

# 21<sup>st</sup> Century Facility Planning Committee

## **Board Recommendation**

September 26, 2011

### The 21<sup>st</sup> Century Facilities Planning Committee

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#### Background

The Mercer Island School District is focused on its '2020 Vision' of successfully preparing students for the cognitive, global and digital world. At the same time, the district is facing growing enrollment and aging schools. Over the last few years, the district has completed building and program needs assessments, and has begun the public conversation about facilities utilizing a "springboard" facilities proposal. In addition, the district has committed to delivering a "master plan" for the North Mercer/MIHS/Admin "mega-block" property as a part of the PEAK development process.

To address facility challenges facing the district, in June 2010 the Mercer Island School District School Board created the 21<sup>st</sup> Century Facilities Planning Committee (21CFPC), a citizens committee that the district will work with to create options and scenarios for housing students and programs to best meet the long-range facility needs of the district. The committee started in September 2010 on their process. Post-recommendation, the MISD School Board will accept or adjust the recommendation, hold public hearings, and then put forth any required bond initiatives.

#### Objective

The committee was asked to make a recommendation to the Mercer Island School Board for a Master Facilities Plan for the Mercer Island School District within a 12- to 18-month period. The master plan is to be a broad-brush plan that includes all MISD facilities on all school properties, including a general timeline. The committee has been asked to start with a "clean slate"; however, all background information, studies and information from previous work is available as are MISD resources, staff and experts, as needed.

#### About the Committee

The committee is made up of 20 people (in 17 seats) that represent a cross-section of the Mercer Island community with a broad set of backgrounds and variety in terms of their community involvement. The 21CFPC process is being facilitated by Kris Kelsay, a Mercer Island resident and principal and founder of [Launch!], a full-service communication agency focused on helping organizations bring new ideas to fruition. The committee is fully supported by MISD staff with Dean Mack, Tony Kuhn and Liz LeRoy as regular attendees.

There was tremendous interest in serving on the committee. The committee was chosen from the pool of applicants so as to have broad representation across Mercer Island stakeholder communities. The committee includes present and/or past members of: the Committee for Mercer Island Public Schools (CMIPs); Mercer Island Schools Foundation; MISD School Board, Boys and Girls Club Board of Directors, MISD PTA, IslandVision, Islanders for Common Sense, Fine Arts Advisory Board, Pixie Hill Pre-school, Mercer Island Parks and Recreation, Mercer Island Rotary, Mercer Island City Council, MISD Title IX Steering Committee, and student representatives from IMS and MIHS.

Committee members include: Hilary Benson, Dick Benster, Amanda Clark, Michael Finn, Carrie George, Carol Gullstad, Megan Hand, Einer Handeland, Bill Hochberg, Bert Loosmore, Frank Morrison, Walt Ritchie, Greg Steinhauer and Toby Suhm. Three student representatives—Kaya, Jason and Maxwell—actively participated in the process. Bruce Bassett was the City Council Representative on the committee and Janet Frohnmayer was the School Board Representative. Brian Emanuels started the process as a committee member and continued on the committee as a School Board Representative after his appointment in the summer of 2011. Joan Wold was appointed to the committee but resigned due to time constraints. Bios for the committee members can be found in [APPENDIX A | COMMITTEE BIOGRAPHIES](#) of this document.

#### Process and Resources

The committee held its kick off meeting on September 20, 2010, and held close to 50 meetings comprising over 120 hours of work through the year-long process. The process was driven by the committee and tended to be information intensive. The committee reviewed past work, requested new information from the school district, and utilized expert resources. In addition, they sought input through their personal connections as well as through six feedback sessions including sessions with school principals, current and past volunteer school leadership, current mega-block tenants, and the general public. Despite the hours and effort, several on the committee believe that the committee did not have enough time to adequately address all of the issues involved.

The data, and building blocks that the committee created and utilized to come to their recommendation is available to the board as they move through their process. Expert resources are listed in [APPENDIX B | EXPERT RESOURCES](#) at the end of this document.

### The 21CFPC Recommendation

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#### Recommendation Criteria

This 21CFPC recommendation is put forward with the following criteria in mind:

- **Solve immediate capacity issues.** The committee understands the acute need to increase the capacity of our K-8 schools to reduce significant overcrowding and meet current and immediate future requirements.
- **Create a master plan for the next 50 years.** The committee looked to continue Mercer Island's strong tradition of great schools and responsible facility planning as we replace schools as they age over the next 30 years.
- **Stay competitive through best practice facilities.** The committee looked to reduce current facility-related programmatic limitations and improve best practice opportunities within our schools.

#### The 21CFPC Recommendation

- **Facility Capacity Targets**

The 21CFPC unanimously agrees that there is an *urgent* need to address the current and projected capacity issues within our elementary and middle schools. They recommend increasing the capacity of the elementary and middle school learning spaces by 45% and public spaces for those schools by 60%.

- **Best Practice Facilities**

The 21CFPC unanimously agree that MISD educators today are making significant programmatic compromises that challenge the quality of our education due to our current facilities. They recommend incorporating the powerful best-practice school design concepts that support our districts' 20/20 Vision as quickly as possible.

These best-practice concepts, already found in many of our neighboring school districts, include: flexible learning areas that support lecture, independent study, team collaboration, one-on-one learning, and project-based learning; space to learn through art, science, technology and design; and the concept of small learning communities that are shown to increase the social components, intimacy and sense of community in best-practice schools.

- **School Configuration**

While close to half of the committee members believe an ideal master plan would include four elementary schools, all but one on the committee would support a three elementary school configuration where larger schools are built on existing school sites if a 4<sup>th</sup> elementary site were not viable.

All but three on the committee oppose placing another school on the North Mercer mega-block so as to provide flexible options for the future high school, retain scarce field space, support potential community partnerships, offer a safety valve in a short term enrollment crisis, and avoid negative traffic implications.

The majority of committee members believe that because of the unavailability of viable sites and the urgency of our current needs, the School District should begin working toward plans to rebuild the three existing elementary schools on their current sites without further delay. A minority of the committee would like the school district to initiate discussions with the City and private landowners on the Island to explore a potential fourth site.

- **Balancing Short and Long-Term Requirements**

The committee recognizes that simply because of the age and infrastructure of our schools and their significant remodels, our elementary schools and middle schools will need to be replaced or significantly remodeled within the next 10-12 years and the high school within the next 20-30. However, they also recognize that the capacity problems and programmatic shortcomings of our existing elementary and middle schools dictate that action be taken much sooner. The committee recommends that the school board look at the task with both and short and long term perspective—balancing what is right for our community today as well as tomorrow.

Committee members unanimously agree that the school district is currently constrained by the land that it owns and that the board should be looking to acquire additional land for district use, as prudent and over time, offering them flexibility when considering the location of the bus barn, playfields, pre-school programs or new school sites.

The committee also recommends the School Board build some or all of its new schools to the higher standard required for a true emergency shelter, and work with the city to equip them for community use in a catastrophic emergency.

- **Cost & Bonding**

A majority of the committee recommends a single bond issue to be sold in increments within promised tax rate goals to fund the required elementary schools and the middle school. A minority recommends a more phased approach of first bonding a single elementary school and the middle school or just the three elementary schools.

- **Other Mega-Block Considerations**

The committee strongly believes that the services provided at the North Mercer campus are critical community assets and the school district, in partnership with the City of Mercer Island, has an obligation to carefully consider their needs. The committee recommends providing space for pre-schools and before-care/after-care services and envisions potential partnerships with current tenants to provide those services. They also recommend that the board consider Youth Theater Northwest in future plans that involve the addition of a Black Box theater extension at the high school.

The committee believes that the North Mercer buildings will need to be demolished in the near future for safety reasons, and recommends that a structural engineer be hired to assess the safety and make recommendation as to when those buildings should be demolished.

In parallel to increasing capacity at the elementary and middle school levels, the committee recommends the Board commit dollars and begin the planning work associated with building a new high school facility on the mega-block campus. By putting the high school at the center of this formal master planning process, the committee believes the Board will get the visibility they need to make better decisions about existing and potential mega-block facilities and uses.

### Key Areas of Consideration

This recommendation hinges on thorough consideration in the following areas:

- Facility Capacity Targets
- Best Practice Schools
- Balancing Short and Long-Term Requirements
- School Configuration
- Cost and Bonding
- Other Mega-Block Issues

Detail and analysis for recommendations in each of these areas follow.

## Key Area of Consideration: Facility Capacity Targets

### Recommendation

The 21CFPC unanimously agrees that there is an urgent need to address the current and projected capacity issues within our elementary and middle schools. They recommend increasing the capacity of the elementary and middle school learning spaces by 45% and public spaces for those schools by 60%.

As capacity targets, the 21CFPC recommends using the projected enrollment for the district in 5 years as the target for learning spaces; a target that is 10% larger for public spaces such as eating facilities, gyms, playgrounds, and auditoriums; and a flexible plan for expansion of learning spaces when and if required.

	Current Enrollment (2010-11)	Current Capacity (Permanent)	Current Capacity (Portables)	Classroom Target (2015-16)	Change (+/-)	Public Space Target (+10%)	Change (+/-)
<b>K-5</b>	1822	1350	472 (35%)	1955	605 (45%)	2151	801 (59%)
<b>6-8</b>	937	750	187 (25%)	1094	344 (46%)	1203	453 (60%)
<b>9-12</b>	1419	1460	-41 (-3%)	1438	-22 (0%)	1581	121 (0%)
<b>TOTAL</b>	<b>4178</b>	<b>3560</b>	<b>618 (15%)</b>	<b>4486</b>	<b>+ 926 (26%)</b>	<b>4935</b>	<b>+1,375 (39%)</b>

Based on 2010-11 numbers, significant capacity increases are required at the elementary and middle school levels, but not the high school (with enrollment actually projected to drop very slightly), which equates to the following capacity targets:

- **Elementary schools:** Increase total learning area capacity to 2,000 students and common area capacity to 2,150.
- **Middle school:** Increase total learning area capacity to 1,100 students and common area capacity to 1,200.

The committee recommends that Capacity Targets be updated by the board to reflect enrollment projections and cohorts for 2011-12 which will be available after October 1, 2011, and yearly thereafter. They also suggest monitoring future construction in the Town Center to telegraph future increases. Additionally, these numbers do not include the recommended inclusion of pre-schools in the school system.

### Analysis

During the 2010-11 school year, enrollment reached 4,178 students requiring 659 students to be housed in temporary housing (in portables or in common areas) all at the elementary and middle school level. This constitutes 35% of elementary students and 25% of middle school students. Among the elementary schools, West Mercer and Lakeridge house the majority of portables because of site limitations at Island Park. This year, 678 students are being housed at West Mercer which has a design capacity of 475 and 577 students are being housed at Lakeridge Elementary which has a design capacity of 450.

All possible areas have been repurposed as learning areas, and little room exists for additional portable classrooms on existing properties. In addition, school principals state they are making significant facility related programmatic compromises today—including increasing class size, doubling up and shortening PE, and shortening recess and lunch periods. Common areas (such as kitchens, multipurpose rooms, gyms, playgrounds, health rooms, office space and storage) built for smaller populations are particularly stressed.

Enrollment gains are due primarily to an “echo effect” from the Island’s high growth period in the 1950’s and 1960’s. A small impact (about 100 students) was felt with the downtown area build out which is relatively complete. Less than 50 off-island “open enrollment” students remain in the district with the majority moving out of the system within the next few years.

A 21CFPC enrollment subcommittee extensively studied the approach, accuracy and reliability of school enrollment projection methodology, even discussing new and alternative methodologies with the top experts in the field. The sub-committee determined that the district’s school enrollment projection approach is best practice, and that projections attached using it are quite reliable to about 5 to 7 years in the future, but are not accurately knowable beyond that timeframe. Because of the inherent limitations of school enrollment projections and methodologies, the 21CFPC sub-committee recommends the adoption of a highly flexible facility plan that at a minimum can manage projected 2015 enrollment in permanent housing, and can expand through permanent housing extensions and temporary housing to meet a 10% peak in enrollment.

### Key Area of Consideration: **Best Practice Facilities**

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#### Recommendation

- The 21CPFC unanimously agree that MISD educators today are making significant programmatic compromises that challenge the quality of our education due to our current facilities. They recommend incorporating the powerful best-practice school design concepts that support our districts' 20/20 Vision as quickly as possible.
- These best-practice concepts, already found in many of our neighboring school districts, include: flexible learning areas that support lecture, independent study, team collaboration, one-on-one learning, and project-based learning; space to learn through art, science, technology and design; and the concept of small learning communities that are shown to increase the social components, intimacy and sense of community in best-practice schools.

#### Analysis

The committee spent significant time reviewing what constitutes the best practice school facilities in the region, the nation and globally. They passed around copies of books discussing school design trends and concepts, invited Randy Fielding of Fielding Nair—broadly considered the global leader in 21<sup>st</sup> Century School Design—to visit MISD schools and speak with them, toured our own schools and toured dozens of new schools in surrounding school districts—all to get a sense of how our school facilities compare to best practice facilities of today and the future.

In our schools, the committee saw the 2020 Vision being taught in our classrooms today. They saw teachers that are creative in the way they organized their classrooms, examples of project-based learning, hallways tables set up for personalized learning, partitions in place to create small group learning environments, technology integrated into the learning environment.

They also saw the facility-related challenges that our principals are facing today. Our schools remain impressive, despite facilities that don't truly support this extended form of learning. Mercer Island school facilities are a classic example of the traditional "cells and bells" model of school design. While this type of building was designed with a single, lecture mode of learning in mind, the MISD clearly does a tremendous job of flexing this traditional model into one that supports the best practice teaching they do—utilizing every nook, cranny, office and closet as an extended learning space.

The committee also heard universally from school principals that they are currently making significant programmatic compromises that stem from outdated facility design. Unlike surrounding school districts, our elementary schools don't have separate art, science or design areas; they don't have flexible learning areas to support the different modalities of learning; and they don't have full kitchens where they can provide more nutritious meals. Our middle school does not have a space where the student body can gather at once; it doesn't have a theater to support our strong music, drama and arts programs; we house science teachers in rooms without sinks; and have hallways in use as gathering areas outside of classrooms that are in session.

In addition the committee visited surrounding school districts and saw the facilities being built to replace the traditional "cells and bells" schools in their districts. In fact, almost every school district in the Puget Sound region—including Bellevue, Lake Washington, Issaquah and Renton—are in the process of replacing their aging schools. These schools utilize small learning communities, have "daVinci rooms"—jointly shared "wet spaces" that can be utilized for design, science and art; and have impressive spaces for project-based, inter-disciplinary, and team-based learning. The committee saw clearly that while our current facilities are in good condition and well utilized, they are no longer state-of-the art.

The committee believes that best-practice facilities can make a tremendous educational difference when coupled with our impressive teachers and staff, and that it will soon become a requirement keep our schools at the top for the next 50 years.

### Key Area of Consideration: **Balancing Short and Long-Term Requirements**

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#### Recommendation

- The committee recognizes that simply because of the age and infrastructure of our schools and their significant remodels, our elementary schools and middle schools will need to be replaced or significantly remodeled within the next 10-12 years and the high school within the next 20-30. However, they also recognize that the capacity problems and programmatic shortcomings of our existing elementary and middle schools dictate that action be taken much sooner. The committee recommends that the school board look at the task with both a short and long term perspective—balancing what is right for our community today as well as tomorrow.
- The committee recommends the School Board build some or all of its new schools to the higher standard required for a true emergency shelter, and work with the city to support equipping them for community use in a catastrophic emergency.

#### Analysis

The MISD currently owns four properties: The 43.17 acre high school “mega-block” (including MIHS, North Mercer, MOT/Bus Lot, PEAK, the Pool and the Admin building; the 36.84 South Mercer Campus (including IMS, Lakeridge and the South Mercer Playfields between them), the 9.37 acre Island Park campus, and the 8.86 West Mercer Campus.

The district has five schools in operation currently—one high school (which includes Crest), one middle school and three elementary schools—with a total design capacity of 3,560 students. All schools were built in the 1950’s and 60’s and were extensively remodeled in the 1990’s. Design capacity was decreased in the school in the late 1990’s by programmatic mandates by the state including reduced class sizes and the integration of special needs programs.

The schools have been very well maintained and are in good condition. Existing elementary and middle schools as they stand, can be expected to last another 10-12 years. The high school can be expected to last another 20-30 years. The North Mercer buildings were not upgraded in the 1990’s and will need to be removed or incur significant investment within the next few years and are not considered feasible capacity for the MISD at this time.

The group found that extensive remodels could extend the life of our schools by 10 or more years, but will not mitigate the need to rebuild them within the next 30 years. The committee found that while some significant programmatic improvements could be accomplished through remodels, it does not appear to be feasible to significantly increase the capacity of our existing schools through a remodel. This is because the building infrastructure would not support a two-story school and because of inherent site-limitations associated with expanding the schools outward. Further, the committee recognizes that despite significant improvements, remodeled buildings will not result in best-practice facilities.

The committee does believe that any new schools that are built will offer a significant safety improvement to the school community and the Mercer Island community-at-large. While our schools meet the earthquake safety requirements that were in place in the 1990’s when the schools were remodeled, earthquake building standards since that time have been significantly increased to address the greater understanding of risk that our region faces. The committee recommends the School Board build some or all of its new schools to the higher standard required for a true emergency shelter, and work with the city to equip them for shelter use in a catastrophic emergency.

### Key Area of Consideration: School Configuration Options

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#### Recommendation

- While close to half of the committee members believe an ideal master plan would include four elementary schools, all but one on the committee would support a three elementary school configuration where larger schools are built on existing school sites if a 4<sup>th</sup> elementary site were not viable.
- All but three on the committee oppose placing another school on the North Mercer mega-block so as to provide flexible options for the future high school, retain scarce field space, support potential community partnerships, offer a safety valve in a short term enrollment crisis, and avoid negative traffic implications.
- The majority of committee members believe that because of the unavailability of viable sites and the urgency of our current needs, the School District should begin working toward plans to rebuild the three existing elementary schools on their current sites without further delay. A minority of the committee would like the school district to initiate discussions with the City and private landowners on the Island to explore a potential fourth site.
- Committee members unanimously agree that the school district is currently constrained by the land that it owns and that the board should be looking to acquire additional land for district-use, as prudent and over time, offering them flexibility when considering the location of the bus barn, playfields, pre-school programs or new school sites.

#### Analysis

The committee considered a broad variety of school configuration options throughout the year.

##### Grade Reconfiguration

Grade reconfiguration options such as adding a single K-8 school, moving grade 6 to the elementary schools, or having a one or two grade campus were dismissed fairly early in the process. This was based on feedback from the board, superintendent and principals that indicated a strong preference from an educational perspective for the current K-5/6-8/9-12 system; the acknowledgement that a small district such as ours would have difficulty absorbing the overhead of multiple systems or the creation of a new system; and the fact that the current systems seems to be working well. Additionally, the committee felt that there were good, viable options available that don't require a grade reconfiguration.

##### Number of Schools

Most of the school configuration debate centered on whether to have three or four elementary schools in the system. Just under half of the committee, ideally, would favor a configuration with a 4<sup>th</sup> elementary school, however the motivations behind providing that 4<sup>th</sup> school differ. For some, it's a matter of school size. For others, it's seen as an efficient mechanism to solve the immediate capacity issues at the elementary school level at a lower cost to the community.

**School size.** The concern with larger elementary schools has centered on "community." In traditional schools, like ours today, school size is the primary driver of the strength of the school community. Interestingly, in new best-practice facilities, the emphasis shifts from school size to learning community size. Randy Feilding, largely regarded as the foremost expert on school facility design, believes that strong school communities are best built through intimate learning community groupings, independent of school size, but a some in the group place a high value on schools no larger than 500 students.

**Cost Considerations.** For others, adding a fourth elementary school is seen as a lower cost option to meet the short-term capacity issues in our schools. In this scenario, building a fourth elementary school first relieves the majority of the elementary school capacity issues (leaving 100 elementary students in portables), allowing the current elementary schools to be used for the remaining life of their remodels (10-12 years).

To meet the committee's target capacity numbers, the MISD would need three schools with a capacity of 650 for learning spaces and 725 for public spaces; or four schools of 500 with public spaces for 550. The fourth school would carry additional administrative and operational overhead, but three larger schools will also have some additional costs associated with them as well.

The group also discussed and dismissed the idea of adding a second middle school to the school configuration fairly early in the process. This decision was based on feedback from the Principals, the benefits that a larger school has on the elective courses offered, and the fact that the larger school is currently working well, despite significant facility challenges.

### North Mercer as a New School Site

When a 4<sup>th</sup> elementary school was considered by the group, there was no consensus on where the MISD might put it. The committee did agree on where *not* to put it, as there is strong opposition to putting any new school on North Mercer, with all but three opposing the idea.

The primary reason the committee does not want another school on the mega-block campus is because they want the property to be optimized to fully support a future best-practice facility for Mercer Island High School. The committee considered that when Mercer Island High School is rebuilt (within the next 20 to 30 years) it will need to be located on a new site on the mega-block property to accommodate a reasonable student transition with minimal disruption. Since the existing school occupies the east side, the likely location for a new MIHS is on the west side of the property. The committee feels that placing a second school on the west side of the property now will significantly compromise the design of the high school.

Secondarily, most of the committee believes that the mega-block property is too small to accommodate a second school—even a small one—at least until Mercer Island High School is rebuilt as a multi-story building. The committee considered that the average high school property in surrounding districts is 43 acres—precisely the size of the entire mega-block campus—which also hosts Crest, the MOT & Bus Lot, the Boys & Girls PEAK, the Administrative Buildings, the pool, and all of the N. Mercer tenants. Even with the removal of the MOT building and bus lot, a new school is likely to require structured parking and loss of highly utilized high school fields.

Lastly, the committee felt that not placing a school on offers the most flexible support for:

- North Mercer tenants by allowing them to remain until the buildings need to come down for safety reasons
- Potential future community partnerships allowing the school district to participate in discussion regarding an expanded pool or potential performing arts center on the property
- An enrollment emergency, allowing a temporary school at North Mercer, if the district saw a significant, unpredicted spike in enrollment in the next few years and has no additional portable spaces to house students.

While the committee recognized and debated the political difficulties of placing a school at North Mercer due to the fact that an organized anti-PEAK community exists, it was not a primary reason for its decision against placing it there. In the end, the committee did not consider it any more politically difficult than placing a school on any other new Mercer Island site.

### Other Potential New School Sites

The committee was intrigued by the idea of having the MISD acquire new property for a school site, but quickly became acutely aware of the limited possibilities on Mercer Island.

Mercer Island current elementary school sites range between 8 and 10 acres and general standards indicate 6+ acres as a desired parcel size for an elementary school. The committee determined that no 6+ acre sites exist on the Island that aren't parks. While some on the committee feel that building a school on an existing park is viable, most do not. The committee also looked at examples of urban schools that reside on smaller parcels and researched available 3+ acre parcels, as well. In general, there is no consensus among the committee on what would constitute a "viable or comparable" new school on a smaller parcel.

As a conclusion, the majority of committee members believe that because of the unavailability of viable sites and the urgency of our current needs, the School District should begin working toward plans to rebuild the three existing elementary schools on their current sites without further delay. A minority of the committee would like the school district to initiate discussions with the City and private landowners on the Island to explore a potential fourth site.

In addition, the committee members unanimously agree that the school district is currently constrained by the land that it owns and that the board should be looking to acquire additional land for district-use, as prudent and over time, offering them flexibility when considering the location of the bus barn, playfields, pre-school programs or new school sites.

### School Sequencing

The committee spent significant time discussing the options and best approaches for school sequencing. The discussion centers on whether to use a swing school during the construction process or to build the schools in sites on existing properties while school is in session.

**IMS as Swing School.** Some committee members favor building the IMS school on the IMS track as the first school and then utilizing the old IMS school as a swing school as all or some of the elementary schools are built. This approach enables the new elementary schools to be built without site compromise and offers simplicity to the construction process. The downside of this approach is associated with the neighborhood stress of having an additional school of students on the IMS property and loss of the IMS track for or multiple years as the school is rebuilt. Additionally, students transition schools more in a swing school situation.

**Lakeridge as Swing School.** To alleviate the loss of the IMS track and field and reduce design compromise of IMS, Lakeridge could similarly be built first with its old building used as a swing school. Similar neighborhood and transition trade-offs would exist in this scenario, but the loss of the IMS track and field for multiple years would be alleviated.

**Build in Place.** Although the task seems daunting, most school districts today do not have the luxury of a swing school so building in place while school is in session has almost become the norm. All of our school sites have been assessed and little design compromise would be required with this approach. Although our schools will each have one noisy, complicated school year as their school is built.

The committee has no clear recommendation on school sequencing, as opinions differ, but all want what makes the process easiest on the students. Probably some blend of Swing and Build in place might be the right approach for the board.

## MISD Facilities Recommended 50-Year Plan

The 21CFPC recommendation, whether 3-1-1 or 4-1-1 on an acquired property results in the following:

### South Mercer Campus

- Lakeridge Elementary** Lakeridge Elementary School would be replaced with a new, 2-story K-5 (650-725 students in a 3-1-1 configuration, 500-550 in a 4-1-1 configuration)  
Additional fields space become available as footprint is reduced
- South Mercer Playfields** Existing configuration
- Islander Middle School** Islander Middle School would be replaced with a new 2-story 6-8 (1100-1200 students)  
Additional field space becomes available as footprint is reduced
- IMS Track & Field** Could be affected in the short term as IMS is rebuilt depending on design and approach.

### Island Park Campus

- Island Park Elementary** Island Park Elementary School would be replaced with a new, 2-story K-5 (650-725 students in a 3-1-1 configuration, 500-550 in a 4-1-1 configuration)  
Additional fields space become available as school is re-sited and footprint is reduced  
Parking and traffic optimized by moving the school back on the property

### West Mercer Campus

- West Mercer Elementary** West Mercer Elementary School would be replaced with a new, 2-story K-5 (650-725 students in a 3-1-1 configuration, 500-550 in a 4-1-1 configuration)  
Additional fields space become available as footprint is reduced

### Mega-Block

- Mercer Island High School** Current use until new multi-story high school is built on west side of property to accommodate student transition. Likely to require the removal of the stadium, bus lot, admin building and Crest. Once high school is rebuilt, this site offers flexibility for new fields, services or even a school. Potential to save part of old MIHS for admin use and/or use as a community theater.
- Crest** Current use, then transitioning into new high school or off-campus when MIHS is rebuilt
- Pool** Removed or renovated as prudent or required. Site repurposed as a new aquatic center, stadium, fields and/or other community use through partnerships.
- N. Mercer & Youth Theater** Removed or renovated as prudent or required. Repurposed as stadium, fields or other community resources through partnerships if desired.
- Stadium** Likely to be relocated to another mega-block location when new high school is built.
- Fields** Current use. Over time optimized or expanded as facility footprints are reduced.
- Boys & Girls PEAK** Current use.
- Administration Building** Current use until new high school is built, then transitioning to another mega-block location or off-campus when new high school is rebuilt. Could be located in part of the old MIHS.
- MOT & Bus Lot** Current use, then transitioning to another mega-block location or off campus over time, but before new high school is rebuilt.
- Campus Parking & Access** Current use. As facility footprints are reduced, opportunities to improve campus access through parking and interior road reconfiguration.

**Key Area of Consideration: Other Mega-Block Issues**

**Recommendation**

- The committee strongly believes that the services provided at the North Mercer are critical community assets and the school district, in partnership with the City of Mercer Island, has an obligation to carefully consider their needs. The committee recommends providing space for pre-schools and before-care/after-care services and envisions potential partnerships with current tenants to provide those services. They also recommend that the board consider Youth Theater Northwest in future plans that involve the addition of a Black Box theater extension at the high school.
- The committee believes that the North Mercer buildings will need to be demolished in the near future for safety reasons, and recommends that a structural engineer be immediately hired to assess the safety and make recommendation as to when those buildings should be demolished.
- In parallel to increasing capacity at the elementary and middle school levels, the committee recommends the Board commit dollars and begin the planning work associated with building a new high school facility on the mega-block campus. By putting the high school at the center of this formal master planning process, the committee believes the Board will get the visibility they need to make better decisions about existing and potential mega-block facilities and uses.

**Recommendation**

The committee understands there is a delicate line between what the school district can and cannot do in terms of services that are not core to the educational mission. They also understand that supporting these groups is both important from a community standpoint, but also from a political standpoint. Our current North Mercer tenants have strong contingencies that can work for the district if approach carefully and respectfully.

### Key Consideration: Cost and Bonding Implications

#### Recommendation

- A majority of the committee recommends a single bond issue to be sold in increments within promised tax rate goals to fund required the required elementary schools and the middle school. A minority recommends a more phased approach of first bonding and single elementary school and the middle school or just the three elementary schools.

#### Analysis

Cost to taxpayers played a critical role in the deliberations of the committee. The district is faced with the daunting task of balancing the short-term costs associated with solving today’s critical capacity needs, the reality of replacing all of its schools due to age over the next 12-30 years, and the clear educational advantage that best-practice facilities will give to our students.

#### Cost Assumptions

The committee worked with experts to establish some reasonable cost assumptions for rebuilding and remodeling our schools as they reviewed their options. The assumptions they used included both the construction and soft costs associated with building or remodeling quality schools on Mercer Island. The costs are estimated in today’s costs.

The following costs ranges were used for **new schools**:

SCHOOL CONFIGURATION	CAPACITY TARGETS* Per School		CAPACITY TARGETS* Total All Schools		COST RANGE** Per School		COST RANGE** Total All Schools	
	Learning Spaces	Common Spaces	Learning Spaces	Common Spaces	Low	High	Low	High
<b>ELEMENTARY SCHOOL</b>								
Four Elementary Schools	500	550	2000	2200	\$27M	\$31M	\$108M	\$124M
Three Elementary Schools	650	725	1950	2250	\$30M	\$34M	\$90M	\$102M
<b>MIDDLE SCHOOL</b>								
One New Middle School	1100	1200	1100	1200	\$67M	\$75M	\$67M	\$75M

The following assumptions were used for school **remodels**:

Our experts estimated that a reasonable cost assumption for remodels is \$265/square foot including construction costs and soft costs. This is compared to an average new school construction cost of \$324/square foot. Essentially, the cost of doing significant remodels at this point in time is 80% of the cost of rebuilding. Pete Wall, Island Resident and Director of Capital Projects in the Tacoma School District validated this assumption as well stating that you get 60% of the school for 80% of the cost with a remodel.

That’s not to say that the committee did not consider remodels—as previously noted, when considering remodels, the group found that extensive remodels could extend the life of our schools by 10 or more years, but will not mitigate the need to rebuild them within the next 30 years. The committee found that while some significant programmatic improvements could be accomplished through remodels, it does not appear to be feasible to significantly increase the capacity of our existing schools through a remodel. This is because the building infrastructure would not support a two-story school and because of inherent site-limitations associated with expanding the schools outward. Further, the committee recognizes that despite significant improvements, remodeled buildings will not result in best-practice facilities.

These costs were rough estimate only, to give the committee a sense of the costs of relative options. The School Board would need to do extensive independent costing before putting a bond proposal before the public.

### Bond Rate Assumptions

The committee also utilized experts to get an understanding of the current combined tax rates for Mercer Island schools, comparable tax rates for surrounding areas, and the tax implications of various size bond sizes.

The committee found that the Mercer Island school tax rate, including cost of M&O Levy, capital levy, transportation levy, and debt service is significantly lower than most surrounding districts. Those cities with comparable rates such as Bellevue and Seattle have large business centers that support the schools and effectively lower tax rates. In addition the current debt will be rolling off over the next few years.

#### Comparable tax rates for surrounding areas:

Bellevue	2.73
Federal Way	5.35
Issaquah	4.85
Kent	5.37
Lake Washington	2.98
<b>Mercer Island</b>	<b>2.52*</b>
Northshore	4.60
Renton	4.06
Riverview	4.10
Seattle	2.34
Shoreline	5.36
Snoqualmie	3.87
Tacoma	6.38
Tahoma	5.2

#### Tax implications of borrowing:

- \$100M for 15 years: Increase to 3.21
- \$150M for 20 years: Increase to 3.38
- \$200M for 25 years: Increase to 3.47

### Phase I Options

Using the above assumptions, the committee evaluated rough bond amounts and rates for various options including:

Phase I Options	3-1-1	4-1-1
Bond all elementary schools & IMS in Phase I	\$157M - 177M Increase to 3.42	\$175M - 199M+ Increase to 3.45+ <i>(+ Does not include cost of land)</i>
Bond all elementary schools only in Phase I	\$90M - 120M Increase to 3.25	\$108M - 124M+ Increase to 3.35+ <i>(+ Does not include cost of land)</i>
Bond one elementary and IMS in Phase I	\$ 97M - 109M Increase to 3.28	\$94M - 106M + Increase to 3.26 + <i>(+ Does not include cost of land)</i>

The committee found that because larger bonds can be better financially optimized, because bonding lengths will vary according to the size of the bond, the relative cost on a yearly basis to taxpayers, between bonding all of the elementary schools + IMS and bonding just one elementary school and IMS is relatively small at <0.2%.

Because MISD is faced with the requirement of rebuilding all of its schools over the next 30 years, the committee talked a lot about how to balance taxpayer costs that would be incurred today and what would be required in the future. The committee agrees that a larger bond over a longer period of time will give the best long-term value to Mercer Island residents, will offer a consistent tax rate to residents, and will also take advantage of a strong borrowing environment. It also understands that the current economic environment may make a large bond initiative harder to sell to the community.

In summary, a majority of the committee recommends a single bond issue to be sold in increments within promised tax rate goals to fund required the required elementary schools and the middle school. A minority recommends a more phased approach of first bonding and single elementary school and the middle school or just the three elementary schools.



### Conclusion

The 21<sup>st</sup> Century Facilities Planning Committee submits this report to the Mercer Island School Board with a unique understanding of the complex decisions they have before of them. While the committee had strong opinions on approach and often disagreed on specifics as they did their research, the consistently and unanimously agreed that schools in our community are a top priority that deserves our time, attention and investment.

The 21<sup>st</sup> Century Facilities Planning Committee wishes to thank the members of the Mercer Island Administrative team that supported us through the process—Dean Mack, Tony Kuhn and Liz LeRoy—for their efficient and quality work; Dr. Gary Plano for his powerful vision for the district; and the Mercer Island School Board for the opportunity to be a part of this important process. They invite the board to continue to regard them as a resource.

### APPENDIX A | COMMITTEE BIOGRAPHIES

#### **Hilary Benson**

Hilary Benson is a Mercer Island mother with three children in MISD schools. Besides active involvement in PTA and school volunteering, she has served three terms on the board of Pixie Hill Preschool. Benson's professional background is in journalism, having spent twenty years a professional reporter in both television and print. As part of a local consulting group, she also assisted in public relations work for local non-profits including the Technology Access Foundation, The Moyer Foundation and Treehouse.

#### **Dick Benster**

Dick Benster has a history of involvement with Mercer Island facilities having led the Lakeridge Playground Design Committee, the MICC pool redesign, and MIHS track and turf projects. He has a proven history of working on complex, multi-national software projects, including NATO weather forecasting systems. He's participated on the Lakeridge Site Council, The Really Big Idea Committee, has coached various youth teams, and was a MISF and MICC Board Member.

#### **Amanda Clark**

Amanda Clark is an active community member who is currently Chair of Friends of Luther Burbank Park, served on the MI Arts Council for six years, and chaired Islanders for Common Sense which opposed building PEAK on school district property. Professionally, she was a College English textbook developmental and acquisitions editor for many years with Scott, Foresman and a lead editor for technical style at Microsoft before retiring in 1997. She served on the committee to make the high school campus a jewel of community planning, serving well the needs of the school district, the City, and the neighborhood.

#### **Michael Finn**

As a mega-block neighbor, Michael Finn joined the committee to be involved in the issues that directly affect his neighborhood, quality of life and the safety of the students. He brings a background as a Civil Engineer with specialties in structural design and hydraulics to the committee.

#### **Carrie George**

Carrie George has one child in the district now – a senior at MIHS – and a college-age child who attended Mercer Island public schools K-12. Carrie is an active participant in the MIHS PTA, and served on the MISD School Board from 2001-2005 after a stint on the Mercer Island Schools Foundation Board and as PTA Vice President at Island Park. Carrie also is on the Board of Trustees of Washington Women's Foundation, where she served as Chair of WWF's Grants Committee and various other committees. Professionally, Carrie is a Partner at Inviso Corporation, where she manages Inviso's consulting practice. She earned a Bachelor's degree of Economics from Claremont McKenna College and a Master's degree in Business Administration from Harvard Business School.

#### **Carol Gullstad**

Carol Gullstad has been a resident of Mercer Island since 1999 and has four children (currently 5<sup>th</sup>, 9<sup>th</sup>, 11<sup>th</sup> and college freshman) who have attended MI Schools for their entire education. She is Past President and board member of Mercerwood Shore Club, is a Mercer Island Lacrosse Board member, has been a coach and team manager for various youth sports, a parent organizer for the Destination Imagination Team, classroom volunteer and Great Books leader. She led the Title IX initiative a few years ago, that resulted in upgraded field space for girls softball and other equity improvements in the district. Professionally, she is a strategic planning and marketing professional, Owner of organic farm with husband, Wayne, Co-author of the blog, Permission Slips, and an adviser and investor to start up businesses and was previously a V.P. at General Mills Inc. Carol is a product of public schools with a B.S. from U.C. Berkeley and an M.B.A. Anderson School at UCLA.

#### **Megan Hand**

Megan Hand joined the committee because of her strong interest in supporting the districts 20/20 Vision through its facilities. She has an interest and background in art education for children and design, and a passion for Mercer Island Schools.

#### **Einer Handeland**

Einer Handeland has been a Mercer Island north end resident for forty years. His wife taught in the Mercer Island elementary schools for nineteen years and his two children attended the Mercer Island schools. Einer is a professional civil engineer who just recently retired after a forty year career as a private consultant working on many of the areas' major transportation projects. He served on the Mercer Island Design Commission for eight years. He is currently active in many community groups including the Seattle Rotary and Mercer Island Presbyterian Church.

**Bill Hochberg**

A graduate of Mercer Island schools, Bill Hochberg has had a long term interest in Mercer Island Schools and local policy. He was formerly the chair of the Park Board that passed the park bond in 1983 and is an attorney by profession. He currently has two children in the MISD system.

**Bert Loosmore**

Bert Loosmore moved to Mercer Island 6 years ago because of the schools. He feels the school district is presented with an incredible opportunity to catalyze 21<sup>st</sup> Century education, and wanted to do his part to help. As a Ph.D. candidate at the University of Washington studying how mathematical models and statistics can be used to interpret ecological data, he takes a quantitative approach to decision making. As an active member of Island Vision, he has an interest in how sustainable practices can be applied on Mercer Island.

**Frank Morrison**

Frank Morrison is a long-time Mercer Island resident that has held a multitude of leadership positions in our community. Perhaps best known for his 15+ years leading school bond and levy campaigns, Frank brings a deep knowledge of bond strategy and Mercer Island history to the committee. He

**Walt Ritchie**

Walt Ritchie came to the committee because he believes that our schools are our community's greatest asset and that inherent in this belief is the shared responsibility between MISD and the community for stewardship of these assets. Prior to retirement, he was the Department Director responsible for the capital improvements for a large public transportation agency. He brings a strong understanding of planning, facility planning, design, permitting, public financing, public bidding, and construction of large, complex public facilities. Walt's three children attended Mercer Island Schools, and he's married to a long time MISD teacher who retired last year.

**Greg Steinhauer**

Greg Steinhauer is a product of the Mercer Island School System K-12. He has been active in the community—coaching football, soccer, T-Ball and Basketball. He served on the Boys and Girls Club Board for 10 years and was named volunteer of the year in 1998. In his professional life, he is COO of a large real estate development and construction firm spending his time developing the SODO area of Seattle and building hotels in LA. He and his wife Charlene have two daughters, the youngest is in 3rd grade and the oldest is a Sophomore at MIHS.

**Toby Suhm**

Toby Suhm is an experienced business and community leader with 20 years experience in Public Accounting, Health Care, Wireless Communications and High Tech industries and the past 10 years as a community organizer and leader. He is an active member of the MISD School community and has held positions on the DAC, IMS PAC, the Health and Wellness Committee and PTA.

***Student Representatives***

**Kaya, Jason and Maxwell**

***City Council Representative***

**Bruce Bassett**

***MISD Administrative Support***

**Dean Mack** | Executive Director of Business Services and Human Resources

**Tony Kuhn** | Maintenance and Operations

**Liz LeRoy** | Principal of company & MISD Facilities Owner's Representative

***Mercer Island School Board Representatives***

**Janet Frohnmayer**

**Brian Emanuels**

***Facilitator***

**Kris Kelsay** | Principal of Launch

Kris Kelsay, a Mercer Island resident and principal and founder of [Launch!], a full-service communication agency focused on helping organizations bring new ideas to fruition.

**APPENDIX B | EXPERT RESOURCES**

**Enrollment Projections**

Les Kendrick

**Enrollment Methodology**

Tim Carver	OSPI
Joel Davis	Meng Analysis
Heather Rogers	Berk Associates
Shelly Lapkoff	Lapkoff & Gobalet
Ken Ward	Davis Demographics & Planning

**Professional Service**

Fielding Nair	Architectural Planning
Bassetti Architects	Architectural Services
BLRB Architects	Architectural Services
PCS Structural Solutions	Structural Engineering
The Robinson Group	Construction Cost Estimating
PACE Engineering	Surveying
Seattle NW Securities	Bond Modeling
City of Mercer Island	

**Local School Expertise for School Tours**

Peter J. Wall	Director of Capital Projects, Tacoma School District
Bortleson	Cheri Principal, Medina Elementary, Bellevue School District
Robin Earl	Principal, Creekside Elementary, Issaquah School District
Guy Overman	NAC Architecture
David Mount	Mahlum
Todd Tressler	Facilities Director, St. Thomas School

*Many other school districts provided expertise including Bellevue, Issaquah, Lake Washington and Bainbridge School District for data and bond history information.*

**Mercer Island School District**

Fred Rundel	Principal, Lakeride Elementary Dr.
Nancy Lorum	Principal, Island Park Elementary
Rich Mellish	Principal, West Mercer Elementary
Mary Jo Budzius and Aaron Miller	Principals Islander Middle School
Mark Roschy	Associate Principal, Mercer Island High School

**Mercer Island School District Partners:**

Country Village  
Little Acorn  
Pixie Hill  
CHILD  
Youth Theatre Northwest