



South Windsor Public Schools Elementary Schools Master Plan

Town Council Update

December 19, 2016

David S. Joy, Chairman, Board of Education

Kate Carter, Ed.D., Superintendent of Schools

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Good evening, Mayor Delnicki, Deputy Mayor Mirek, Councilors, and Mr. Galligan.

Dr. Carter and I will present you with an update on the status of our Elem Schools Master Plan. Joining us tonight are my fellow board members Beth Esstman, Jamie Gamble, Phil Koboski and Craig Zimmerman.

Strategic Planning

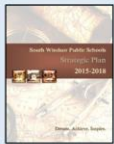


2011 – 2014 Strategic Plan



Develop a long-range elementary facilities plan that promotes a safe, engaging learning environment that is accessible to all students and community members through a “staggered” construction and referenda approach

2015 – 2018 Strategic Plan



Achieve 2015-2018 goals outlined in Elementary Facilities 10-Year Master Plan

- Complete Phase One tasks
- Begin tasks associated with Phase Two

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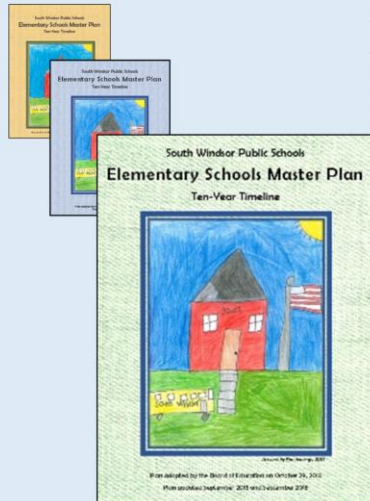
In 2011, the Board of Education adopted our first three year [Strategic Plan](#), which covered [2011 to 2014](#).

Among other initiatives, we called for the development of a long-range plan to address our aging elementary schools.

As a result of that charge, Dr. Carter developed our Elementary Master Plan, which the Board enthusiastically adopted in October 2013.

The goals associated with the Master Plan are now captured in our current [Strategic Plan](#) for [2015 to 2018](#).

Elementary Facilities Master Plan



- Three-phase approach with staggered referenda and construction
- Move from five to four elementary schools; close Wapping
- “1 – 2 – 1” Referenda Schedule to address the four schools

Phase 1: Orchard Hill

Phase 2: Eli Terry and P.R. Smith

Phase 3: Pleasant Valley

	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029	2029-2030
Orchard Hill	Referendum												
Eli Terry		Referendum											
P.R. Smith			Referendum										
Pleasant Valley				Referendum									
Wapping					Referendum								
Construction													

The Master Plan calls for a 3 phase approach, with staggered referenda, over the course of ten years.

The Plan results in move from 5 to 4 elementary schools through what we call the “1 – 2 – 1 Referenda Schedule:

- Phase 1 addressed the first school in the first referendum.
- Phase 2 is addressing the next two schools in the second referendum.
- And Phase 3 will address the final school in a third and final referendum.

We periodically update the plan to reflect the latest enrollment data and then republish our timeline brochure, which we did in Sept.

And while not shown here, we also issue community newsletters, the latest of has just been mailed to all South Windsor homes.

Overview of Ten Year Plan



PHASE 1	PHASE 2	PHASE 3
Referendum: March 2014 New School Opens: Aug 2017 <ul style="list-style-type: none"> • Construction of new PK-5 school (Orchard Hill) • Close Wapping school • Redistrict Wapping students to four remaining schools • Return Wapping to the town • Use old Orchard Hill as “swing space” during Phase 2 and Phase 3 construction 	Referendum: March 2017 New Schools Open: Aug 2020 <ul style="list-style-type: none"> • Construction of new K-5 school (Eli Terry) <ul style="list-style-type: none"> • Students remain in old Eli Terry during construction • Old Eli Terry demolished when new school opens • Construction of new K-5 school (Philip R. Smith) <ul style="list-style-type: none"> • Old PRS demolished, students move to old Orchard Hill during construction 	Referendum: March 2020 New School Opens: Aug 2023 <ul style="list-style-type: none"> • Construction of new K-5 school (Pleasant Valley) <ul style="list-style-type: none"> • Students move to old Orchard Hill during construction • When new school opens, return old Orchard Hill to the town

Here are the details for each of the 3 phases over the 10 years. We’re well into Phase 1, constructing the new Orchard Hill school, which opens this Fall, when we also close Wapping. In Phase 2, we’ll build new Eli Terry and Philip R Smith schools. And then, in Phase 3, we’ll address Pleasant Valley.

The logistical beauty of this staggered approach, and for taxpayers the efficiency of this plan, has been our ability to use the old OH school as “swing space” during construction of Phases 2 and 3. We’ll avoid the expense and inconvenience of having to lease temporary classroom space in another location.

In Phase 2, the old Orchard Hill will house Philip R Smith students while construction occurs at the PRS site.

And in Phase 3, the old Orchard Hill will house Pleasant Valley students while construction occurs at the PV site.

Status of Phase 1



On Time and On Budget!



- New Orchard Hill School building construction project is adhering to budget approved by South Windsor residents in 2014.
- 63% of construction has been completed as of December 2, 2016.
- On schedule for substantial completion by May 2017.

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I'm thrilled to report that not only is the new OH school on time and nearly 2/3rds complete, it is also on budget!

We expect the school will be substantially complete by May and ready for students when the District starts the new school year in August.

These great results are the work of our Public Building Commission and the team of many talented professionals, including DRA architects, Gilbane Construction, and our owner's representative, Colliers International, as well as the many trades that have done very high quality work without a single job interruption or workplace injury.

The use of an Owner's Representative was a new approach for SW and we applaud the PBC for their willingness to embrace this idea.

I think all involved will say this a wise decision by the PBC. I don't think we can imagine how the OH portion of Phase 1 would have moved forward as smoothly as it did without Colliers' involvement.

Elementary Redistricting



- Worked closely with professionals to design redistricting plan
- Assessed districtwide programming needs
- Analyzed current and future enrollment
- Created district boundaries that align with current and future phases
- Met enrollment targets to maximize state reimbursement
- Avoids need for further redistricting in future projects
- Districtwide changes in staffing assignments due to school closure
- Transition activities for students and families already underway

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As I mentioned a moment ago, Phase 1 also involves closing Wapping. The redistricting of our elementary system has been an entire project unto itself.

We've relied on expert guidance from Milone & MacBroom on demographic movement within our town and in our neighborhoods, and the effect on our student enrollments.

We also looked at our programming needs in developing the redistricting plan, all of which we hope will allow us to avoid further redistricting in Phase 3.

This plan involves not just student redistricting, but also district-wide staff reassignments as we realign to the new structure of four elementary schools.

I'm pleased to report that as result of Dr. Carter's thoughtful and transparent approach to this effort, community acceptance of our redistricting plan has been

very high.

Phase 2 Overview



Two new schools to be built on existing campuses

Eli Terry K-5 elementary school

- 463 students / 66,586 gross sq. ft.
 - Includes district-wide Medically Fragile and Elementary Intensive Programs
- Construct new building while occupying existing building
- Demolish existing building after new building is ready

Philip R. Smith K-5 elementary school

- 390 students / 58,243 gross sq. ft.
- Demolish existing building (students move to old Orchard Hill “swing space”)
- Construct new building on cleared site

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Phase 2 calls for the construction of 2 new elementary schools, specifically:

- a 66K sq ft K-5 elementary school to be built on the ET campus, which will include space for 2 districtwide Special Education programs, and
- a 58K sq ft K-5 elementary school to be built on the PRS campus.

If the March referendum is approved, construction for both schools would begin in the spring of 2019 and be completed in the summer of 2020.

Eli Terry students will remain in their current building while their new school is being built, and then move into the new school in August 2020. Ultimately, the old ET building will be demolished to allow for the construction of playgrounds and ball fields.

The old PRS building will be demolished prior to construction, and PRS students will be temporarily relocated to the old OH swing space while their new school is being built, and they will return when the new school opens in August 2020.

Changes to Phase 2 Approach



Philp R. Smith, originally proposed as a renovation, will now be new construction, in order to:

- Minimize risks with the proposed new state guidelines
- Maximize state reimbursement
- Minimize financial risks of the unforeseen conditions within PRS
- Equitable facilities for all elementary schools
- Maximize site functionality
- Benefit from newer energy efficiency measures

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Our master plan and 10 year timeline has been refreshed twice since it was originally adopted in 2013, most recently this past September.

Although the timeline and 1-2-1 sequencing remain unchanged, there is now a change to the approach to PRS: Our original plan called for PRS to undergo a “renovate-like new” construction process. Our current plan now calls for brand new construction, rather than renovation.

This decision was made with the expertise of our project professionals and guidance from the state Office of School Construction Grants and Review. The administration met with the state and it was through that discussion that it was determined that new construction would be the best course of action.

Chief among the reasons are the unknown costs associated with the abatement of hazardous materials found in buildings of the PRS era and demolition will provide a more predictable cost and timeline than renovation.

In addition, the state told us they were looking at renovate-like-new projects through a new lens, and those limitations were going to be difficult for us to navigate on the current site footprint and with the ADA compliance issues found within PRS.

New construction will be a better investment with a superior outcome and will ensure equity of resources across all of our elementary schools.

Phase 2 Budget Development



Factors Behind Budget Development

<u>Building Size</u>	<u>Building Quality</u>	<u>Site and Existing Building Conditions</u>	<u>Project Schedule</u>
<ul style="list-style-type: none">• Size dictated by:<ul style="list-style-type: none">• Number of Students• Educational Specifications	<ul style="list-style-type: none">• Building material• Roof style• Sustainability	<ul style="list-style-type: none">• Hazardous Materials• Ledge• Water table	<ul style="list-style-type: none">• Cost Escalation

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There are a number of factors that enter into creating a budget for school construction. The most prominent factors are shown here. And we did learn from Phase 1 that we need more budget flexibility to avoid the “value engineering” process that had to be employed for Orchard Hill. This will minimize either the need to use “Value Engineering” techniques or otherwise not met our programming requirements.

Obviously the size of a building drives the budget, which in turn comes from the number of students from our enrollment projections, as well as the programming requirements from our Educational Specifications, or what we call the “ep specs”. We did have to give up some of our approved ed specs in Phase 1 due to budget pressures that development as that project unfolded, and we’re committed to bringing those ed specs back in Phase 2.

Also driving the budget is the quality of the building, as evidenced by choices like building cladding materials and roof styles, as well as environmental sustainability measures.

Site and building conditions impact the budget, as does the length of the project schedule and the need for cost escalation of the budget to adjust for the time delay from referendum until construction actually begins.

Finally, the Phase 2 Budgets include Prevailing Wage labor rates. And there will be standard, elementary size school gyms at both schools.

Phase 2 Budget Summary



Depending on DAS approval of our space waiver requests, state reimbursement of project costs for each school will range between 32.42% and 37.14%

Total Cost of Phase 2 = \$69.9MM

- South Windsor share (62.86% to 67.14%) = \$44.1MM to \$46.9MM

Philip R. Smith Total Cost = \$32.5MM

- South Windsor share (62.86% to 67.86%) = \$20.5MM to \$22.0MM

Eli Terry Total Cost = \$37.4MM

- South Windsor share (62.86% to 66.56%) = \$23.6MM to \$24.9MM

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The total cost of Phase 2 is \$69.9 million, of which at least \$23MM is expected to be eligible for state reimbursement.

While the maximum state reimbursement rate for South Windsor school construction projects is currently 37.14%, the effective rate may be lower because we slightly exceed the state's allowable space standards due to current programming needs, driven in part by the two districtwide special education programs included in Phase 2. Exceeding the space standard is a common occurrence in school construction and we are actively pursuing the state's approval of our waiver request.

However, approval of the waiver can't be guaranteed prior to the referendum, so to be prudent in the presentation of the budget for referendum purposes, we will use the slightly lower effective reimbursement rates to ensure that we are not understating the cost to the local taxpayer.

Specifically, we are applying a reduced reimbursement rate of 33.66% to Eli Terry and a reduced reimbursement rate of 32.42% to PRS.

Projected Tax Impact of Phase 2



Incremental Tax Impact of Phase Two Based on Home Values

Home Market Value	Taxable Assessment	2021	2022	2023	2024	2025	2026	Total Cost - 6 Years	Average Monthly Cost
200,000	140,000	\$32.20	\$35.00	\$35.00	\$42.00	\$30.80	\$7.00	\$182.00	\$2.53
250,000	175,000	\$40.25	\$43.75	\$43.75	\$52.50	\$38.50	\$8.75	\$227.50	\$3.16
300,000	210,000	\$48.30	\$52.50	\$52.50	\$63.00	\$46.20	\$10.50	\$273.00	\$3.79
350,000	245,000	\$56.35	\$61.25	\$61.25	\$73.50	\$53.90	\$12.25	\$318.50	\$4.42
400,000	280,000	\$64.40	\$70.00	\$70.00	\$84.00	\$61.60	\$14.00	\$364.00	\$5.06
450,000	315,000	\$72.45	\$78.75	\$78.75	\$94.50	\$69.30	\$15.75	\$409.50	\$5.69
500,000	350,000	\$80.50	\$87.50	\$87.50	\$105.00	\$77.00	\$17.50	\$455.00	\$6.32
Mill Rate Increase:		0.23	0.25	0.25	0.30	0.22	0.05		

Prepared by Matthew Galligan, South Windsor Town Manager

Note: Tax impact has been conservatively estimated based on assumption of no State approval of our space standard waivers prior to preparation of referendum materials. State review of space waiver request will not occur prior to the referendum.

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This exhibit was prepared by Mr. Galligan. As this table illustrates, the incremental cost to the taxpayer for Phase 2 is nominal. Due to the retirement of existing bonded debt, there will be only six years of the 20-year bond term where the new debt service of Phase 2 will exceed the amount of existing debt service that will be retired.

To use a specific example, in the red box is the impact for a house with a market value of \$350K.

In 2021, the incremental tax impact of Phase 2 on that home is \$56.35, rising slightly to \$61.25 in both 2022 and 2023, then \$73.50 in 2024, and then declining to \$55.90 in 2025 and \$12.25 in 2026.

The total incremental tax increase for that home over the 6 years is \$318.50, or an average of less than \$5 per month. It's important to note that the table is based upon the Real Estate/Personal Property Mill Rate and that no increases in grand list growth were incorporated into the projection.

Phase 2 Referendum Planning



- In January, BOE will formally request Town Council to set March 21, 2017 as the Phase 2 referendum date
 - Schools are already scheduled for a Teacher Professional Development Day to avoid students in session during voting
- Superintendent of Schools is working with Town Clerk and Town Manager on planning and preparing for the referendum
- Town Manager and Superintendent of Schools will work with bond counsel and town attorney to prepare neutral explanatory text
- Neutral explanatory text will be mailed to all households

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We will return in January with a formal request that you officially set March 21, 2017 as the Phase 2 referendum date. Our schools are already scheduled for a Teacher Professional Development that day to avoid students being in session while our buildings are open to the public for voting.

Dr. Carter is working with Mr. Galligan and Ms. Trahan on planning and preparing for the referendum. In addition, Mr. Galligan and Dr. Carter will work with bond counsel and the town attorney to prepare neutral explanatory text that will be mailed to all households once the referendum date is set.



Celebrating Community Engagement

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At this time, it is my pleasure to introduce Dr. Kate Carter who will speak to our efforts for community engagement. She'll describe some of the many wonderful events and activities that we have celebrated on our journey to deliver a new Orchard Hill School, the first new school building to be constructed in South Windsor in more than 50 years.

Community Engagement



Ground Breaking

Community Engagement



Ground Breaking

Community Engagement



Beam Signing and Topping Off

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Community Engagement



Student Learning



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Community Engagement



Student Learning



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Community Engagement



Student Learning



Thank You for Your Support!



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South Windsor Public Schools Elementary Schools Master Plan

Questions?