

ACKNOWLEDGEMENTS

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PART 2 - CAPITAL IMPROVEMENT PROGRAM

WEST LINN-WILSONVILLE SCHOOL DISTRICT

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INTRODUCTION

The West Linn-Wilsonville School District is facing school deficiencies due to several factors including reduced capacity at the primary level and aging facilities and systems. Facility improvements will be necessary to maintain the excellent education programs, which are the District's trademark. The public is invited to help the District determine which improvements should be made and how they should be accomplished. This report is intended to support consideration of a capital bond measure in the near future by providing background information relating to issues facing the District and the potential improvements that could address them.

This report is divided into four key sections:

OVERVIEW

WHAT is the District's mission, what are the challenges, and what is the capital improvement program?

EXCELLENCE IN EDUCATION

WHY does the District's goal for excellence in education serve as the basis for the Capital Improvement Program?

CAPITAL IMPROVEMENT PLANNING PROCESS

HOW is the Capital Improvement Program developed and how will the proposed projects support the District's commitment to excellence?

CAPITAL PROJECTS LIST AND NEXT STEPS

WHEN will the Capital Improvement Program projects be prioritized and implemented?

District Commitment to Excellence

The West Linn-Wilsonville School District is committed to excellence in education. We want a high-quality education for all our students – one that provides a personalized education for all students and affords all learners the opportunity to capitalize on strengths, work on challenges, and maximize potential. This unyielding commitment to excellence has produced an exemplary public education system.

VISION THEMES

The District creates learning communities that nurture a growth mindset for great thinking. In this environment, we work to maximize human potential and enable all students to function successfully in a changing world through access to a high-quality education that:

1. Demonstrates personal and academic excellence.
2. Provides a personalized education to improve student performance.
3. Establishes community partnerships and expands the classroom beyond the school.
4. Creates a circle of support for each student.
5. Educates the whole person--intellectually, emotionally, physically, and ethically.
6. Integrates technology in daily learning.

Accommodating Future Enrollment Changes

Creating and maintaining a quality educational environment is constantly challenged by changes in enrollment. Historically, enrollment steadily increased across the District with some of the highest growth rates occurring in the 1990's, peaking in 2018. The total enrollment for the District in October, 2023 was 9,045 K-12 students. This enrollment is a decline of 878 students over a 5-year period. In addition to balancing the capacity to give each and every student a superior education, the District must also maintain and upgrade existing facilities and constantly look for ways to improve educational programs and techniques.

To meet this challenge, the School Board first created the Long Range Planning Committee (LRPC) made up of District residents in 1988. The committee's key responsibility is to review the capital improvement and facility needs of the District and to advise the School Board regarding these needs and the priorities for addressing them.

To further enhance the District's ability to proactively plan for the future, it developed the West Linn-Wilsonville School District Long Range School Facilities Plan in 1996, the first of its kind in the state. This plan, developed under the guidance of the LRPC, has provided a rational framework for evaluating and addressing future school facility needs as the West Linn and Wilsonville areas grow. The plan was updated in 2000, 2006, 2014, 2109, and again in 2025 to retain its value as a planning tool.

Balancing Enrollment and Capacity

As noted earlier, the District has experienced a sharp decrease in enrollment over the past 6 years. To provide adequate school facilities for primary, middle, and high school students during times of enrollment growth, the District received voter approval of school bond measures to construct new facilities and upgrade and maintain existing assets.

The District is committed to providing educational facilities in the most financially prudent manner possible. The key is to balance efficiency with maintaining quality educational environments. The graph in Figure 1 demonstrates the balance the District must maintain between enrollment growth and capacity. Figure 2 illustrates how the capacity has increased in increments when new schools or school expansions were completed.

FIGURE 1
SCHOOL FACILITY CAPACITY

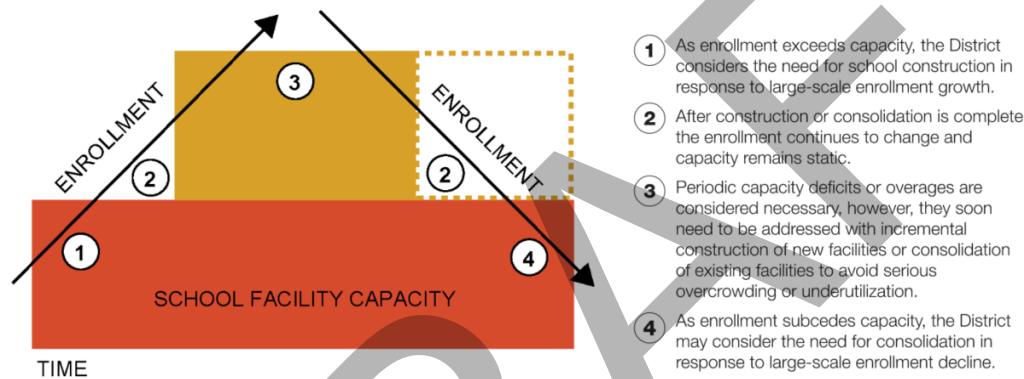
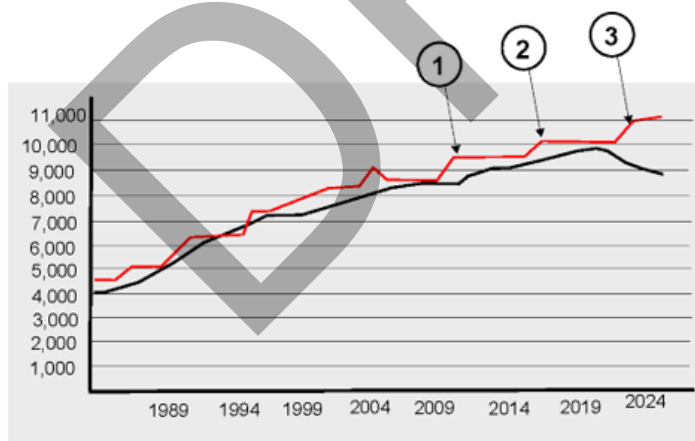


FIGURE 2
TOTAL ENROLLMENT VERSUS CAPACITY



- 1 Student capacity increase due to the opening of Inlilum Creek and Lowrie primary schools.
 - 2 Student capacity increase due to the opening of Meridian Creek Middle School.
 - 3 Student capacity increase due to the opening of Riverside High School, Athey Creek Middle School, and Frog Pond Primary School.
- Total District Capacity
— Total District Enrollment

Facility capacity is directly influenced by educational programs. Following its commitment to provide educational excellence for all students, the District continually seeks to improve its teaching practices. The District has found that an inquiry-based, collaborative, and integrated approach to teaching and learning actively engages students in their education. This well-balanced approach for creating quality education includes the following basic programs:

- Early Childhood Programs
- Inclusive Services: Learning for All
- Cultural Diversity and Multilingualism: World Language, Dual Language, English Language Development
- Health and Wellness
- Science, Technology, Engineering, Math (STEM) Education
- Career and Technical Education (CTE)
- Visual and Performing Arts
- The Center for Research in Environmental Sciences and Technologies (CREST)
- Co-Curricular Enrichment and After-School Programs
- Athletic and Recreational Programs
- The Library: A Center for Research and Inquiry
- Leadership and Community Service Learning
- School clubs in middle and high school focus on a wide range of academic and co-curricular interests.
- Mentoring Programs and Affinity Groups
- Family Empowerment Center (FEC)
- High School Online Academy and Hybrid Learning Options

The implementation of these programs has effectively changed the District's capacity because many of them have building space ramifications. Improving educational programs may reduce or increase school capacity, depending on the program. It is important to note that any capacity changes are outweighed by the improved educational results created by these programs.

Capital Improvement Program

With the District committed to educational excellence and efficiently providing quality facilities, the Long-Range Planning Committee continually examines existing functional needs stemming from aging facilities, expected student population change, and education program equity for all students. This must be treated as an ongoing process for the District to successfully anticipate needs well in advance. Planning and efficiently providing educational services for the community go hand-in-hand. District residents have approved Capital Improvement Program (CIP) bond measures in 1979, 1988, 1989, 1992, 1997, 2002, 2008, 2014, and 2019. This pre-planned sequence of smaller bonds (rather than less frequent large bonds) has enabled the District to successfully balance ongoing maintenance, needed facility improvements, and changing enrollment and capacity in a way that minimizes public debt, maintains a stable tax rate, and provides lasting solutions in real time. The 2025 Capital Improvement Program represents the next step toward fulfilling the District's Long Range Plan first envisioned over 25 years ago.

Potential Bonding Capacity

Since 2001, the District has held to its commitment to keep capital bond levies at or below \$3.00 per \$1,000 of assessed value at any given point in time. With previous bonds expiring in 2025, the District sees an opportunity to present a capital bond to voters in the near future to respond to facilities stewardship needs and priorities from the community, and to continue the excellence in education the communities of Wilsonville and West Linn have come to expect without increasing the tax rate.

Programming Affecting School Capacity

Suitable school facilities are an essential prerequisite for providing a quality education. Virtually all educational programs rely on them. The District uses many programs to create a collaborative, integrated approach that provides a high-quality education. While these necessary programs increase the space needs for the District, they significantly enhance the overall quality of education offered to the students. District programs and strategies include:

- Early Childhood Programs
- Inclusive Services: Learning for All
- Cultural Diversity and Multilingualism: World Language, Dual Language, English Language Development
- Health and Wellness
- Science, Technology, Engineering, Math (STEM) Education
- Career and Technical Education (CTE)
- Visual and Performing Arts
- The Center for Research in Environmental Sciences and Technologies (CREST)
- Co-Curricular Enrichment and After-School Programs
- Athletic and Recreational Programs
- The Library: A Center for Research and Inquiry
- Leadership and Community Service Learning
- School clubs in middle and high school focus on a wide range of academic and co-curricular interests.
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Programming Affecting Facility Size, Design, and Needs

The District believes school design should create a welcoming and nurturing environment for learning. Schools are a visible and daily symbol to students and teachers of the community's commitment to education. Schools that are well designed and maintained provide a supportive environment for learning and achievement.

In planning for facilities improvements, the District supports the following design recommendations:

- Design schools to support a variety of learning styles.
- Enhance learning by integrating technology.
- Support learning neighborhoods within schools.
- Create schools as centers of community.
- Engage the public in the planning process.
- Make healthy, comfortable, and flexible learning spaces.
- Consider non-traditional options for school facilities and classrooms.

As programs evolve, new and remodeled school facilities will be created that express the values of our community and allow the best environment for teaching all children. In addition to the traditional auxiliary facility needs, such as administrative spaces, libraries, music rooms and gymnasiums to name a few, the following programs have implications for the size and design of future facilities.

- High-Performing Schools
- Safe and Welcoming Schools
- Community Partnerships
- Learning with Technology
- Equitable and Inclusive Learning Opportunities

Capital Improvement Program (CIP) History

District residents have approved Capital Improvement Program (CIP) bond measures in 1979, 1988, 1989, 1992, 1997, 2002, 2008, 2014, and 2019. This pre-planned sequence of smaller bonds (rather than less frequent large bonds) has enabled the District to successfully balance ongoing maintenance, needed facility improvements, and expanding enrollment and capacity in a way that minimizes public debt and provides lasting solutions in real time.

The last CIP bond measure, passed in 2019, represents the most recent step toward fulfilling the District's Long Range Plan first envisioned over 20 years ago. Highlights of the bond included: construction of a replacement middle school, a new primary school, stadium and parking expansion at West Linn High School, Performing Arts Center addition at Wilsonville high school, a newly renovated Riverside High School, additions and major renovations to Wood Middle School, new security improvements district-wide, new technology district-wide, and various athletic and site improvements. The bond provided additional area in excess of 150,000 square feet to district facilities, as well as contributing to the local economy during an unprecedented global pandemic.

The District's CIP is based on an over-arching strategy to "capitalize" general fund expenses by incorporating bond planning and spending with daily facility management. This allows regularly occurring bond eligible expenses to be incorporated into the CIP thus preserving general fund monies. Over the bond's 5-year period, including bond eligible expenses in the CIP has freed up millions of dollars in expenses that otherwise would have been paid by the general fund. As a result, more annual resources are available for classroom instruction.

Building on that history, and the commitment to provide quality facilities, the LRPC has examined the existing functional needs of the District stemming from aging facilities, expected student enrollment decline, equity for all students to learn in the most conducive environment and respect for the stewardship required to maintain the facilities we currently utilize. Through this process, the LRPC has compiled and categorized this information into this 2025 Capital Improvement Program.

Responding to Changes in Enrollment

The District currently operates nine primary schools, four middle schools, three high schools, and one charter school. The last evaluation of the learning space capacity of each school was conducted in 2018. In 2019, District voters approved a Capital Improvement Bond that funded additions, improvements, and new facilities, changing the capacity of many school locations. Specifically, Athey Creek Middle School is a replacement facility that opened in the fall of 2023, Riverside High School is a renovated facility that opened in the fall of 2023, and Frog Pond Primary School is a new facility that will open in the fall of 2026.

The enrollment forecast in Table 1 illustrates what the District should expect over the next ten years. The projection anticipates enrollment reduction from 9,045 students in September 2023 to 8,690 by 2028 before rising to 8,955 by 2033. In order to focus on the anticipated school facility needs for a potential school bond, the District will be directing most of its attention to school capacity needs in 2028 rather than 2033.

As demonstrated in Table 1 student enrollment is not evenly distributed, and the concentration of students is expected to vary widely across the District. During the timeframe of the 10-year forecast, the majority of the enrollment growth is anticipated to come from the Wilsonville area. The number of housing projects and available developable land is not evenly distributed between Wilsonville and West Linn, with the former expected to receive 92% of prospective new housing between 2024 and 2033.

The most acute capacity problems will be associated with primary schools, which are operating well below with a capacity of 4,925 students and a 2023 student enrollment of 3,566. However, this forecast also indicates that a new primary school will be needed in Wilsonville as the Frog Pond west development accelerates. Similarly, the middle schools, with a capacity of 2,659 and a current enrollment of 2,129 are below capacity. High school capacity is 3,747, and the current enrollment of 3,240 yields a slight under-capacity situation.

TABLE 1

2023 SCHOOL CAPACITY AND 10-YEAR ENROLLMENT FORECAST*

	School Name	Capacity	Current Enrollment	5-Year Forecast				
			2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
PRIMARY	Boeckman Creek	550	475	480	496	502	512	516
	Boones Ferry	775	479	485	494	518	523	530
	Frog Pond							
	Lowrie	575	457	463	461	461	450	451
	Wilsonville Subtotal	1,900	1,411	1,428	1,451	1,481	1,485	1,497
	Bolton	475	231	223	212	222	228	228
	Cedarbrook Park	500	333	339	330	328	319	329
	Stafford	525	345	337	319	314	309	317
	Sunset	425	375	387	389	392	386	387
	Trillium Creek	575	484	481	490	475	471	480
	Willamette	525	387	393	388	372	364	367
	West Linn Subtotal	3,025	2,155	2,160	2,128	2,103	2,077	2,108
	Total Primary School	4,925	3,566	3,588	3,579	3,584	3,562	3,605
MIDDLE	Athey Creek	832	512	461	567	562	577	546
	Meridian Creek	490	400	389	368	379	383	396
	Rosemont Ridge	713	737	716	626	655	678	659
	Inza Wood	624	480	440	456	436	458	458
	TOTAL MIDDLE SCHOOL	2,659	2,129	2,006	2,017	2,032	2,096	2,059
HIGH	West Linn	1,730	1,868	1,817	1,730	1,654	1,559	1,530
	Wilsonville	1,393	1,260	1,266	1,187	1,189	1,139	1,083
	Riverside High School	624	112	175	241	269	282	302
	TOTAL HIGH SCHOOL	3,747	3,240	3,258	3,168	3,112	2,980	2,915
	TOTAL AVAILABLE CAPACITY	11,330	8,935	8,852	8,764	8,728	8,638	8,579

*Projections assume that current school attendance remain unchanged.

Students enrolled in preschool, post-high, and SPED-Placed in External Program are excluded from analysis.

Sources: West Linn-Wilsonville October 2017–18 to 2023–24 headcount enrollment and FLO October 2024–25 to 2028–29 and 2033–34 enrollment forecasts (middle scenario).

Three Rivers Charter is not included in Building Capacity Analysis.

Under construction during the 2023/24 school year, Frog Pond Primary is excluded from available capacity.

School Name	6-10-Year Forecast					Capacity	
	2029-30	2030-31	2031-32	2032-33	2033-34		
Boeckman Creek	547	578	600	619	647	550	PRIMARY
Boones Ferry	543	549	562	569	588	775	
Frog Pond						300	
Lowrie	460	465	472	473	483	575	
Wilsonville Subtotal	1,550	1,592	1,634	1,661	1,718	2,200	
Bolton	225	230	231	231	236	475	
Cedarbrook Park	332	338	341	338	346	500	
Stafford	327	337	347	348	356	525	
Sunset	387	392	292	390	397	425	
Trillium Creek	480	489	493	487	497	575	
Willamette	371	374	377	375	383	525	
West Linn Subtotal	2,122	2,160	2,182	2,169	2,215	3,025	
Total Primary School	3,672	3,752	3,816	3,830	3,933	5,225	
Athey Creek	500	485	491	512	513	832	MIDDLE
Meridian Creek	387	389	393	421	434	490	
Rosemont Ridge	632	612	624	641	642	713	
Inza Wood	455	448	458	488	490	624	
TOTAL MIDDLE SCHOOL	1,974	1,934	1,966	2,062	2,079	2,659	
West Linn	1,549	1,521	1,506	1,461	1,377	1,730	HIGH
Wilsonville	1,094	1,085	1,108	1,106	1,106	1,393	
Riverside High School	321	335	344	349	349	624	
TOTAL HIGH SCHOOL	2,964	2,941	2,958	2,916	2,832	3,747	
TOTAL AVAILABLE CAPACITY	8,610	8,627	8,740	8,808	8,844	11,631	

PROJECT SELECTION

Identification of Facility Needs

Consistent with the District's progressive planning mindset, the School Board has consistently provided guidance for long term capital needs through thoughtfully created and prioritized Board Goals. The Board has given priority to forward planning and facility stewardship by adopting the following 2024- 25 goal: Together, we will engage as a Board with the Long Range Planning Committee (LRPC) and the community on long-range facilities and financial planning to host a Bond Summit in Spring 2025. (Board approved goal #4)

As District enrollment changes, and life-cycle replacement schedules narrow, the LRPC has moved forward with the following processes.

- Engage the community in a conversation about the considerations of operating small schools through a Small Schools Task Force.
- Consider the impacts of changing enrollment across the District
- Develop a list of potential projects/capital items, which could be included in the next bond issue
- Develop possible strategies for a future bond issue
- Re-calibrate student capacity at all schools.

Throughout this study, interviews were held with District administration, principals, building administrators, classified employees, certified employees, the technology leaders, local city planners, and the District's land-use planner, architect, and mechanical/electrical engineer. Task Force Groups were established at the direction of the Long Range Planning Committee to review stakeholder feedback from dozens of focus groups and technical reports associated with potential capital improvement projects. Community representatives were present in all Task Force Groups.

The 2025 edition of the Long Range Plan recognizes the value of community involvement in developing long term vision and positive outcome through collaboration between patrons, the Long Range Planning Committee and the School Board.

Project Evaluation Criteria

Following the District's vision themes, the Operations Department staff routinely canvass the District to determine the current state of existing facilities and perceived near-term (five year) needs. To weigh this information, several evaluation criteria have been developed. Each criterion has unique relevance to District goals and the CIP:

- **Growth:** Primarily related to student enrollment increases; also program and staff growth and expanded offerings.
- **Equity:** The notion that every patron's child should enjoy the same educational experience regardless of which school in the District they attend.
- **Teaching and Learning:** School facilities must be designed and have adequate capacity to accommodate successful educational programs. Part A of the Long Range Plan provides a comprehensive list and description of programs that shape school buildings.
- **Health and Wellness:** New state and federal mandates require a health and wellness policy. The District adopted this new policy in 2006. It impacts health curriculum, physical education and food service.
- **Stewardship:** The strong community support experienced over many years has provided the District with some of the finest public education facilities in the state. Stewardship contemplates measures needed to protect these investments, including capital-level maintenance and life cycle replacement.

In addition, supplemental criteria recognize the role schools play in a larger community ecosystem and embrace these initiatives that shape the design and use of its facilities to build resiliency within its schools and increase their capacity to adapt to changing conditions.

- **High-Performing Schools:** Buildings must integrate and optimize all major performance attributes including energy efficiency, life-cycle performance, durability, and occupant productivity.
- **Safe and Welcoming:** Structures and systems for safe and welcoming schools are supported by the built environment. The policies and practices rely on those structures and systems to be in place.
- **Community Partnerships:** Joint ventures with in-district groups to further the District's mission and empower community interests to the benefit of all. District athletic facilities remain the primary venue for all organized sports in the District and for many community programs. As schools thrive and grow, so does the community.
- **Learning with Technology:** From classrooms to HVAC systems, every aspect of the District is enhanced with technology. It is integrated into and beyond the learning environment.
- **Equitable and Inclusive Learning Opportunities:** Inclusive schools promote engagement and achievement for all regardless of background, ability, or identity by providing access and opportunities.

Task Force Groups

In the spring of 2024, the West Linn-Wilsonville School District Long Range Planning Committee authorized a series of Task Force Groups. The charge of these groups was to review a set of anchor documents that includes technical reports and stakeholder focus group feedback, and to provide a set of recommendations for facility improvements to the Long Range Planning Committee. The final set of recommendations can be found in the appendix of this report.

A total of seven (7) Task Force Groups convened, focused on the following topics:

- Accessibility
- Athletics and Recreation
- Equity and Stewardship
- Safe and Welcoming
- STEAM, CTE, and Career Pathways
- Sustainability and Resilience
- Technology

Educational Adequacy Evaluations

In compliance with the Oregon Department of Education criteria for Long-Range Facility Plans, West Linn-Wilsonville School District conducted Educational Adequacy (EA) evaluations of every school in the Spring of 2024. Through a series of interviews and building tours with school principals and in compliance with Oregon Administrative Rule (Chapter 581, Division 27), an EA rating has been given to each facility. The ratings and summary of findings can be found in the appendix of this report.

Educational Adequacy evaluations focused on the following categories:

- Educational Program Support
- Health & Wellness
- Safe, Secure, & Welcoming
- The Physical Environment

Long Range Planning Committee Recommendations

Following a presentation of all materials and deliberation, the Long Range Planning Committee agreed with district patrons and have made the following recommendations for inclusion in the 2025 Capital Improvement Program:

*This section intentionally left blank.
Project lists will be developed after input has been gathered in the Bond Summit.*

Alternative Solutions

As potential capital projects became evident, each was assessed to consider alternative solutions in place of new construction or major renovations. In particular:

- Similar to other District facilities, the construction of Meridian Creek Middle School and Frog Pond Primary School is planned in phases. Both facilities have been designed to meet the needs of future enrollment with future classroom additions. Core HVAC and building systems are sized for the full build, and kitchen/commons and gymnasium spaces designed for full capacity. This phased construction provides the District with flexibility to reduce the initial costs and to add classrooms as enrollment demands increase.
- Facility infrastructure and system replacement alternatives have been considered to reduce up-front costs and replace components as-needed. For instance, rather than removing all fluorescent light fixtures in all buildings, those that are fully functional can remain in place in the short-term and will eventually be replaced with more efficient LED when they are no longer functional. Similar alternative solutions have been developed for HVAC controls and alarms.
- The District considered renting fields as existing turf fields neared the end of life. This alternative solution was not feasible due to the long-term financial costs, lack of flexibility to use the fields when needed, and challenge posed by traveling to and from rental fields for daily practices.
- The District Long Range Plan has always included a comprehensive list of district-wide asset replacement projects to make sure all district schools are safe, comfortable and serve the instructional needs of the district. These projects also increase the life expectancy of all district facilities and minimize the need for new construction or costly renovation.