



## FAC Meeting No. 6 | 25 February 2020

# call to order

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# Questions





# AGENDA

Tuesday, February 25, 2020

## Meeting 6 (February 25, 2020): Preliminary Options Review

1. Call to Order – Co-Chairs
  - a. Review of Agenda and Upcoming Meetings
  - b. Questions from Previous Meeting
2. Review of Charter & Group Task - CGS
3. Operational Referendum Update – District
4. Review Prioritization of Needs – PRA
5. Options Development & Concept Pricing – PRA/CGS
6. Table Exercise – Scoring of Options – ALL
7. Tour Purdy Elementary - All

**NEXT MEETING: March 17, 2020 @ Luther Elementary**



# review of charter & FAC task

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## Facilities Advisory Committee Master Planning Charter

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### Responsibilities

*The Facilities Advisory Committee (FAC) is charged by the Board of Education with developing a master plan that will guide the investment into district facilities to support future academic programs and create safe and vibrant learning environments.*

This requires the FAC to explore every possible solution taking into account the academic needs, student and staff requirements, condition of existing buildings, and the fiscal challenges facing the district. The FAC will explore all short and long-term solutions based off the Facilities Assessment Report that was completed on April 24, 2019, which outlines the deferred maintenance needs completed by educational facility consultants CG Schmidt (CGS) and Plunkett Raysich Architects (PRA).

The consultants reviewed the physical characteristics of each building including the appearance, condition and current use, in addition to exploring building capacity, educational space adequacy, accessibility standards and security. The data collected is used to determine the feasibility and cost of space reallocation, developing new spaces, remodeling, consolidation, or expanding the buildings. The FAC will identify viable facility solutions to present to the community for feedback, which will be narrowed through community engagement sessions with the final options being tested via a community-wide survey.

### Holistic Approach to Planning

As part of the District's Strategic Planning process five bold steps were identified to lead the District into the future. As the FAC explores facility solutions it will be important to make sure the short and long-term solutions support the district's strategic goals.

- Implementation of District-wide System for Equity
- Develop and Implement a Comprehensive Public Relations Plan
- Research and Identify Opportunities for Innovation
- Implement and Enhance Access to Student Support Resources
- Strengthen Family and Community Engagement

### Planning Drivers

- Realize the master planning process will be running parallel with an operating referendum
- Determine an approach for each building and the district that satisfies the community
- Consider all factors during the decision-making process (i.e. academic, financial, and social)
- Ensure building equity amongst all district schools
- Maintain manageably sized schools
- Reinforce safety and security at all district buildings
- Consider district ongoing continuous improvement efforts
- Address short and long-term deferred maintenance items at all schools

### Decision Making

The FAC shall make decisions based on majority consensus and support decisions that are in the best interest of the district, staff and students. District Administration will keep the Board of Education informed on committee progress, and any potential solutions or recommendations will be considered for approval and adoption by the Board of Education.

### Meeting Schedule

The FAC will meet monthly for two hours from September 2019 through April 2020.

# operational referendum

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# prioritization of needs

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# prioritization of needs

Identified at FAC Meeting 5 – January 28, 2020:

- District-wide maintenance upgrades
- Safety/Security - school safety concerns
- Learning environments - built to current model
- Basic maintenance and safety, fire protection
- Adaptable and usable learning spaces
- Proactive maintenance (no rush orders)
- Equitable (Special Education, flexibility, grade level, each school)

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# prioritization of needs

[illegible]

# options review & concept pricing





# CONSTRUCTION ESTIMATING

We ensure all costs are accurately captured early on using a suite of sophisticated tools.

## TOOLS WE USE

### HISTORICAL COST DATABASE

Developed from 100's of similar education projects

### SITE ANALYSIS

In-depth analysis of existing conditions creates more certainty during estimating

### SCOPE MATRIX

Filtering tool used to define project's scope

### LIFECYCLE COST ANALYSIS

Determines the most cost-effective option among competing alternatives

### COST CONTROL LOG

Easy tracking of cost impacts to make better design decisions

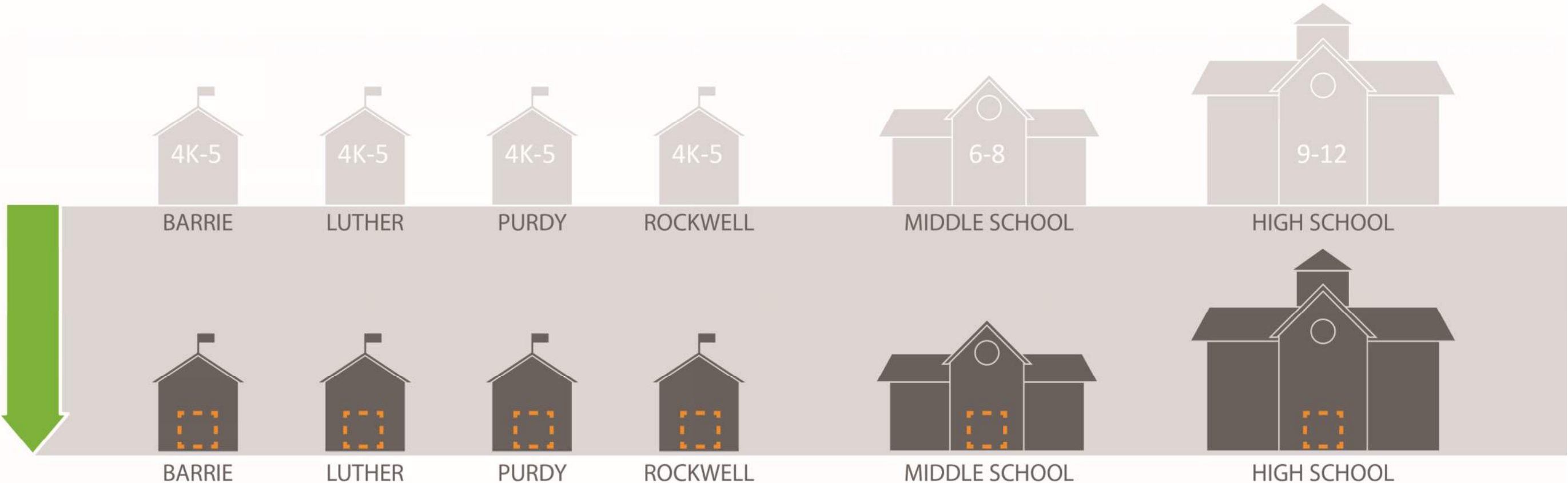
### TOTAL PROJECT BUDGET

Accounts for all project costs, not just construction



# options review

## Option 1 – Maintenance Only



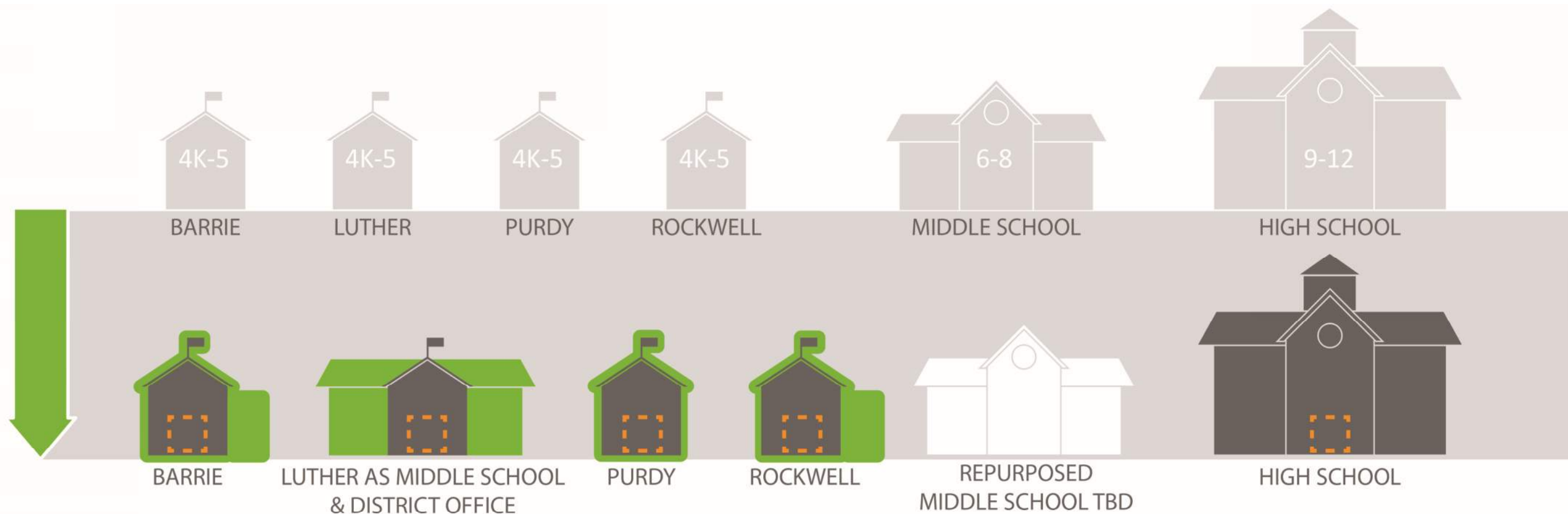
- Address category Urgent, 2-5 year & 6-10-year maintenance items at all buildings
- Renovations as needed to provide secure entry sequences at each school

Cost: \$36M

Secure Entry	Maintenance
Renovation	Repurpose
Building Addition	New Construction

# options review

## Option 2 – Renovate/Expand Luther as 6-8 MS



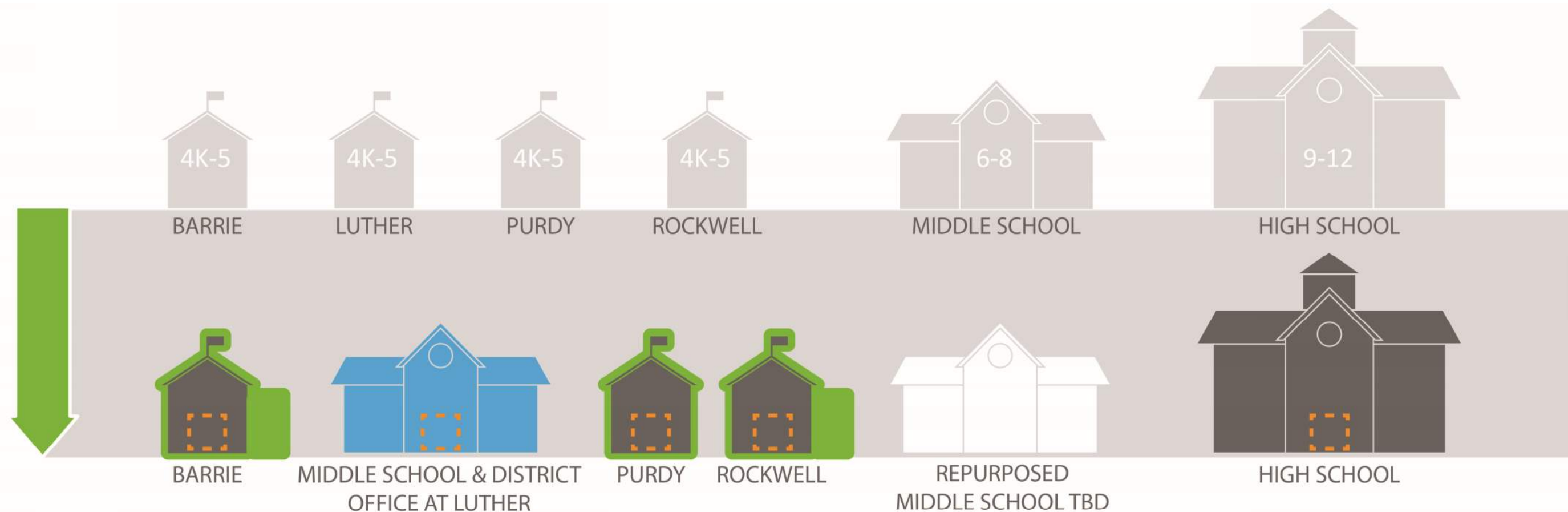
- Expand Barrie & Rockwell to be three section 4K-5 elementary schools
- Reorganize Purdy Elementary to be a three section 4K-5 School
- Adjust attendance boundaries
- Renovate / Expand Luther to become 6-8 Middle School and District Office
  - o Close / sell existing Middle School building
- Address category Urgent, 2-5 year & 6-10-year maintenance items at all buildings
- Renovations as needed to provide secure entry sequences at each school

Cost: \$107-111M



# options review

## Option 3 –New 6-8 MS at Luther Site



- Expand Barrie & Rockwell to be three section 4K-5 elementary schools
- Reorganize Purdy Elementary to be a three section 4K-5 School
- Adjust attendance boundaries
- Replace existing Luther with a new 6-8 Middle School / District Office building
  - Close / sell existing Middle School building
- Address category Urgent, 2-5 year & 6-10-year maintenance items at all buildings
- Renovations as needed to provide secure entry sequences at each school

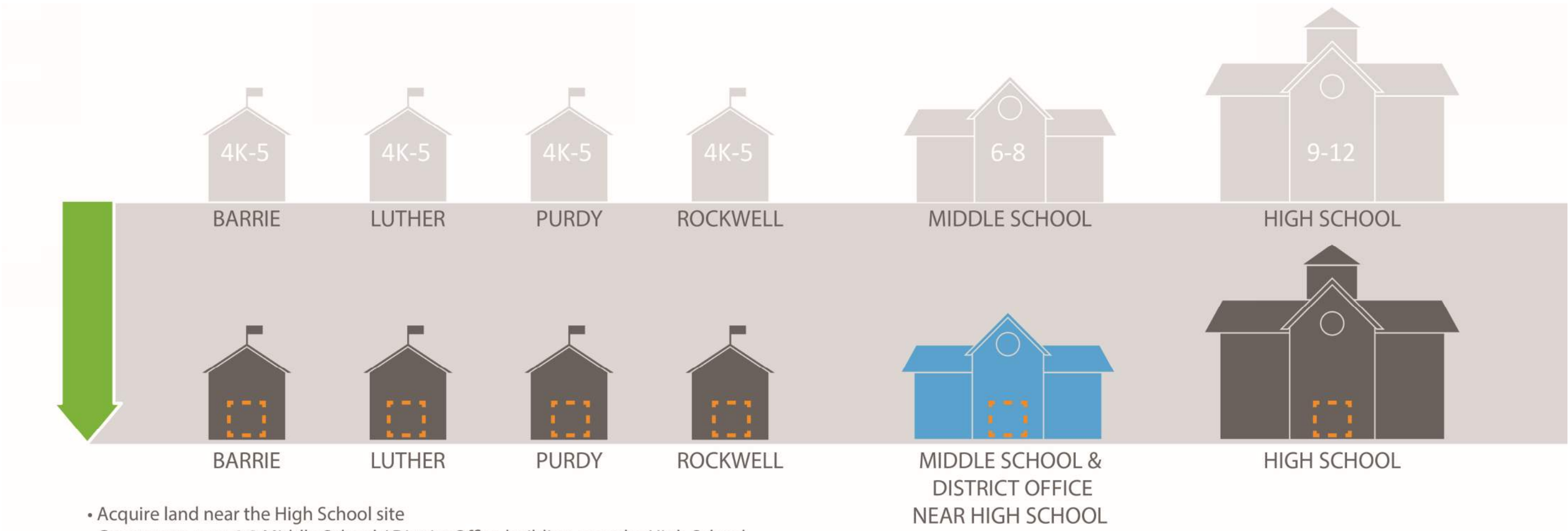
Cost: \$108-112M





# options review

## Option 4A –New 6-8 MS Near the High School Site



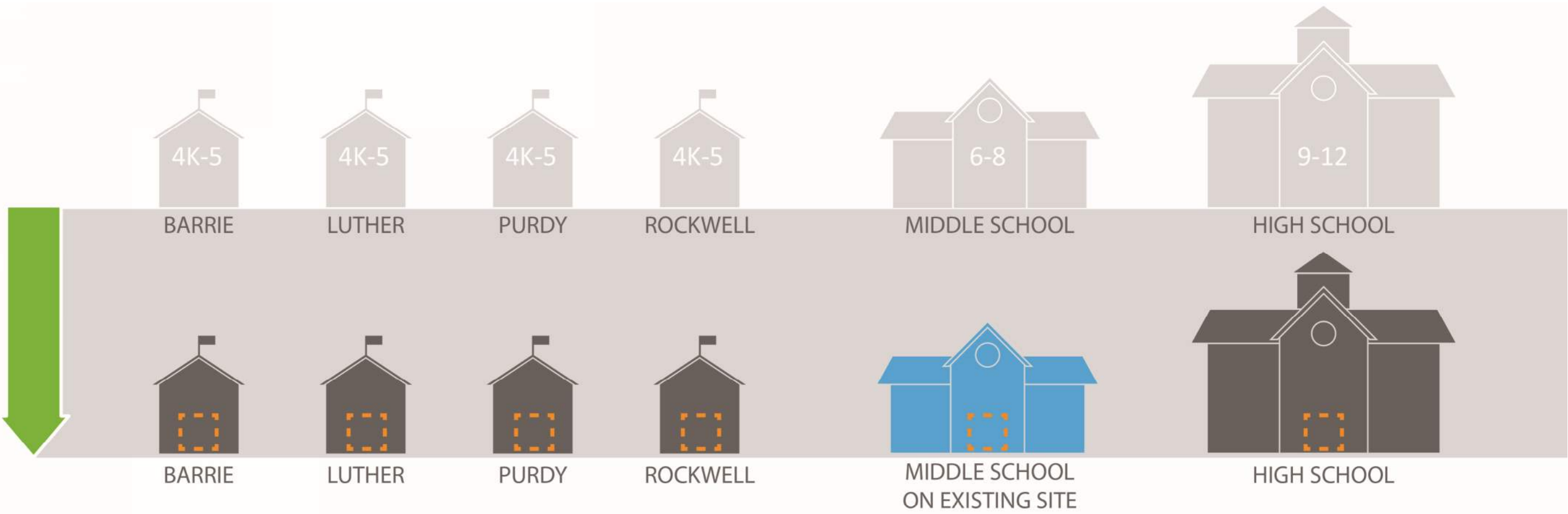
- Acquire land near the High School site
- Construct a new 6-8 Middle School / District Office building near the High School
  - Close / sell existing Middle School building
- Address category Urgent, 2-5 year & 6-10-year maintenance items at all buildings
- Renovations as needed to provide secure entry sequences at each school

Cost: \$74-77M

	Secure Entry		Maintenance
	Renovation		Repurpose
	Building Addition		New Construction

# options review

## Option 4B –New 6-8 MS on Existing Site



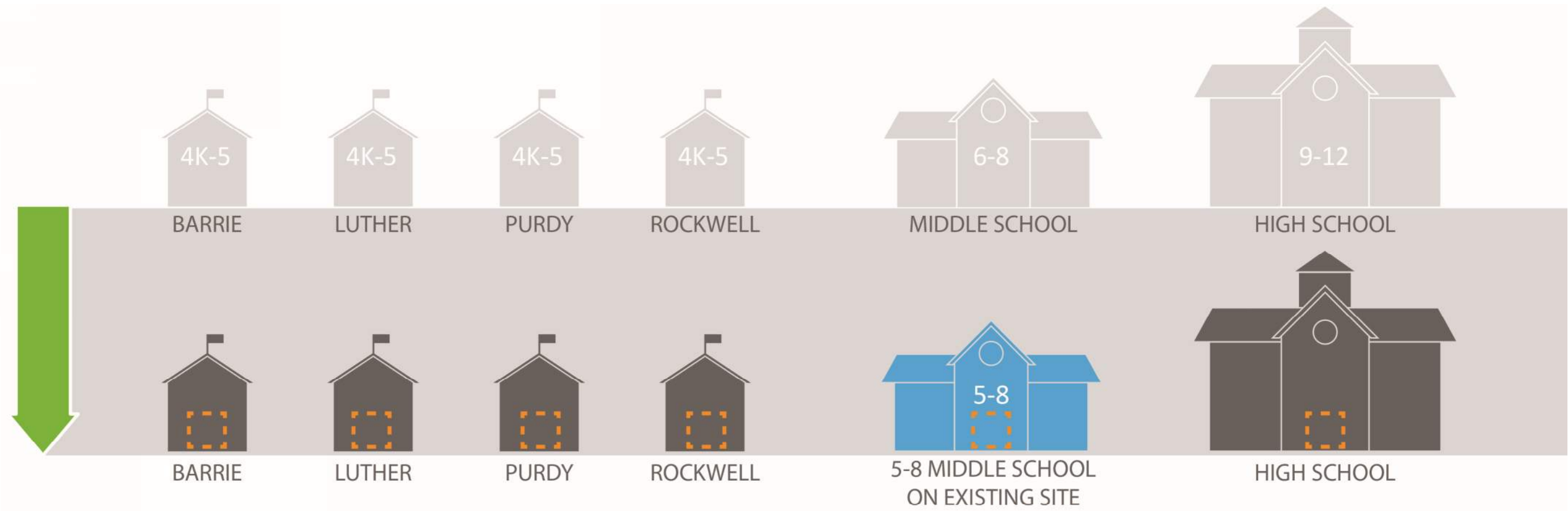
- Construct a new 6-8 Middle School. Remove existing middle school building and improve site, circulation and parking. Maintain existing north parking lot.
- Address category Urgent, 2-5 year & 6-10-year maintenance items at all buildings
- Renovations as needed to provide secure entry sequences at each school

Cost: \$71-74M

 Secure Entry	 Maintenance
 Renovation	 Repurpose
 Building Addition	 New Construction

# options review

## Option 4C –New 5-8 MS on Existing Site



- Construct a new 5-8 Middle school. Remove existing middle school building and improve site, circulation and parking.
- Address category Urgent, 2-5 year & 6-10-year maintenance items at all buildings
- Renovations as needed to provide secure entry sequences at each school

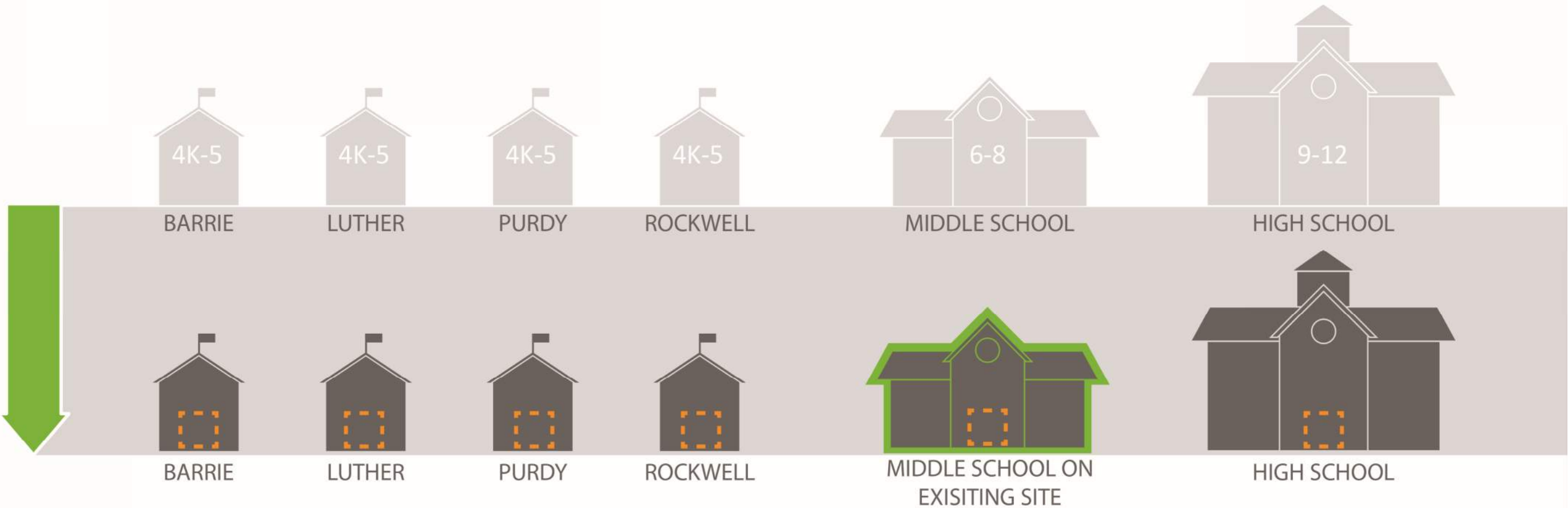
Cost: \$76-79M

	Secure Entry		Maintenance
	Renovation		Repurpose
	Building Addition		New Construction



# options review

## Option 5 – Modernize Existing 6-8 Middle School



- Address identified maintenance needs
- Selectively renovate classrooms to create open collaboration spaces
- Add fire sprinkler system throughout building
- Replace finishes throughout
- Revise drop-off, parking & other site features
- Address category Urgent, 2-5 year & 6-10-year maintenance items at all buildings
- Renovations as needed to provide secure entry sequences at each school

Cost: \$68.5-71.5M

 Secure Entry	 Maintenance
 Renovation	 Repurpose
 Building Addition	 New Construction

# options review

## Option 6 – Consolidate & Modernize Elem. Schools



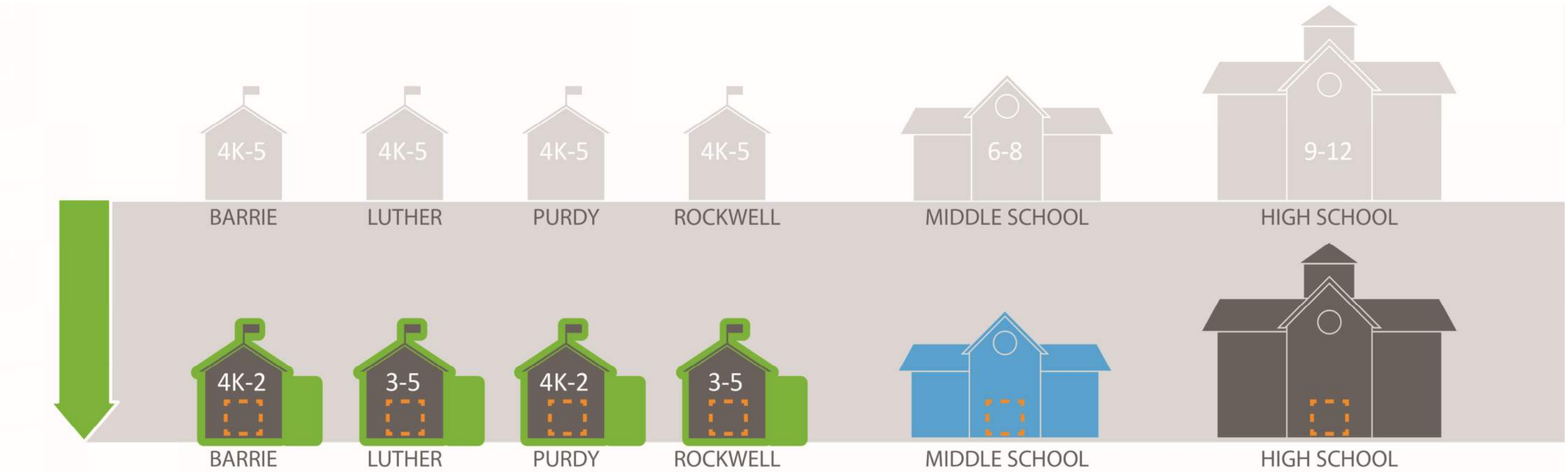
- Close Luther Elementary, combine students into Purdy Elementary
  - o Combined 19/20 Enrollment: 571
  - o Target Capacity of Purdy Elementary: 616
- Renovate and expand Purdy Elementary to accommodate 4 sections and collaborative learning spaces
- Renovate Rockwell and Barrie to remain 2 section Elementary Schools and provide collaborative learning spaces
- Maintain existing attendance boundaries
- Address category Urgent, 2-5 year & 6-10-year maintenance items at all buildings
- Renovations as needed to provide secure entry sequences at each school

Cost: \$65-67M



# options review

Option 7 – 4K-2 Primary, 3-5 Interm., New 6-8 MS



- Renovate / expand Barrie & Purdy schools to create 4K-2 Primary Centers
- Renovate / expand Rockwell & Luther schools to create 3-5 Intermediate Schools
- Construct a new 6-8 Middle School. Remove existing middle school building and improve site circulation. Maintain existing north parking lot.
- Address category Urgent, 2-5 year & 6-10-year maintenance items at all buildings
- Renovations as needed to provide secure entry sequences at each school

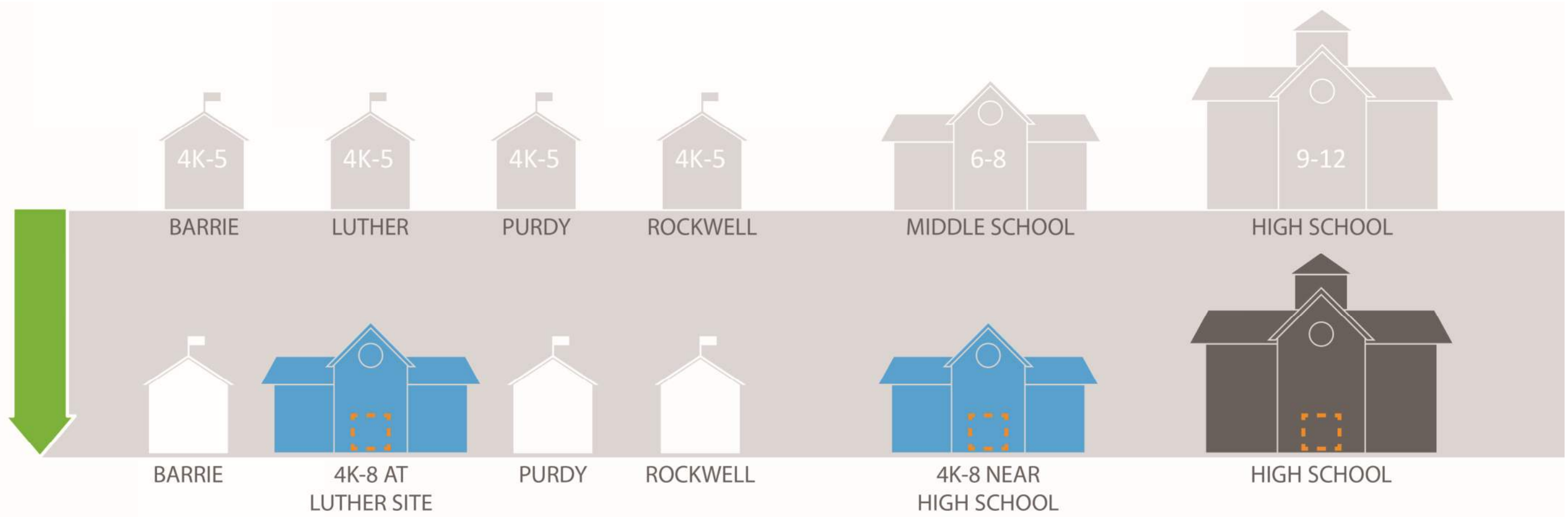
Cost: \$115-119M

	Secure Entry		Maintenance
	Renovation		Repurpose
	Building Addition		New Construction



# options review

## Option 8 – 4K-8 at Luther Site & Near HS Site



- Construct a new K4-8 building (850 student) near the High School site with District Office.
- Construct a new K4-8 building (850 student) on the existing Luther site. Improve site, circulation and parking.
- Close / sell Barrie, Rockwell, Purdy and the Middle School
- Address category Urgent, 2-5 year & 6-10-year maintenance items at all buildings
- Renovations as needed to provide secure entry sequences at each school

Cost: \$129-133M

Secure Entry	Maintenance
Renovation	Repurpose
Building Addition	New Construction

# tax impact



## School District of Fort Atkinson SUMMARY OF REFERENDUM TAX IMPACTS

REFERENDUM AMOUNT	\$20,000,000	\$30,000,000	\$40,000,000	\$50,000,000	\$60,000,000	\$70,000,000
<b>MAX MILL RATE IMPACT (OVER 2020-21)*</b> <i>(Per \$1,000 valuation)</i>	\$0.38	\$0.73	\$1.10	\$1.46	\$1.76	\$2.11
<b>TAX IMPACT ON PROPERTY WITH FAIR MARKET VALUE OF:</b>						
<b>\$100,000 Property</b>						
<i>Maximum Impact</i>	\$38.00	\$73.00	\$110.00	\$146.00	\$176.00	\$211.00
<i>Monthly Impact</i>	\$3.17	\$6.08	\$9.17	\$12.17	\$14.67	\$17.58
<b>\$200,000 Property</b>						
<i>Maximum Impact</i>	\$76.00	\$146.00	\$220.00	\$292.00	\$352.00	\$422.00
<i>Monthly Impact</i>	\$6.33	\$12.17	\$18.33	\$24.33	\$29.33	\$35.17
<b>\$300,000 Property</b>						
<i>Maximum Impact</i>	\$114.00	\$219.00	\$330.00	\$438.00	\$528.00	\$633.00
<i>Monthly Impact</i>	\$9.50	\$18.25	\$27.50	\$36.50	\$44.00	\$52.75

**Assumptions:**

Long term debt borrowings amortized over 20-years at estimated planning interest rates of **4.00% - 4.50%**.  
Tertiary aid impact on incremental expenditures at 13.03% (2019-20 Oct. 15 certification).  
Mill rate based on 2019 Equalized Valuation (TID-OUT) of \$1,612,443,974 with annual growth of 1.00% thereafter.

*\* Impact represents the change in mill rate over the estimated 2020-21 levy of \$0.47 for referendum debt service. The mill rate for debt service may remain flat or decline without a referendum passing.*

Note: Planning estimates only. Significant changes in market conditions will require adjustments to current financing plan. Rates subject to change.

# table exercise

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## scoring of options



# scoring of options

Organize into five table groups:

- Group 1: Option 1 & Option 8
- Group 2: Option 2 & Option 3
- Group 3: Option 4A & Option 4B
- Group 4: Option 4C & Option 7
- Group 5: Option 5 & Option 6

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## Evaluation Scoring:

- 1 – Marginally addresses need – significant work remains
- 2 – Needs partially met – some areas of work remain
- 3 – Needs substantially met
- 4 – Needs met and some added value realized
- 5 – Needs met and District well positioned for future



# next steps

- Meeting 7 – March 17, 2020 at Luther
  - Narrow to a single option to be recommended to the school board
- Meeting 8 – April TBD 2020 at Luther
  - Review of FAC work and preparation of Co-Chairs' presentation to the school board with the entire group.
- Board Meeting – April 16, 2020
  - Presentation of FAC work and recommendation by Co-Chairs'

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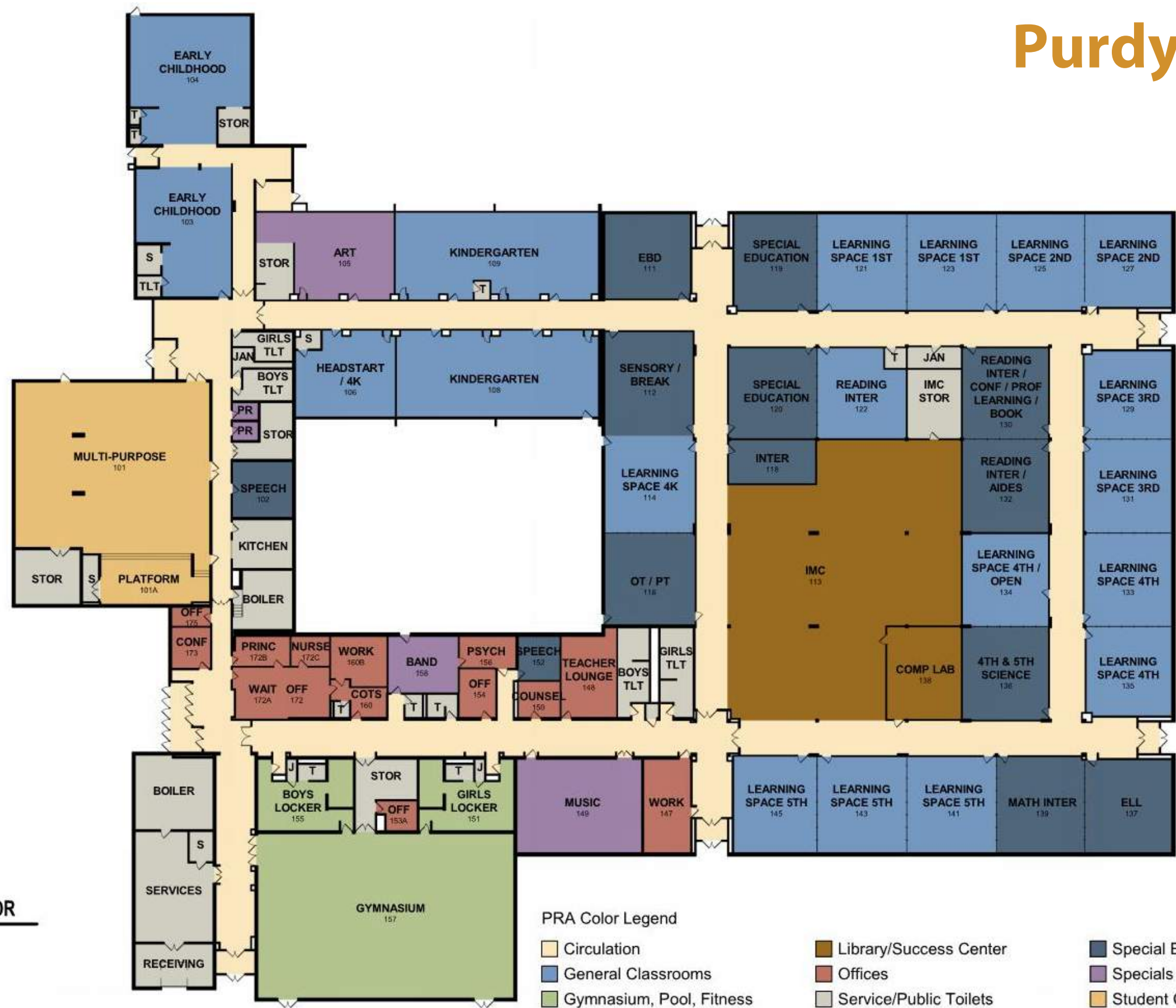
# building tour

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## Purdy



# Purdy Elementary



FIRST FLOOR

1" = 40'-0"





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