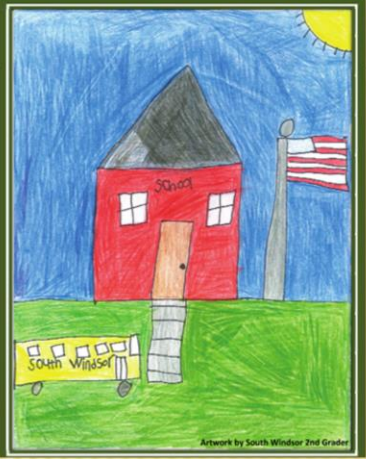


Town Council Presentation  
December 2, 2013



**SOUTH WINDSOR PUBLIC SCHOOLS  
ELEMENTARY FACILITIES MASTER PLAN**

Good evening, Mayor Anwar, Deputy Mayor Havens, members of the council and Mr. Galligan.

Tonight, it's my pleasure to represent the Board of Education and report to you our recommendations to address our aging elementary facilities.

I'm joined by our Supt of Schools, Dr. Kate Carter, and many of our Board members:

Diane Behler, Carol Driscoll, Lisa Maneeley, Matt Riley, Rick Stahr and Craig Zimmerman

You have a copy of this presentation, which will last about 20 minutes, as well as a copy of our timeline document. We will then hear from Mr. Galligan, who will address the tax impact of the first phase of our master plan.

And following the second presentation, we'll be happy to take your questions.

## BOARDS OF ED AND SCHOOL BUILDINGS

The Connecticut General Statutes\* address duties of Boards of Education, including the following related to school buildings:

- ✦ Each local or regional board of education shall provide an appropriate learning environment for its students which includes: adequate instructional books, supplies, materials, equipment, staffing, facilities and technology; equitable allocation of resources among its schools; and a safe school setting.
- ✦ Each local or regional board of education shall have charge of the schools of its respective school district.
- ✦ Each local or regional board of education shall make a continuing study of the need for school facilities and of a long-term school building program and from time to time make recommendations based on such study to the town.
- ✦ Each local or regional board of education shall have the care, maintenance and operation of buildings, lands, apparatus and other property used for school purposes.
- ✦ Each local or regional board of education shall at all times insure all such buildings and all capital equipment contained therein against loss in an amount not less than eighty percent of the replacement cost.

\* CGS Section 10-220(a)

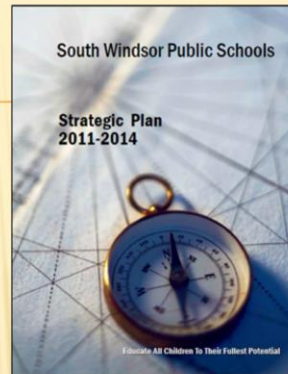
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I'll start with the Board's obligations related to our school buildings. Those responsibilities are from the CT General Statutes and require us to **provide an appropriate learning environment for our students.** This includes **facilities and technology** and **a safe school setting.**

We also have the responsibility to report to the Town from time-to-time on the needs that we face with respect to our buildings, and that is exactly what we are doing this evening.

## OUR STRATEGIC PLAN

In September 2011, the Board of Education adopted a three-year strategic plan for South Windsor Public Schools. A major element of that plan addressed our **Learning Environments**:



*“Develop a long-range elementary facilities plan that promotes a safe, engaging learning environment that is accessible to all students and community members.*

- *Update the 2007 Elementary Planning Study*
- *Develop a staggered construction/referenda proposal*
- *Identify a timeline for going to referendum ”*

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The Board was mindful of our need to **provide an appropriate learning environment for our students** when we adopted our Strategic Plan in September 2011.

One of the three major elements of that plan was to address our **Learning Environments**, specifically,

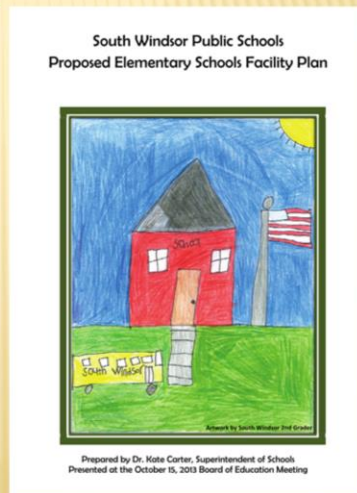
*“Develop a long-range elementary facilities plan that promotes a safe, engaging learning environment that is accessible to all students and community members.*

- *Update the 2007 Elementary Planning Study*
- *Develop a staggered construction/referenda proposal*
- *Identify a timeline for going to referendum”*

We’ve done all of this and we’ll present to you tonight a summary of those activities and our master plan.

# SUPERINTENDENT'S PLANNING PROCESS

- × Reflect on prior plans and reasons for failed referenda
- × Consult with experts
  - Updated enrollment projections
  - Updated building / site analyses
  - Consider current programs
  - Consider emerging trends
- × Engage stakeholders to identify community “win-wins”
- × Shape a long-range master plan
- × Obtain cost estimates
- × Present for Board approval



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We asked the Supt of Schools to lead the planning process, and I'll take this opportunity to thank Dr. Carter and her team on developing a plan that is typical of the thoughtful and thorough approach that she takes with any major initiative.

Here on slide 4 you'll see a very brief summary of the steps that she followed.

We'll talk more about the process, but it started more than a year ago with Dr. Carter reflecting on what we had tried before and why referenda failed in 2004 and 2007.

She received expert guidance and advice on our current options, and in working with her team, they shaped a long-range plan that would benefit not only the students of South Windsor, but one that also identified conditions for “win-wins” that could benefit other parts of our community as well.



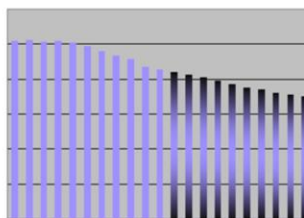
# UPDATED ENROLLMENT PROJECTIONS

We engaged Dr. Peter Prowda to develop updated enrollment projections, for which he:

- ✦ Reviewed 40 years of enrollment data.
- ✦ Studied past and present birth patterns for South Windsor residents.
- ✦ Compared South Windsor's historical enrollment trends to Connecticut's trends.
- ✦ Accounted for effects of:
  - new full-day kindergarten program,
  - our 3% target for Project Choice seats,
  - trends in South Windsor students attending magnet and private schools.
- ✦ Considered factors such as housing starts, home sales, job growth and unemployment.

In May, Dr. Prowda provided his projected enrollments by grade level, by year to 2022.

## SOUTH WINDSOR PUBLIC SCHOOLS ENROLLMENT PROJECTED TO 2022



Peter M. Prowda, PhD  
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Simsbury, CT 06070  
(860) 716-7971  
[peterprowda@yahoo.com](mailto:peterprowda@yahoo.com)  
May 24, 2013

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An important part of the planning process was the development of a comprehensive, long-range enrollment projection. This was critical to ensuring that we would not intentionally “under-build”, or “over-build”, for our elementary space needs in the coming years.

“Under-building” would be short-sighted, while “over-building” would be wasteful. Further, the State of CT requires an eight-year enrollment projection to determine the size of a school project eligible for partial state reimbursement of our construction or renovation costs.

While the specific percentage of state reimbursement varies according to a town’s wealth ranking, the size of a new or renovated school is limited for reimbursement purposes, based on the State’s space standards, which look to the high point of an eight year enrollment projection.

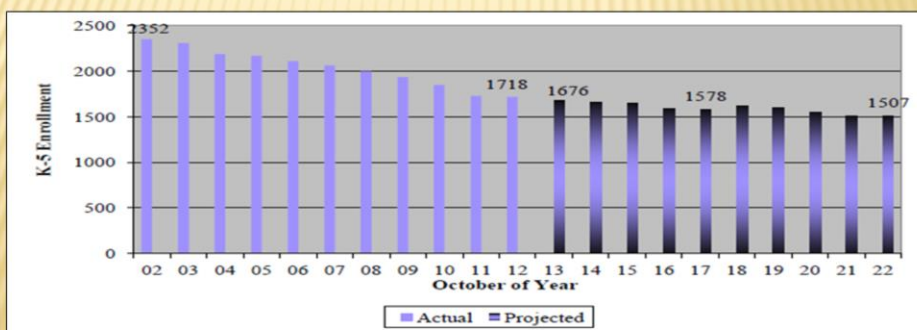
Dr. Peter Prowda, a noted enrollment statistician who is retired from the State Department of Education, now consults on enrollment projections for us and other districts. Earlier this year, he developed highly-detailed enrollment projections for South Windsor out to the year 2022. Listed here are some of the steps he took to develop that report.

Using Dr. Prowda’s information, our master plan envisions end-state school sizes that will maximize state reimbursement while being within our enrollment projections.

For the public’s benefit tonight, this enrollment projection report, along with all of the other materials that I’m referring to tonight, are easily found on our website, as well as videos of the Board meetings where we have discussed the Elementary Schools Master Plan.

## ENROLLMENT PROJECTION FINDINGS

- × **By 2022, total district enrollment decreases 18%**
  - (from 4,274 students in 2012 to about 3,485 students in 2022)
- × **Elementary enrollment decreases 12%**
  - (from 1,718 students in 2012 to about 1,510 students in 2022)



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With respect to Dr. Prowda's findings, he continues to validate what we, and other school districts, have seen over the last 10 years – we are in an era of declining enrollment.

While the details in his report are plentiful, the summary is simple – South Windsor is trending similar to the state as a whole.

We expect overall enrollment to decline 18% from now through the year 2022.

Elementary enrollment should decline by 12% during that same period.

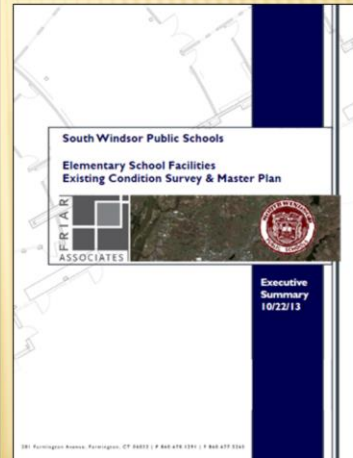
The graph shown here was taken from the May report. It addresses elementary enrollment only and illustrates the recent and expected continued decline in enrollment.

A decline significant enough to warrant the closing of a school as a part of our comprehensive master plan.

## UPDATED PLANNING STUDY

In June, we engaged Friar Associates to update the 2007 Elementary Planning Study, in which they:

- × Analyzed current elementary facilities and reviewed existing building sites.
- × Consulted with district administration to develop a multi-year, phased approach.
- × Determined optimal school sizes to maximize state reimbursement eligibility.
- × Worked with Newfield Construction to calculate construction cost estimates.



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We also engaged Friar Associates, a Farmington based architectural firm specializing in school design to help us update the 2007 planning study, used by the Board when we last went to referendum.

We asked Friar to verify and document the current conditions of our buildings, as well as to specifically evaluate code and regulation compliance with respect to the International Building Code, the National Fire Protection Association code and with the requirements of the Americans with Disabilities Act.

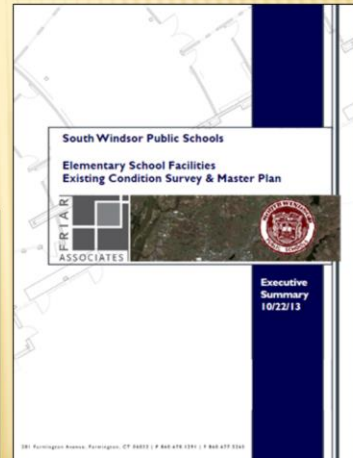
We also wanted their input on how to develop a plan that would maximize state reimbursement while providing for the removal of all remaining modular classrooms and creating adequately-sized, permanent buildings that would efficiently accommodate our projected enrollment in a cost effective manner.

# PLANNING STUDY FINDINGS

	Wapping	PV	PRS	OH	ET
Built	1953	1958	1959	1963	1965
Last Major Update	1992	1988	1988	1988	None
Modular classrooms	No	Yes	Yes	Yes	Yes
ADA Compliant	No	No	No	No	No

## Friar's study noted that:

- × None of our elementary facilities have had major updates within the past 25 years,
- × All require significant mechanical upgrades,
- × Most continue to rely on modular classrooms
- × All need work to comply with current codes,
- × None are ADA compliant.



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Perhaps not very surprising, but the findings of the updated planning study confirmed that our existing buildings are only getting older and more tired.

Wapping, the oldest building at age 60, has not had a major update in 21 years

Pleasant Valley, Philip R Smith and Orchard Hill are all between 50 and 55 years old, with the last major updates 25 years ago.

And finally, ET is the youngster of the family at age 48, and it has never had a major update.

All need significant upgrades to deal with dated mechanical systems that are at, or near, end-of-life.

All but Wapping continue to rely on non-permanent modular classrooms.

All have issues under current building and fire codes.

And none are ADA compliant.



# STAKEHOLDER INPUT

**The Superintendent and central office team engaged stakeholders to understand community needs and identify “win-win” opportunities**

- Town Manager
- Town Planner & Town Engineer
- Public Building Commission
- Director of Human Services
- Director of Parks and Recreation
- PTO/PAC Presidents
- Parks and Recreation Commission
- So Windsor Community Foundation

- Senior Citizen Advisory Council
- Eli Terry PTO
- Orchard Hill PTO
- Philip R. Smith PTO
- Pleasant Valley PTO
- Wapping PTO
- Elementary school principals
- Elementary school staff

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Dr. Carter and her team engaged with a wide variety of stakeholders to identify conditions for “win-win” opportunities in the community as a result of our intent to address the elementary facilities.

The most notable of these opportunities will come from the return of an elementary school building to the Town as part of Phase One of our plan, which we’ll hear more about in a moment.

While only the Town Council will determine what’s done with a surplus building no longer required by the school district, the goal was to develop a master plan that could create the conditions for “win-wins” in the community, perhaps by helping with other aspects of the Town’s space needs, such as the crowded Community center trying to meet the many needs of both the Human Services and Parks & Recreation Departments.

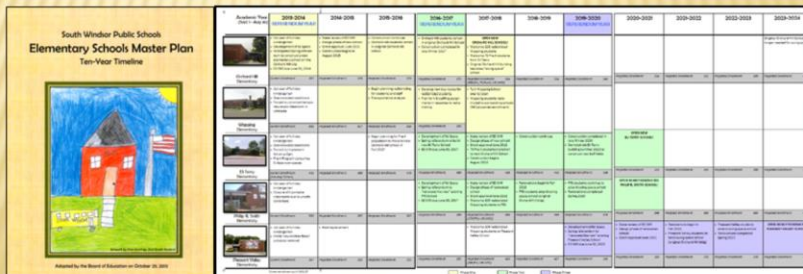
Certainly our town manager was excited when he learned of our plan and thought about the opportunities that could provide to the Town.

And we hope that each of you, in your capacity as a town leader and council member take advantage of those opportunities when we are able to return a school building for Town use.

# ELEMENTARY SCHOOLS MASTER PLAN

## Highlights of Master Plan

- × Three-phase approach over ten year timeline
- × “1-2-1” Referenda Schedule
  - **Phase One:** Address one school in first referendum
  - **Phase Two:** Address two schools in second referendum
  - **Phase Three:** Address final school in third referendum
- × Operate one fewer school at completion of Phase One



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Which brings us to the master plan itself. In early October, the Superintendent of Schools presented her recommendations, and after discussing the topic at meetings throughout October, the Board adopted the master plan you see tonight.

Our plan takes a three-phase approach, one that we expect could take ten years to complete.

The staggered referenda schedule called for in our Strategic Plan has been adopted here, and can be thought of as a “1-2-1” schedule where the Phase One referendum addresses the first school, the Phase Two referendum addresses two more schools and the Phase Three referendum addresses the final school.

And as I discussed on our last slide, the master plan includes reducing the number of elementary schools from five to four. We will close a school -- Wapping School -- as part of the master plan and return that building to the Town.

## PHASE ONE

- × **Referendum Spring 2014**
- × **Construction begins August 2015 for new school on Orchard Hill campus for 564 students:**
  - 369 students from Orchard Hill
  - 125 students from Wapping
  - 70 Pre-K students from Eli Terry
- × **New school opens Fall 2017**
  - Original Orchard Hill building available for use as swing space in Phases Two and Three
- × **Wapping closed; remaining students redistricted to Philip R Smith and Pleasant Valley for Fall 2017**
  - Building returned to Town for community use

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Looking at your copy of the timeline document, which again is on our website for the public to review, you'll see that we are planning for the Phase One referendum to be scheduled for next spring, and when approved by the voters, we would begin design work for the new building, with actual construction starting in August 2015.

This Phase will result in a new 71,000 sq ft building located on the existing Orchard Hill campus. When completed, the new school will house 564 students, including the existing Orchard Hill population, approximately 1/3 of the Wapping population and the entire pre-K program currently housed at Eli Terry. The remaining Wapping population will then be redistricted between Philip R Smith and Pleasant Valley.

For those not familiar with our pre-K program, also known as POP, which is short for Pre-School Outreach Program, this is a Reversed mainstream preschool program for 3, 4 and 5 year olds consisting of special education students and fee-paying peer role models. The program has been housed at Eli Terry for many years, which is a building that is currently overcrowded.

When construction is complete, the original Orchard Hill School will be used as "swing space" for the later renovations of buildings in Phases Two and Three.

The creation of swing space is a critical element to our plan to renovate two other schools. Unlike our high school and middle school renovation projects, where those students stayed in their school during renovation, there is no practical way to do this in smaller schools containing younger children, nor would we want to do so even if it were feasible.

## PHASES TWO AND THREE

### **Phase Two** *(assumes referendum Spring 2017)*

- × **New Eli Terry built on existing site**
  - 442 students
  - Opens in 2020
  - Old school razed for replacement ball fields
- × **Philip R Smith students relocated to original Orchard Hill while Philip R Smith is renovated “as new”**
  - 388 students
  - Opens in 2020

### **Phase Three** *(assumes referendum Spring 2020)*

- × **Pleasant Valley students relocated to original Orchard Hill while Pleasant Valley is renovated “as new”**
  - 383 students
  - Opens in 2023
- × **Original Orchard Hill returned to Town when PV opens**

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Phase Two could go to referendum in spring of 2017, and when approved, a new Eli Terry for 442 K-5 students would be built on the existing site, opening in 2020. At that time, the existing building would be razed and the site restored with replacement ball fields.

At the same time as the Eli Terry construction, Philip R Smith students will attend the original Orchard Hill School while their school is undergoing a complete renovation, a type of project that the state classifies as “renovate-as-new”. It will also include a small addition to the original structure. That renovated building would also open in 2020 for 388 K-5 students.

Phase Three follows a similar pattern, and could go to referendum in spring of 2020, with Pleasant Valley students attending the original Orchard Hill School while their school is undergoing a complete renovation, one that also includes a small addition to the original structure. The renovated Pleasant Valley would reopen in 2023 for 383 K-5 students.

At that time, the original Orchard Hill School, which will then be turning 60, will no longer be needed and will be returned to the Town having served us well without a major update in more than 35 years.



## COSTS FOR PHASE ONE

- × BOE's review of Educational Specifications for Phase One supports maximizing building size to standards permitted by state reimbursement formula.
- × Based on permitted size, initial estimate of total project cost is \$32.4MM.
- × State reimbursement for new school construction in South Windsor is 34.64% of total project cost.
- × South Windsor's net cost expected to be \$21.5MM.
- × Phase One tax impact has been calculated by IBIC.

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The total project cost for Phase One is currently estimated at \$32.4MM \*, based on the state's maximum reimbursable size formula.

Of that amount, we expect \$10.9MM to be reimbursed by the State of CT, leaving a net cost to South Windsor taxpayers of \$21.5MM.

This new school is expected to be the largest of the four schools, due in part to the 70 student Pre-K program being transferred from Eli Terry.

I should note these are the initial cost estimates, which will be finalized by Friar Associates once the Board gives its approval to the building's detailed Educational Specifications, which we are currently reviewing.

The final cost estimate will be used when we return to the Council next month seeking formal approval to send the Phase One portion of our plan to referendum.

Finally, the tax impact of Phase One, using these initial cost estimates, has been calculated by the town's bond consultants, IBIC. Mr. Galligan will speak to that projection shortly.

\* - construction costs of \$24.2MM plus other project costs of \$8.2MM

\*\* - Current SW reimbursement is 34.64% for new construction; 44.64% for renovate as new

## HOW IS THIS DIFFERENT FROM PAST PLANS?

- × **Component of well publicized Strategic Plan**
- × **Phased approach – begins with a single school**
- × **Options minimized – responsive to voter feedback**
- × **Clarity of potential “win-wins” for community**
- × **Continued declining enrollments makes case even more compelling for consolidation to four schools**
- × **Elimination of administrative office renovation**

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It's important to speak to how our plan is different from the plans for the failed referenda in 2004 and 2007. While there are similarities, especially to the last plan, there are notable differences shown here.

First, though some now seem surprised, we told everybody this plan would be coming as part of our well-publicized three- year strategic plan.

Second, we heard the feedback from last referendum that the project was too much at one time, so we are starting with a single school, and allowing voters to have their say at each of three phases.

Third, we also heard the feedback that last time it was just too confusing – too many options being discussed that left the public questioning exactly what we planned to do. We have now put a single vision on the table – reflective of Dr. Carter's best thinking -- and we have avoided the confusing evolutionary process of the last plan.

Fourth, we have looked into and spoken about the potential for community “win-wins” that this plan provides, and hope that you can state with authority, prior to the referendum, what will happen to Wapping when it is returned to the Town.

Fifth, the case for closing a school is even more compelling today than it was five years ago as the trend of declining enrollment continues and the data substantiates that we can close a school if it is part of a comprehensive master plan.

And finally, our focus is only on the elementary facilities, and does not include the renovation of the administrative facility at Ellsworth, which was a component of the last plan.

## WHAT OUR MASTER PLAN WILL DO

The master plan provides for elementary schools that:

- × Create learning environments designed for current instructional strategies
- × Benefit from needed technology upgrades,
- × Comply with current building and fire codes,
- × Incorporate contemporary design for school safety,
- × Utilize modern, efficient heating and cooling systems,
- × Provide accessibility to all by meeting the requirements of the American with Disabilities Act.

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Before I close, I want to touch on what this plan does for us, how it's flexible and why that's important, as well as the next steps in our process. With respect to the merits of this plan, it delivers what we need, and what our students deserve, for an elementary education setting in the 21<sup>st</sup> century:

- Starting with a learning environment suitable for current instructional strategies. You may have heard it before, but our classrooms at these grade levels are not simply the "five by five" groupings of desks that you grew up with. Having flexible spaces suitable for multi-group instruction is important to our success.
- We'll have needed technology upgrades that will allow for the expanded use of technology in our classrooms by kids who are now growing up using technology from the earliest of ages.
- We'll have buildings that comply with current building and fire codes,
- Buildings that will incorporate contemporary design for school safety,
- Buildings that utilize modern, efficient heating and cooling systems,
- And finally we will have buildings that provide accessibility to all by meeting the requirements of the Americans with Disabilities Act.

# MASTER PLAN FLEXIBILITY

## The master plan is flexible:

- × Provides voters with multiple opportunities for phased approvals via staggered referenda.
- × Addresses current over-crowding now while allowing enrollment trends to continue to unfold.
- × Spreads out construction borrowing and allows time for further economic development and improvement before Phases Two and Three.

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With respect to how our master plan is flexible, the phased approach allows voters to have multiple opportunities to approve our progress via the “1-2-1” staggered referenda schedule.

The staggered construction timeline allows us to focus on manageable bites of the overall plan.

It also gives us an opportunity to apply lessons learned as we go through the three phases.

Let’s not forget – we may be a little rusty at this. We’ve not built a brand new school in SW in 45 years (which was TE), and we haven’t managed a major renovation project since 2000 when the TE addition was completed.

Our phased approach allows us to address current over-crowding, especially at Eli Terry, while providing time to allow our enrollment projections to unfold. If necessary, we’ll be able to further adjust the size of the schools in Phase Two and Three as time moves forward.

It will also spread out the borrowing that’s required to fund these projects, and that will allow for some time to pass where hopefully we’ll see more in the way of local economic development and overall economic improvement at the state and federal levels.



## NEXT STEPS

- × Board approves Ed Specifications for Phase One (Dec. 2013)
- × Friar finalizes Phase One project cost estimate (Dec. 2013)
- × Board sends mailing to all households (Dec. 2013)
- × Board makes formal request to Town Council for referendum approval (Jan. 2014)
- × Town Council approves referendum (Feb. 2014)
- × Town Council charges Public Building Commission
- × Town holds referendum (March 25, 2014)
- × Board submits state grant request (by June 30, 2014)

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As for next steps,

- The Board will approve, probably at our next meeting, the Educational Specifications for Phase One,
- With those in hand, Friar Associates will be able to finalize their initial project cost estimate for Phase One,
- We then plan to send a mailing to all households concerning the master plan,
- Once we have the finalized cost estimates from the approved Educational Specifications, we'll return next month to make a formal request of you for referendum approval,
- We'd hope that you approve the referendum for March 25, 2014, and that you do so as close to the charter-required 30 day window as possible,
- The Public Building Commission will need to be charged,
- The voters will then have their say on Phase One at the referendum in March,
- And if approved, we'll submit our state grant request by 6/30/14.

In fact, June 30, 2014 is the date that drives all of this activity. If we miss that annual submission deadline, we will need to wait a full year since the state processes reimbursement grant requests for school construction only on an annual cycle. Most importantly, we'd hope that you not only approve Phase One to go to referendum, but that each of you becomes an active and vocal supporter of our master plan and the Phase One referendum. Thank you for your interest this evening and I we'll now hear from Mr. Galligan on the tax impact of Phase One.