



## **Long Term Infrastructure Handbook**

### **East Helena Public Schools**

**School District No. 9**

**P.O. Box 1280 \* East Helena, MT. 59635**

Superintendent/Administration Office (406) 227-7700

Eastgate Elementary School (406) 227-7770 \* Radley Elementary School (406) 227-7710

East Valley Middle School (406) 227-7740

**“Success For All”**

# **Long Term Infrastructure Handbook**

Prepared June 19, 2006

Revised Sept. 18, 2006

Revised Oct. 2, 2006

Revised Oct. 1, 2012

Revised Mar. 2, 2015

Revised Mar. 24, 2016

Revised April 26, 2018

Revised June 12, 2018

Updated November 21, 2022

Thanks to the Long Term Infrastructure Planning Committee for their stellar efforts to create a useful document to benefit the school district planning for future growth.

#### Revised Committee Members 2022

|                          |                        | <u>Sub Committee Assignments</u> |
|--------------------------|------------------------|----------------------------------|
| -                        |                        |                                  |
| Scott Walter, Chairman   | EHPS Board Member      | Comm. Dev. & Impact (C)          |
| Kelly Harris, Vice-Chair | EH City Mayor          | Comm. Dev. & Impact              |
| Wes Feist                | EH City Council Member | Communications                   |
| Molly Hollohan           | Realtor                | Comm. Dev. & Impact              |
| Stacy Baird              | EHPS Board Trustee     | Comm. Dev. & Impact              |
| Tyrel Murfitt            | EHPS Board Trustee     | Building Arrangement             |
| Jeri Lynn Traynham       | Parent/PTO Member      | Benchmarks and Indicators        |
| Kelly Traynham           | Parent                 | Comm. Dev. & Impact              |
| Kate Johnson             | Parent/Teacher         | Building Arrangement             |
| Shaun Murgel             | Athletic Director      | Comm Dev. ,& Impact              |
| KD Jones                 | Parent/Teacher         | Building Arrangement             |
| Jason Cobb               | Teacher                | Benchmarks & Indicators          |
| Ashley Torgerson         | Teacher                | Communications                   |
| Larry Torgerson          | Parent                 | Comm. Dev. & Impact              |
| Casey Harris             | Teacher                | Communications                   |
| Quinton Mergenthaler     | Parent                 | Building Arrangement             |
| Stacy Murfitt            | Parent                 | Building Arrangement             |
| Lynsi Morris             | Principal              | Benchmarks & Indicators          |
| Michael Kemper           | Vice Principal         | Communications                   |
| Brian Kessler            | Principal              | Benchmarks & Indicators (C)      |
| Gus Somerfeld            | Principal              | Building Arrangement (C)         |
| Brandon Crusat           | Principal              | Building Arrangement             |
| Dan Rispens              | Superintendent         | Benchmarks & Indicators          |
| Brandon Hansen           | Technology Coord       | Communications (C)               |

#### Revised Committee Members 2018:

Revised Committee Members 2018 (for review by the Chair):

|                             |                    | <u>Sub Committee Assignments</u> |
|-----------------------------|--------------------|----------------------------------|
| Scott Walter, Chairman      | EHPS Board Member  | Comm. Dev. & Impact (C)          |
| Kevin Bokovoy, Vice-Chair   |                    | Comm. Dev. & Impact              |
| Breck Scheet                | EHPS Board Trustee | Communications                   |
| Mark Diehl                  | Trustee            |                                  |
| Marcia Ellermeyer           | Trustee            |                                  |
| Kevin Bokovoy               | Trustee            |                                  |
| Karen Goldsberry            | Trustee            |                                  |
| Vacant                      | EHPS Board Trustee | Comm. Dev. & Impact              |
| Scott Cromwell, Slate Arch. | Parent/Architect   | Building Arrangement             |
| Richard Adamson             | Teacher            | Building Arrangement             |

|                        |                        |                             |
|------------------------|------------------------|-----------------------------|
| Sarah Sandau           | Teacher                | N/A                         |
| Kelsey Phelps          | Teacher                |                             |
| Katy Hauer             | Parent/Teacher         |                             |
| Jodi Ridgeway          | Parent/Teacher         |                             |
| Tricia Haines          | Parent/Teacher         |                             |
| Cody Melton            | Parent/Teacher         |                             |
| Mike Agostinelli, Sr.  | Vice Principal         | Communications              |
| Dan Rispens            | Principal              | Benchmarks & Indicators (C) |
| Joe McMahon            | Principal              | Building Arrangement (C)    |
| Jill Miller            | Parent/Principal       | Benchmarks & Indicators     |
| Ron Whitmoyer          | Superintendent         | Building Arrangement        |
| Jeanette Winslow       | Technology Coord       | Communications (C)          |
| Keith Obert            | Community Member       |                             |
| Martin Balukus         | Parent                 |                             |
| Kelly and Jenny Harris | Parents                |                             |
| Bob Denherder          | Business Owner/Realtor |                             |
| Don Dahl               | EH city council        |                             |
| Moriah Bucy            | Parent                 |                             |

## **Introduction October 19, 2022**

As of this writing the community, state, nation, and world is emerging from the effects of the COVID -19 worldwide pandemic. The health effects of the pandemic resulted in Increased focus and attention on facility issues such as:

- indoor air quality,
- HVAC systems,
- technology infrastructure and accessibility,
- industrial hygiene and surface contaminants, and
- available physical space for learning activities.

The social effects of the pandemic resulted in an unforeseen inbound migration to our state and community. Individuals felt more free to choose where they live due to:

- availability of remote work options,
- political choice and effects of local laws,
- quality of life, and
- availability of comparably affordable housing.

East Helena in particular, as a relocation destination in Montana, has an unusually large amount of new subdivisions and available building lots due to the transition of METG Trust land into the City of East Helena for sale on the open real estate market for residential and commercial uses.

The addition of East Helena High School (new building opened fall 2020) as well as the new Prickly Pear Elementary School (2018) make the EHPS an attractive district for parents who are relocating and concerned about educational availability and quality. The foresight of previous administrations and school boards in securing the 50 acre Dartman property on which PPE was built will be an ongoing benefit to the district and local community as an available space for new facilities as well as open space for recreation. The long range predictions and reality of potential new development will require intense forethought and consideration of the educational needs of the community and potential sites for new school construction.

The consideration for school safety continues to be at the forefront of discussion as mass casualty events grab headlines around the nation. For facilities, this can mean consideration of intruder prevention (hardening the target) in the design and development phase for new construction as well as the retrofitting of current facilities to improve lines of sight, district wide communication, and shelter in place and reunification options for students and staff.

## **Mission Statement**

School District #9's Strategic Planning Committee will develop a strategic plan to accommodate projected population growth linked to subdivision development in the school district. The School Board in cooperation with the community will develop a timeline of benchmarks and trigger points to which the community and school officials will respond. This action will be timely, addressing additional student population growth before it exceeds existing facility accommodations. This committee will develop a Long Term Infrastructure document that outlines guidance to address future growth in School District #9.

## **Planning**

The plan is designed to anticipate the critical pressure points in the school district population growth and avoid crisis planning with informed decision making. It is the purpose of the committee to inform the Board of Trustees of our future facility needs. This plan is an assessment of our current school district growth and a tool to efficiently plan facility development.

### **Scope of Work:**

1. Review of general demographic, economic and curricular information for the community and school district.
2. Projection of student enrollment for all grades for a ten year period.
3. Evaluation of existing school campuses (noting commendations, and areas of concern.)

4. List of strategies that may be considered for long-range improvement of the overall school district facility program.

### **LTIC- Guiding Core Principles (REVISED 2022)**

The East Helena Public Schools values the community, parents, students, staff, administration, and board members as key stakeholders. They will work together as a team for the betterment of student learning in the East Helena Public School District.

East Helena has an excellent school system and will seek to exceed a high level of quality for all students.

A grade level school is the most effective and efficient way to organize the existing buildings in the school district.

School safety will remain a top priority for all stakeholders at the core of all district operations.

Full Day Kindergarten and Preschool Programs are educationally a priority as established by the EHPS Trustees recognizing that additional space may be required.

Enrollment guidelines for each classroom directed by the School Board, as guided by state standards, will be used to make population projections manageable in 850-900 square foot classrooms.

Rapid growth cannot be accurately predicted from a historical growth trend analysis for the purpose of this report. While growth in most cases does not occur evenly across grade levels and therefore creates issues not easily definable in this report or in predictions of future growth this document best represents a baseline for decision making.

Growth in most cases does not occur evenly across grade levels and therefore creates issues not easily definable in this report or in predictions of future growth.

Management of potential out of district tuition students will be critical in the long term efficiencies and success of the school enrollment capacities.

**Facilities Inventory: (OCT 2022)**

| School                    | Grade          | Population | Capacity     |
|---------------------------|----------------|------------|--------------|
| Eastgate Elementary       | Pre K - Kndg   | 178        | 300          |
| Prickly Pear Elementary   | 1st - 2nd      | 273        | 360          |
| Radley Elem               | 3rd, 4th & 5th | 440        | 500          |
| East Valley Middle School | 6th, 7th, 8th  | 484        | 600          |
| East Helena High School   | 9th - 12th     | 585        | 700          |
| Total                     |                | 1960       | <u>2,460</u> |

**Facilities Inventory:(2018)**

| School                    | Grade          | Population | Capacity                   |
|---------------------------|----------------|------------|----------------------------|
| Eastgate Elementary       | Pre K - Kndg   | 162        | 300                        |
| Prickly Pear Elementary   | 1st - 2nd      | 264        | 360                        |
| Radley Elem               | 3rd, 4th & 5th | 393        | 500                        |
| East Valley Middle School | 6th, 7th, 8th  | 409        | <u>600</u>                 |
| Total                     |                | 1,228      | 1,760                      |
| East Helena High School   | 9th - 12th     | 535        | 614 Projected Fall of 2022 |
| Total                     |                |            | <u>2,374</u>               |

## **Population Projections from Major Known Subdivisions (OCT 2022):**

(Assumption of 5 year build out for approved and in progress)

(Assumption of 20 year build out for rumors and proposed)

| <b>Subdivision Name</b>                                             | <b>NEW Housing Units Proposed</b>  | <b>Corresponding K - 12 Enrollment</b> |
|---------------------------------------------------------------------|------------------------------------|----------------------------------------|
| Mountain View Meadows<br>Hilltop behind BCBS                        | 250 (Nearing final approval)       | 60 = $250 \times 0.24$                 |
| Habitat For Humanity (proposed)<br>Between MVM and EH Rodeo grounds | 250 Proposed                       | 60 = $250 \times 0.24$                 |
| Highland Meadows (in progress)<br>Between EHHS and PPE              | 280 Remaining (estimate)           | 67 = $280 \times 0.24$                 |
| Red Fox Meadows (in progress)<br>Near Roundabout                    | 60 26 NEW and Remaining (estimate) | 14 = $60 \times 0.24$                  |
| Vigilante (in progress)<br>North of EHHS                            | 80 Remaining (Phase II)            | 19 = $80 \times 0.24$                  |
| Herron Creek (in progress)<br>Eames lane                            | 60 Remaining (estimate)            | 14 = $60 \times 0.24$                  |

|                     |                         |                                 |
|---------------------|-------------------------|---------------------------------|
| <b><u>TOTAL</u></b> | <b><u>980 Homes</u></b> | <b><u>234 K-12 Students</u></b> |
|---------------------|-------------------------|---------------------------------|

Assuming a 5 year build out at a constant rate that means approximately 46 new K-12 students per year, evenly distributed across 12 grade levels or 4 students per year per grade per year.

|                                                                         |               |                          |
|-------------------------------------------------------------------------|---------------|--------------------------|
| East Fields (Rumor in progress)<br>East of Smelter behind Manlove Cabin | 2500 Proposed | 600 = $2500 \times 0.24$ |
| Canyon Ridge Subdivision<br>(Phase II Rumor)                            | 600 (rumor)   | 144 = $600 \times 0.24$  |

|                           |                          |                                 |
|---------------------------|--------------------------|---------------------------------|
| <b><u>Grand TOTAL</u></b> | <b><u>4080 Homes</u></b> | <b><u>978 K-12 Students</u></b> |
|---------------------------|--------------------------|---------------------------------|

Assuming a 20 year build out at a constant rate that means approximately 49 new K-12 students per year, evenly distributed across 12 grade levels or 4 students per year per grade per year.

## **Population Projections from Major Known Subdivisions (2018):**

(Assumption of 10 year build out)

| Subdivision Name         | Housing Units Proposed | Corresponding K - 8 Enrollment |
|--------------------------|------------------------|--------------------------------|
| Mountain View Meadows    | 936                    | $225 = 936 \times 0.24$        |
| Broadwater and Company   | 250                    | $60 = 250 \times 0.24$         |
| Wheat Ridge Estates      | 40                     | $10 = 40 \times 0.24$          |
| Red Fox Meadows          | 250                    | $60 = 250 \times 0.24$         |
| Canyon Ridge Subdivision | 110                    | $26 = 110 \times 0.24$         |
| <b>TOTAL</b>             | <b>1,586 Homes</b>     | <b>381 Elem Students</b>       |

Assuming a 10 year build at a constant rate that means approximately 38 new elementary students per year, evenly distributed across 9 grade levels or 4 students per year per grade.

At the high school level we should also experience similar growth of 4 students per class per year.



### **Facilities Capacity in Years using the growth projections (2022):**

| School                                    | Grade          | Population | Capacity | Years to Capacity                                |
|-------------------------------------------|----------------|------------|----------|--------------------------------------------------|
| Assume 4 new students per year per grade: |                |            |          |                                                  |
| Eastgate Elementary                       | Pre K - Kndg   | 178        | 300      | $= 122 / 8 \text{ (4/gr)} = 15.25 \text{ years}$ |
| Prickly Pear Elementary                   | 1st - 2nd      | 273        | 360      | $= 87 / 8 = 11 \text{ yrs}$                      |
| Radley Elem                               | 3rd, 4th & 5th | 440        | 500      | $= 60 / 12 = 12 \text{ yrs}$                     |
| East Valley Middle School                 | 6th, 7th, 8th  | 484        | 600      | $= 116 / 12 = 9.6 \text{ yrs}$                   |
| East Helena High School                   | 9th - 12th     | 585        | 700      | $= 116 / 16 = 7.18 \text{ yrs}$                  |

### **Property Holdings Inventory:**

| School                    | Grade             | Acreage     |
|---------------------------|-------------------|-------------|
| Eastgate Elementary       | Pre K - Kndg      | 4.95 acres  |
| Prickly Pear Elementary   | 1st - 2nd         | 50.01 acres |
| Radley Elem               | 3rd, 4th & 5th    | 20.00 acres |
| East Valley Middle School | 6th, 7th, 8th     | 19.22 acres |
| Miller House Property     | Prickly Pear Sped | 4.30 acres  |
| East Helena HS            | 9-12              | 35.01       |
| Mountain View Meadows     | Empty lot         | 8 acres     |

Since the School Board Trustees have anticipated growth for the next 10-20 years and have developed a new infrastructure plan to meet those growth needs, no significant additional bond needs are projected for hopefully 10 years, provided the administration and the School Board manage enrollment carefully. Unrestricted enrollment increases by allowing significant numbers of tuition or out of district boundary enrollments would however create significant crowding issues and disruption to their plan.

## **Financial Planning**

The district is in solid financial condition and continues to revise district policy to improve that financial stability. Reserve minimum balances continue to be steady at 7% which ensures the fiscal dexterity of the district in times of budget challenges and reflects the conservative, fiscally responsible attitude of the Board of Trustees. In addition the Board has recognized and is very committed to limiting additional debt for the district. In particular the Board recently revised Board Policy 7007 Accounting Standards to preserve the fiscal health of the district by controlling debt.

The Board fully recognizes that the needs of the students are always foremost in all of their decisions, however in making those decisions they must consider how to balance the student fiscal needs with the needs of the taxpayers and the financial stability of the district. The responsibilities of the current taxpayers and the need for a quality education for each student in the district must be evaluated in a fiscally responsible and accountable manner.

The district has established a Building Reserve fund for the purpose of addressing facility repairs and improvements that are needed to maintain our quality buildings. This small permissive levy was established to complete the repairs required in the 2008 State Inventory of School Facilities across the State. This fund along with a reserve fund transfer for safety repairs will complete the requirements of ongoing repair and maintenance.

It is also important to note that the general fund or operating fund for the district is not a source of financing available for the construction of buildings. Bond requests are needed to accomplish these capital improvements.

## **Primary Planning and Recommendations with Benchmarks & Trigger Points**

After assessing the district situation with regards to enrollment the EHPS LTIC suggests the following actions to the board of trustees:

1. We recommend the EHPS Board of Trustees review and evaluate policies and procedures regarding non resident students.
2. Explore property acquisitions within the boundaries of EHPS and within COEH Boundaries. Consider traffic impacts of prospective properties.
3. In **September 2023** - Notify the committee members of the school enrollment in the fall of the 2023–24 school year and any variance from projections embedded in this plan update.
  - a. Immediate Growth Concerns seem to be directed at grades 3-12 (Radley, EVMS, EHHS). Also any moves at the Montana Legislature in the direction of universal Pre-K would be a cause of reconvening the LTIC.
4. As our student population increases, the building arrangement sub committee focused primarily on what we can do with our current buildings in anticipation. We took a two

pronged approach; what to anticipate for the 0-5 year term and what to anticipate for the 5-10 year term.

- a. 0-5 years
  - i. Consider Shuffling Radley, EG, and EVMS to house only essential programs. (i.e. reorganize the robotics, Indian Impact, and meeting rooms, as well as ending our relationship with Head Start to add additional classrooms at EG and Radley or future sections. The biggest consideration is adding additional specialists to help with master schedules so the elementary level does not need to double classes during specials.
  - ii. Currently, EVMS, PPE, and EHHS have some space to grow student numbers.
- b. 5-10 years
  - i. Our recommendation is to consider one of the following building projects to our current infrastructure:
  - ii. Adding an additional wing to EVMS to house our 5th and 6th grade students. It would follow an elementary model. Considerations include: adding playground equipment and additional gym space, but on the surface the EVMS property line can take on additions.
    - 1. EG would house PK-K, PPE would house 1-2, Radley would house 3-4, and EVMS would house 5-8.
  - iii. Adding an additional wing to PPE to house our 3rd grade students. Considerations included: adding additional specialists to prevent doubling classes and adding playground equipment.
  - iv. Adding additional infrastructure to house maintenance, food services, administration building, and bus barn. We believe building this type of infrastructure would be less expensive and free up space in our current schools.
- c. Alternative options to consider, but would ultimately result in a recommendation to build a new school on one of the EHPS properties:
  - i. repurpose EG or Radley to house central office staff, food services, maintenance, and alternative programs for EHHS and EVMS.
  - ii. Building either a middle school or elementary school that fit our growing population and restructure our current schools to facilitate that.

The committee agreed that we would prefer to keep our grade band schools.

The committee believes the addition to EVMS would be the preferred option.

- 5. As the high school population has now approached 600 students it is time for the following to be considered:
  - a. The district and high school administration, in conjunction with the high school faculty council, will begin reviewing the use of space, daily schedules, transformational learning options, and a true study of building use throughout the day to determine the true needs of the building. It is recommended that the board consider contracting with an architect to review needed information (population

growth, building capacity, and other requested information) and make recommendations on potential additions and look at creative options on how to better use the space we have. This analysis will be inclusive of work based learning, dual enrollment, and internship opportunities.

6. As the K-8 population has approached 1,400, it is time for the district to bring in an architect to review usage of space and make recommendations on how to either better use the space based on growth predictions, or where additions may be needed to prepare for/or accommodate the rising population predictions.

## Historical Archive

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## National Center for Educational Statistics

Below is the most recent data available for the school district as gathered from the National Center for Educational Statistics. Housing increases were significant over the 10 year period but appear to be advancing at a higher rate currently.

### Census Data for EHPS School District

|                            | 1990     | 2000     | Change   | 2010     |
|----------------------------|----------|----------|----------|----------|
| Total Population           | 5,561    | 7,593    | 2,032    | 7,282    |
| Total Housing Units        | 2,474    | 3,305    | 831      | 2,754    |
| Occupied Housing Units:    | 1,999    | 2,802    | 803      | 2,690    |
| -Owner Occupied            | 1,663    | 2,319    | 656      | 2,048    |
| -Renter Occupied           | 336      | 483      | 147      | 642      |
| Vacant Housing Units       | 475      | 503      | 28       | 64       |
| Households                 | 2,021    | 2,802    | 781      | 2,330    |
| Families                   | 1,542    | 2,126    | 584      | 1,971    |
| Households w/ Children <18 | 899      | 858      | -41      |          |
| Median Household Income    | \$25,436 | \$38,954 | \$13,518 | \$59,130 |

Source: National Center for Educational Statistics, Web sites:

<http://nces.ed.gov/surveys/sdds/singledemoprofile.asp?county1=3009560&state1=30>

<http://nces.ed.gov/surveys/sdds/printf90.asp?fips=30&agid=09560&tytype=PF>

### Census 2000 School District Tabulation (STP2) Data

|                  |     |                     |
|------------------|-----|---------------------|
| Under 1 Year Old | 110 | 70 male + 40 female |
| 1 year           | 145 | 85 male + 60 female |
| 2 years          | 95  | 35 male + 60 female |
| 3 years          | 105 | 80 male + 25 female |
| 4 years          | 95  | 45 male + 50 female |
| 5 years          | 145 | 80 male + 65 female |
| 6 years          | 115 | 80 male + 35 female |
| 7 years          | 120 | 75 male + 45 female |
| 8 years          | 145 | 65 male + 80 female |
| 9 years          | 160 | 65 male + 95 female |
| 10 years         | 130 | 50 male + 80 female |
| 11 years         | 130 | 50 male + 80 female |
| 12 years         | 125 | 75 male + 50 female |
| 13 years         | 110 | 70 male + 40 female |
| 14 years         | 150 | 70 male + 80 female |

Rounding process:

1. 0 remains 0

2. 1-7 rounds to 4
3. 8 or greater rounds to the nearest multiple of 5

Source: ies National Center for Educational Statistics, Web site:  
<http://nces.ed.gov/surveys/sdds/print.asp?id=p8&cat=&geo=districts&county...>

## **Updated Attendance Information for March 2018**

TO: Trustees, East Helena Schools

FROM: Ronald C. Whitmoyer  
 Superintendent

BOARD MEETING: March 12, 2018

RE: Student Enrollment (as of March 5, 2018)

| <u>School</u>       | <u>Grade Level</u> | <u>Enrollment</u> |                  |                 |
|---------------------|--------------------|-------------------|------------------|-----------------|
|                     |                    | <u>To Date</u>    | <u>Month Ago</u> | <u>Year Ago</u> |
| Eastgate            | Pre-K              | 18                | 18               |                 |
|                     | K                  | 144               | 143              | 145             |
|                     | 1                  | 136               | 138              | 125             |
|                     | <b>EG Total</b>    | <b>[298]</b>      | <b>[299]</b>     | <b>[270]</b>    |
| Radley Elementary   | 2                  | 129               | 128              | 132             |
|                     | 3                  | 137               | 138              | 129             |
|                     | 4                  | 130               | 131              | 138             |
|                     | 5                  | 144               | 143              | 136             |
| <b>Radley Total</b> |                    | <b>[540]</b>      | <b>[540]</b>     | <b>[535]</b>    |
| East Valley         | 6                  | 134               | 135              | 128             |
| Middle School       | 7                  | 134               | 133              | 133             |
|                     | 8                  | 128               | 129              | 135             |
| <b>EVMS Totals</b>  |                    | <b>[396]</b>      | <b>[397]</b>     | <b>[396]</b>    |
| <b>TOTALS</b>       |                    | <b>1234</b>       | <b>1236</b>      | <b>1201</b>     |

## Updated Attendance Information for March 2016

TO: Trustees, East Helena Schools

FROM: Ronald C. Whitmoyer  
Superintendent

BOARD MEETING: March 14, 2016

RE: Student Enrollment (as of March 8, 2016)

| <u>School</u>       | <u>Grade Level</u> | <u>Enrollment</u> |                  |                 |
|---------------------|--------------------|-------------------|------------------|-----------------|
|                     |                    | <u>To Date</u>    | <u>Month Ago</u> | <u>Year Ago</u> |
| Eastgate            | K                  | 146               | 146              | 130             |
|                     | 1                  | 134               | 133              | 136             |
| <b>EG Total</b>     |                    | <b>[280]</b>      | <b>[279]</b>     | <b>[266]</b>    |
| Radley Elementary   | 2                  | 133               | 132              | 138             |
|                     | 3                  | 142               | 140              | 134             |
|                     | 4                  | 138               | 138              | 121             |
|                     | 5                  | 128               | 127              | 129             |
| <b>Radley Total</b> |                    | <b>[541]</b>      | <b>[537]</b>     | <b>[522]</b>    |
| East Valley         | 6                  | 134               | 133              | 131             |
| Middle School       | 7                  | 131               | 131              | 125             |
|                     | 8                  | 123               | 124              | 130             |
| <b>EVMS Totals</b>  |                    | <b>[388]</b>      | <b>[388]</b>     | <b>[386]</b>    |
| <b>TOTALS</b>       |                    | <b>1209</b>       | <b>1204</b>      | <b>1174</b>     |



## **Financial Planning**

Understanding the financial ability of the district to fund the construction of new facilities is another key aspect to the complete picture of what options are available for the school district.

The board must balance the needs of the students, the needs of the taxpayers and the financial stability of the district in any decision. The responsibilities of the current taxpayers and the need for a quality education for each student in the district must be evaluated in a fiscally responsible and accountable manner.

The district has established a Building Reserve fund for the purpose of addressing facility repairs and improvements that are maintaining our quality buildings. This fund requires the passage of a Building Reserve levy by a vote of the taxpayers. A Bond levy would be a means by which to fund the actual construction costs of a building and again requires taxpayer approval.

The general fund or operating fund for the district is not a source of financing available for the construction of buildings.

### **Budget Projections**

|            |             | Projected Budget | Prior Year Budget | Difference |
|------------|-------------|------------------|-------------------|------------|
| 2017- 2018 | K-12 Budget | \$7,417,412      |                   |            |
| 2018- 2019 | K-12 Budget | \$7,645,181      |                   |            |
| 2019- 2020 | K-12 Budget | \$9,011,792      |                   |            |
| 2020- 2021 | K-12 Budget | \$10,070,293     |                   |            |
| 2021- 2022 | K-12 Budget | \$10,944,002     |                   |            |
| 2022- 2023 | K-12 Budget | \$12,032,958     |                   |            |

The current 2006 – 2007 budgets are set as stated below:

## Current 2006 – 2007 budgets

### East Helena Public Schools

#### 2006 - 2007 Budget

| <b><u>Fund</u></b>           | <b><u>Budget</u></b> |                   |
|------------------------------|----------------------|-------------------|
| General Fund                 | \$5,308,923          |                   |
| Transportation               | \$292,592            |                   |
| Bus Depreciation             | \$299,579            |                   |
| Food Service                 | \$348,054            |                   |
| Retirement                   | \$675,000            |                   |
| Adult Education              | \$22,500             |                   |
| Technology                   | \$32,195             |                   |
| Flexibility                  | \$41,984             |                   |
| Building Reserve             | \$0                  |                   |
| Debt Service                 | \$612,018            |                   |
| Enterprise - All Day<br>Kndg | \$48,840             |                   |
|                              |                      | <b>\$10,535,7</b> |
| <b>Taxable Value</b>         | <b>\$11,014,935</b>  | <b>35</b>         |

The breakdown of the general fund budget is:

#### General Fund Budget Breakdown

|                                   |             |
|-----------------------------------|-------------|
| Instructional Services            | \$3,086,430 |
| Support Serv - Instr - Counselors | \$142,357   |
| Support Serv - Library            | \$154,200   |

|                                      |                 |
|--------------------------------------|-----------------|
| Support Serv - Supt./Schl Board      | \$187,560       |
| Elections                            | \$3,000         |
| Support Serv - School Admin          | \$373,363       |
| Support Serv - Business Office       | \$88,022        |
| Operations & Maintenance             | \$596,525       |
| Student Transportation - Field Trips | \$5,600         |
| Support Serv - Technology            | \$95,218        |
| Loan/Lease Debt Service              | \$3,700         |
| Spec Prog - Gifted/Talented          | \$6,000         |
| Special Education Instruction        | \$384,782       |
| Vocational Education Services        | \$149,406       |
| Transp - School Sponsored Activities | \$1,260         |
| School Sponsored Activities          | \$31,500        |
| <br>Total General Fund Budget        | <br>\$5,308,923 |

When deciding on the need for construction or the purchase of additional property for the future construction of classroom space it is important to note that there is not a fund currently existing that has revenue for this purpose.

### **Ongoing monitoring of the student population and trends:**

Ongoing monitoring of the student population and trends is necessary by school officials. As of the date of this report (October 2, 2006) the district enrollment figures are as follows:

| <u>Grade</u> | <u>Total in Grade</u> | <u>Male/Female</u> |
|--------------|-----------------------|--------------------|
| Kindg        | 124                   | 61/63              |
| 1            | 110                   | 69/41              |
| 2            | 130                   | 63/67              |
| 3            | 127                   | 62/65              |
| 4            | 117                   | 57/60              |
| 5            | 115                   | 57/58              |
| 6            | 121                   | 63/58              |
| 7            | 114                   | 62/52              |
| 8            | 130                   | 69/61              |
|              | 1,088                 | 563/525            |

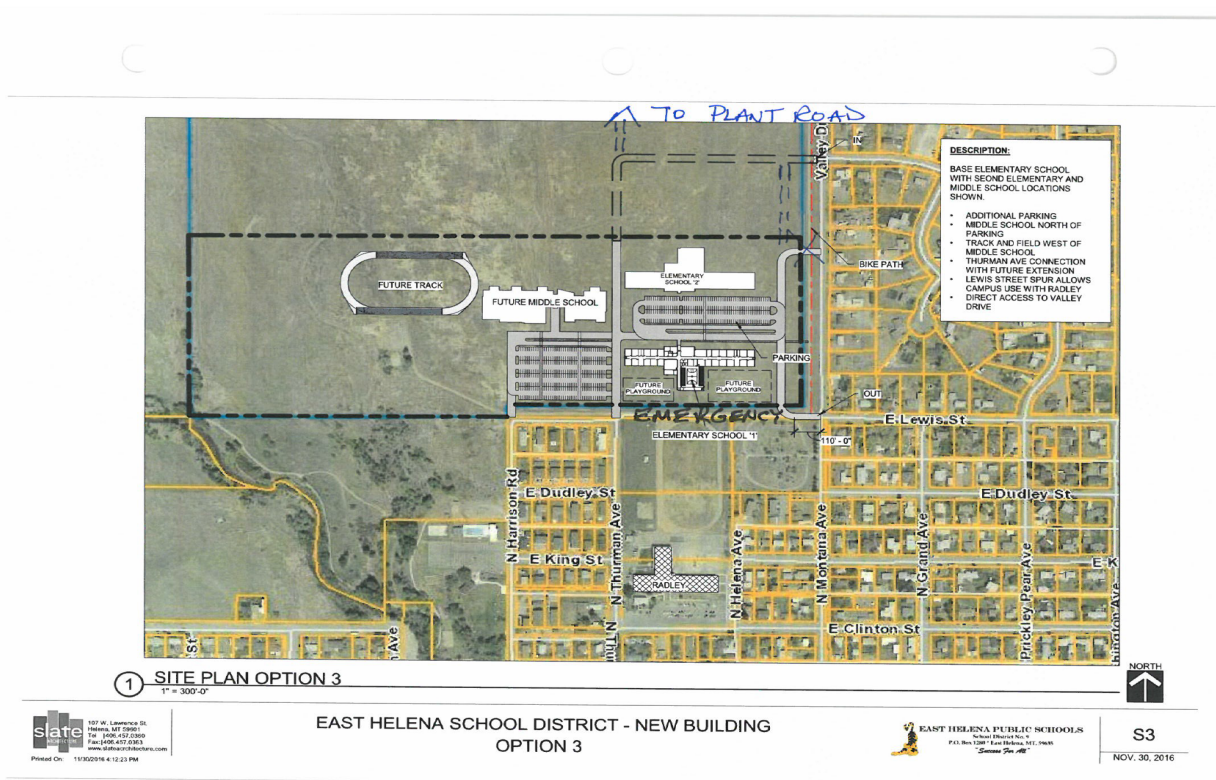
As of the date of this report (May 14, 2018) the district enrollment figures are as follows:

| <u>Grade</u> | <u>Total in Grade</u> | <u>Male/Female</u> |
|--------------|-----------------------|--------------------|
| Pre-K        | 18                    | 10/8               |
| Kindg        | 145                   | 79/66              |
| 1            | 138                   | 72/66              |
| 2            | 129                   | 62/67              |
| 3            | 135                   | 80/55              |
| 4            | 129                   | 80/49              |
| 5            | 141                   | 65/76              |
| 6            | 136                   | 74/62              |
| 7            | 132                   | 62/70              |
| 8            | 125                   | 64/61              |
|              | 1,228                 | 648/580            |

The district should project at a minimum any needs for increased space at least 4 – 6 years in advance of the actual need. Planning of any improvements or additions will require at least that much lead time in order to occupy any new space. With the need for voter approval of a Bond for the purpose of constructing new facilities, lead time is imperative.

The district now owns a 9 acre parcel in the Mountain View Meadows Estates that was donated by R & D Developers, L.L.C. They have requested that any school that is built on the site give consideration to naming the school after the co-owners deceased wife Joyce Runkle.

There will be additional costs for adding extra classes. There are added costs associated with each of these facility modifications. See Appendices G & H.



## Update to introduction 2015-16

The beginning of the 2015-16 school year saw a new EHPS enrollment record of 1197 students triggering the Long Term Infrastructure Committee (LTIC) back to action. This number continued to rise, breaking 1200 by winter. The primary planning benchmark and trigger points state that as the EHPS population approaches 1200 students, the LTIC is to meet to consider constructing new facilities to accommodate student growth. Contributing factors to the enrollment growth include (but are not limited to) the continued construction of new homes in the Mountain View Meadows subdivision (over 20 students from this subdivision are now attending EHPS), the addition of an age-exception kindergarten class at Eastgate, and the school district's reputation for excellence.

Additional pressure to call the LTIC to action is added by following:

- Canyon Ridge subdivision has 123 lots that are all reported to be sold and several houses have just been built or are under construction as of March 2016.
- The Governor is working to implement universal PreK in the state of Montana. Just as EHPS was "ahead of the curve" in supporting and implementing full day kindergarten before it was fully funded by the state, PreK is the "next frontier" in education. While it is not yet funded by the state, the Board has put its support behind a 2015-16 pilot program (age-exception kindergarten). Future plans to accommodate district growth should include planning for adding preK.
- In 2018 the current bond on EVMS will be paid off. The timing is such that taxpayers could see little or no change in their taxes if a new bond were approved as the previous one is paid off making this a prime time to consider some type of new construction.
- In 2015-16 an additional section of 4th grade was added at Radley school to accommodate the growing enrollment of that grade level. Several of the grade levels are at or nearing the maximum capacity per section as set by the Board of Trustees. For 2016-17, it is planned to add additional sections to 5th grade (one section) and Kindergarten.
- The need to provide quality school based mental health (CSCT) continues to grow. Quality school based mental health requires dedicated space. 2015-16 Radley school augmented its CSCT from one team to two and immediately filled the caseload. The teams at Eastgate and EVMS also have full caseloads. Recent changes in Intermountain will put additional pressure on EHPS to provide school based mental health services.

Update to Introduction from 2012 needs to be added here...

#### Census Data for EHPS School District

|                            | 1990     | 2000     | Change   | 2010     |
|----------------------------|----------|----------|----------|----------|
| Total Population           | 5,561    | 7,593    | 2,032    | 7,282    |
| Total Housing Units        | 2,474    | 3,305    | 831      | 2,754    |
| Occupied Housing Units:    | 1,999    | 2,802    | 803      | 2,690    |
| -Owner Occupied            | 1,663    | 2,319    | 656      | 2,048    |
| -Renter Occupied           | 336      | 483      | 147      | 642      |
| Vacant Housing Units       | 475      | 503      | 28       | 64       |
| Households                 | 2,021    | 2,802    | 781      | 2,330    |
| Families                   | 1,542    | 2,126    | 584      | 1,971    |
| Households w/ Children <18 | 899      | 858      | -41      |          |
| Median Household Income    | \$25,436 | \$38,954 | \$13,518 | \$59,130 |

Source: U.S. National Center for Educational Statistics, Web sites:

<http://nces.ed.gov/surveys/sdds/singledemoprofile.asp?county1=3009560&state1=30>

<http://nces.ed.gov/surveys/sdds/printf90.asp?fips=30&agid=09560&tytype=PF>

| Census 2000 School District Tabulation (STP2) Data |     |                     | & Census 2010 School (STP2) Data |         |
|----------------------------------------------------|-----|---------------------|----------------------------------|---------|
| Under 1 Year Old                                   | 110 | 70 male + 40 female | 97                               | 53 + 44 |
| 1 year                                             | 145 | 85 male + 60 female | 116                              | 59 + 57 |

|          |     |                     |     |         |
|----------|-----|---------------------|-----|---------|
| 2 years  | 95  | 35 male + 60 female | 106 | 53 + 53 |
| 3 years  | 105 | 80 male + 25 female | 117 | 57 + 60 |
| 4 years  | 95  | 45 male + 50 female | 98  | 51 + 47 |
| 5 years  | 145 | 80 male + 65 female | 133 | 58 + 75 |
| 6 years  | 115 | 80 male + 35 female | 108 | 61 + 47 |
| 7 years  | 120 | 75 male + 45 female | 125 | 63 + 62 |
| 8 years  | 145 | 65 male + 80 female | 110 | 66 + 44 |
| 9 years  | 160 | 65 male + 95 female | 117 | 60 + 57 |
| 10 years | 130 | 50 male + 80 female | 112 | 57 + 55 |
| 11 years | 130 | 50 male + 80 female | 101 | 53 + 48 |
| 12 years | 125 | 75 male + 50 female | 115 | 53 + 62 |
| 13 years | 110 | 70 male + 40 female | 124 | 56 + 65 |
| 14 years | 150 | 70 male + 80 female | 116 | 61 + 55 |

Rounding process:

1. 0 remains 0
2. 1-7 rounds to 4
3. 8 or greater rounds to the nearest multiple of 5

Source: ies National Center for Educational Statistics, Web site:

<http://nces.ed.gov/surveys/sdds/print.asp?id=p8&cat=&geo=districts&county...>

## **Facilities Sub-Committees Descriptions:**

The full committee decided that to break the work into smaller portions and assign the work to sub committees was important for expediency and efficiency. The responsibilities of the chairman shall be to lead the Committee through its work in an orderly fashion. He shall direct the discussion at the meetings, set the agenda with the Superintendent, assign committees and tasks to individuals as necessary, and preside over the meetings. Sub-Committees and assignments for the sub-committee that were used are:

Ø Communications Sub-Committee



The Communications Sub-Committee is delegated the responsibility to develop necessary surveys and gather data as is necessary from the community to answer questions essential for decision making. They would be directed to find representative samples of subdivision populations for population projection purposes. A usable number of students per household in sample subdivisions should be discovered that is based on the price of the representative housing. Separate estimates of the number of pre-school and school aged students in four- or eight-plexes should also be included as an individual statistic.

#### Ø Community Development and Impact Sub-Committee

This sub-committee is delegated the responsibility to determine the networking relationships that need to be developed with surrounding public and private entities to provide a holistic approach to community services. They would be delegated the responsibility to research and contact agencies about developing cooperative efforts to provide a safe system of trails and corridors for student and pedestrian travel. They would also investigate the necessity of transportation needs for the schools as outlying subdivisions add student population on existing and future bus routes. The committee will network with public libraries, universities, community service groups, basketball teams, etc. to discover the needs of local agencies in a multiple use facility such as a school.

#### Ø Benchmark Sub-Committee

Develops a system of charts that provide guidance in making decisions as population increases are documented in the schools. This sub-committee will expand upon the plans and growth potential in the district.

#### Ø Building Arrangement Sub-Committee

This sub-committee will review the current building arrangements that exist and review the ability of each facility to house students in a physically and educationally realistic and practical school building. This sub committee will research the availability of using portable classrooms as an interim step in accommodating growth.

## **Initial Planning Description**

It became evident early in the development of this plan that it would be inappropriate and inaccurate to try to base Long Term Infrastructure Planning Committee decision making on absolute numbers and projections of population growth. The population growth projections were varied with the new subdivisions not immediately translating into enrollment increases in the schools. It proved to be a very unreliable means of basing taxpayer liabilities on facility development. As an alternative it became the position of the Long Term Infrastructure Planning Committee to try to make a master plan that would approach the problem by creating a sequence of steps that account for population trends that vary and creates a systematic process of evaluating student enrollment.

Key Indicators of growth include:

Ø Total School Enrollment – What population of students will result in crowding?

Ø Student Enrollment by Grade Level – What happens when the student enrollment in one or more grade levels suddenly changes the needs of the district?

Ø School Organizational Plan – Grade level schools are academically appropriate but what happens if we have to re-organize for maximizing facility use?

Ø Staffing Needs – Currently Eastgate school has consolidated its teacher lunch room to a facility that is inadequate to seat all staff that are at lunch at one time.

Ø Educational Programming – What needs are there to offer students educationally relevant classes that have not been considered to this point such as technology, home economics, robotics, health enhancement, etc.

## **2015-16 Update to the Initial Planning Assessment**

Eastgate houses 312 preK-1 students (279 K-1 in 8 sections of Kindergarten and 7 sections of 1st grade, 33 preschoolers through Head Start programs). Several spaces are being used to serve multiple needs: the music room is used in the morning for kindergarten reading and math intervention, the former art room is divided for use by 4 different services/instructors, office space has been created in one of the larger storage closets, the school psychologists office is used for small group instruction on the days the school psychologist is not at Eastgate. The computer lab has been updated to laptop computers in anticipation that the computer lab may need to become mobile so the lab space can be retrofitted as a classroom. In 2016-17 there will be 9 sections of K (one of which is an age-exception 2 yr Kindergarten class) and 7 sections of 1st grade. In order to accommodate 9 sections of Kindergarten, the instructional tutors will be relocated from their current instructional space, sharing spaces with other staff members throughout the day. Consideration is being given to eliminating the staff lounge to create appropriate instructional space, or having the music teacher teach music from a mobile cart that moves from classroom to classroom. First grade classes have averaged 19-20 students in recent years. It is anticipated that an additional section of 1st grade will be needed in the near future. Without other options (new construction or modular units), this will require the computer lab to become mobile to create the needed classroom space.

Radley school enrollment is over 530 students. All classrooms are currently occupied. In the last few years, reorganization and relocation of space (library, central storage) has occurred to maximize existing space and accommodate growth of school based mental health services. Scheduling has required that some gym classes are doubled in the gym, and some music instruction is delivered from a cart in the classroom setting. Maintenance closets are used for temporary office space in order to conduct one-on-one benchmark assessments. In anticipation of the addition of another section of 5th grade for the 2016-17 school year, plans are being

made to create a computer lab in one of the hallways to allow the current lab space to become a classroom.

EVMS is the only building with some room to spare. Current enrollment is 386. It has 3 classrooms that could be assigned as regular, full day classes for teachers and students. These classrooms are currently used for small group instruction, drafting classes and cooking classes. Additional classroom space could be created by re-assigning some teachers, classes and services to different times and/or locations.

There is growing concern within the administration and the Board of Trustees that the measures being taken to accommodate growth within existing structures are reaching a point that the quality of education EHPS is able to deliver is on the verge of being compromised by the physical limitations of and strains on the current facilities.

As the LTIC was called to action, the enrollment and challenges created by the increasing enrollment were shared with committee and community members. Over the course of several meetings, data, ideas, thoughts, concerns and other relevant information were shared. Initial meetings generated assumptions and possible solutions (brainstormed):

Original ideas (brainstormed):

A+ Additions to Eastgate, EVMS

B+ New Building-Pre K, K 1st

C+ Additions -Eastgate, Radley

D+ New Building-Grades 1,2

E+ New Building- 6,7,8 Middle School & use current EVMS for grades 4 & 5

F+ Build New K-5 Neighborhood School

G+ Swap Buildings Radley becomes the 6,7,8 Middle School & EVMS becomes the 2 - 5 School

H+ Pre-K and K at Eastgate, 1st - 3rd at Radley and 4th - 8th at EVMS

I+ Addition to EVMS Middle School for Pre K and Kindergarten

J+ Move 5th Grade to EVMS, Build a New Radley for 1-4, Eastgate a PK-K

K+ New Pre-K - 2nd bldg, make EG a pre-k - 2nd and Radley a 3-5, leaving EVMS as is

L+ Year Round School, No Construction necessary

Assumptions:

Growth in enrollment will continue at a rapid rate of nearly 30 students per year

Subdivision/Development will continue to grow in this economy

Blue Cross employees will try to live close to work further encouraging enrollment growth

Some form of Early Edge otherwise known as PreK will happen in the near future

The high quality East Helena Schools education will continue to draw more families to EH

Tuition requests will continue

Enrollment from tuition will be held stable or decline in spite of increasing requests from families

Teachers will continue to want their kids to attend East Helena Schools

Growth in school enrollment will be 0.2 students per new residence

Without new classroom space the quality of education will suffer if we repurpose too much more now

MVM will continue to build 45 new homes per year  
Canyon Ridge Subdivision will build 25 new homes per year  
Assume State Support of taxable valuation considerations will decline

In December 2015 it was determined that it would be beneficial to contract with an architectural firm to help formulate “next steps” with moving the planning process forward. Three firms responded to the District’s Request for Qualifications: Slate Architecture, CWG Architects, and SMA Architects. Slate Architecture was selected by the Board of Trustees. In subsequent meetings the original ideas brainstormed were narrowed down to 4:

New Building-Pre K, K, 1st  
New Pre-K - 2nd bldg, make EG a pre-k - 2nd and Radley a 3-5, leaving EVMS as is  
New Building-Grades 1,2  
Additions to Eastgate, EVMS

A list of Standards/Guiding Principles was created to help determine the best options for eventual recommendation to the Board of Trustees.

Standards/Guiding Principles:

Is it educationally appropriate for students

From the March 24th, 2016 Independent Record , Article by Marga Lincoln...

At a Feb. 22 meeting, citizens narrowed down 11 facility options to four possible choices. These include:

- A new building for grades 1-2
- A new building for grades pre-K to second grade, also housing pre-K to second grade at Eastgate, housing grades 3-5 at Radley, and leaving East Valley Middle School as is
- Additions to Eastgate and EVMS
- A new building for pre-K, kindergarten and first grades

On Tuesday, the group created criteria for scoring the options against each other, which will take place at the next facilities meeting, scheduled for 5:30 p.m. Monday, April 25, at East Valley Middle School. According to the recommended criteria, the facilities should:

- Be most appropriate educationally for the best interests of the child;
- Provide for students' safety and security, yet be welcoming;
- Provide infrastructure appropriate to the grade level;
- Be a salable project that is explainable to the community;
- Be fiscally responsible;
- Be expandable and flexible for the future, providing for 15-20 years of enrollment growth;

- Easily accommodate new technology;
- Be energy efficient and sustainable; and
- Provide community space.

## **2012 Update to the Initial Planning Assessment [needs to be added here](#)**

### **Initial Planning Assessment**

The East Helena Public Schools is organized into three grade-level buildings that have a combined enrollment of approximately 1,070 students for the 2005-2006 school year.

Eastgate Elementary School houses 367 kindergarten through 2<sup>nd</sup> grade students, 35 staff, currently occupying 19 classrooms, a multipurpose cafeteria/gymnasium, a gymnasium, a special ed classroom, a teachers room, a computer lab, a library and a music classroom. The addition of a full day kindergarten program has filled Eastgate beyond its planned classroom-use capability. Therefore, the staff room, which is located near the office will be used as a regular classroom during the 2006-2007 school year. This precarious balance of students at Eastgate makes it the most significant overcrowding location in the district.

Robert H. Radley Elementary School houses 357 students and 35 staff that are organized into 16 third through fifth grade classrooms, a Headstart Room, a Title I room, a reading tutor Room, a self contained special ed room, a single student self contained room, a music/band room, two computer labs, a conference room, a gymnasium, a cafeteria, the district kitchen, the central supply room, a library, a small teachers room and 3 classroom size storage rooms. The school is also home to offices for Golden Triangle Mental Health Services for the district. They occupy 2 classrooms in the east wing of the basement. This wing is a structural marvel. It was built in 1963 and constructed with 12-16 inch solid steel reinforced concrete walls to serve as a fallout shelter.

East Valley Middle School is home to 345 middle school students and 35 staff that are organized into a series of grade level teams and specialty teachers for the 6<sup>th</sup>, 7<sup>th</sup> and 8<sup>th</sup> graders. The building houses one grade level team composed of four teachers that specialize in mathematics, science, Communication Arts (English) and Social Studies at each grade level for a total of 12 classrooms. In addition to the 12 core curriculum area classrooms there is a Title I room, a music room, a band room, two computer labs, an art room (including a darkroom & Kiln room), a shop/practical arts room, a small computer assisted drafting and computer art lab, a small conference room, a gymnasium, a cafeteria, a library, a home economics room, a 4 office area special ed room, 3 teaming rooms, a health enhancement room and a science lab. The mechanical system of the building was built to accommodate future additions to the building of approximately 7 additional classrooms.

The district also employs 24 support staff for custodial, transportation and food services and 5 Central office staff to serve the 1071 district students.

## **Primary Planning with Benchmarks & Trigger Points**

After assessing the district situation with regards to enrollment the Long Term Infrastructure Planning Committee suggests the following benchmarks to future decision making. The East Helena Schools shall:

In **September of 2006 and 2007**:

Notify the committee members of the school enrollment in the fall of the 2006 – 2007 school year and subsequently in September of 2007 for the 2007 – 2008 school year.

Immediate Growth Concerns seem to be directed at Eastgate School. A growth plan was developed by the Eastgate School staff and is currently being used to accommodate growth but within a few months to a year the population of Eastgate may exceed its capacity and have to make immediate population moves.

When the student population in **grades K – 2 approaches 380**:

The administration should consider restructuring the Eastgate School to a K - 1 program, Radley to a 2 - 5 building and EVMS remain as a 6 – 8 middle school or some other organization that is conducive to learning. In addition the Headstart Program should be moved from Radley to Eastgate School simultaneously in the fall of 2007.

As an alternative the administration may want to consider moving all of the 4 – 5<sup>th</sup> graders to Eastgate, and consider moving all Kindergarten to another building in the district. It is imperative that one upper grade level never be isolated by itself in a building because historically it has caused major discipline problems. This option would require significant remodeling of all lavatory facilities in both Radley and Eastgate. This is in addition to the moving costs associated with relocating both buildings in their entirety. The committee did not develop cost estimates for this option but the moving and remodeling costs would be considerably more than moving 2<sup>nd</sup> grade to Radley.

When the student population of the district approaches **1125 students**:

Reconvene the Long Term Infrastructure Planning Committee for further consideration of student enrollment, facilities capacities, growth potential and future classroom needs.

When the student Population of EHPS approaches **1,200 students**:

Meet with the Long Term Infrastructure Planning Committee for consideration of constructing new facilities to accommodate student growth. Consider the addition of a pod on EVMS of 6 – 8 classrooms, the construction of an elementary school, or the addition of modular units.

When the student Population of EHPS approaches **1,323 students**:

Meet with the Long Term Infrastructure Planning Committee for consideration of moving the Headstart back to Radley and divide 2<sup>nd</sup> grade evenly between Eastgate and Radley till the construction of a new building is complete.

Ongoing monitoring of the student population and trends is necessary by school officials.

As of the date of this report (October 2, 2006) the district enrollment figures are as follows:

| <u>Grade</u> | <u>Total in Grade</u> | <u>Male/Female</u> |
|--------------|-----------------------|--------------------|
| Kindg        | 124                   | 61/63              |
| 1            | 110                   | 69/41              |
| 2            | 130                   | 63/67              |
| 3            | 127                   | 62/65              |
| 4            | 117                   | 57/60              |
| 5            | 115                   | 57/58              |
| 6            | 121                   | 63/58              |
| 7            | 114                   | 62/52              |
| 8            | 130                   | 69/61              |
|              | 1,088                 | 563/525            |

The district should project at a minimum any needs for increased space at least 5 – 7 years in advance of the actual need. Planning of any improvements or additions will require at least that much lead time in order to occupy any new space. With the need for voter approval of a Bond for the purpose of constructing new facilities, lead time is imperative.

The district now owns a 9 acre parcel in the Mountain View Meadows Estates that was donated by R & D Developers, L.L.C. They have requested that any school that is built on the site give consideration to naming the school after the co-owners deceased wife Joyce Runkle.

There will be additional costs for adding extra classes. There are added costs associated with each of these facility modifications. See Appendices G & H.

## **Final Recommendations**

After careful review of the collected data the committee decided that not enough detailed information exists to start to worry about the population increases at this point. Due to the rather uncertain growth at this time and the possibility of absorbing over 100 students in the current building format the Committee decided to continue to monitor the enrollment for sudden or gradual growth that would be more accurately measured and acted upon based on benchmark enrollment decisions outlined in this document.

As of the time of this report the enrollment at Eastgate School has caused a need to consider the reorganization of the school and district by the fall of 2007.

The district will disseminate this information to taxpayers and community in a press release or releases as the status of the district changes. The release of this report or a focused portion of the report should be considered by the school trustees and the Infrastructure Committee.

The Infrastructure committee recommends to continue to meet each fall to stay abreast of current enrollment trends.

The administration should assign classroom space as appropriate in the course of their duties.

The superintendent should biannually review benchmarks and take actions as appropriate to execute those recommendations.

## **Summary**

At this time it is the recommendation of the Long Term Infrastructure Committee to monitor school district growth until such a time as the growth in the district is measurable and indicative of a perceived crowding concern in the existing school buildings.

The details of this report will be shared with the East Helena Public Schools Board of Trustees at their October 9<sup>th</sup> Board meeting that will be held in the EVMS Library at 7:00 PM.



## **Updated Attendance Information for September 2012**

### **Financial Planning**

Understanding the financial ability of the district to fund the construction of new facilities is another key aspect to the complete picture of what options are available for the school district.

The district recently refinanced its bonds to take advantage of the low bond interest rates that were available in January, February and March of 2006. With an increase in the taxable valuation of the EHPS from \$10,535,735 to \$11,024,935 the bonding capacity of the school district is now about \$6,500,000. Each year this bonding capacity will increase until the current bonds are completely paid off in 2018.

The board must balance the needs of the students, the needs of the taxpayers and the financial stability of the district in any decision. The responsibilities of the current taxpayers and the need for a quality education for each student in the district must be evaluated in a fiscally responsible and accountable manner.

The district could establish a Building Reserve fund for the purpose of future building. This fund requires the passage of a Building Reserve levy by a vote of the taxpayers. A Bond levy would be a means by which to fund the actual construction costs of a building and again requires taxpayer approval.

The general fund or operating fund for the district is not a source of financing available for the construction of buildings.

The current 2006 – 2007 budgets are set as stated below:

### **Current 2006 – 2007 budgets**

#### **East Helena Public Schools**

##### **2006 - 2007 Budget**

| <b><u>Fund</u></b> | <b><u>Budget</u></b> |
|--------------------|----------------------|
| General Fund       | \$5,308,923          |

|                              |                     |                     |
|------------------------------|---------------------|---------------------|
| Transportation               | \$292,592           |                     |
| Bus Depreciation             | \$299,579           |                     |
| Food Service                 | \$348,054           |                     |
| Retirement                   | \$675,000           |                     |
| Adult Education              | \$22,500            |                     |
| Technology                   | \$32,195            |                     |
| Flexibility                  | \$41,984            |                     |
| Building Reserve             | \$0                 |                     |
| Debt Service                 | \$612,018           |                     |
| Enterprise - All Day<br>Kndg | \$48,840            |                     |
|                              |                     | <b>\$10,535,735</b> |
| <b>Taxable Value</b>         | <b>\$11,014,935</b> |                     |

The breakdown of the general fund budget is:

#### **General Fund Budget Breakdown**

|                                      |             |
|--------------------------------------|-------------|
| Instructional Services               | \$3,086,430 |
| Support Serv - Instr - Counselors    | \$142,357   |
| Support Serv - Library               | \$154,200   |
| Support Serv - Supt./Schl Board      | \$187,560   |
| Elections                            | \$3,000     |
| Support Serv - School Admin          | \$373,363   |
| Support Serv - Business Office       | \$88,022    |
| Operations & Maintenance             | \$596,525   |
| Student Transportation - Field Trips | \$5,600     |
| Support Serv - Technology            | \$95,218    |

|                                      |                 |
|--------------------------------------|-----------------|
| Loan/Lease Debt Service              | \$3,700         |
| Spec Prog - Gifted/Talented          | \$6,000         |
| Special Education Instruction        | \$384,782       |
| Vocational Education Services        | \$149,406       |
| Transp - School Sponsored Activities | \$1,260         |
| School Sponsored Activities          | \$31,500        |
| <br>Total General Fund Budget        | <br>\$5,308,923 |

When deciding on the need for construction or the purchase of additional property for the future construction of classroom space it is important to note that there is not a fund currently existing that has revenue for this purpose.

## \_Appendices of Comments

Addressed to Scott & Ron,

Regretfully, I will be out of town on the 22nd on a trip for OPI. The agenda looks like it will be an important meeting in the process.

I would like to provide a little feedback to you that I would have brought up at the meeting.

Guiding Principles that I think are important!!

1. Any option to be considered should maintain the grade level school model that East Helena has been using for the last 12-15 years.

2. Adding a new school is fine, but make it a series of grades not found at any other school. Neighborhood schools like we had prior to 2000 created many problems for the district that were counterproductive to the education process :

a. Inequality between schools. Radley use to be considered the ugly step-child of the district. Educationally, the schools were similar, but community perceptions were that Radley was this huge scary place.

b. Cooperation and planning between members at any grade level was non-existent across buildings due to a lack of time. Curriculum focus and coordination was impossible. Children suffered from this dysfunction within the schools. We are here for what is good for kids, not what is convenient for adults (staff and parents)

c. Neighborhood schools require constant changes in attendance areas with each new subdivision started. Class sizes vary wildly between schools. 1999- 4th grade Radley -24 per class--- Eastgate 19. We even had kindergarteners across the street from Eastgate that could not attend there due to fluctuating class numbers.

d. Neighborhoods age. There are more of us empty-nesters in Eastgate 2, than there are young families.

3. Any new building should be close to existing schools for the sharing of support services. A primary building of today is an intermediate school attendance area in 5 year, and a high school attendance area in 10 years. With the grade level model we have more stability.

Thanks for letting me climb on my soap box one more time.

Sincerely, Keith Obert- retired principal.

Mr. Whitmoyer,

I was unable to attend the 22<sup>nd</sup> of March meeting because I was out of town for traveling. I do have some comments, I don't know what was discussed at the meeting and I do plan on being there for the April one but here are some comments I have regarding the proposed options:

1. Building a new building at this point in time seems to be the best options in my eyes, (regardless of the configuration of students) because currently land is at a premium and it will only get worse so getting the land now rather than later makes it more efficient use of non-renewable resources.
2. If additions are chosen the retrofit costs are likely to be higher than expected, I am sure that any building that we upgrade will be required to meet current building codes, this will be an added cost.
3. Eastgate parking lot simply cannot handle any more traffic in its current configuration. Additions will only exacerbate this problem.
4. By building a new school you gain maximum flexibility in further options to the district the next time the LTIC needs to start meeting. If you don't build now you remove the option of additions or expansion in the future.
5. Take advantage of the growth in East Helena school district and use the bonding power for construction of a new school.

I know you probably already know most of these items that I have pointed out above but I figured it would be best to put them to words and add them to the process. I have some thoughts on the performance of the proposed options.

1. To take advantage of the remodels already done at Eastgate, use Eastgate as the "little" person school, I'm not sure if it has the capacity but use the infrastructure you have. It might even be prudent to add a classroom or four to Eastgate if that benefits the overall district best even though the parking lot is operating at a low level of service. This would require a re-design of the parking lot.
2. Some ideas on the parking lot at Eastgate.
  - a. Investigate if a right turn lane storage lane is practical on Lake Helena Drive this would allow for storage of vehicles waiting to pick up kids.
  - b. Reconfigure the parking lot, by removing the planters and providing multiple lanes of pickup, attention to detail would be necessary though for the conflict of cars and kids. Alternatively a single pickup lane like now is still possible but the removal of the planter would move that lane further east and allow for more park and pick-up. This would increase the capacity of the parking lot as well for events.

- c. Purchase land across Lake Helena Drive and provide (apply for a grant possibly) a parking lot there with an appropriate crosswalk installed. Again this would increase capacity for park and pick-up as well as increased parking for events. The designated crosswalk would increase the safety of crossing Lake Helena Drive.
3. Any new building should be constructed with the option to have additions in the future.
4. Any option considered or carried forward should be able to handle an increase of 600 students comfortably and maybe 700 students if you implement space saving measures.
5. Any new building construction should have additional multi-use space (labs, office, counseling rooms, etc.) so as the needs of the district change the building can handle those changes. This should help mitigate using locker rooms as office space in the future.
6. For new construction consider building a new bus barn/facility so the land at Eastgate could be repurposed for future use, this might not be feasible with this bond/timeframe but should be considered in the near future <5-10 years.

These are just some of my thoughts and ideas, thank you for your time and I will see you at the next meeting. Another point, it might not be too prudent to discuss the pre-K state program that is currently not law at this time. Only because touting this as a bonus or a high priority to the district (even though it is) could be seen as extravagant and too high of a cost. I believe this is a good idea to provide that capacity in any proposed option but just think on the presentation of the bond and the final dollar amount because most people only consider the taxes to “me” and not the benefit to the community or the students.

### ***Tyrel G. Murfitt P.E.***

Missoula District Geotechnical Specialist

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"You cannot be disciplined in great things and undisciplined in small things. Brave undisciplined men have no chance against the discipline and valour of other men. Have you ever seen a few policemen handle a crowd?" - General George S. Patton, May 1941

**From:** Ron Whitmoyer [mailto:[rwhitmoyer@ehps.k12.mt.us](mailto:rwhitmoyer@ehps.k12.mt.us)]

**Sent:** Thursday, January 28, 2016 3:32 PM

**To:** Christa Schoenfeld; Kelly Harris; Alyssa Salerno; Ann Marie Thompson; Betsy Burns ([Burns.Betsy@epa.gov](mailto:Burns.Betsy@epa.gov)); Bob Den Herder; Breck Scheet; Brittany Fuller; Clint Smith; Don Dahl; Heather Ireland; Harris, Jennifer; Jill F Cohenour; Jim Schweyen; Julie Penner; Julie Sauer; Katy Hauer; KD Jones; Keith Obert; Kelley Shields; Kelsey Phelps; Luke Den Herder; Marga Lincoln; Martin Balukas; Moriah Bucy; Rachel Bright; Rose Powell; Sarah Sandau; Scott Cromwell; Stephanie Higgins; Tricia Haines; Murfitt, Tyrel; Vashti Teders; Dan Rispens; Jill Miller; Joe McMahon; Mike Agostinelli; Joe Nye; Kevin Bokovoy; Marcia Ellermeyer; Mark Diehl; Scott Walter; Tony Perpignano; James Schell; Denice Harris; Richard Adamson; Kultgen - Kent; Craig Erickson; Bob Church; [khamilton@lccountymt.gov](mailto:khamilton@lccountymt.gov); Brian Obert; Karen Goldsberry; Amy Strainer; [mredmond24@msn.com](mailto:mredmond24@msn.com); [spikegirl@hotmail.com](mailto:spikegirl@hotmail.com); Angie Howell; Clancy Casey; Adrienne Simonson; becky corbett; TARA STEINKE; Judy Leland; Kit Johnson; Mike Misowic; Pete Elverum; City Clerk; [wcovey@bresnan.net](mailto:wcovey@bresnan.net)

**Cc:** Jennifer Cordell; Kim Aarstad

**Subject:** Re: Meeting Notes from LTIC Monday

Folks,

Attached are the details that we have fleshed out to be scrutinized by the LTIC. Please take a few minutes to review these preliminary ideas to fully understand the ramifications of each before we next get together. As we spoke at the last meeting, in almost every scenario, grade levels need to somehow be reorganized. Keep in mind that we wish to avoid creating an albatross or mega school so huge that it defeats our educational program by sheer size. Each scenario is simply a preliminary sketch of an option to be chosen as a finalist for complete planning development. And that is the goal of the next meeting on February 22nd at 5:30 at EVMS to start the arduous process of narrowing choices and then creating the most preferred to least preferred idea of 3 or 4 of these attached.

As always, please contact me or other administrators with your questions.

Thank You for your commitment to creating the best possible educational program for our children.

Ron

On Tue, Jan 26, 2016 at 6:08 PM, Ron Whitmoyer <[rwhitmoyer@ehps.k12.mt.us](mailto:rwhitmoyer@ehps.k12.mt.us)> wrote:  
Folks,

Again, Thank You for your participation in last night's meeting of the Long Term Infrastructure Committee (LTIC) and following the issue. As promised, attached are the notes from the record sheets you completed last evening. In the next day or two we will coalesce many of the options that we now have in front of us and I will send that to you for your consideration. As Joe McMahon stated at the conclusion of the meeting, please come to our February 22nd meeting at 5:30 PM in the EVMS library with your **top 3 options** from this rather lengthy list. It's time to start deliberating on finding a good solution to this growing issue. Looking forward to your continued input in this process.

Thanks.

Ron

Here's a start to the list of options:

- A+ Additions to Eastgate, EVMS
- B+ New Building-Pre K, K 1st
- C+ Additions -Eastgate, Radley
- D+ New Building-Grades 1,2
- E+ New Building- 6,7,8 Middle School & use current EVMS for grades 4 & 5
- F+ Build New K-5 Neighborhood School
- G+ Swap Buildings Radley becomes the 6,7,8 Middle School & EVMS becomes the 2 - 5 School
- H+ Pre-K and K at Eastgate, 1st - 3rd at Radley and 4th - 8th at EVMS
- I+ Addition to EVMS Middle School for Pre K and Kindergarten
- J+ Move 5th Grade to EVMS, Build a New Radely for 1-4, Eastgate a PK-K
- K+ New Pre-K - 2nd bldg, make EG a pre-k - 2nd and Radley a 3-5, leaving EVMS as is
- L+ Year Round School, No Construction necessary