



West Linn – Wilsonville Schools

Long Range Planning Committee Meeting
Administration Building
22210 SW Stafford Rd, Tualatin, OR 97062
June 21, 6:00 PM

Agenda

1. Call to Order 6:05 pm Admin Boardroom

2. Roll Call: David Lake **Samy Nada**
 Doris Wehler R. B. Brandvold
 Kent Wyatt **Grady Nelson**
 Mike Jones **Chealsea Martin (Board Liaison)**
 Kathy Ludwig **Tim Woodley**
 Amy Berger **Remo Douglas**
 Barb Soisson **Saskia Dressler**
 Andrew Kilstrom (Reporter)

3. Term Expirations – There is one member who has a term expiration at the end of June, Mike Jones. The position will be open and applicants will be able to apply and Mr. Jones will be able to reapply if he wishes.

4. The Long Range Plan: Tim spoke at a Portland State University seminar about public school facilities planning. He shared his PowerPoint presentation with the group.
 - a. “Long Range Planning: Community conversation about school facilities, over a long period of time, that is informed by contemporary education goals & themes, demographic data, community partnerships, existing facility assessments, bonding capacity, and public participation.”
 - i. Part A: Framework for Excellence – Values, themes and approaches that are the basis for facility planning.” (District Vision, School Board Commitment to Excellence, Educational Programming and Programming affecting facility size, design & needs)
 - ii. Part B: School Facilities, identifies existing capacity, enrollment and growth.” (Snapshot of today, Planning for the future, Long-term enrollment potential, Future school needs, Short-term enrollment forecasts, District properties, Accommodating school facility needs and Next steps)
 - iii. Part C: Capital Improvements – “Outlines the capital improvement planning process.” (Capital Improvement Program history, linking the CIP to the Long Range Plan and the CIP Process, Project evaluation criteria, CIP timing and sequence)

- b. Planning around the bond timing is very thoughtful and stems from community involvement largely at the bond summit, election timing and for the last 2 bonds the timing corresponding with the local options.
 - c. Construction bonds looks at the existing vs potential bonding capacity. When one school is paid for and drops off the bonding capacity opens up without raising taxes and the voters get to vote on renewal.
5. 5 Year Demographics Study
- a. Davis Demographics & Planning predicts student populations for the district. The methodology they use is explained in the handout.
 - i. The group would like to look at previous predictions by DDP and compare to real enrollment numbers.
 - ii. The methodology starts by graduating the 12th grade and move all existing classes up a year. They do predictions every 5 years unless the district has a specific need (boundary process, going out for a bond, etc.)
 - iii. New residential development is taken into consideration by interviewing county and cities to determine what is in for permits, what zones are changing, looking at buildable lots, and by talking to developers in the area to determine what is coming up split into district study areas based on where kids live, not where they go to school.
 - iv. Student yield factors are calculated by linking the parcel data with student data based on where the kids live.
 - v. Incoming kindergarten estimates are calculated by live birth counts by zip codes.
 - vi. Modified enrollment with the mobility factor. This is when people buy homes in this district based on our schools. There are always new families moving in with school age kids.
 - vii. Each of the study areas are projected over the 5-year period and broken down into attendance area and study area projections.
 - viii. DDP cannot predict out of district kids. They take the existing numbers and project them out for each year at the same number.
 - b. The district takes these numbers and can look at how many kids are projected for each school type (K-5, 6-8, 9-12) and compare those numbers to existing school educational capacity. Determining a capacity of the school district is a conversation for the district to have. Primary schools are not as difficult as middle and high due to changing schedules. Each space is considered a teaching station at the higher levels. How many students are we wanting in each class, what is a teaching station, is a stage a teaching station? These are all several things to take into consideration when determining the enrollment capacity. The district knows the architectural capacity based on district preferred class size per grade level but translating that to enrollment capacity has more to take into consideration.

- c. The long range planning committee members should become proficient in these three areas as we move forward:
 - i. How to demographics work?
 - ii. Really understand the distinction between building capacity and educational capacity.
 - iii. What are the district programs what impact the educational capacity? (ex/ dual language, preschool, etc.)
 - d. It might be helpful for the Long Range Planning Group to listen on a phone conference with Davis Demographics while they explain their data in the projections.
 - e. More long range planning will include looking at where is there space in existing schools, what the district land bank looks like, etc.
6. High School Options Task Force
- a. The Long Range Planning Committee should start to study updated demographics data in regards to the above information. WLWV is a growing district. The boundary process showed the district that the high school level needs to be reviewed. Dr. Ludwig is hoping to put together a task force in the fall to examine high school learning needs. A handout includes a draft of a schedule for that task force. The task force will meet with the Long Range Planning Committee to discuss progress and strategy in planning.
 - b. The goal of the committee is to look at current conditions and what are the needs as we move forward. What does that look like, what kind of learning environment, where should that be, etc. At the end of the study the group will analyze the study and have a recommendation for the superintendent.
7. Amy will poll the group to find a date in August for a tour of the new schools before they open.
8. Adjourn 7:48 pm



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Administration Building
22210 SW Stafford Rd, Tualatin, OR 97062
Wednesday, June 21, 2017 6:00 PM**

Long Range Planning Committee Meeting

Agenda

1. Call to Order
2. Roll Call
3. The Long Range Plan: Overview ppt
4. Discussion: Demographic Methodology
5. High School Options Task Force

Members / Term

R.B. Brandvold / 6/8/15 – 6/30/18
Michael Jones / 12/1/08 - 6/30/17
David Lake / 5/8/06 – 6/30/18
Samy Nada / 11/18/16 – 6/30/19
Grady Nelson / 12/7/15 – 6/30/18
Doris Wehler / 11/5/01 – 6/30/19
Kent Wyatt / 1/9/12 – 6/30/19

Adjourn



**West Linn-Wilsonville
School District**
Tualatin, Oregon

**“DRAFT”
5-Year
Student Population Projections
By Residence**

Fall 2017-2021
(Based on Fall 2016 Data)

October 18, 2016

Prepared by



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**5-Year Projections by “Residence”
for the
West Linn-Wilsonville School District**
(Based on Fall 2016/2017 K-12 Student Data)

The West Linn-Wilsonville School District (WLWSD, or the District) has requested Davis Demographics & Planning, Inc. (DDP) to assist in preparing a District-wide enrollment forecast based upon student residence. The projected student enrollments generated by DDP cover a five-year period that are based upon the actual Fall 2016 student enrollment figures. The projections conducted by DDP were calculated at the smallest level possible, the Study Area. The WLWSD has been broken up into 179 individual “study areas.” No study area straddles two District attendance areas. Therefore, the projected number of students in each of the District’s current attendance areas are derived by the simple addition of all of the study areas that comprise that particular region. The District-wide projections is the summary of all 179 study areas.

The concept of running projections at the “study area” level is ideal for a school district that plans on re-adjusting its current attendance areas. This then gives the District the ability to determine a variety of new attendance area scenarios and know approximately what the future number of students will be living in the proposed areas.

A variety of factors go into the calculation of the “study area” projections. These components include the following: (1) examining the current and planned residential development over the next seven years; (2) calculating Student Yield Factors to apply to this new development; (3) determining birth factors for this District area; and (4) calculating Mobility Factors, which examine the in/out migration of students within existing housing units (this factor, for example, takes the “resale” of units into account).

SOURCES OF DATA

Historical Enrollment:	Obtained verified K-12 student data files downloaded by the District to DDP for each October from Fall 2013 to Fall 2016.
Housing Information:	Obtained by DDP through information provided by District staff. In addition to data provided by city and county planning departments, various site visits were made and certain developers were contacted. The use of aerial imagery and county parcel data in a GIS format were also used in this process.
Birth Data: (used for estimating incoming Kindergarten)	Live birth counts for the West Linn-Wilsonville area (by zipcode) were obtained from the State of Oregon, Center for Health Statistics Department.

METHODOLOGY

1. Graduate 12th grade: move up other grades.
2. New residential development information was gathered by District staff by contacting city and county planners, site visits and individual developers. A listing of all residential development (by Study Area) used in these projections can be found in the enclosed Residential Development Summary Report. The use of aerial imagery and county parcel data in a GIS format were also used in this process.
3. Student Yield Factors were calculated for by geographically linking assessor parcel data with student data. These rates were organized by using the District’s predominant grade configurations (K-5, 6-8 and 9-12). The Student Yield Factors used in these projections were a result of a large sampling of residential units built within the District’s boundaries over the past seven years (2007-2013). The use of aerial imagery and county parcel data in a GIS format were also used in this process.

STUDENT YIELD FACTORS USED IN THE FALL 2016 PROJECTIONS
(from a large sampling of units built between 2007-2013)

Single-Family Detached (SFD) Units [850 units built]				
Grade Ranges	K-5	6-8	9-12	K-12
Student Yield Factor	0.307	0.120	0.135	0.562

Multi-Family Units [605 units built] <i>[apartments, condos, townhouses, etc.]</i>				
Grade Ranges	K-5	6-8	9-12	K-12
Student Yield Factor	0.096	0.048	0.061	0.205

4. Incoming Kindergarten estimates were calculated by gathering live birth counts by the District’s three main zipcodes (97062, 97068 and 97070) and annual comparisons were made to the Fall 2016 Kindergarten class (born in 2011) as the base year.

District-Wide Birth Factors
 2017 K = 109.8% of 2016 K
 2018 K = 109.0% of 2016 K
 2019 K = 109.8% of 2016 K
 2020 K = 116.2% of 2016 K
 2021 K = 111.7% of 2016 K

5. Modify enrollment further by using student Mobility Factors as follows:
 Mobility refers to the in-out migration of students from existing housing. This variable reflects the percentage of students progressing through the grade ranges. The Mobility Factors help account for the following trends occurring throughout the District: existing housing resales, foreclosures, apartment migration and high school dropout rates. Student counts for each study area are available for the last four school years (Fall 2013 through Fall 2016). A sample of 151 study areas (from a total of 179) were chosen within the District’s boundaries that had no new residential development over the last five years. The Mobility Factors were conducted at the current primary school attendance boundary level. There was a total of 21 study areas were chosen from the Boeckman Creek Primary attendance area; 8 study areas from the Bolton Primary attendance area; 21 from the Boones Ferry Primary area; 1 study area from Boones Ferry-Lowrie PS Choice area; 10 study areas from Cedar Oak Primary’s area; 17 from the Stafford-Boeckman Choice area;

28 from the Stafford Primary area; 9 from the Sunset Primary boundary; 19 from Trillium Creek Primary area; and 17 from the Willamette Primary Attendance Area were chosen for this study. The Mobility Factors that show no net increases or decreases (zero change in the number of students) over time is represented by a factor of 1.00 (blue). A net student loss is represented by a factor less than 1.00 (red) and a net gain by a factor greater than 1.00 (green).

When the data is available, the typical method that DDP uses to calculate Mobility Factors is using four consecutive years of mapped student data which results in three years of change and then average it out to even out any anomalies. A comparison was made for the Fall 2013 K student population to the Fall 2014 1st grade students within a specific study area. This comparison was also conducted for the following pairings: Fall 2014 & Fall 2015 and the Fall 2015 & Fall 2016 school-years. In addition, middle school and high school grades were also looked at in this manner (all transitions from Kindergarten through 12th grade).

Student Mobility Factors

(used in the Fall 2016 Projections)

“3 Years of Change” (Using Fall 2013 through Fall 2016 students)

West Linn-Wilsonville SD Mobility (Using Fall 2013 through Fall 2016 Student Data)													
<i>(Excluding Study Areas that Have Had Development and Ones that Contain Low Student Counts)</i>													
	G1	G2	G3	G4	G5	G6	G7	G8	G9	G10	G11	G12	City
Boeckman Creek Primary	0.960	0.980	1.040	1.000	1.020	0.940	1.020	1.020	1.020	1.030	0.920	1.070	W
Bolton Primary	1.030	1.130	1.060	1.100	1.020	1.060	1.070	1.000	1.050	0.980	0.980	0.970	WL
Boones Ferry Primary	1.020	0.960	0.990	0.970	1.010	0.960	1.030	1.030	1.010	0.950	0.980	1.050	W
Boones/Lowrie Choice*	1.020	0.960	0.990	0.970	1.010	0.960	1.030	1.030	1.010	0.950	0.980	1.050	W
Cedaroak Primary	1.160	1.030	1.070	1.010	1.030	1.090	1.040	0.990	1.040	1.010	0.990	1.020	WL
Lowrie Primary	1.020	0.960	0.990	0.970	1.010	0.960	1.030	1.030	1.010	0.950	0.980	1.050	W
Stafford/Boeckman Choice*	0.960	0.980	1.040	1.000	1.020	0.940	1.020	1.020	1.020	1.030	0.920	1.070	W
Stafford Primary	1.190	1.010	1.100	1.000	1.020	1.060	1.020	0.990	1.000	0.960	1.010	1.040	WL
Sunset Primary	1.100	1.070	1.030	1.060	1.060	1.080	1.020	1.010	1.000	0.960	1.030	0.980	WL
Trillium Creek Primary	1.170	1.060	1.060	1.120	1.060	1.070	1.090	1.050	1.050	1.000	0.990	0.990	WL
Willamette Primary	1.000	1.080	1.010	1.010	1.000	1.000	1.000	1.010	1.040	0.990	0.960	1.030	WL

* The Boones Ferry Primary Mobility Factors were used for the Boones/Lowrie Choice area due to too small a sample size

* The Boeckman Creek Primary Mobility Factors were used for the Stafford/Boeckman Choice area due to too small a sample size

* The Boones Ferry Primary Mobility Factors were used for the Lowrie Primary area due to too small a sample size

- Each of the 179 Study Areas are then projected out over the next five years (Fall 2017 through Fall 2021). From these study areas, individual Attendance Area reports are generated (see enclosed Attendance Area and Study Area Projections). Please refer to the attached map (11" X 17") to see the individual study area locations as well as determining the study areas that comprise each Attendance Area.

These projections are based on where the students live and where they should be attending school. DDP uses the actual location of where the students reside, as opposed to their school of enrollment, in order to provide the most accurate depiction of where future schools (if necessary) should be located. The concept of running projections at the “study area” level is ideal for a school district that plans on re-adjusting its current attendance areas. The best way to plan for future schools is to know where the next group of students will be coming from, not necessarily which school they are currently attending.

FIVE-YEAR RESIDENTIAL DEVELOPMENT SUMMARY REPORT

Total SFD = 946 Total MFA = 546 Total APT = 0 Total All Units = 1,492

Study Area	YEAR 1 10/1/2016 - 9/30/2017			YEAR 2 10/1/2017 - 9/30/2018			YEAR 3 10/1/2018 - 9/30/2019			YEAR 4 10/1/2019 - 9/30/2020			YEAR 5 10/1/2020 - 9/30/2021			Study Area	All Units/Types Years 1 - 5	Elementary	Middle	High
	SFD	MFA	APT	SFD	MFA	APT	SFD	MFA	APT	SFD	MFA	APT	SFD	MFA	APT					
101	8	0	0	26	0	0	0	0	0	0	0	0	0	0	0	101	34	Cedar oak Primary	Rosemont Ridge Middle	West Linn High
102	26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	102	26	Cedar oak Primary	Rosemont Ridge Middle	West Linn High
129	0	0	0	15	0	0	25	0	0	10	0	0	0	0	0	129	50	Sunset Primary	Rosemont Ridge Middle	West Linn High
147	6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	147	6	Trillium Creek Primary	Rosemont Ridge Middle	West Linn High
151	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	151	10	Trillium Creek Primary	Rosemont Ridge Middle	West Linn High
428	0	0	0	50	0	0	100	0	0	100	0	0	100	0	0	428	350	Stafford/Boeckman Choice Area	Inza R Wood Middle	Wilsonville High
430	31	0	0	42	0	0	30	0	0	35	0	0	0	0	0	430	138	Lowrie Primary	Inza R Wood Middle	Wilsonville High
432	119	0	0	85	0	0	12	0	0	0	0	0	0	0	0	432	216	Lowrie Primary	Inza R Wood Middle	Wilsonville High
437	0	177	0	0	177	0	0	177	0	0	0	0	0	0	0	437	531	Lowrie Primary	Inza R Wood Middle	Wilsonville High
448	12	15	0	0	0	0	0	0	0	0	0	0	0	0	0	448	27	Boones Ferry Primary	Inza R Wood Middle	Wilsonville High
454	9	0	0	5	0	0	0	0	0	0	0	0	0	0	0	454	14	Boeckman Creek Primary	Inza R Wood Middle	Wilsonville High
468	50	0	0	30	0	0	0	0	0	0	0	0	0	0	0	468	80	Boones Ferry Primary	Inza R Wood Middle	Wilsonville High
484	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	484	10	Boones Ferry Primary	Inza R Wood Middle	Wilsonville High
Units	281	192	0	253	177	0	167	177	0	145	0	0	100	0	0	Units	1,492			
Types	SFD	MFA	APT	SFD	MFA	APT	SFD	MFA	APT	SFD	MFA	APT	SFD	MFA	APT	Types				
Totals	2016/2017 = 473			2017/2018 = 430			2018/2019 = 344			2019/2020 = 145			2020/2021 = 100			Totals	All Units (1.5)			

Last updated October 2016

Notes about this summary report:

- The phasing schedules on this page are based upon estimated dates of occupancy.
- Includes Approved and Tentative maps plus proposed and potential development.
- Summary only includes units that may be occupied in the five year timeframe of the projections.
- Based upon data gathered in October 2016 and may not reflect recent changes.
- The information for this summary was gathered by conversations with individual developers, sales offices, district staff and city and county officials.

Contact/Owner/Developer	Project/Area	Study Areas	Total Units	Type	Left to Build	Comments
CONTACT = CITY OF WEST LINN	Chene Blanc Estates	101	34	SFD	ALL	Project denied / Appealing now / May come back as 45 Townhomes
CONTACT = CITY OF WEST LINN	SHADY HOLLOW (duplexes)	102	26	SFD	ALL	13 duplexes / almost all built / 1st occupants soon / all done in 2017
CONTACT = CITY OF WEST LINN	1270 Rosemont Road	129	50	SFD	ALL	Icon Construction / Approved by 1.5 years from 1st occupants / 2-3 years to build
CONTACT = CITY OF WEST LINN	2282 Weatherhill Road	147	11	SFD	6	About half the homes are occupied / Rest should be done by Spring 2017
CONTACT = CITY OF WEST LINN	Weather View 22850 Weatherhill Rd	151	22	SFD	7	Started in 2016 and should all be done and occupied by Spring 2017
RENAISSANCE HOMES	Grandview - 23150 Bland Circle	151	11	SFD	3	Started in 2015 and should all be done and occupied by Spring 2017
CONTACT = CITY OF WILSONVILLE	FROG POND AREA	428	610-1000	SFD	ALL	Very large project in the early planning stages with City / could have 1st occ in 2+ yrs
POLYGON HOMES/CITY	SAP N	430	147	SFD	63	Started up in 2015 / 84 units occupied / rest should be done by mid 2018
CHANG FAMILY	SAP N	430	75	SFD	ALL	To follow after the Polygon units west of it are built (2018?) - higher end homes
POLYGON HOMES/CITY	TONQUIN MEADOWS-LUND	432	60	SFD	ALL	Starting in late 2016 / 1st occupants in 2017 all done sometime in 2018
POLYGON HOMES/CITY	TONQUIN MEADOWS-LUND	432	56	SFD	ALL	Expected to start sometime in 2017 and done in early 2019
POLYGON HOMES/CITY	TONQUIN MEADOWS-LUND	432	89	SFD	19	Under construction in 2015 / Should all be built and occupied by Spring 2017
POLYGON HOMES/CITY	Tonquin Meadows No. 2 - Fasano	432	43	SFD	28	Started in Summary 2015 and all should be built and occupied by sometime in 2017
POLYGON HOMES/CITY	Tonquin Meadows No. 2 - Fasano	432	13	SFD	ALL	Expected to start sometime in 2016 and done in 2017
POLYGON HOMES/CITY	Tonquin Meadows No. 2 - Fasano	432	39	SFD	ALL	Expected to start sometime in 2017 and done in 2018
ARBOR SOLD TO POLYGON?	VILLEBOIS	437	984	MFA	551	453 of 984 built as of Oct. 2016 / MF mix of units / all done by sometime in 2019
Dutch Ventures, LLC	ASH PARK (north of existing condos)	448	12	SFD	ALL	Just started up in 2015 / should all be done and occupied by Summer 2017
Dutch Ventures, LLC	ASH MEADOWS Condos	448	15	MFA	ALL	To finally finish the last of the condominiums sometime in 2017
Custom Homes	Custom Homes	454	23	SFD	14	High-end homes building very slowly - in fl of lots to be built over the next 2 years
POLYGON HOMES/CITY	GRAND POINT @ VILLEBOIS	468	100	SFD	80	Started in 2015 / 2 years to build / may build more quickly / should be done in 2018
RENAISSANCE HOMES	RENAISSANCE BOAT CLUB	484	33	SFD	10	Larger homes and lots / started in 2015 / bldg slow / should be done in 2017

West Linn-Wilsonville School District

**Active and Future
New Residential Development Projects
&
Study Areas**

