



Eugene School District 4J

Master Plan Update & Facilities Assessment
Final Report
May 9, 2012

MGT of America, Inc.



Eugene School District 4J

Master Plan Update & Facilities Assessment

May 9, 2012

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Section 1: Introduction and Methodology

INTRODUCTION

The Eugene School District 4J contacted MGT of America, inc. about updating its long-range facilities master plan in October 2011. Since the district had a considerable amount of data, it was decided to have MGT conduct a facilities assessment and use the district's demographic and capacity/utilization data to develop recommendations for updating the master plan. This report details the results of the facilities assessment, the district's demographic and capacity/utilization data, and the recommendations that were developed.

METHODOLOGY

Facilities Assessment

Four types of assessment for each facility were conducted using MGT's BASYS software. This included:

- ◆ Building condition - which evaluates the condition of all the building systems, e.g. roofing, windows, mechanical, electrical, etc.
- ◆ Site condition - which evaluates the condition of the site systems, e.g. paving, exterior lighting, utilities, fencing, etc.
- ◆ Educational suitability - which evaluates how well the facility supports the educational program. The questions asked include, does the building have the appropriate kinds of spaces, are the spaces the appropriate size, etc.
- ◆ Technology readiness - which evaluates how well the building's infrastructure supports information technology. For instance, do the classrooms have enough electrical capacity and outlets to support the appropriate number of computers and teaching equipment?

The assessment was conducted over a three-week period by senior MGT staff, and included an architect and an educator who have extensive facility assessment experience. The architect toured the buildings with the head custodian or a facilities staff person. The educator toured the school with the principal or an assistant principal.

Each assessment results in a numerical score based on a 100 point scale, which can be used to prioritize needs and develop the budgets necessary to remediate all deficiencies identified. All of the assessment data is housed in a database. The district will be able to use the software and the database to update and monitor the condition of the facilities as the master plan is implemented.

Data Review

The assessment data underwent a preliminary review at the conclusion of the site visit during an exit interview with the principal. MGT staff reviewed the data again once it had been input into the database as part of a standardized quality control process. The assessment reports were published and then reviewed again by the district's facilities staff and the principals.

Capacity and Utilization

The district provided functional capacities for each school and projected enrollments by school for the 2012-13 school year. These capacities and enrollment projections were used to calculate utilization rates for each school, and thereby determine if the district had excess space or needed additional space.

While there are many methods for calculating the functional capacity of a school, the district's methodology for calculating capacity followed typical industry protocols. The capacity calculations allowed for full day kindergarten, and class sizes of 25 students at the elementary level, 25 at the middle school level, and 28 at the high school level.

Strategy Session and Recommendations

MGT conducted a strategy session with district staff to review the assessment data, the district's capacity and utilization data, the educational program goals of the district, and to develop recommendations for updating the long-range facility master plan.

Goals for updating the plan were established. Major findings of the data were reviewed and compared against the goals. Recommendations were developed and prioritized, and budgets were projected for each recommendation.



Section 2: Capacity and Utilization

This section examines and compares the capacity and utilization rates for the schools of Eugene School District 4J (ESD) as calculated by the district.

The functional capacity of an educational facility is defined as the number of students the facility can accommodate. More specifically, a school’s capacity is the number of students which can be accommodated given the specific educational programs, the class schedules, the student-teacher ratios, and the size of the rooms. The utilization rate of a facility is calculated by dividing the current or projected enrollment of the educational facility by the capacity. The utilization rate is used to determine if the facility has excess space or if it is over-crowded.

FUNCTIONAL CAPACITY

The *Capacity Model*, used by the district, counts the number of the various types of instructional rooms and multiplies that number by the students-per-room or the *loading* factor to identify the gross capacity for the school. The gross capacity is then multiplied by a scheduling/grouping factor, which takes into account the realities of how the space is scheduled and how students are grouped.

Typically, all classrooms are not scheduled for every period at a middle school or high school. In addition, all classes do not have the maximum number of students allowable, e.g. special education, advanced classes, etc. These factors are not as applicable in elementary schools, so therefore no scheduling/grouping factor is applied.

Exhibit 2-1 lists the loading factors and scheduling/grouping factors used to calculate the functional capacities.

Exhibit 2-1
Eugene School District 4J
Functional Capacity Loading Factors

Room Type	Loading	Scheduling
K-5 classroom*	25	N/A
6-8 classroom	25	85%
9-12 classroom	28	80%

Source: Eugene School District 4J, 2012.

* Full day kindergarten

The following example shows how the model is used to calculate the capacity of theoretical schools.

Exhibit 2-2
Eugene School District 4J
Examples of Capacity Calculation

School Type	Number of Rooms	Loading Factor	Gross Capacity	Scheduling Factor	Functional Capacity
K-5 elementary school	22	25	550	N/A	550
6-8 middle school	30	25	750	85%	640
9-12 high school	55	28	1540	80%	1230

Source: Eugene School District 4J, 2012.

UTILIZATION RATES

The effective management of school facilities requires a school's capacity and enrollment to be aligned. When capacity exceeds enrollment (underutilization), operational costs are higher than necessary and facilities may need to be repurposed or the facilities may need to be removed from inventory. When enrollment exceeds capacity (overutilization), the school may be overcrowded and may require capital expenditures or redistricting (adjustment to attendance boundaries) to alleviate the crowding.

Exhibit 2-3 shows the corresponding utilization rates calculated using the different capacities and the projected 2012-13 enrollments at each school.

Exhibit 2-3
Eugene School District 4J
Projected Utilization Rates
2012-13

Site	Projected Enrollment 2012	Total Capacity K-5	Utilization
Elementary*			
Adams	406	375	108%
Awbrey Park	463	475	97%
Buena Vista	299	500	60%
Camas Ridge	417	325	128%
Chávez	466	525	89%
Charlemagne @ Fox Hollow	297	250	119%
Edgewood	396	400	99%
Edison	346	325	106%
Gilham	455	550	83%
Holt	528	550	96%
Howard	296	425	70%
McCornack	389	400	97%

Exhibit 2-3 (continued)
Eugene School District 4J
Projected Utilization Rates - 2012-13

Site	Projected Enrollment 2012	Total Capacity K-5	Utilization
Elementary (continued)			
River Road	350	425	82%
Silver Lea**	543	525	103%
Spring Creek	336	375	90%
Twin Oaks	191	275	69%
Willagillespie	500	500	100%
Elementary School Total	6,678	7,200	93%
Middle			
Arts & Technology	571	616	93%
Cal Young	569	510	112%
Kelly	406	616	66%
Kennedy	534	553	97%
Madison	489	468	104%
Monroe	541	531	102%
Roosevelt	561	723	78%
Spencer Butte	429	553	78%
Middle School Total	4,100	4,570	90%
High			
Churchill	1,004	1,254	80%
North Eugene	1,072	1,120	96%
Sheldon	1,441	1,389	104%
South Eugene	1,345	1,523	88%
High School Total	4,862	5,286	92%
Other			
Coburg	N/A	N/A	N/A
Crest Drive	N/A	N/A	N/A
Parker ES (Ed Options)	271	N/A	N/A
Other School Total	271	N/A	N/A
District Total	15,640	17,056	92%

Source: MGT of America, Inc., 2012.

*Full day kindergarten

**Counts both Corridor & Yujin Gakuen together

Color Key
Utilization greater than 100%
Utilization between 90% and 100%
Utilization between 80% and 90%
Utilization between 70% and 80%
Utilization below 70%

CAPACITY AND UTILIZATION CONCLUSIONS

Elementary Schools – The district has sufficient capacity, however consolidating some of the small schools into new, larger buildings will increase instructional effectiveness and operational efficiency.

Middle Schools – The district is operating the appropriate number of middle schools given the current enrollment, school size, and geographic conditions.

High Schools – The district is operating the appropriate number of high schools given the current enrollment, school size, and geographic conditions.



Section 3: Facilities Assessment

This section presents the results of the facilities assessment that was conducted by MGT for the Eugene School District 4J. The assessment was conducted using BASYS, MGT’s facility assessment software program. There are four types of assessment, including:

- ◆ Building condition
- ◆ Educational suitability
- ◆ Grounds condition
- ◆ Technology readiness

BUILDING CONDITION ASSESSMENT

The BASYS building condition score measures the amount of deferred maintenance in the building’s major systems. The weighted condition score of a school is the average condition score (weighted by building square footage) of all the buildings at a school (excluding portables). The scores are interpreted as follows:

90+	New or Like New: The building and/or a majority of its systems are in good condition, less than three years old, and only require preventive maintenance.
80-89	Good: The building and/or a majority of its systems are in good condition and only require routine maintenance.
70-79	Fair: The building and/or some of its systems are in fair condition and require minor to moderate repair.
60-69	Poor: The building and/or a significant number of its systems are in poor condition and require major repair, renovation, or replacement.
Below 60	Unsatisfactory: The building and/or a majority of its systems should be replaced.

Note: Scores that fall below the red line indicate the facility has deficiencies that should be addressed as a priority.

The condition rates each system in a building as “new”, “good”, “fair”, “poor”, or “unsatisfactory” based on a detailed description of each rating for the particular system. The possible score for each system is based on that system’s contribution to the overall cost of building construction. Therefore, the condition score is a measure of that portion of the value of the building which is in good condition. The capital needs score (100 minus the condition score) is a measure of the capital needs or deferred maintenance. This score, when presented as a percent, is also referred to the facility condition index or FCI. For example, a building which has a condition score of 80, has a capital needs score of 20 (100 – 80

= 20). A capital needs score of 20 indicates that 20 percent of the value of the building can be reinvested in the building in order to attain a score of 100 and put the building in a “like new” condition. Typically, capital needs scores are calculated using a base condition score of 90 (which indicates that a system is in good condition and requiring only routine maintenance), since it is unreasonable to expect all buildings to be in “like new” condition indefinitely. The capital needs score and resulting calculations do not include the costs of additions, site improvements, improvements for educational suitability, or technology readiness improvements.

Exhibit 3-1 presents the range of weighted condition scores and the weighted average condition scores (weighted by GSF) by type of facility for Eugene School District 4J. As the exhibit shows, there is a range of condition scores, from 40 to 90, with the average condition scores in the “Unsatisfactory” to “Fair” range.

Exhibit 3-1
Eugene School District 4J
Building Weighted Condition Score Ranges

Site Type	Building Condition Score Range		Average Condition Score
	Low	High	
Elementary Schools	63.36	90.00	73.16
Middle Schools	40.08	88.74	69.86
High Schools	64.30	72.34	68.32
Other Facilities	67.46	76.37	73.37

Source: MGT of America, Inc., 2012.



Exhibit 3-2 presents the weighted average condition score for each school that was assessed. As the exhibit shows, condition scores are in the “Unsatisfactory” to “Good” categories which indicates that the facilities range in need from routine maintenance to replacement.

Exhibit 3-2
Eugene School District 4J
Condition Scores – by Site

Site Name	GSF*	Weighted Average Condition Score*
Elementary Schools		
Adams ES	47,037	69.63
Awbrey Park ES	56,816	76.85
Bertha Holt ES	67,389	90.00
Buena Vista ES	45,911	65.67
Camas Ridge ES	41,327	63.51
César Chávez ES	66,940	90.00
Charlemagne at Fox Hollow ES	27,872	77.30
Edgewood ES	36,719	70.33
Edison ES	42,195	63.36
Gilham ES	74,500	81.91
Howard ES	45,775	69.65
McCornack ES	54,933	73.92
River Road ES	50,381	66.23
Silver Lea ES	44,349	66.47
Spring Creek ES	41,387	73.27
Twin Oaks ES	35,198	72.29
Willagillespie ES	57,500	73.35
Elementary School Total/Average	836,229	73.16
Middle Schools		
Arts & Technology Acad. at Jefferson MS	100,237	72.06
Cal Young MS	90,341	88.74
Kelly MS	112,356	78.28
Kennedy MS	89,057	62.70
Madison MS	86,953	82.25
Monroe MS	87,401	69.86
Roosevelt MS	105,770	40.08
Spencer Butte MS	82,414	64.87
Middle School Total/Average	754,529	69.86

*Excludes portables

**Exhibit 3-2 (continued)
Eugene School District 4J
Condition Scores – by Site**

Site Name	GSF*	Weighted Average Condition Score*
High Schools		
Churchill HS	245,538	64.85
North Eugene HS	214,767	64.30
Sheldon HS	231,748	72.34
South Eugene HS	310,831	71.80
High School Total/Average	1,002,884	68.32
Other Facilities		
Coburg ES	27,537	76.37
Crest Drive ES	23,562	76.29
Parker ES (Ed Options)	40,837	67.46
Other School Total/Average	91,936	73.37
District Total/Average	1,849,349	71.75

Source: MGT of America, Inc., 2012.

*Excludes portables



EDUCATIONAL SUITABILITY ASSESSMENT

The educational suitability assessment evaluates how well the facility supports the educational program that it houses. Each school receives one suitability score which applies to all the buildings at the facility. The educational suitability of each school was assessed with BASYS® using the following categories:

Environment	The overall environment of the schools with respect to creating a safe and positive learning environment.
Circulation	Pedestrian/vehicular circulation and the appropriateness of site facilities and signage.
Support Space	The existence of facilities and spaces to support the educational program being offered. These include general classrooms, special learning spaces (e.g. music rooms, libraries, science labs), and support spaces (e.g. administrative offices, counseling offices, reception areas, kitchens, health clinics).
Size	The adequacy of the size of the program spaces.
Location	The appropriateness of adjacencies (e.g., physical education space separated from quiet spaces).
Storage & Fixed Equipment	The appropriateness of utilities, fixed equipment, storage, and room surfaces (e.g. flooring, ceiling materials, wall coverings).

Suitability scores are interpreted as follows:

90+	Excellent: The facility is designed to provide for and support a majority of the educational program offered. It may have a minor suitability issues but overall it meets the needs of the educational program.
80-89	Good: The facility is designed to provide for and support the educational program offered. It may have minor suitability issues but generally meets the needs of the educational program.
70-79	Fair: The facility has some problems meeting the needs of the educational program and will require remodeling.
60-69	Poor: The facility has numerous problems meeting the needs of the educational program and needs significant remodeling, additions, or replacement.
Below 60	Unsatisfactory: The facility is unsuitable in support of the educational program.

Note: Scores that fall below the red line indicate the facility has deficiencies that should be addressed as a priority.

Exhibit 3-3 presents the range and average of suitability scores by facility type. The suitability scores range from 58 to 96. The average scores fall within the “Poor” to “Fair” category:

**Exhibit 3-3
Eugene School District 4J
Suitability Score Ranges**

Site Type	Suitability Score Range		Average Suitability Score
	Low	High	
Elementary Schools	58.47	88.44	69.51
Middle Schools	63.11	96.39	76.70
High Schools	68.60	84.36	76.61
Other Facilities	58.92	69.87	63.43

Source: MGT of America, Inc., 2012.

Exhibit 3-4 presents the educational suitability score for each school. As the scores indicate, some schools have significant suitability deficiencies.

**Exhibit 3-4
Eugene School District 4J
Suitability Scores – by Site**

Site Name	Suitability Score
Elementary Schools	
Adams ES	66.23
Awbrey Park ES	61.56
Bertha Holt ES	88.44
Buena Vista ES	69.64
Camas Ridge ES	63.79
César Chávez ES	87.81
Charlemagne at Fox Hollow ES	59.44
Edgewood ES	66.50
Edison ES	62.71
Gilham ES	86.32
Howard ES	64.64
McCornack ES	66.89
River Road ES	63.50
Silver Lea ES	58.47
Spring Creek ES	63.06
Twin Oaks ES	82.93
Willagillespie ES	69.72
Elementary School Average	69.51

**Exhibit 3-4 (continued)
Eugene School District 4J
Suitability Scores – by Site**

Site Name	Suitability Score
Middle Schools	
Arts & Technology Acad. at Jefferson MS	63.15
Cal Young MS	96.39
Kelly MS	74.67
Kennedy MS	80.41
Madison MS	87.83
Monroe MS	75.07
Roosevelt MS	63.11
Spencer Butte MS	73.00
Middle School Average	76.70
High Schools	
Churchill HS	80.12
North Eugene HS	68.60
Sheldon HS	73.37
South Eugene HS	84.36
High School Average	76.61
Other Facilities	
Coburg ES	69.87
Crest Drive ES	61.50
Parker ES (Ed Options)	58.92
Other School Average	63.43
District Average	71.63

Source: MGT of America, Inc., 2012.

GROUNDS CONDITION ASSESSMENT

The grounds condition assessment score is a measure of the amount of capital needs or deferred maintenance at the site, which includes the driveways and walkways, the parking lots, the playfields, the utilities, and fencing, etc. The scores are interpreted as follows:

90+	New or Like New: The site and/or a majority of its systems are in good condition, less than three years old, and only require preventive maintenance.
80-89	Good: The site and/or a majority of its systems are in good condition and only require routine maintenance.
70-79	Fair: The site and/or some of its systems are in fair condition and require minor to moderate repair.
60-69	Poor: The site and/or a significant number of its systems are in poor condition and will require major repair or renovation.
Below 60	Unsatisfactory: The site and/or a majority of its systems should be renovated.

Note: Scores that fall below the red line indicate the facility has deficiencies that should be addressed as a priority.

The grounds assessment scores were calculated in the same manner as the building condition scores. *Exhibit 3-5* presents the range of grounds assessment scores and the average grounds assessment scores by facility type. The grounds assessment scores averaged in the “Fair” category.

Exhibit 3-5
Eugene School District 4J
Grounds Assessment Score Ranges

Site Type	Grounds Assessment Score Range		Average Grounds Score
	Low	High	
Elementary Schools	53.64	90.00	77.09
Middle Schools	47.67	90.00	78.43
High Schools	70.88	81.76	76.16
Other Facilities	65.62	79.81	74.91

Source: MGT of America, Inc., 2012.

Exhibit 3-6 presents the grounds assessment score by each school site. Each school site receives a single grounds assessment score.

**Exhibit 3-6
Eugene School District 4J
Grounds Scores – by Site**

Site Name	Grounds Score
Elementary Schools	
Adams ES	85.29
Awbrey Park ES	81.41
Bertha Holt ES	90.00
Buena Vista ES	85.56
Camas Ridge ES	83.33
César Chávez ES	80.09
Charlemagne at Fox Hollow ES	72.83
Edgewood ES	79.52
Edison ES	53.64
Gilham ES	75.66
Howard ES	79.67
McCornack ES	62.11
River Road ES	71.83
Silver Lea ES	66.38
Spring Creek ES	83.25
Twin Oaks ES	81.44
Willagillespie ES	78.61
Elementary School Average	77.09



Exhibit 3-6 (continued)
Eugene School District 4J
Grounds Scores – by Site

Site Name	Grounds Score
Middle Schools	
Arts & Technology Acad. at Jefferson MS	85.32
Cal Young MS	90.00
Kelly MS	82.41
Kennedy MS	78.73
Madison MS	90.00
Monroe MS	75.55
Roosevelt MS	47.67
Spencer Butte MS	77.78
Middle School Average	78.43
High Schools	
Churchill HS	73.80
North Eugene HS	78.20
Sheldon HS	70.88
South Eugene HS	81.76
High School Average	76.16
Other Facilities	
Coburg ES	65.62
Crest Drive ES	79.31
Parker ES (Ed Options)	79.81
Other Facilities Average	74.91
District Average	77.11

Source: MGT of America, Inc., 2012.

TECHNOLOGY READINESS

The BASYS® technology readiness score measures the capability of the existing infrastructure to support information technology and associated equipment. The score can be interpreted as follows:

90+	Excellent: The facility has excellent infrastructure to support information technology.
80-89	Good: The facility has the infrastructure to support information technology.
70-79	Fair: The facility is lacking in some infrastructure to support information technology.
60-69	Poor: The facility is lacking significant infrastructure to support information technology.
Below 60	Unsatisfactory: The facility has little or no infrastructure to support information technology.

Note: Scores that fall below the red line indicate the facility has deficiencies that should be addressed as a priority.

Exhibit 3-7 presents the range of technology scores and the average technology scores by facility type. Technology readiness scores vary from 42 to 100, with the averages in the “Unsatisfactory” to “Fair” category.

Exhibit 3-7
Eugene School District 4J
Technology Score Ranges

Site Type	Technology Readiness Score Range		Average Technology Score
	Low	High	
Elementary Schools	61.70	100.00	76.81
Middle Schools	60.00	100.00	77.50
High Schools	63.30	85.00	74.58
Other Facilities	42.00	67.50	56.50

Source: MGT of America, Inc., 2012.

Exhibit 3-8 presents the technology readiness score for each school site.

**Exhibit 3-8
Eugene School District 4J
Technology Scores – by Site**

Site Name	Technology Score
Elementary Schools	
Adams ES	76.75
Awbrey Park ES	82.44
Bertha Holt ES	100.00
Buena Vista ES	63.30
Camas Ridge ES	65.00
César Chávez ES	95.00
Charlemagne at Fox Hollow ES	68.30
Edgewood ES	90.00
Edison ES	61.70
Gilham ES	91.70
Howard ES	70.00
McCornack ES	81.70
River Road ES	63.30
Silver Lea ES	70.00
Spring Creek ES	73.30
Twin Oaks ES	71.60
Willagillespie ES	81.70
Elementary School Average	76.81



Exhibit 3-8 (continued)
Eugene School District 4J
Technology Scores – by Site

Site Name	Technology Score
Middle Schools	
Arts & Technology Acad. at Jefferson MS	71.70
Cal Young MS	100.00
Kelly MS	70.00
Kennedy MS	60.00
Madison MS	100.00
Monroe MS	85.00
Roosevelt MS	63.30
Spencer Butte MS	70.00
Middle School Average	77.50
High Schools	
Churchill HS	75.00
North Eugene HS	75.00
Sheldon HS	63.30
South Eugene HS	85.00
High School Average	74.58
Other Facilities	
Coburg ES	60.00
Crest Drive ES	42.00
Parker ES (Ed Options)	67.50
Other Facilities Average	56.50
District Average	74.80

Source: MGT of America, Inc., 2012.

COMBINED SCORES

The building condition, educational suitability, grounds condition, and technology readiness scores are combined into one score for each school to assist in the task of prioritizing projects. Since the building condition score is a measure of the maintenance needs (e.g. leaky roofs, etc.) and the educational suitability score is a measure of how well the building design and configuration supports the educational program, it is possible to have a high score for one assessment and a low score for another assessment. It is the combined score that attempts to give a comprehensive picture of the conditions that exist at each school and how each school compares relative to the other schools in the district.

To create the combined score, the four scores are weighted, based on which deficiencies the district wants to emphasize and the relative impact on capital costs. For Eugene School District 4J, the building condition score was weighted 40 percent, the educational suitability score was weighted 40 percent, the grounds condition score was weighted 10 percent, and the technology readiness score was weighted 10 percent. Exhibit 3-9 presents all the scores for each facility and the resulting combined score using this weighting formula.

Exhibit 3-9
Eugene School District 4J
Combined Scores – by Site

Site Name	Weighted Building Condition Score*	Suitability Score	Grounds Condition Score	Tech. Readiness Score	Combined Score 40/40/10/10
Elementary Schools					
Adams ES	69.63	66.23	85.29	76.75	70.55
Awbrey Park ES	76.85	61.56	81.41	82.44	71.75
Bertha Holt ES	90.00	88.44	90.00	100.00	90.38
Buena Vista ES	65.67	69.64	85.56	63.30	69.01
Camas Ridge ES	63.51	63.79	83.33	65.00	65.75
César Chávez ES	90.00	87.81	80.09	95.00	88.63
Charlemagne at Fox Hollow ES	77.30	59.44	72.83	68.30	68.81
Edgewood ES	70.33	66.50	79.52	90.00	71.69
Edison ES	63.36	62.71	53.64	61.70	61.96
Gilham ES	81.91	86.32	75.66	91.70	84.03
Howard ES	69.65	64.64	79.67	70.00	68.68
McCornack ES	73.92	66.89	62.11	81.70	70.71
River Road ES	66.23	63.50	71.83	63.30	65.41
Silver Lea ES	66.47	58.47	66.38	70.00	63.61
Spring Creek ES	73.27	63.06	83.25	73.30	70.19
Twin Oaks ES	72.29	82.93	81.44	71.60	77.39
Willagillespie ES	73.35	69.72	78.61	81.70	73.26
Elementary School Average	73.16	69.51	77.09	76.81	72.46

*Excludes portables

**Exhibit 3-9 (continued)
Eugene School District 4J
Combined Scores – by Site**

Site Name	Weighted Building Condition Score*	Suitability Score	Grounds Condition Score	Tech. Readiness Score	Combined Score 40/40/10/10
Middle Schools					
Arts & Technology Acad. at Jefferson MS	72.06	63.15	85.32	71.70	69.79
Cal Young MS	88.74	96.39	90.00	100.00	93.05
Kelly MS	78.28	74.67	82.41	70.00	76.42
Kennedy MS	62.70	80.41	78.73	60.00	71.12
Madison MS	82.25	87.83	90.00	100.00	87.03
Monroe MS	69.86	75.07	75.55	85.00	74.03
Roosevelt MS	40.08	63.11	47.67	63.30	52.37
Spencer Butte MS	64.87	73.00	77.78	70.00	69.93
Middle School Average	69.86	76.70	78.43	77.50	74.22
High Schools					
Churchill HS	64.85	80.12	73.80	75.00	72.87
North Eugene HS	64.30	68.60	78.20	75.00	68.48
Sheldon HS	72.34	73.37	70.88	63.30	71.70
South Eugene HS	71.80	84.36	81.76	85.00	79.14
High School Average	68.32	76.61	76.16	74.58	73.05
Other Facilities					
Coburg ES	76.37	69.87	65.62	60.00	71.06
Crest Drive ES	76.29	61.50	79.31	42.00	67.25
Parker ES (Ed Options)	67.46	58.92	79.81	67.50	65.28
Other Facilities Average	73.37	63.43	74.91	56.50	67.86
District Average	71.75	71.63	77.11	74.80	72.54

Source: MGT of America, Inc., 2012.

*Excludes portables

Color Key
80 - 90
70 - 79
Below 70

The above exhibit provides the data to prioritize needs based on the overall condition of the facility.

Findings and Recommendations

This section presents the findings resulting from the review of the facilities assessment and the capacity/utilization analysis and offers recommendations for updating the 2002 long-range facilities master plan.

Process

MGT presented the results of the facilities assessment and the capacity/utilization analysis to district staff during a strategic planning session on March 5th and 6th. After the presentation, MGT facilitated a discussion on academic goals, facility planning goals, findings, and potential recommendations. The discussion explored various scenarios for meeting the district's long-range facility needs.

After the discussion, the MGT team met, without district staff, to develop recommendations for updating the long-range facilities plan. These recommendations were presented to the district team in a third session on March 6th. After considerable discussion, a consensus was arrived at on the proposed recommendation and how they should be prioritized.

Facility Planning Goals

The following facility planning goals were established during the strategic planning session. The goals reflect the key priorities for the district with regard to facilities.

1. Address schools with combined scores of less than 70 and/or utilization of more than 105 percent.
2. Accomplish long term operating efficiencies.
3. Provide sufficient capacity for class size goals.
4. Accommodate full day kindergarten.
5. Provide a world language program within each high school attendance zone and consider location of alternative programs to increase accessibility.
6. Consider opportunities for co-location of YMCA with schools, and/or partnerships with the City of Eugene for community centers, athletic/recreation facilities, and/or libraries.
7. Identify available properties to be repurposed or sold.

Findings

The following findings were established after a thorough review of the data.

- ♦ **Elementary Schools** – The district has sufficient capacity, however consolidating some of the small schools will increase instructional effectiveness and operational efficiency.

The utilization rate of the district's elementary schools is 93 percent assuming a full day kindergarten program. This utilization rate indicates that the district does not have excess seats on a district wide basis. At the same time, 10 of the 17 elementary schools have a functional capacity of approximately 400 students or less, which from a national perspective is quite small. Consequently, the district could maintain "small" elementary schools that average approximately 500 to 600 students, and increase operational efficiencies by consolidating some schools.

- ♦ **Middle Schools** – The district is operating the appropriate number of middle schools given the current enrollments, school size, and geographic conditions, however reduction in capacity should be considered.

The district currently has a model of two middle schools feeding each high school. This works well to ensure that students will be grouped together throughout their K-12 educational experience. Some of the middle schools, such as Roosevelt, Spencer Butte, and Kelly have excess capacity which could be reduced if the facility is replaced or remodeled.

- ♦ **High Schools** – The district is operating the appropriate number of high schools given the current enrollments, school size, and geographic conditions.

The district is operating four high schools which have an average capacity of approximately 1,300 students. This configuration works well given the district geography and the preference for medium sized high schools.

- ♦ **World Language Programs** - The district has two world language programs in the North region, but none in the Churchill region.

The district would like to offer a language immersion or dual language program in each region. Relocating the Japanese immersion school to the Churchill region would accomplish this.

- ♦ The replacement/renovation of numerous schools that have serious condition and suitability deficiencies (<70) will result in operational savings and increased educational effectiveness.

A significant number of the district's schools have condition deficiencies related to old HVAC systems and building envelopes (e.g. single pane windows) that are not energy efficient. Remediating these deficiencies will lower operating costs of the schools. In addition, repairing leaking roofs and old systems that require frequent maintenance will lower maintenance costs. Many of the suitability deficiencies are due to the lack of appropriate spaces for special or targeted programs. The lack of appropriate spaces hampers the effective delivery of these programs and meeting the educational goals of the district.

- ♦ The facility assessment scores are an indicator of the amount of dollars needed to correct all the deficiencies identified.

The assessment rates each system in a building as “new”, “good”, “fair”, “poor”, or “unsatisfactory” based on a detailed description of each rating for the particular system. The possible score for each system is based on that system’s contribution to the overall cost of building construction. Therefore, the condition score is a measure of that portion of the value of the building which is in good condition. The capital needs score (100 minus the condition score) is a measure of the capital needs or deferred maintenance. This score, when presented as a percent, is also referred to the facility condition index or FCI. For example, a building which has a condition score of 80, has a capital needs score of 20 (100 – 80 = 20). A capital needs score of 20 indicates that 20 percent of the value of the building can be reinvested in the building in order to attain a score of 100 and put the building in a “like new” condition. Typically, capital needs scores are calculated using a base condition score of 90 (which indicates that a system is in good condition and requiring only routine maintenance), since it is unreasonable to expect all buildings to be in “like new” condition indefinitely.

The chart below shows, by school, the projected budgets (in today’s dollars) required to remediate the deficiencies identified in each assessment.

Fiscal Impact of Facility Assessment Deficiencies

Site Name	Bldg to 90%	Suit to 100%	Grounds to 90%	Tech to 100%	Total
Adams ES	\$2,873,763	\$1,667,639	\$90,558	\$57,712	\$4,690,000
Awbrey Park ES	\$2,241,205	\$2,293,391	\$199,669	\$52,637	\$4,787,000
Bertha Holt ES	-	\$818,028	-	-	\$818,000
Buena Vista ES	\$3,350,879	\$1,463,505	\$83,478	\$88,918	\$4,987,000
Camas Ridge ES	\$3,284,489	\$1,571,113	\$112,843	\$76,332	\$5,045,000
César Chávez ES	-	\$856,968	\$271,381	\$17,663	\$1,146,000
Charlemagne at Fox Hollow ES	\$1,061,728	\$1,186,942	\$195,727	\$46,627	\$2,491,000
Edgewood ES	\$2,166,458	\$1,291,596	\$157,351	\$19,377	\$3,635,000
Edison ES	\$3,372,159	\$1,652,126	\$627,590	\$85,284	\$5,737,000
Gilham ES	\$1,807,864	\$1,069,890	\$437,094	\$32,632	\$3,347,000
Howard ES	\$2,794,293	\$1,699,625	\$193,508	\$72,470	\$4,760,000
McCornack ES	\$2,650,154	\$1,909,526	\$626,796	\$53,051	\$5,240,000
River Road ES	\$3,592,072	\$1,930,943	\$374,573	\$97,575	\$5,995,000
Silver Lea ES	\$3,130,922	\$1,934,085	\$428,598	\$70,212	\$5,564,000
Spring Creek ES	\$2,076,795	\$1,605,401	\$114,337	\$58,315	\$3,855,000
Twin Oaks ES	\$1,870,000	\$630,791	\$123,248	\$52,753	\$2,677,000
Willagillespie ES	\$2,872,459	\$1,828,242	\$268,004	\$55,530	\$5,024,000
Elementary Schools Total	\$39,145,240	\$25,409,811	\$4,304,755	\$937,088	\$69,798,000

Fiscal Impact of Facility Assessment Deficiencies (continued)

Site Name	Bldg to 90%	Suit to 100%	Grounds to 90%	Tech to 100%	Total
Arts & Technology Academy at Jefferson MS	\$5,393,229	\$3,878,395	\$191,740	\$149,700	\$9,613,000
Cal Young MS	\$340,507	\$342,222	-	-	\$683,000
Kelly MS	\$3,950,649	\$2,988,240	\$349,062	\$177,879	\$7,466,000
Kennedy MS	\$7,293,585	\$1,831,684	\$410,604	\$187,990	\$9,724,000
Madison MS	\$2,022,518	\$1,111,292	-	-	\$3,134,000
Monroe MS	\$5,280,171	\$2,287,665	\$516,660	\$69,185	\$8,154,000
Roosevelt MS	\$15,840,752	\$4,097,016	\$1,831,779	\$204,850	\$21,974,000
Spencer Butte MS	\$6,212,777	\$2,336,604	\$411,948	\$130,476	\$9,092,000
Middle School Total	\$46,334,188	\$18,873,118	\$3,711,793	\$920,080	\$69,840,000
Churchill HS	\$18,526,141	\$5,125,904	\$1,627,609	\$323,941	\$25,604,000
North Eugene HS	\$16,556,660	\$7,081,122	\$1,036,561	\$283,344	\$24,958,000
Sheldon HS	\$12,277,004	\$6,480,659	\$1,812,829	\$448,837	\$21,019,000
South Eugene HS	\$16,972,082	\$5,104,931	\$1,047,967	\$246,049	\$23,371,000
High Schools Total	\$64,331,887	\$23,792,616	\$5,524,966	\$1,302,171	\$94,952,000
Coburg ES	\$1,126,270	\$871,210	\$274,651	\$58,128	\$2,330,000
Crest Drive ES	\$969,055	\$952,490	\$103,046	\$72,119	\$2,097,000
Parker ES (Ed Options)	\$2,761,541	\$1,761,292	\$170,157	\$70,040	\$4,763,000
Other Facilities Total	\$4,856,866	\$3,584,992	\$547,854	\$200,287	\$9,190,000
District Total	\$154,668,181	\$71,660,537	\$14,089,368	\$3,359,626	\$243,780,000

- ◆ The district has properties that are available for repurposing or sale.

The district has five facilities/properties that are not currently in use, or are underutilized, that could be sold or repurposed (Dunn, Civic Stadium, Bailey Hill, Crest Drive, Willard). In addition, there are a number of facilities the district is currently using, but due to their poor condition, the property should be sold or repurposed.

Recommendations

The following recommendations for updating the long-range facilities master plan have been formulated to meet the above goals, given the above findings and the results of the facilities assessment and capacity/utilization analysis.

The district needs to continue replacing aging school buildings over the next 10 years and has the opportunity, in light of enrollment trends, to dispose of several surplus properties.

Recommendations for major projects are:

- ◆ Replace 6 older elementary buildings with 4 elementary school buildings through school consolidations and program relocations.
- ◆ Replace Roosevelt Middle School.
- ◆ Replace North Eugene High School.
- ◆ Remodel the Arts and Technology Academy building to better support multiple school programs.
- ◆ Remodel areas of Churchill High School to better accommodate a Science, Technology, Engineering and Math (STEM) program.
- ◆ Expand or remodel areas of Sheldon High School to better accommodate its student enrollment.
- ◆ Enclose connection of main building to west and south quads (upper grades) at Gilham Elementary School and provide additional restrooms for this area.



Major project recommendations by region:

South Region	Replace Roosevelt Middle School with a new building at the Roosevelt site or at the Civic Stadium site.
	Consolidate Edison and Camas Ridge Elementary Schools with a new building at either the current Roosevelt site or at the Camas Ridge site.
	Relocate the alternative programs to a new building at the Willard site.
North Region	Replace Howard Elementary with a new building. Merge programs and students from Corridor and vacate the Silver Lea building.
	Replace River Road/el Camino del Rio Language Elementary School with a new building.
	Replace North Eugene High School.
	Move Yujin Gakuen Japanese Immersion alternative school to the Churchill region.
Churchill Region	Remodel the Arts and Technology Academy building to accommodate a middle school program and the Yujin Gakuen Japanese Immersion (or an Asian studies program if Chinese is added in the future).
	Remodel areas of Churchill High School to better accommodate a STEM program.
Sheldon Region	Expand or remodel areas of Sheldon High School.
	Connect main building to west/south quads at Gilham Elementary School.

The recommendations have been prioritized into three bond initiatives that would occur over the ten year planning period. The following exhibits identify the following aspect of each recommendation:

- ◆ The goals addressed by the recommendation
- ◆ The high school region
- ◆ The school or program
- ◆ The recommendation
- ◆ The projected budget¹

¹ All costs/budgets shown in this report are in today's dollars.

Recommendations for Bond I

Goal	HS Region	School/Program	Recommendation	Budget
Elementary Schools				
1,2,4,5	South	Camas Ridge & Edison	Replace and consolidate into one school on the Roosevelt MS site or at Camas Ridge ES site. (600 capacity)	\$25,000,000
1,2,3,4,6	North	Howard	Replace with new facility (600 capacity)	\$25,000,000
1,2,6	North	Corridor	Relocate to Howard	See Howard
5	North/ Churchill	Yujin Gakuen	Relocate to new Asian Studies program at ATA.	See ATA
1,2,6	North	Silver Lea	Integrate site into North Eugene HS. Consider YMCA at this location.	See North Eugene HS
Middle Schools				
1,2,3,6	South	Roosevelt	Replace on Civic Stadium site with YMCA facility or at current Roosevelt MS site. (650 capacity)	\$35,000,000
1,2,5	Churchill	Arts & Technology Academy	Remodel to provide two facilities to create STEM MS and Asian Studies ES. Relocate current elementary school and Family school.	\$15,035,550
1,2	South	Spencer Butte	Renovate HVAC	Current bond* (\$1.5 mil)
1,2	Churchill	Kennedy	Renovate HVAC controls and boilers	Current bond* (\$0.5 mil)
High Schools				
1,3	Sheldon	Sheldon	Add new technology wing and/or renovate old industrial arts building for tech or media production.	\$3,500,000
1	Churchill	Churchill	Renovate industrial arts building to support STEM program. Consider funding from current bond.	Current bond* (\$2.5 mil)
1,2,3,6	North	North	Phase 1 renovations/construction.	\$30,000,000
Surplus Properties				
7	South	Edison	Sell	
7	South	Dunn	Sell	
7	South	Parker	Sell (Location for EEO program?)	
7	Churchill	Bailey Hill	Sell (Location for current program?)	
7	Churchill	Crest Drive	Sell (Consider use for temporary/permanent program location.)	
7	South	Civic Stadium	Sell – if not repurposed	
Grand Total				\$133,535,550

* Not included in Grand Total

Recommendations for Bond II

Goal	HS Region	School/Program	Recommendation	Budget
Elementary Schools				
1,2,4	North	River Road	Replace (450 capacity)	\$16,875,000
1	South	Charlemagne	Relocate to Camas Ridge on temporary basis (assuming building is available)	
1,5	South	Willard	Build new school for alternative programs. (450 capacity)	\$17,000,000
1,2,3	Sheldon	Gilham	Renovate/remodel	\$2,000,000
Middle Schools				
High Schools				
1,2,3,6	North	North HS	Phase 2 renovations/reconstruction	\$25,000,000
Surplus Properties				
7	South	Fox Hollow	Sell	
Grand Total				\$60,875,000

Recommendations for Bond III

Goal	HS Region	School/Program	Recommendation	Budget
Elementary Schools				
1	Churchill	Adams	Renovate	\$5,000,000
1	North	Spring Creek	Renovate	\$5,000,000
1	Sheldon	Buena Vista	Renovate	\$5,000,000
Middle Schools				
3	Sheldon	Cal Young	Complete planned classroom addition	\$4,000,000
High Schools				
Surplus Properties				
7	South	Camas Ridge	Sell – if not repurposed	
Grand Total				\$19,000,000

2002 Long-Range Facilities Plan Recommendations

The following chart compares the recommendations found in the 2002 long-range facilities plan with projects that have been completed since 2002 and with the recommendations found in this update.

Comparison of Recommendations with 2002 Master Plan

2002 Master Plan		Completed Projects	2012 Update	
School	Recommendation		School	Recommendation
Elementary Schools				
Gilham		Replaced/renovated 1994	Gilham	Minor remodel
Westmoreland/Patterson	Replace/renovate	Replaced with Chavez 2004		
Willakenzie/Washington	Replace/renovate	Replaced with Holt 2004		
Willagillespie	Renovate	In progress		
North Region Elementary	Replace/renovate		Howard	Replace/consolidate
South Region Elementary	Replace/renovate		Willard	Replace for alternative programs
Charlemagne/Fox Hollow	Possible consolidation		Charlemagne	Move to Camas Ridge on temporary basis, if building is available
Edison/Harris	Possible consolidation		Camas Ridge/ Edison	Consolidate and replace on Roosevelt site or Camas Ridge site
Crest Drive		Consolidated 2011, students moved to Adams		
Parker		Repurposed 2011, students moved to Edgewood and Camas Ridge		
Middle Schools				
Kelly		Renovated/remodeled 1995		
Madison	Replace	Replaced 2005		
Cal Young	Replace	Replaced 2006	Cal Young	Complete classroom addition
Roosevelt	Replace/renovate		Roosevelt	Replace
One middle school	Replace/renovate		ATA	Remodel

Comparison of Recommendations with 2002 Master Plan

2002 Master Plan		Completed Projects	2012 Update	
School	Recommendation		School	Recommendation
<i>High Schools</i>				
North Eugene HS	New science wing and student center	Science area remodel, student center renovated, 2004	North Eugene HS	Replace/renovate
Sheldon HS	New science and technology wing	New science wing completed 2004	Sheldon HS	Add tech wing and/or renovate industrial arts bldg.
South Eugene HS	Renovate student center	Completed 2004		
Churchill HS	New science wing	Completed 2006	Churchill HS	Renovate industrial arts bldg. for STEM
New regional environmental science center	Secure matching funds	Cancelled		
<i>Properties</i>				
Westmoreland	Surplus	Sold		
Laurel Hill	Surplus	Sold		
Willakenzie	Surplus	Sold		
Whiteaker	Surplus	Sold		
Santa Clara	Surplus	Sold		
Washington	Surplus	Repurposed		
Bailey Hill	Surplus		Bailey Hill	Sell
Civic Stadium	Surplus		Civic Stadium	Repurpose/Sell
Dunn	Surplus		Dunn	Sell
Edison			Edison	Sell
Parker			Parker	Sell
Camas Ridge			Camas Ridge	Repurpose/Sell
Fox Hollow			Fox Hollow	Sell

Operating Costs Analysis

The following chart identifies potential operating costs savings that would be realized by replacing and consolidating some existing school facilities. The dollar values shown are the difference in annual costs for each expense category that would be associated with the new facility.

Operating Costs Analysis Due to Recommendations

Operating Costs/(Savings)						
Recommendation	Utilities	Maintenance	Insurance	Staffing	Transportation	10-Year Savings
Replace existing Roosevelt w/ new facility	\$(27,953)	\$(6,030)	\$6,663	-	-	\$(273,200)
Consolidate Camas Ridge & Edison into new facility	\$(13,014)	\$(39,735)	\$4,399	\$(261,248)	\$45,000	\$(2,645,975)
Replace Howard with new facility	\$(50,687)	\$(24,870)	\$1,130	\$(190,332)	-	\$(2,647,580)
Remodel/reconstruct Jefferson/ATA	\$(12,517)	\$(16,984)	\$1,749	-	-	\$(277,517)
Reconstruct/renovate North Eugene HS	\$(28,396)	\$(73,043)	\$8,011	-	-	\$(934,281)
Relocate alternative program(s) to new facility at Willard	\$6,951	\$9,940	\$5,903	-	-	\$227,941
Replace River Road with new facility	\$(6,512)	\$(9,085)	\$4,285	-	-	\$(113,119)
Total Costs/(Savings)						\$(6,663,731)

Source: Eugene 4J School District, Facilities Department, 2012.

Impact on Capital Costs

The following chart calculates the net capital costs the district would incur due to implementing the recommendations for new construction. The calculation assumes the district would avoid those costs identified by the assessment as necessary to restore these buildings to good condition, by building new or remodeling the listed schools.

Impact on Capital Costs Due to Recommendations					
Recommendation	New Construction	Renovation	Total	Avoided Capital Costs*	Net Capital Costs
Replace existing Roosevelt w/ new facility	\$35,000,000	-	\$35,000,000	\$(21,974,000)	\$13,026,000
Consolidate Camas Ridge & Edison into new facility	\$25,000,000	-	\$25,000,000	\$(10,782,000)	\$14,218,000
Replace Howard with new facility	\$25,000,000	-	\$25,000,000	\$(10,324,000)	\$14,676,000
Remodel/reconstruct Jefferson/ATA	\$7,500,000	\$7,500,000	\$15,000,000	\$(9,613,000)	\$5,387,000
Reconstruct/renovate North Eugene HS	\$47,250,000	\$7,875,000	\$55,125,000	\$(24,958,000)	\$30,167,000
Relocate alternative program(s) to new facility at Willard	\$17,000,000	-	\$17,000,000	\$(2,491,000)	\$14,509,000
Replace River Road with new facility	\$17,000,000	-	\$17,000,000	\$(5,995,000)	\$11,005,000
Totals			\$189,125,000	\$(86,137,000)	\$102,988,000

*Costs calculated from the assessment to maintain buildings in *Good* to *Excellent* condition.

