



Business, Finance and Planning

TO: School Committee

FROM: Liam Hurley, Assistant Superintendent/Chief Financial & Administrative Officer
Julie Kirrane, Director of Business and Planning
David Stickney, Director of Facilities

DATE: May 13, 2019

RE: Update and Discussion on Long- and Short-Term Space Plans:
Middle School Space
Summer Facility Projects
Supplemental FY20 CIP (2020-2024)
Update of the Long-range facilities timeline and plan

The following information is on long- and short-term space plans in the district in 2019-20 and 2020-21, and beyond. Four main topics are planned for discussion and feedback:

- The district has been reviewing middle school space and has worked with Mayor Fuller and the city executive team to obtain funding for two modular classrooms to be installed at Oak Hill in response to sustained enrollment growth at south middle schools.
- There also will be an update in advance of the summer months (when the district completes school facilities projects) of the types of projects to be completed this season.
- Information is also provided on the proposed Supplemental City of Newton FY2020 CIP (2020-2024) released recently in conjunction with the annual budget process.
- The annual process of updating the long-range facilities plan begins with feedback tonight and discussion at the joint School Committee and City Council meeting scheduled for June 13, 2019. The process continues with school and city administration until the updated FY20 plan is presented in Fall 2019.

I. Middle School Space

The district has been reviewing middle school space and has worked with Mayor Fuller and the city executive team for proposed capital funding for two modular classrooms to be installed at Oak Hill in response to sustained enrollment growth at south middle schools.

Current enrollment at Oak Hill is 630 students. The enrollment projections for Oak Hill have increased. The November 2017 enrollment projections showed Oak Hill at 663 students in five years. A year later, the November 2018 enrollment projections for Oak Hill projected 708 students in five years, an increase of 45 students from the prior year projection.

The district has been carefully monitoring rising enrollment projections for Oak Hill, and hoped to be able to manage enrollments internally. Last September's 2018 update of the long-range plan included adding

two additional classrooms at Oak Hill beginning in 2024. However, given the current enrollment estimates, we strongly recommend an earlier timeline to be ready for projected enrollment of 669 students in eighteen months (September 2020). Since the expansion of Oak Hill in 2010, enrollment has ranged from 600 to 630 students. It would be very challenging for Oak Hill to accommodate enrollment expected to grow to 708 students in five years, an increase of over 70 students from today.

Given the above points and financial and time pressure, it is impractical to build permanent construction. The existing modular wing at Oak Hill is a high quality, functional educational space which is well used space in the building. It is hoped that two additional modular spaces can be added without major site impact. It is also not possible to send students bound for Oak Hill next door to Brown since that school is also increasing in population and already has two modular classrooms.

Capacity Changes: There have been a series of changes in the district that have increased enrollment pressure at Oak Hill. These changes have included:

- 2015 redistricting to ease crowding at neighboring elementary schools and to utilize new capacity at Angier and Zervas.
- 2015 enrollment projections suggested lower enrollment levels at Oak Hill.
- Middle school feeder patterns were maintained in order to avoid splitting the Zervas population.
- Zervas elementary school has grown slightly ahead of projection for the past four years
- The current grade 4 at Zervas is a large cohort and will enter Oak Hill in 2020-21
- This class is followed by another large cohort currently in grade 2.

Enrollment: As reported previously, overall middle school enrollment is anticipated to have a three-year increase followed by a return to current enrollment levels overall. This is due to the above average grade 4 and 5 classes (an enrollment bubble). Both North High feeder middle schools, Bigelow and Day, are projected to have decreased enrollment in five years. This works well with North High School capacity challenges. Both South High feeder middle schools, Brown and Oak Hill, will see enrollment increases over the next five years with a total of 123 additional students.

However, Oak Hill will continue to have projected enrollment levels that remain high due to changes to the enlarged Zervas school district. The need for additional capacity at Oak Hill has been discussed over the past few years, and was added to the FY19 Long-Range Facilities Planning Timeline in September 2018 and has been included in recent facilities updates.

The following considerations relate to the need for increased capacity at Oak Hill:

- Oak Hill is significantly smaller than Brown, designed originally as an elementary school.
- Brown has already had two modular classrooms added and has some additional potential options for internal changes to accommodate increased enrollment.
- NPS has had middle school capacity at Oak Hill on its long-range facilities plan for the past year, with timing of September 2024.
- School and district leadership's review of enrollment shows greater than anticipated space constraints, arriving by 2020.
- Oak Hill has 39 full sized classrooms available for an enrollment that is projected to grow to 708 students by October 2023 (+76 students above the current year).
- In comparison, Bigelow Middle has 38 full sized classrooms for an enrollment that is projected to peak in October 2020 at 558 students.

Funding for two modular classrooms at Oak Hill has been added in the City's proposed Supplemental FY20 CIP. Design and site plan recommendations will begin immediately, and are funded by Newton Public Schools, in order to meet project deadlines and have additional space possibly available for September 2020. The earliest timing for an appropriation by the city to cover design work would not have allowed for a September 2020 availability needed at Oak Hill. The CIP funding will cover the purchase and installation of two fully-equipped modular classrooms.

Actual and projected enrollment for all middle schools is reviewed below. Capacity information at Oak Hill, as compared to Bigelow Middle School, is also summarized below, reprinted from the January 2019 Enrollment Planning Report.

| School Name | ACTUAL | | | | | | PROJECTED | | | | | | 5-Year Projected Change |
|---|--------|-------|-------|-------|-------|-------|-----------|-------|-------|-------|-------|------|-------------------------|
| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | | |
| Bigelow | 525 | 504 | 509 | 525 | 521 | 501 | 512 | 558 | 548 | 542 | 495 | -6 | |
| Brown (formerly Meadowbrook Day) | 743 | 738 | 780 | 774 | 753 | 744 | 771 | 821 | 833 | 827 | 789 | 45 | |
| Oak Hill Middle | 947 | 932 | 927 | 922 | 980 | 976 | 994 | 980 | 958 | 942 | 894 | -82 | |
| Total All Middle Schools | 634 | 632 | 602 | 639 | 614 | 630 | 636 | 669 | 689 | 702 | 708 | 78 | |
| Change | 2,849 | 2,806 | 2,818 | 2,860 | 2,868 | 2,851 | 2,913 | 3,028 | 3,028 | 3,013 | 2,886 | 35 | |
| % Change | 130 | -43 | 12 | 42 | 8 | -17 | 62 | 115 | 0 | -15 | -127 | 35 | |
| % Change | 4.8% | -1.5% | 0.4% | 1.5% | 0.3% | -0.6% | 2.2% | 3.9% | 0.0% | -0.5% | -4.2% | 1.2% | |

| 2018-19 Utilization of Core Instructional Space | BIGELOW | | | | OAK HILL | | | |
|---|-----------------|------------------|------------|-----------|-----------------|------------------|------------|-----------|
| | Classroom Space | Small Size Space | Modular CR | Total | Classroom Space | Small Size Space | Modular CR | Total |
| GENERAL ACADEMIC SPACES | | | | | | | | |
| Core, World Language, Electives and Small Group Instructional Rooms | 33 | | | 33 | 32 | 3 | 4 | 39 |
| STUDENT SERVICES | | | | | | | | |
| Districtwide Special Education | 1 | 2 | | 3 | | | | |
| Academic Support/Learning Center/Inclusion | 2 | 3 | | 5 | 1 | 4 | | 5 |
| ART & MUSIC | | | | | | | | |
| Art Classroom | 1 | | | 1 | 1 | | | 1 |
| Music Classroom | 1 | | | 1 | 1 | | | 1 |
| TOTAL INSTRUCTIONAL CLASSROOMS | 38 | 5 | | 43 | 35 | 7 | 4 | 46 |
| OTHER | SF | Largest Cohort | SF/Student | | SF | Largest Cohort | SF/Student | |
| Cafeteria | 2,750 | 174 | 16 | | 5,000 | 231 | 22 | |
| Library/Media Center | 3,300 | 174 | 19 | | 6,000 | 231 | 26 | |
| Auditorium | 3,400 | 174 | 20 | | 6,000 | 231 | 26 | |
| Gymnasium | 3,200 | 174 | 18 | | 5,568 | 231 | 24 | |

II. Summer Facility Projects

Facilities began the process of collecting summer project requests in early December 2018. This involved visiting each school and walking with the principal and senior custodian to identify areas in need of service that generally cannot be addressed when school is in session. After compiling the complete list of proposed projects, our Project and Financial Manager created an initial database where we input estimated costs, prioritized based on gross value, project scope, vendor availability, and potential scheduling conflicts. Lists were then presented to each principal for review and comment. We then teamed with Public Buildings to engage vendors, architects, and engineers to firm up costs.

Generally, we allocate 30 – 35% of the total maintenance budget for summer projects. With approved projects to-date, we are nearing those percentages now, but have a few larger projects where costs are not yet available that may impact the total work load.

Construction projects account for 29% of total work and include space reconfiguration, door replacement, ceiling replacement and roof repair.

Projects of note:

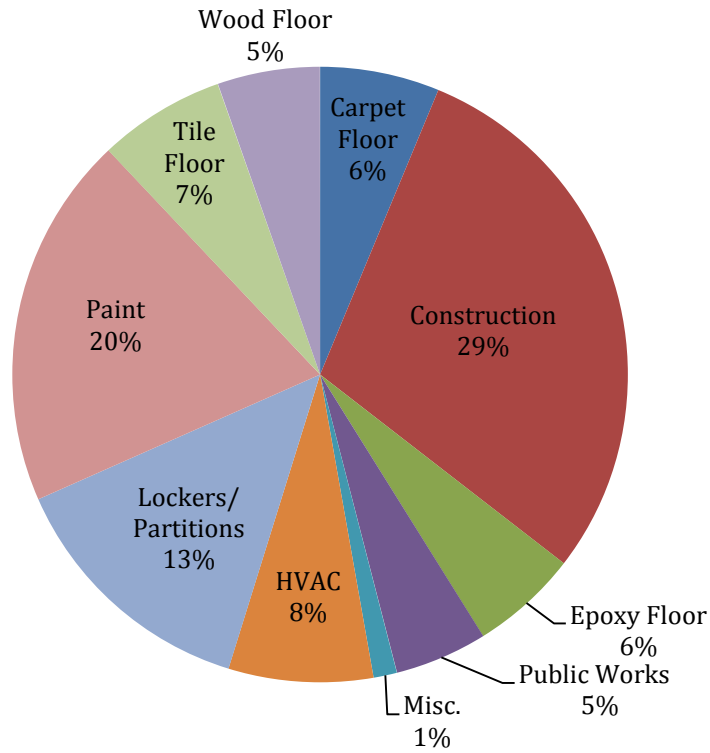
- Complete flooring replacement in the library at Day
- Complete flooring replacement in the lecture hall at South
- Space reconfiguration at Burr and Oak Hill to allow for new calm space to support student self-regulation
- Installation of three (3) new exterior doors at Bowen

It is important to note that the collaboration of school and Public Buildings administrators and staff has made the prospect of the successful completion of 300 or so work projects attainable this year.

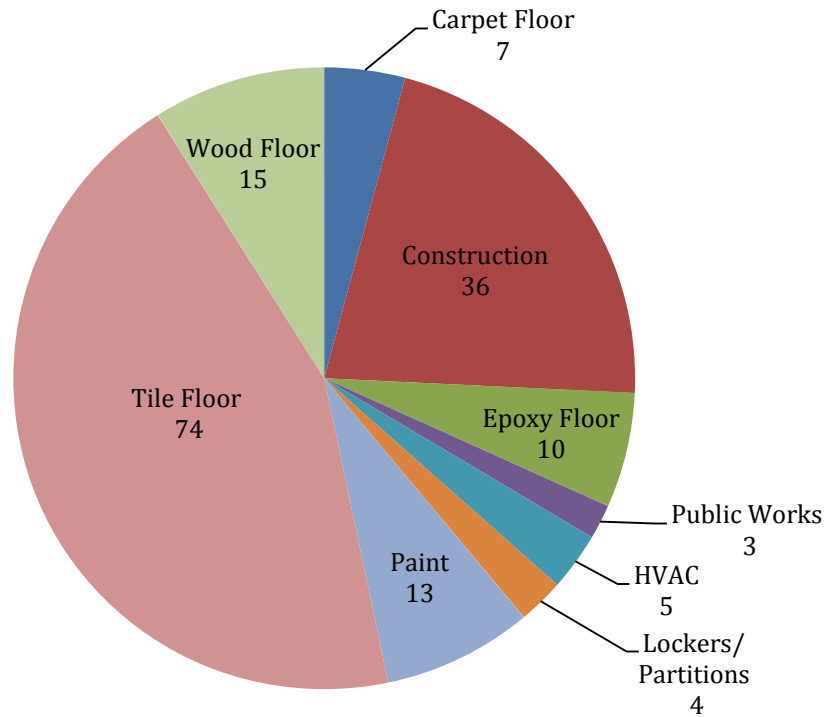
| <u>Public Schools</u> | <u>Public Buildings</u> |
|-----------------------|-------------------------|
| Joe Crossen | Josh Morse |
| Emily Higgins | Art Cabral |
| June McCarthy | Steve Regan |
| Beverly Hall | Jay Bradley |
| Cindy Brown | Stephanie Tocci |

Please see statistics that follow on the Facility Department's level and type of investment in ongoing maintenance and repair of Newton Public Schools buildings planned for summer 2019.

**FACILITIES DEPARTMENT SUMMER 2019 (FY20)
Percentage of Capital Outlay based on \$850,000**



Number of Summer 2019 Work Orders Based on Trade



III. Supplemental City of Newton FY19 CIP (2019-2023)

The draft supplemental City of Newton FY20 (2020-2024) CIP is attached.

As of October 2018, school projects on the CIP totaled \$119, 275,000. There is a significant increase in capital funding added in the supplemental CIP that is projected for Newton Public Schools, an increase of just over \$3.75 million. The additional funding is allocated as follows:

- \$1.5 million in additional costs for the Bigelow and Day MSBA Accelerated Repair Project (ARP) boiler replacement projects (due to revised budget estimates for the original scope of work)
- \$1.8 million in additional funding for the Newton Early Children Program renovation at 687 Watertown Street
- \$750 thousand in additional funding for the Oak Hill modulars
- Timing moved up for the Underwood roof (\$180K) and moved later for the Bowen roof (\$450K anticipated MSBA ARP project)

There are some timing changes to the funding schedule in the final years of the plan and some improved timing. The Supplemental CIP by Priority FY2020-FY2024 is included for your reference.

IV. Long-Range Facilities Plan

Each year, Newton Public Schools reviews and updates the long-range facilities plan and timeline in response to an array changing conditions relating to facility condition, five- and ten-year enrollment trends and any other factors that may impact school capacity needs. The timing for this update begins now and continues throughout the summer.

In August, capital budget meetings are scheduled and the school long-range plan is fully coordinated with the city CIP. A presentation on the updated school facilities plan and timeline and the draft FY21 CIP (2021-2025) is typically done in each fall. School Committee input and discussion now, and at the June 13, 2019 joint City Council and School Committee meeting, will help inform this update. Your input is encouraged and welcome.

The FY19 Recommended Long-Range Facilities Planning Timeline is included for your reference.

| Fiscal Year | School Year | New School | | | | Renovation / Additions - Elementary Schools | | | | | | | | | | Middle Schools | | | | | | | | |
|-------------|-------------|---------------|--------|----------------------------------|------|---|---------------------------|----------------------------|-------------|--------------|----------|----------|------------|--------|------|----------------|--------------------|------------|-------|---------|----------|-----|--------------|--|
| | | Angier (MSBA) | Zervas | Cabot (MSBA) | Ward | Carr | Lincoln-Eliot | Horace Mann | 150 Jackson | Country-side | Franklin | Williams | Mason-Rice | Peirce | Burr | Bowen | Memorial-Spauiding | Under-wood | Brown | Bigelow | Oak Hill | Day | | |
| FY19 | 2018-19 | | | | | | | | | | | | | | | | | | | | | | | |
| FY20 | 2019-20 | | | Completed: +4 Classrooms SEP '19 | | HVAC Windows (CIP) Cabot Swing Space HVAC | | | | | | | | | | | | | | | | | | |
| FY21 | 2020-21 | | | Summer work | | Horace Mann to Carr: +1 SEP '19 | Windows (CIP) | 4E | | | | | | | | | | | | | | | Boiler (ARP) | |
| FY22 | 2021-22 | | | Summer work | | | Summer work | | | | | | | | | | | | | | | | | |
| FY23 | 2022-23 | | | Feasibility | | | Summer work | Completed: CRs TBD SEP '21 | | | | | | | | | | | | | | | | |
| FY24 | 2023-24 | | | Design | | | Swing Space - Countryside | | | | | | | | | | | | | | | | | |
| FY25 | 2024-25 | | | | | | | | | | | | | | | | | | | | | | | |
| FY26 | 2025-26 | | | | | | | | | | | | | | | | | | | | | | | |
| FY27 | 2026-27 | | | | | | | | | | | | | | | | | | | | | | | |
| FY28 | 2027-28 | | | | | | | | | | | | | | | | | | | | | | | |
| FY29 | 2028-29 | | | | | | | | | | | | | | | | | | | | | | | |
| FY30 | 2029-30 | | | | | | | | | | | | | | | | | | | | | | | |
| FY31 | 2030-31 | | | | | | | | | | | | | | | | | | | | | | | |
| FY32 | 2031-32 | | | | | | | | | | | | | | | | | | | | | | | |
| FY33 | 2032-33 | | | | | | | | | | | | | | | | | | | | | | | |
| FY34 | 2033-34 | | | | | | | | | | | | | | | | | | | | | | | |
| FY35 | 2034-35 | | | | | | | | | | | | | | | | | | | | | | | |

CURRENT CITY CIP GROUP NEXT FUNDING GROUP NEXT FUNDING GROUP

| Fiscal Year | School Year | New School | | | | Renovation / Additions - Elementary Schools | | | | | | | | | | Middle Schools | | | | | | | |
|-------------|-------------|---------------|--------|--------------|------|---|------------------------|-------------|-------------|--------------|----------|----------|------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|-------|---------|----------|------|--|
| | | Angier (MSBA) | Zervas | Cabot (MSBA) | Ward | Carr | Lincoln-Eliot | Horace Mann | 150 Jackson | Country-side | Franklin | Williams | Mason-Rice | Peirce | Burr | Bowen | Memorial-Spauiding | Under-wood | Brown | Bigelow | Oak Hill | Day | |
| FY36 | 2035-36 | | 2017 | 2019 | 1928 | 1934 | Swing Space Burr | 1965 | 1965 | 1953 | 1939 | 1950 | 1959 | 1951 | 1967 | 1952 | 1954 | 1924 | 1956 | 1967 | 1936 | 1971 | |
| FY37 | 2036-37 | | | | | | | | | | | | | 40 New Classrooms SEP '27 | Construction | Feasibility | | | | | | | |
| FY38 | 2037-38 | | | | | | Swing Space Bowen | | | | | | | | 40 New Classrooms SEP '27 | Construction | Feasibility | | | | | | |
| FY39 | 2038-39 | | | | | | | | | | | | | | | | Design | | | | | | |
| FY40 | 2039-40 | | | | | | Swing Space Mem-Spauid | | | | | | | | | 40 New Classrooms SEP '27 | Construction | Feasibility | | | | | |
| FY41 | 2040-41 | | | | | | | | | | | | | | | | | Design | | | | | |
| FY42 | 2041-42 | | | | | | Swing Space Underwood | | | | | | | | | | 40 New Classrooms SEP '27 | Construction | | | | | |
| FY43 | 2042-43 | | | | | | | | | | | | | | | | | | | | | | |
| FY44 | 2043-44 | | | | | | | | | | | | | | | | | 40 New Classrooms SEP '27 | | | | | |