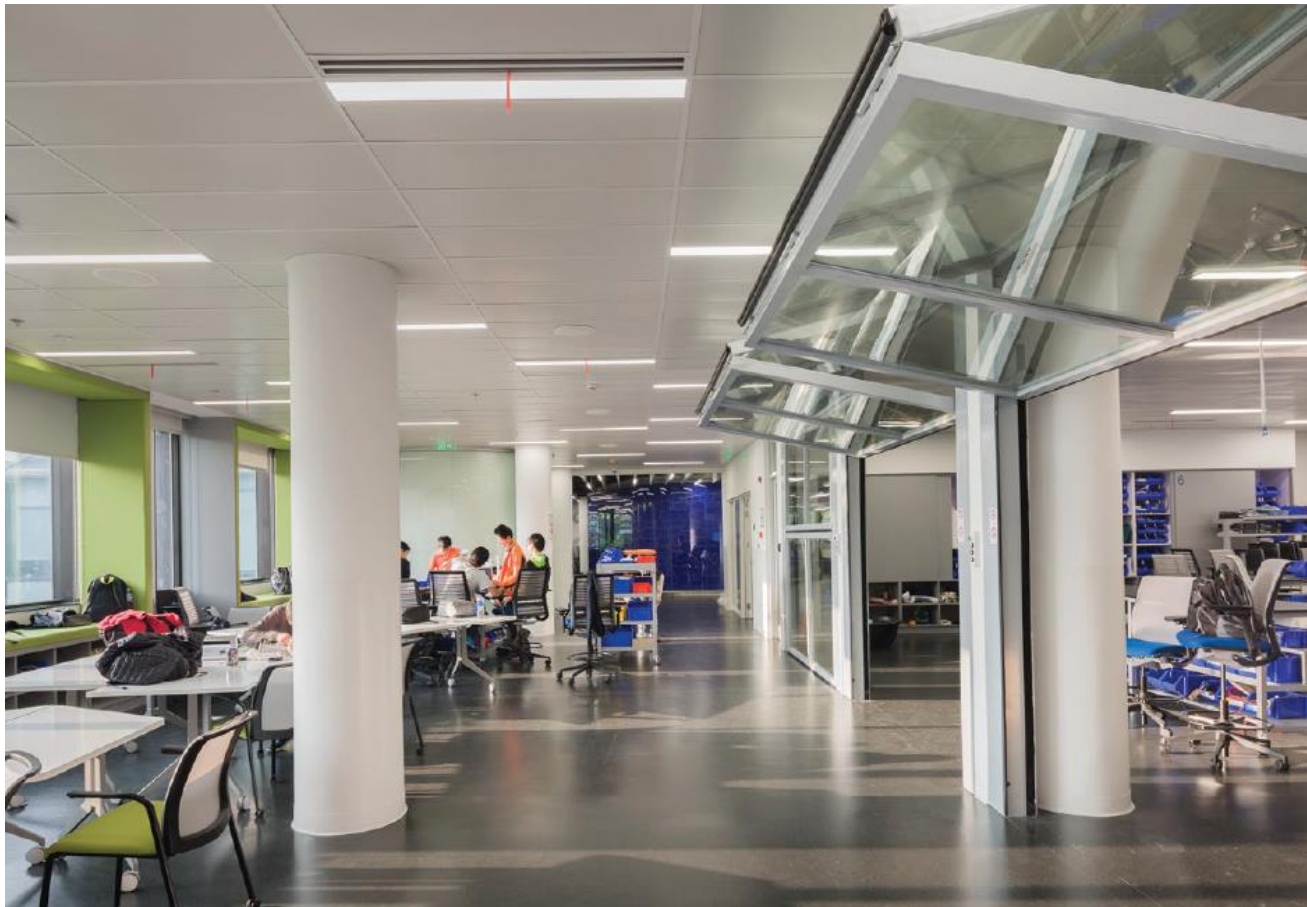
Deer Path MS – Physics Lab



- ✓ Pipe rail for hanging experiments
- ✓ Moveable wall and marker boards
- ✓ Flat screens at each lab
- ✓ Integrated outlets
- ✓ Overhead door allows for creation of breakout space
- ✓ Moveable tables can be docked at lab stations or centrally arranged for group work



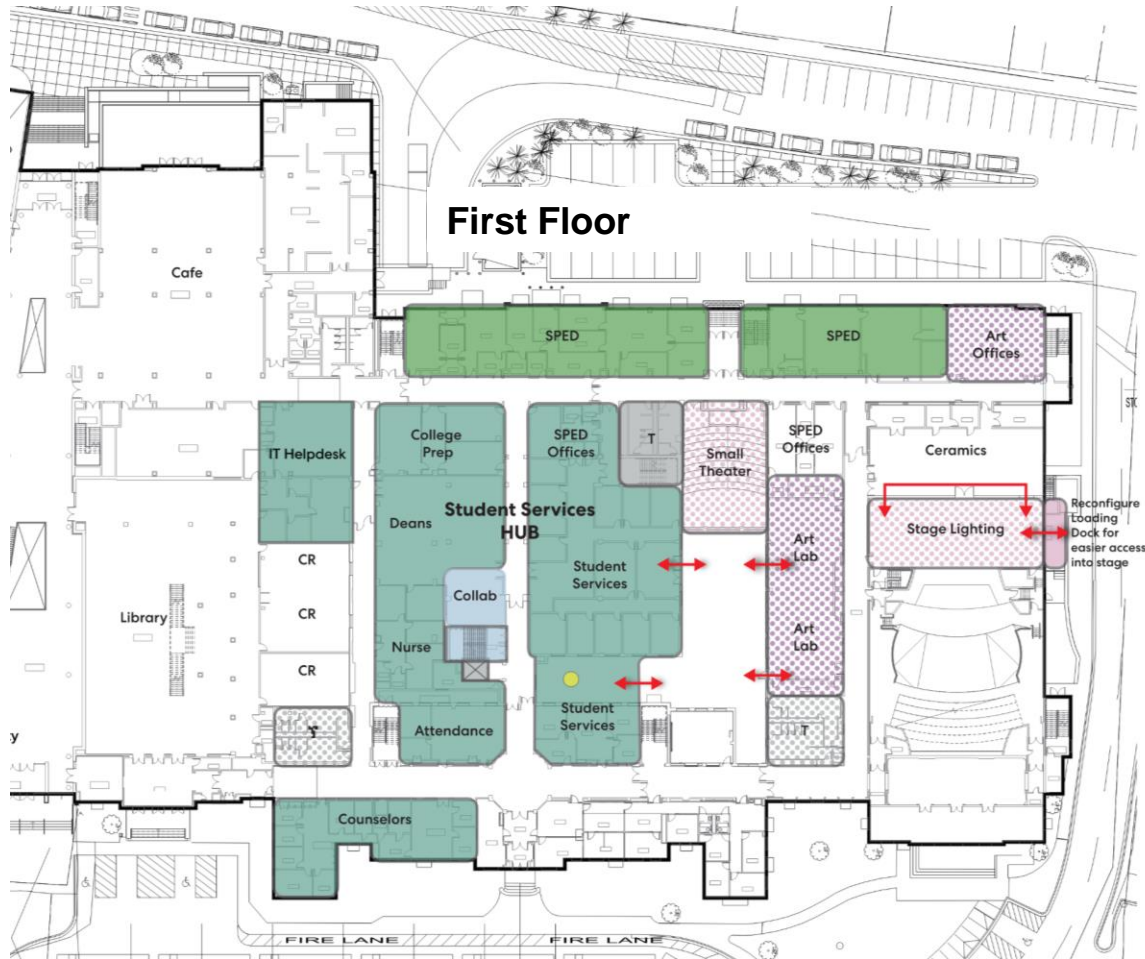
Example of Flexible Science Lab and Collaborative Corridor



- ✓ Expanded collaborative corridors used by any classroom in the area
- ✓ Mobile tables, chairs and storage
- ✓ Movable walls create collaborative spaces



First Floor

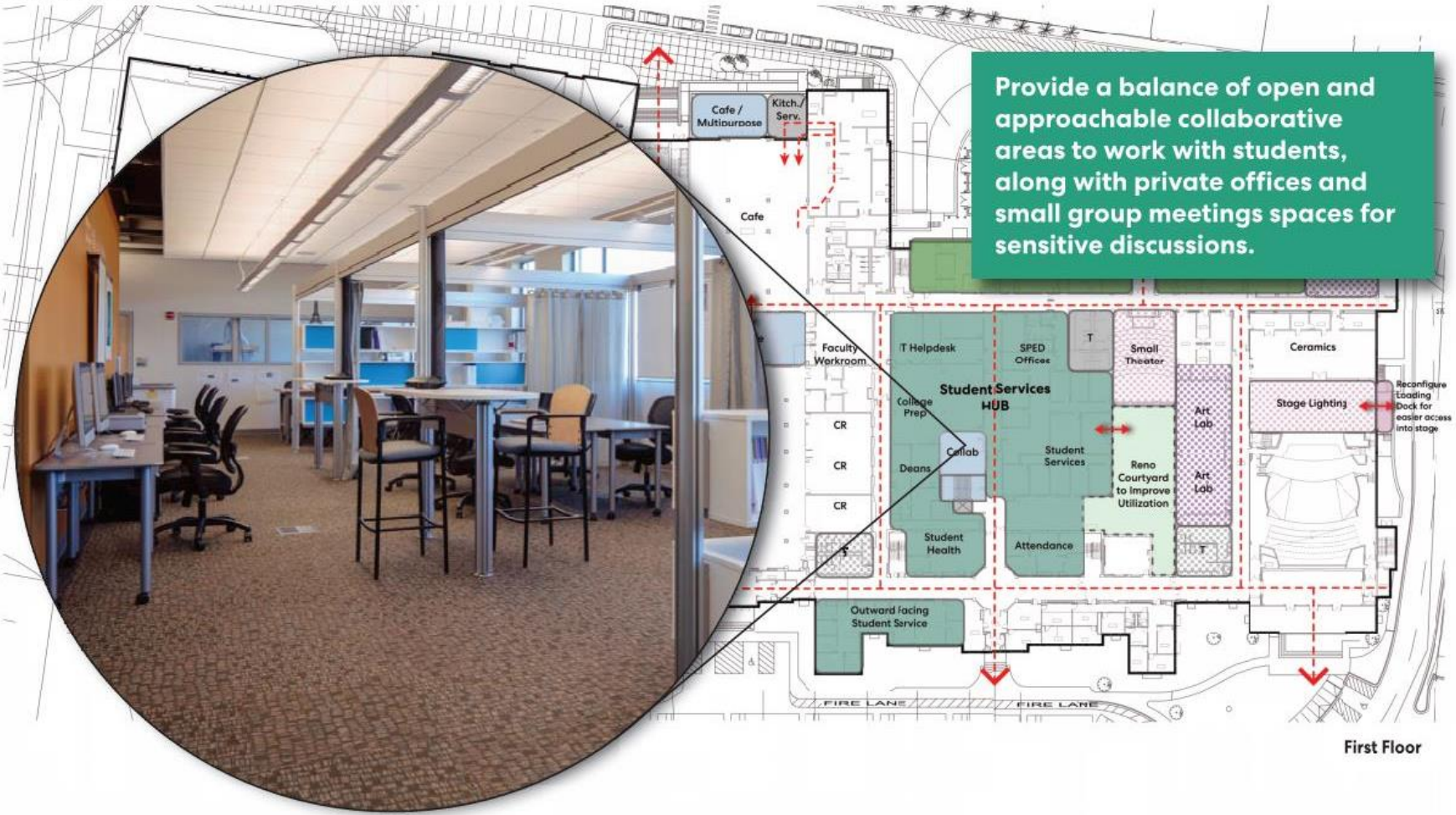


Updated Spaces for Student Services, Special Education, Performing & Visual Arts Classes

- ✓ Student Support
 - College Prep
 - Dean
 - Nurse
 - Student Services
 - Counselors
 - Attendance
 - IT Help Desk
- ✓ Special Education Classrooms & Office
- ✓ Art Lab & Offices
- ✓ Small Theater & Stage Lighting
- ✓ Technology Space

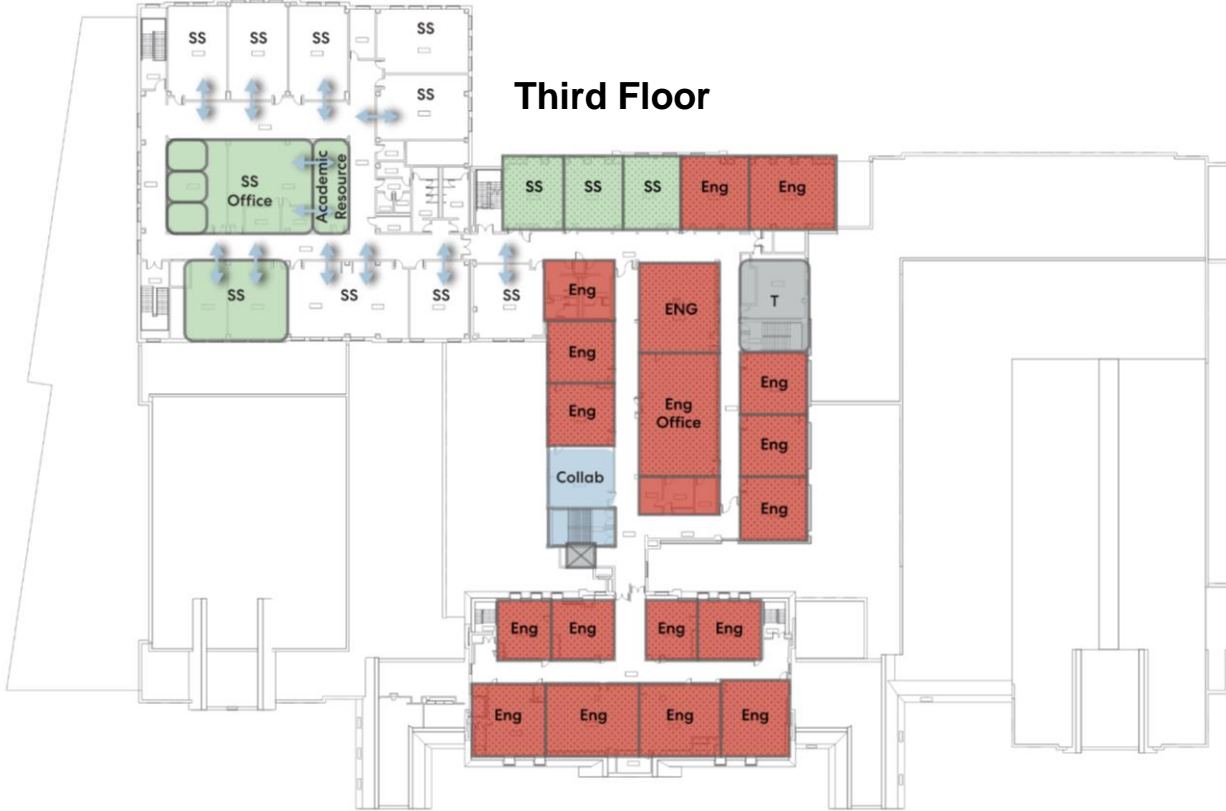


Potential Student Services Hub



Provide a balance of open and approachable collaborative areas to work with students, along with private offices and small group meetings spaces for sensitive discussions.

First Floor



Updated Spaces for Social Studies & English Classes

- ✓ English Classrooms, Breakout/Collaboration Spaces & Office
- ✓ Social Studies Classrooms & Office/Academic Resources



Lake Forest HS – Existing Classroom Furniture



- ✓ Majority of classrooms either tablet arm or sled desks (with a few left-handed desks)
- ✓ Not conducive to group work
- ✓ Uncomfortable rigid seats
- ✓ Heavy desks are difficult to rearrange



Example of Flexible Furniture



- ✓ Integrated marker boards
- ✓ Flexible furniture
- ✓ Adjustable table arms (meeting needs of right- or left-handed students)
- ✓ Integrated storage below seats
- ✓ Wheels allow for quick rearrangement:
 - *discussion*
 - *lecture*
 - *small group*





Anticipated Benefits



Creating a healthier, safer and more secure school



Enhancing ADA accessibility



Extending the useful life of existing facilities



Reducing costly and disruptive emergency repairs



Improving energy efficiency



Providing LFHS students with the tools and spaces needed to excel



Further preparing students for college and careers



Improving access to student support services



Attracting and retaining quality teachers

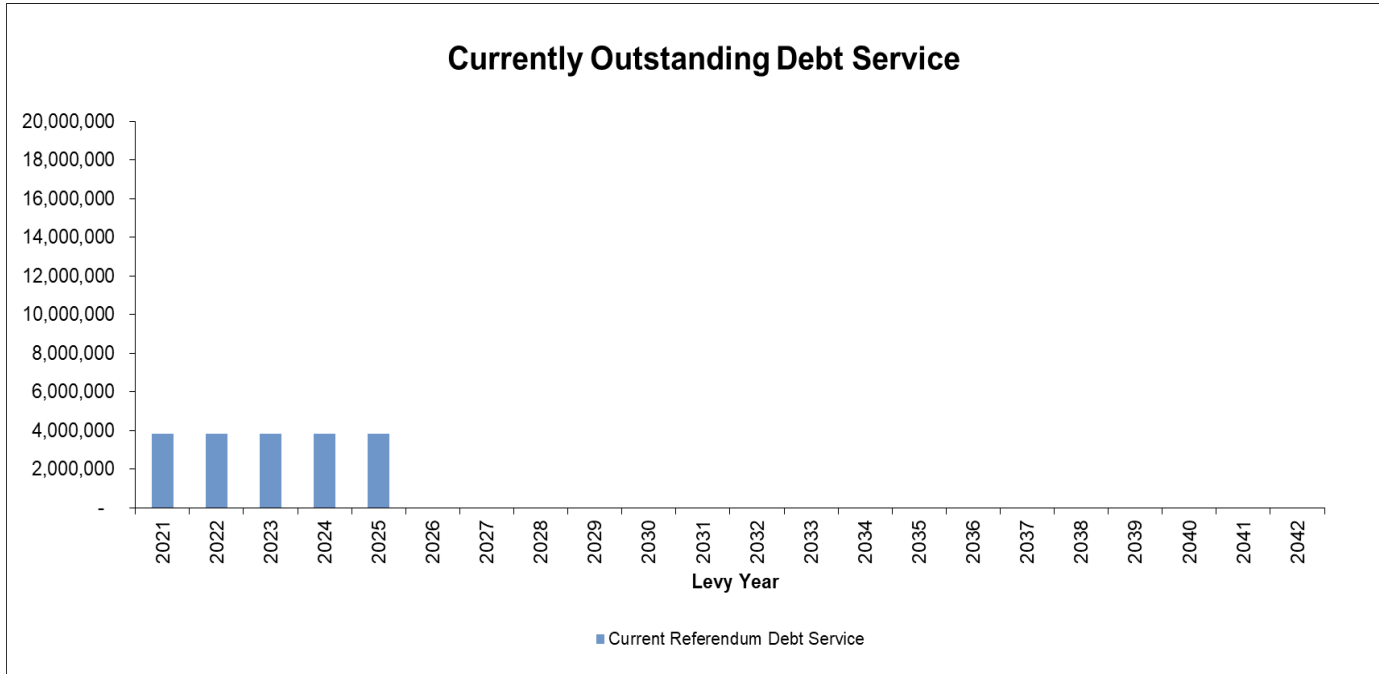


Protecting property values

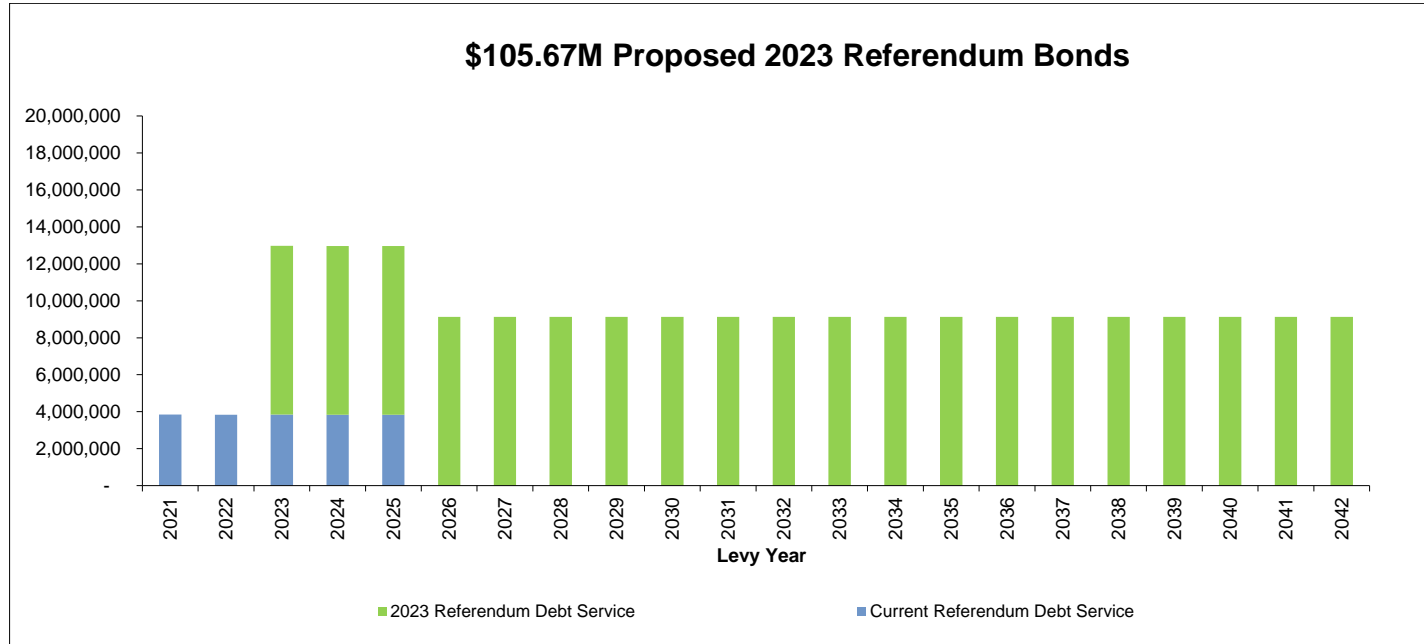


Proposed Financing Plan

Elizabeth Hennessy
Managing Director
Raymond James



- The last building referendum that was approved was in November 2006 for \$54M;
- The District maintains a Aaa/AAA bond rating from both Moody’s and Standard and Poor’s;
- The outstanding District referendum debt will be retired in 2025 levy year (2026 payments).



- The proposed Series 2023 referendum bond payments are level debt service (principal and interest) like a mortgage.
- They will be repaid simultaneously with the Series 2016 Bonds for 3 years; The total debt service payments drop in levy year 2026 after the Series 2016 bonds are retired.

TAX IMPACT OF PROPOSED \$105.7M DATED DECEMBER 1, 2023

Tax Year	Equalized Assessed Valuation	% Change	Referendum Debt Service			Proposed TOTAL Referendum Debt Service	Estimated Tax Rate for Debt Service	Estimated Debt Payments \$500,000 Home'	Estimated Tax Increase due to New Bonds on \$500,000 Home'	Estimated Debt Payments \$1,000,000 Home'	Estimated Tax Increase due to New Bonds on \$1,000,000 Home'
			Current Referendum Debt Service	Series 2023 Plus Referendum Debt Service	Proposed Referendum Debt Service						
2020	2,993,422,541	-2.33%	3,840,900		3,840,900	3,840,900	0.128	\$206		\$420	
2021	2,966,938,417	-0.89%	3,844,800		3,844,800	3,844,800	0.130	\$208		\$424	
2022	3,044,027,181	2.53%	3,838,700		3,838,700	3,838,700	0.126	\$203		\$413	
2023	3,044,027,181	0.00%	3,843,550	9,129,288	12,972,838	12,972,838	0.426	\$676	\$474	\$1,386	
2024	3,044,027,181	0.00%	3,837,900	9,128,850	12,966,750	12,966,750	0.426	\$676		\$1,386	
2025	3,044,027,181	0.00%	3,840,300	9,124,225	12,964,525	12,964,525	0.426	\$676		\$1,386	
2026	3,044,027,181	0.00%	-	9,125,975	9,125,975	9,125,975	0.300	\$476	-\$200	\$975	
2027	3,044,027,181	0.00%	-	9,128,475	9,128,475	9,128,475	0.300	\$476		\$976	
2028	3,044,027,181	0.00%	-	9,126,169	9,126,169	9,126,169	0.300	\$476		\$975	
2029	3,044,027,181	0.00%	-	9,128,031	9,128,031	9,128,031	0.300	\$476		\$976	
2030	3,044,027,181	0.00%	-	9,128,081	9,128,081	9,128,081	0.300	\$476		\$976	
2031	3,044,027,181	0.00%	-	9,125,794	9,125,794	9,125,794	0.300	\$476		\$975	
2032	3,044,027,181	0.00%	-	9,125,513	9,125,513	9,125,513	0.300	\$476		\$975	
2033	3,044,027,181	0.00%	-	9,124,738	9,124,738	9,124,738	0.300	\$476		\$975	
2034	3,044,027,181	0.00%	-	9,126,913	9,126,913	9,126,913	0.300	\$476		\$975	
2035	3,044,027,181	0.00%	-	9,124,681	9,124,681	9,124,681	0.300	\$476		\$975	
2036	3,044,027,181	0.00%	-	9,126,231	9,126,231	9,126,231	0.300	\$476		\$975	
2037	3,044,027,181	0.00%	-	9,127,081	9,127,081	9,127,081	0.300	\$476		\$975	
2038	3,044,027,181	0.00%	-	9,126,081	9,126,081	9,126,081	0.300	\$476		\$975	
2039	3,044,027,181	0.00%	-	9,126,938	9,126,938	9,126,938	0.300	\$476		\$975	
2040	3,044,027,181	0.00%	-	9,128,100	9,128,100	9,128,100	0.300	\$476		\$976	
2041	3,044,027,181	0.00%	-	9,126,950	9,126,950	9,126,950	0.300	\$476		\$975	
2042	3,044,027,181	0.00%	-	9,125,800	9,125,800	9,125,800	0.300	\$476		\$975	
Total			\$ 15,360,450	\$ 182,533,913	\$ 197,894,363	\$ 197,894,363					
				Proceeds: \$105,700,000							
				All-in TIC: 5.78%							

(1) Series 2023 assumes Aaa-MMD rates as of November 8, 2022 plus Illinois credit spread, with +1.50% cushion for market volatility. EAV for 2022 is the preliminary estimate from Lake County Clerk.
 (2) Market value of home is \$500,000. Tax Impact calculated by dividing market value by 3 to get assessed value. The \$6,000 homeowner deduction is included through 2022 then increases to \$8000 in 2023.

- The tax impact increase and subsequent decrease may be confusing to the public.
- Therefore, we recommend using the annual average debt service payment and tax rate for the new bonds to describe the tax impact.

**High School District Number 115
Lake County, IL (Lake Forest)**

Tax Estimator

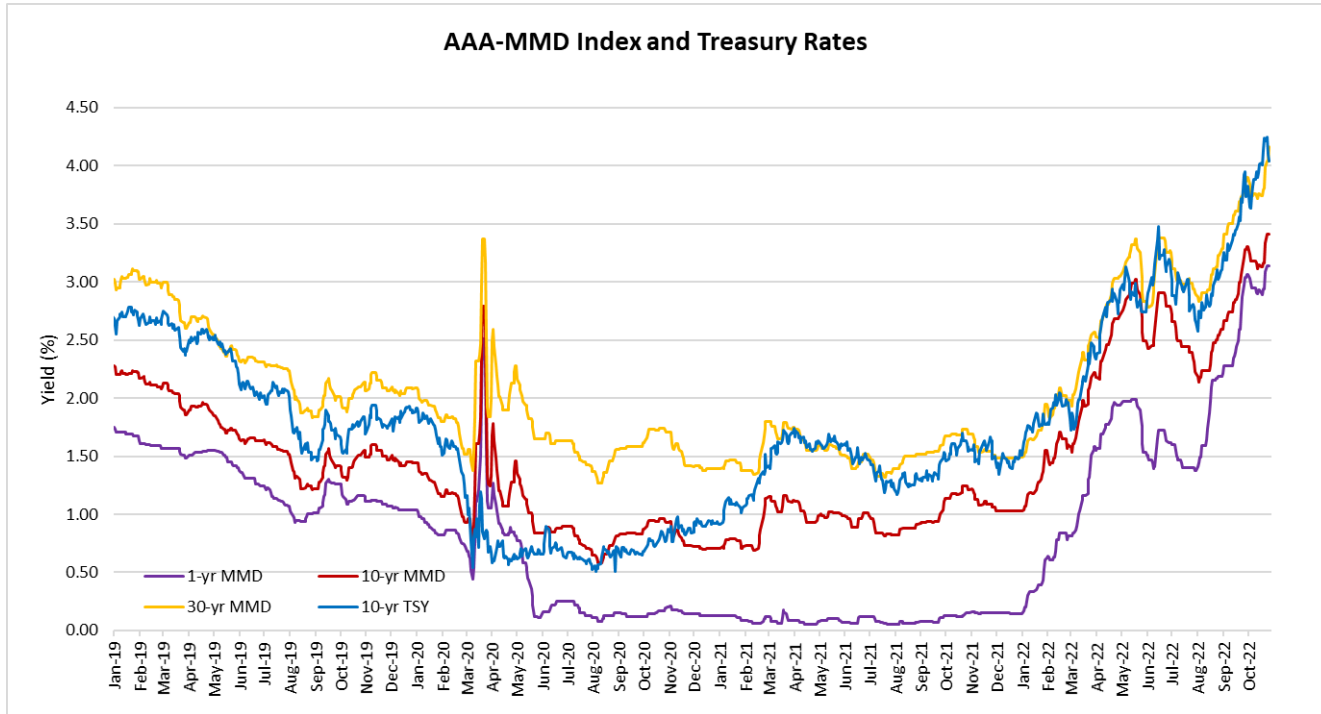
Fair Market Value Input	<input type="text" value="\$ 500,000"/>
Eligible for Homestead Exemption?	<input type="text" value="Yes"/>
Eligible for Disable Person's Exemption?	<input type="text" value="no"/>
Eligible for Returning Veterans' Homestead Exemption?	<input type="text" value="no"/>
Eligible for Senior Citizen Exemption?	<input type="text" value="no"/>

Est. 2022 Property Value	\$	500,000
Total Assessed Value (33.3%) Estimated	\$	166,500
State Equalization Multiplier		1.0000x
Homestead Exemption	\$	8,000.00
Disable Person's Exemption	\$	-
Returning Veterans' Homestead Exemption	\$	-
Senior Citizen Exemption	\$	-
Net Equalized Assessed Value	\$	158,500

Estimated Tax Rate	<input type="text" value="0.30"/>
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Estimated Annual Tax Impact \$475.50
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Note: 2023 levy year homeowner exemption is increased from \$6,000 to \$8,000 and the senior citizen exemption from \$5,000 to \$8,000.





Next Steps





Key Next Steps

- ✓ Continued public engagement - presentations, small groups, other **(November-April)**
- ✓ Further Discussion - Board of Education **(November – December)**
- ✓ Board Vote on Ballot Resolution **(December)**
- ✓ Ongoing Updates to Landing Page on District Website - FAQ, other **(November-April)**
- ✓ Election Day **(April 4, 2023)**



Questions & Answers





Background Information



Total \$105.7M

	CATEGORY	PHASES 1-3
INFRASTRUCTURE	HVAC	\$ 20,685,783
	Electrical	\$ 8,555,136
	Safety & Security	\$ 6,760,238
	Roofing	\$ 4,671,364
	Exterior Enclosure	\$ 4,128,202
	Technology	\$ 4,017,244
	Restrooms	\$ 2,343,563
	Accessibility	\$ 1,631,998
	Fire Protection	\$ 781,826
	Plumbing	\$ 535,471
	Finishes	\$ 226,173
	Building Support	\$ 212,576
	Site	\$ 113,087
	Paving	\$ -
HLS	\$ -	
INSTRUCTION	Science Labs	\$ 15,459,433
	Classrooms	\$ 17,152,182
	Student Services	\$ 5,674,791
	Furniture	\$ 4,631,061
	Collaboration	\$ 1,637,337
	Special Education	\$ 1,608,221
	Misc. Labs	\$ 4,344,330
	Administration	\$ -
	Performing Arts	\$ 504,851
	Food Service	\$ -
	Kinetic Wellness	\$ -
	Athletics	\$ -
	Total	\$ 105,674,869

