

Table of Contents

Attachments Listing.....2

Facilities & Design.....3

Enrollment & Redistricting.....9

Safety, Code & ADA.....16

Planning & Administration.....19

Learning Standards & Programmatic Issues.....23

Finances.....25

Attachments

- A**.....Facilities Equity Model
- A1**.....Elementary School Repairs 2009-2016
- B**.....School Capital Spending 1994-2017
- B1**.....Uniform Plumbing Code
- C**.....English Language Learners by School
- D**.....Free & Reduced Lunch by School
- E**.....4 Schools Free & Reduced Lunch, ELL, Special Ed
- F**.....School Capacity
- G**.....NESDEC Facilities Use & Maintenance Report
- H**.....School Board Capacity Resolution
- I**.....Ocean Avenue Enrollment Action Memo
- I1**.....K-5 Student Density Map
- J**.....Schools CIP & Multi Year Outlook
- J1**.....Planning Department Housing Data
- J2**.....Portland Housing Authority Long Term Development Strategy
- K**.....Davis Demographics Attendance Matrix
- L**.....Portland Public Schools Past & Current Properties
- LL**.....Surrounding Communities' Elementary Schools
- M**.....Portland Residents in Other Schools
- N**.....Transfers Out of Portland Public Schools
- N1**.....2014 School Security CIP Funding
- N2**.....Maine Municipal Association Inspection Action Plan
- O**.....Facilities Studies 1992-Present
- P**.....Policy & Procedures for the Transportation of Students
- Q**.....Acronym Glossary
- R**.....Special Education Acronym Glossary
- S**.....District Scorecard, February 2016
- S1**.....Education Programs in Non-educational Spaces
- S2**.....City & School Tax Rate Projections
- T**.....Valuation for Educational Programs & Services
- U**.....Greater Portland Area - State & Local Funded School Projects
- V**.....Capital Improvement Plan - School & City Actual
- V1**.....Bond Counsel School Debt Memo
- W**.....Debt Retirement Schedule

School Facilities Ad Hoc Committee Questions & Answers

A. Facilities & Design

- I. What were the parameters given to Oak Point by the School Board for developing this proposal? How are we defining “equity?” (Mavodones, Hatzenbeuhler)

The Priorities for Equity at all Portland Elementary Schools that were a part of the 2013 BFOF parameters also included what the School Board considered to be achieving equity. They were:

- ***Safe, secure, and accessible buildings***
- ***Meet LEED standards for energy efficiency***
- ***Separate gyms and cafeterias***
- ***Performance spaces/stage***
- ***Small group learning spaces***
- ***Designated support/ Special Education spaces***
- ***Professional & administrative staff offices***
- ***Hands-on learning/ discovery labs***
- ***Upgraded data infrastructure***
- ***Adequate parking and circulation***
- ***Outdoor learning and play spaces***
- ***ADA accessible sites***
- ***Libraries/media centers***
- ***Computer labs***
- ***Properly accommodated art spaces***
- ***Appropriately appointed music rooms***
- ***ADA accessible showers***
- ***Finishing kitchens***
- ***Individual restrooms for students***
- ***Community/Volunteer rooms***
- ***Spaces for new programs/ Pre-K rooms***

See Attachment A for a fuller explanation of “equity” via the Portland Public Schools Elementary School Capital Needs Task Force report.

- II. What renovations have already been done that are still a part of the proposal? (Brenerman, Ray)

Work that has already been completed has been removed from the proposal. For example, the elevator work being done with FY’17 CIP funds at Reiche School (\$800,000) has been deducted from the cost of Buildings for Our Future (BFOF).

- III. Is there a master plan for all school facilities to ensure we can identify and meet the needs across the entire District? (Suslovic, Ray, Mavodones)

The City has selected the firm to complete a full engineering (non-educational) facilities analysis. Work is currently ongoing and preliminary information should be available for review by mid November.

- IV. We need a checklist of identified facilities issues that the City has addressed in the past as well as unmet needs. (Suslovic)

Since 2009, in total the school department has spent approximately \$375K/yr for maintenance and upgrades on Longfellow, Lyseth, Presumpscot and Reiche through the CIP. See Attachment A1 for full list of work at these four schools. Through the Capital Improvement Plan (CIP), capital spending for all 18 schools since 2009 has been \$25,528,000. See Attachment B for a breakdown of school capital spending since 1995.

The upcoming school facilities assessment (draft review is November 10th) will highlight additional unmet, non-educational capital needs.

- V. Is Reiche staying an open concept school? If so, what is Oak Point doing to address the dark/noisy complaints? Does Reiche need separate classrooms? (Brenerman, Thibodeau, Mavodones)

The proposal for Reiche is a hybrid partially open concept with specialists and Kindergarten/Pre-K in fully-walled spaces while leaving grades 1-5 with a more open concept. The plan adds full-height walls to all of the Special Education programs, English Language Learner (ELL) spaces, reading spaces as well as the Kindergarten rooms. The kindergarten rooms are separated into pods, with two spaces separated by low walls, allowing the collaborative teaching that Reiche is known for.

Since the above proposal, additional input from teachers, parents and students indicate that the fully open concept for grades 1-5 might not be the ideal and the proposed hybrid system will be revisited to ensure it still meets the long-term educational needs of the district. No additional costs would be expected, as this is simply reconfiguring walls and space.

In terms of light and acoustics, additional windows are planned, skylights would be added to the upper floor, new lighting will be installed and additional electrical outlets added to allow individual spaces to function better. Acoustical treatments would be added to the floor, ceiling and roof structure to improve the quality of sound in instructional spaces.

- VI. What is an “outdoor learning space” and can we explore grants or private funding to pay for them? (Ray)

It is an outside space that can be used for instruction such as the courtyard at Longfellow and the gardens outside Reiche on the Clark Street side. The school department can and does explore grants for these efforts.

- VII. What is the current standard size for an elementary school gymnasium? (Mavodones)

According to the MDOE Space Allocation Guidelines, an elementary school with less than 600 students would require a 42' x 64' court plus 3' sidelines and bleacher seating for 1/3 of the student body.¹ This is what has been proposed for the new gym at Longfellow. Lyseth and Presumpscot are slated to get a middle-school sized gym, at 50' x 75' with 7' sidelines.

- VIII. How are decisions made on whether or not to invest in certain schools (i.e. we chose not to invest in Nathan Clifford, but Longfellow has similar problems and is a part of this proposal)? (Suslovic)

Longfellow does have some of the facility challenges that were highlighted during the Nathan Clifford discussions. They are both multi-story masonry structures on relatively small sites that are not ADA accessible. However, Nathan Clifford was 50 years older and the site was half the size. Additionally, Longfellow has limited ADA access to the primary floor and the property adjoins a fairly large tract of land that is home to Deering High School. Though they both had/have unmet program, support and storage needs, Longfellow could accommodate these needs at grade or on the lowest level where an elevator accessing all floors would most likely be added.

¹ The MDOE Space Allocation Guidelines www.maine.gov/doe/facilities/construction/index.html

- IX. How many bathrooms are required per number of students in an elementary school? (Strimling)

<i>Fixture</i>	<i>Fixtures per Male</i>	<i>Fixtures per Female</i>
Water Closets	1 per 30	1 per 25
Urinals	1 per 75	-
Lavatories	1 per 35	1 per 35

2

See Attachment B1 for the standards under the Uniform Plumbing Code. Pre-K/Kindergarten classrooms must have a bathroom in the classroom or within 40 ft.³

- X. How many different renovation scenarios have been studied? (Costa)

Oak Point developed three renovation scenarios for BFOF:

Option 1: Update the BFOF 2013 construction costs, which have been increasing at a rate of three to four percent per year.

Option 2: Escalation plus added costs for “Renovation Non-equity Model” (major infrastructure repairs that have been deferred since the 2013 BFOF report) and Movable Equipment (furniture, technology, infrastructure for classrooms and lunchrooms). This is the scenario that was recommended by the Board of Education.

Option 3: “Light Touch” Oak Point met with Portland Public Schools Operations and City facilities maintenance to determine only the most critical infrastructure needs to be considered for the near-term. Life safety issues were not included in the Light Touch option because it was envisioned that they would be included in the CIP.

- XI. Will the idea to combine Lyseth and Lyman Moore into a single K-8 campus in North Deering be part of the school facilities analysis? (Duson)

The School Board has not formally explored this option, and the concept was not explored in any detail with the community during the charrette process in 2013. However, the committee can review the concept if it so chooses.

² Maine State Plumbing Code - 2009 Uniform Plumbing Code

³ The MDOE Space Allocation Guidelines www.maine.gov/doe/facilities/construction/index.html

- XII. Was historic preservation taken into account when putting together the design as well as the costs for renovation at Longfellow? (Mavodones)

Longfellow is not an historic building nor is it in an historic district. However, Deb Andrews, the city's Historic Preservation Program Manager, has made a request to sustain/maintain the historic "character" of the building and that was taken into account in BFOF, both in the design and accompanying costs.

- XIII. What is Movable Equipment? (Brenerman)

This refers to furniture, technology, infrastructure for classrooms and lunchrooms, etc. Technology is 3% of the construction cost, minus the site work. Site work includes external construction/renovations on things like playgrounds, ballfields, sidewalks, etc.

According to the MDOE Public School Standards & Guidelines for New School Construction & Major Renovation Projects⁴, technology includes:

- ***phone system devices and phone servers***
- ***computers, network equipment and software (including servers, routers, switches and wireless equipment systems)***
- ***digital video projectors***
- ***interactive presentation devices (including interactive whiteboards)***
- ***classroom and auditorium enhanced auditory systems***
- ***video storage***
- ***television monitors***
- ***distribution equipment and specialized systems (i.e. 3D printers, cameras, measuring and recording devices, and digital signage display systems)***

- XIV. Does Presumpscot currently house a Pre-K class in a closet with skylights? (Mavodones)

Last year a Pre-K class was held in a windowless room that was outfitted with two skylights. A temporary shift allows that Pre-K class to be held in a traditional classroom for this year.

- XV. Are there non-education items in this proposal? If so, what are they? (Mavodones)

No. School grounds, parking/bus routes, and safety are related to the ability to safely and effectively educate students.

⁴ <http://www.maine.gov/doe/facilities/construction/3%20Standards%20&%20Guidelines.pdf>

XVI. What facilities and space requirements are mandated by federal or state law? (Costa)

The Maine Department of Education (MDOE) Space Allocation Guidelines can be found at: www.maine.gov/doe/facilities/construction/index.html. Other requirements can be found in the following standards and codes:

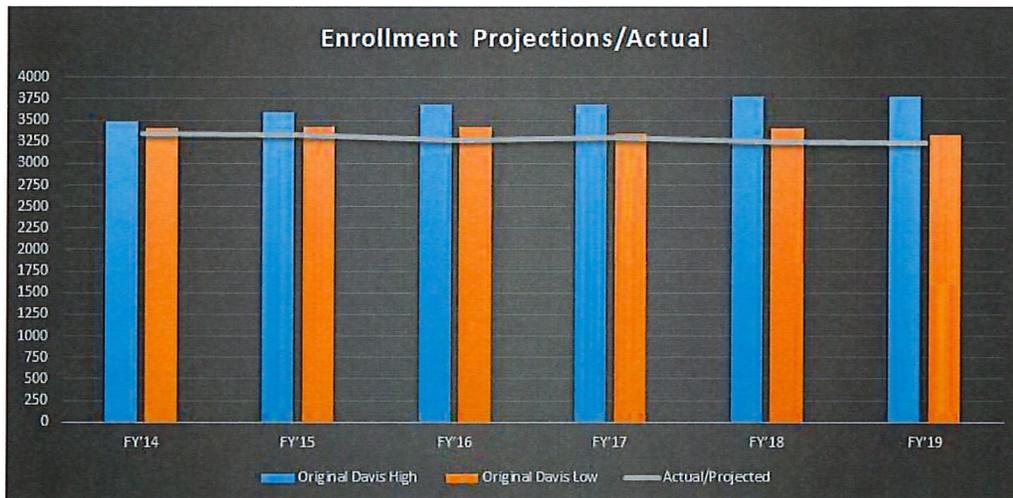
- *Maine State Internal Plumbing Code - 2009 Uniform Plumbing Code*
- *Maine Uniform Building and Energy Code (MUBEC)*
- *2015 National Fire Protection Association Life Safety Code (NFPA 101)*
- *2007 Standard for Portable Fire Extinguishers (NFPA 10)*
- *2007 Standard for the Installation of Sprinkler Systems (NFPA 13)*
- *2007 National Fire Alarm Code (NFPA 72)*

B. Enrollment & Redistricting

- I. Based on enrollment projections, is there a need for a second floor on both Lyseth and Presumpscot? (Ray, Mavodones, Brenerman)

The second floors at Presumpscot and Lyseth were designed for increased capacity and educational flexibility. Capacity projections now show a slight decrease over the next three years (about 100 students below FY'14 actual, see chart below). According to updated Davis enrollment projections plus Pre-K, Oak Point estimates that it “would be possible to eliminate the second floors of Lyseth and Presumpscot.” If the second floors are eliminated, the first floor plans would require reconfiguration, including structural and foundational designs for possible future renovation.

Year	Original Davis (Low-High) ⁵	Actual (K-5) ⁶	Proj. Davis (K-5) ⁷	Pre-K (Act. & proj.) ⁸	Pre-K-5 (act/proj.)
FY'14	3403-3480	3270	-	77	3347
FY'15	3421-3593	3230	-	101	3331
FY'16	3425-3685	3160	-	104	3264
FY'17	3341-3693	-	3170	124	3294
FY'18	3404-3776	-	3119	140	3259
FY'19	3335-3776	-	3084	156	3240



⁵ Davis Demographics (BFOF)

⁶ MDOE K-5 Data

⁷ Davis Demographics (Hall School Study)

⁸ Projected to add 1 Pre-K Class per year

- II. We need demographic information across the District in table format (ELL, free & reduced lunch). (Suslovic, Mavodones)

See Attachments C and D for a full breakdown of this information for all schools. Attachment E highlights Longfellow, Lyseth, Presumpscot and Reiche.

- III. Should we explore redistricting as a way to even out student populations among schools? (Brenerman)

The Board considered multiple options under BFOF to deal with the part of this plan that focuses on capacity, but, as noted in question V below, elementary schools appear well placed in the city. Citywide redistricting was not recently re-evaluated to deal with capacity issues, as PPS does not believe that wholesale movement of school boundaries is in the best interest of the district and its students.

There is also no scenario where a single elementary school closing can be accommodated into any contiguous schools. Thus any closure would require multiple school boundaries changing and major disruption for preserving neighborhood schools and their walkability (see Attachment F for a capacity scenario).

- IV. Is there documentation of enrollment discussions by the School Board? Was there a public hearing and/or official board action? When did the School Board decide to use the 90% capacity number to say that a school is full? (Mavodones)

In 2009, the New England School Development Council (NESDEC) entered into an agreement with the Portland Public Schools Comprehensive Facilities Use and Maintenance Task Force to develop a report which will serve as the basis for the adoption of a Portland Public Schools PK-12 Long-Range Facilities Plan. The final report was publicly presented to the School Board at Portland High School on May 11, 2009 and included a public hearing. That report can be found in Attachment G.

On January 15, 2013, The School Board unanimously adopted a "Resolution Authorizing a Task Force to Support Evaluation of Elementary School Capacity Issues in Portland Public Schools" (Attachment H). The Resolution documents board action of the reviewing and adjusting elementary school district boundaries in the early 1990s, of approving an Ocean Avenue Elementary School Site Neighborhood Boundary Ad Hoc Committee in 2008, accepting the 2009 NESDEC report of the Comprehensive Facilities Use and Maintenance Task Force, and entered into an contract (2013) with Oak Point Associates to review school capacity and boundary issues throughout the BFOF project.

An explanation of the 90% capacity rate can be found on Page 3 of Attachment I.

- V. How do we know that our current schools are in the right locations? What studies have been done? (Mavodones)

As part of Oak Point's work on what became BFOF, they engaged Davis Demographics in plotting where our students lived and identified study areas that could help the School Capacity Task Force look at opportunities for, and impact of, redistricting. Further analysis shows that in the case of the Longfellow, Presumpscot and Reiche approximately 80% of students are within a walkable distance to their neighborhood school; hence, the assertion that the schools are in the right locations. Please refer to the table on Page 13 regarding walkability. A map showing K-5 student density can be found in Attachment I1.

- VI. If we redistricted, would we still have the need for the modular classrooms? (Mavodones)

There are eight modular classroom spaces currently being used at Lyseth and Presumpscot. To eliminate the modulars, 100 students at Presumpscot and 50 at Lyseth would likely need to be displaced.

That said, it is probably not feasible to move specific classes out of Presumpscot to end the current use of the modulars. To do this, the district would need to redistrict part of Presumpscot in such a way as to move sufficient numbers into other buildings that are contiguous (i.e. East End and Ocean Avenue), which would overcrowd those buildings.

- VII. Why has Pre-K enrollment been added into the discussion of the need for renovations? (Mavodones)

Pre-K has always been part of the renovation discussions. Portland will serve 124 Pre-K students across the district this year. There is a need in the community for 350-400 slots and these renovations will create space for at least 60 new students.

- VIII. Has there been official policy or action surrounding Pre-K? Is there a memo explaining School Board intent? (Mavodones)

In 2009, Superintendent Morse held a community-wide charette and the top priority was universal Pre-K. The board adopted this goal and has been adding one class a year. The Portland Public Schools Comprehensive Plan Framework 2011-2016⁹ reviews the background and contexts that forms a Preschool Work Plan in Portland Public Schools.

⁹ https://www.portlandschools.org/district_home/district.../comprehensive_plan

- IX. How is Hall's higher enrollment affecting Ocean Avenue? Is the enrollment management accounted for in the numbers used in the proposal before the Council? (Mavodones)

Libbytown students are now going to Hall School rather than Ocean Avenue Elementary School. This brings Ocean Avenue enrollment now back down to a more stable and manageable level so it can accept more children in the event that was necessary. Enrollment management is accounted for in BFOF.

- X. Why aren't we looking to expand Ocean Avenue School? (Suslovic)

Expanding Ocean could alleviate some of the potential enrollment trends, but expanding Ocean by four classrooms will not address the equity issues for the 1,200 plus students at the four schools addressed in the BFOF.

That said, PPS is interested in expanding Ocean Avenue and has come to the City twice for CIP funding, only to be rejected. In a June 20, 2013 Memo from Superintendent Caulk to School Board Chair Jaimey Caron (Attachment I), it states, in part: "...we have recommended to the City Council the approval of \$870,000 in CIP funding for the construction, equipment, furniture, and design fee to complete expansion plans at Ocean Avenue to address projected enrollment trends and provide the flexibility for swing space when projects occur at other elementary schools. This option was rejected last year..."

In the June 2014 City Manager's recommended list for FY15 CIP funding (see Attachment J), the expansion of Ocean Avenue was listed as a top priority. The expansion of Ocean Avenue was not approved for FY15 CIP funding. As all reasonable options continue to be explored, Ocean Avenue expansion could again be a consideration.

- XI. We need to see future housing planning information and projections for across the city. (Brenerman)

According to data provided by the Planning Board, since 1994, a total of 1,636 units have been approved, with 962 either currently under construction or complete (753 of which have no age restriction). An additional 713 units have been submitted in 2016 but not yet approved, with 382 more units expected to be submitted.

According to the Portland Housing Authority's Long-Term Development strategy, a total of 916 PHA units are planned to go on line over the next 20 years. 847 Of those units are expected to be "family" or "family and elderly" units.

See attachments J1 and J2 for more information.

XII. Who developed the capture rates used in the proposal? (Brenerman)

Davis Demographics. The live birth rate for the city is compared to the incoming Kindergarten class five years later. This comparison establishes the annual capture rate which is utilized in the preparation of long term projections.

XIII. We need to get clarification on enrollment discrepancies in the current data (i.e. Casco Bay being blended with Portland and Deering, Peaks Island School showing both K-5 and K-12). (Ray)

Casco Bay's enrollment is reflected in the report along with Portland High School and Deering High School. When the report was developed Davis Demographics used the Deering High and Portland High attendance boundaries and assigned students to the three high schools based on those boundaries.

Peaks Island students in 6-12 reflects students in those grades who live on Peaks Island. The summary data reflects those students at their actual attending middle and high schools.

XIV. We need the attendance matrix explained in more detail. Is 11% of students attending a school outside of their district high? Low? (Ray)

The matrix (Attachment K) should be read as follows:

Read horizontally, at East End Community School (EECS), there are 375 students in the EECS boundary, 358 are attending EECS, one is attending Lyseth, two Ocean Avenue, etc. A total of 95% of the catchment students attend EECS.

Read top to bottom, EECS has 408 students. 358 live in the EECS catchment, 5 in Hall's, two in Lyseth and 27 in Ocean Avenue's, etc. Altogether 12% of EECS students are from out of its catchment.

At the district level, 11% of students attend a school other than the neighborhood catchment school. The percentages range from 18% and 17% at Longfellow and Hall to a low of 5% at Presumpscot. Most schools capture at least 90% of their attendance area. The only exception is Ocean Avenue due, primarily, to controlled enrollment practices that have sent close to 60 students to EECS and Hall.

XV. We need a list of schools in the Portland School District since the 1970s. (Mavodones)

See Attachment L for a Portland Public Schools Inventory - Past & Present.

XVI. Were smaller schools turned into larger schools, vice versa? (Hatzenbuehler)

As a general rule smaller schools through consolidation have been turned into larger schools.

XVII. What are the ages of the surrounding communities' schools? (Strimling)

See Attachment L1 for the ages and enrollment data of surrounding communities' schools.

XVIII. What is the enrollment in the surrounding communities' public elementary schools? What has been the trend? (Strimling)

Chart does not include Pre-K

City/Town	2013-2014	2014-2015	2015-2016	'14-'16 Chg.	Chg. as %
Cape	708	685	690	-18	- 2.5%
Falmouth	892	925	929	+37	+ 4.1%
Cumberland/ N. Yarmouth	882	854	874	-8	- 1%
Portland	3274	3234	3160	-114	- 3.5%
Scarborough	1334	1314	1220	-114	- 8.5%
S. Portland	1498	1447	1423	-75	- 5%
Westbrook	1191	1191	1206	+15	+ 1.3%
Yarmouth	625	639	653	+28	+ 4.5%

¹⁰

XIX. How many students living in Portland go to schools other than Portland Public Schools? (Strimling)

Information collected from the April EPS report to the state shows a total 381 students currently living in Portland who are enrolled in a school other than a Portland Public School as of April 1, 2016. See Attachment M for a more detailed list.

XX. How many students has Portland lost to Charter and Online schools? (Thompson)

A total of 23 students since 2011 have transferred from PPS to Online (5) and Charter (18) schools. See Attachment N for a complete breakdown.

¹⁰ MDOE K-5 Data

XXI. Why have families left Portland public schools? (Hatzenbuehler)

Although efforts have been made to reach out to families, no reliable data exists surrounding why families leave Portland Public Schools.

XXII. What is the percentage of students who walk to neighborhood schools? (Brenerman)

<i>School</i>	<i>Eligible for Bus Hazard Zone</i>	<i>Eligible for Bus Distance</i>	<i>Others</i>	<i>Within Walk Zone</i>
Presumpscot	26%	14%	7%	53%
Lyseth	14%	41%	9%	36%
Longfellow	0%	8%	10%	82%
Reiche	31%	1%	5%	53%

C. Safety, Code & ADA

- I. We need the safety and security needs at each school separated out from the rest of the proposal. What is critical and does the phasing of the projects meet those needs quickly enough? (Thibodeau, Duson)

At this stage in the BFOF proposal, the level of detail that would be needed to isolate specific safety and security items is not currently available.

Presumpscot, Reiche, Lyseth and Longfellow currently meet the life safety codes that were in place when the structures were built or since the latest renovation. Those systems are inspected each year by the City of Portland Fire Department. When major renovations are undertaken at Presumpscot, Reiche, Lyseth and Longfellow, the building's life safety systems will require an upgrade to current code standards.

In FY2014, \$450,000 in CIP funding was approved for additional upgrades in security in public schools. To date, \$388,535 of those \$450,000 CIP funds have been expended. See Attachment N1.

- II. Why are we just now addressing the boiler needs at Longfellow? Why are we shutting off the heat? Have we made any energy efficiency upgrades to the boiler? (Mavodones)

The heat for Longfellow is provided from the two boilers that serve Deering High School and occasionally there are problems with the heat being inadequate or functionally uncontrollable for Longfellow. The heat is programmed to set back to 65 degrees at 3pm, however, anytime the temperature falls below 20 degrees the setback does not take place. That said, the heat is never shut off. The Deering boilers were replaced in 2015. Due to its age, the system can also be very loud/disruptive in Longfellow classrooms.

- III. Have there been any School Board decisions around the ADA issues at Longfellow? Why have we waited so long to address them? What, if anything, has been done thus far? (Mavodones)

ADA issues at Longfellow were highlighted by the "Elementary School Capital Needs Task Force" Final Report submitted on April 20, 2010 and in the "Building For Our Future" report submitted on July 25, 2013. Funding of these recommendations for Longfellow School are currently being discussed.

At the north side of Longfellow, there is a visitors and employee parking lot with handicap parking. The gymnasium is accessible by an ADA compliant (but currently damaged) ramp from the parking area. The second floor (3-5) and basement classrooms are not ADA. Subsequently, as per national guidelines, most K-5 students needing ADA accommodations are sent to fully ADA compliant schools so students don't have to switch elementary schools in midstream.

- IV. What are the current issues with the sprinkler system at Reiche? (Mavodones)

Currently, only a portion of the school is protected by sprinklers. There is an atrium that was required to be outfitted with sprinklers when the building was built. That system is current. Other portions of the building are not covered by a sprinkler system.

- V. Are there any outstanding code inspection violations at schools? (Mavodones)

At this time the schools are current with all annual inspections, including the Maine Municipal Association (MMA) inspections. Facilities personnel are not aware of any code inspection violations at this time.

- VI. Explain the MMA inspection process, the issues found, and what is being done to address them. (Ray, Duson, Mavodones)

MMA is the Workers Compensation insurance provider for Portland Public Schools. A site hazard survey at Reiche School was conducted by a Loss Consultant in February of 2016. See Attachment N2 for a detailed Action Plan. Following the issuance of the Action Plan, school administrators, school maintenance, building custodians and teaching staff have combined to resolve the issues.

- VII. How many years of life are left on the roof at Reiche? (Brenerman, Strimling)

It is estimated that the roof has eight to 10 years of useful life remaining and has an eight year warranty. If skylights are put in as recommended in BFOF to provide natural light, City facilities staff recommends replacing the roof at that time.

VIII. Have the reported leaks at Reiche been repaired by the city? (Brenerman)

Yes.

IX. Will construction raise lead and asbestos hazards? How will students who are not relocated be affected? (Hinck, Strimling)

Portland Public Schools have been identifying and evaluating building hazards such as asbestos and lead paint since the late 1990s. Portland Public Schools currently maintains an AHERA Plan (Asbestos Hazard Emergency Response Act) as required by the EPA. This plan documents known asbestos and tracks its condition, with updates yearly. In addition, during the design process, Portland Public Schools will contract with a material testing company to review the building, inspect its construction and take physical samples of anything that could potentially be considered hazardous. This often involves destructive investigations such as cores in existing roofs to find any hidden materials. This is all noted and included in the construction documents. Primarily, all of the demolition will take place over summer break, which allows for time to deal with any unforeseen conditions and minimize impact. With these procedures in place, there should be no disruption to the educational program.

D. Planning & Administration

- I. Where are we with state funding for the four schools in the BFOF? (Strimling)

Longfellow, Reiche, Presumpscot and Lyseth are currently numbers 18, 21, 33, and 43 respectively on the "Final Priority List" (the top 16 were funded, including Hall School). This list is still valid, however, the (MDOE) has said that there is no more room under the state debt ceiling to fund additional projects on the list.

- II. When will a new "Priority List" for state-funded school projects be developed? (Strimling)

The application process for the new "Priority List" has begun. Applications are due by June, 2017. The current list remains valid until the new list is developed.

- III. How long will it be for the next "Priority List" for state-funded school projects to be developed? (Strimling)

According to the MDOE it would take "...approximately two years to complete the process... nine to 12 months to develop and complete their applications... [and] an additional nine to twelve months to complete the application review. Pending the number of applicants and other factors, the timeline could exceed the two-year estimate."

- IV. What is the likelihood of a Portland school being high enough on the new list to receive state funding? (Strimling)

The MDOE makes very clear that current/previous rankings have no bearing on future rankings. That said, Longfellow, the top ranked Portland school in the last round, has moved up from #73 to #55 to #18. On the other hand, Reiche moved two spots last time from #23 to #21 despite many schools in front of it being funded on the previous list. Schools behind Reiche (Like Longfellow) leap-frogged and new schools altogether received new rankings demonstrating greater need.

The state has funded 44 schools in the past three rounds and Portland received funding for one school in each round (East End in 2001/2, Ocean in 2004/5 and Hall in 2010/11). Statistically, that gives us a 1-15 chance of being funded. Over these three rounds, Portland submitted 26 applications (an average of nine per cycle).

- V. If a Portland school were on the new "Final Priority List," what would be the timeline for Portland receiving state funds to rebuild that school? (Strimling)

A top-12 school could be completed within five to eight years from the start of the new application process. East End took five years (2001-2006). Ocean Avenue took seven (2004-2011). Hall is expected to be finished in eight (2010-2018).

- VI. Why did the District not apply for funds from the State School Revolving Renovation Fund in 2016? Will they next year? (Ray)

The District missed the deadline in 2016. They will be applying in 2017.

- VII. Has the planning for the BFOF proposal been as thorough as state-funded projects like Hall School? (Mavodones)

Planning for the four schools in BFOF has been much more extensive than what was done prior to Hall being awarded state funding. As with the state-funded projects, the "21 step process" to finalize a school will occur after the decision to fund is made. An additional vote could be taken at that time.

- VIII. What would be the need and impact of relocating students during renovations? (Mavodones)

At both Lyseth and Presumpscot, there would be no need to relocate students off campus because of the ability to use the modulars as swing space during renovation. At Longfellow, students would use swing space in adjacent Deering High School.

At Reiche, students would have to be relocated during renovation, though there are plans to position the unused modulars from Presumpscot (assuming the Presumpscot renovation occurs before Reiche, as currently proposed) on site at Reiche to avoid the need to move students off site.

- IX. What is the status of the School District's hiring of a CFO? (Mavodones)

Alicia Gardiner has been hired and has begun her work.

- X. How will the phasing of the proposal affect children and their ability to learn? (Hinck)

As discussed in question VIII above, students would not feel a major impact due to the construction process, as efforts have been made to keep learners on (or near in the case of Deering) their home campus. Just as teachers and administrators do now, they will ensure that students receive quality education within the limits of their physical plant during the phasing and renovation process.

- XI. What is the Renovation Non-Equity Model? (Brenerman)

This refers to items deemed necessary but deferred and not addressed in prior years' CIP requests.

XII. Does each school have what it needs to educate students? (Hatzenbuehler)

As highlighted during the school visits, educators and staff at all four of the schools that are a part of the BFOF proposal have made the necessary adjustments to provide a quality education within the limitations of their physical plant.

XIII. What are the challenges and benefits of neighborhood schools? (Trevorrow)

XIV. Which of the seven studies in 22 years have actually reached the council? The Finance Committee? How many stayed with the Board of Education? Can we get copies of each? (Brenerman, Mavodones)

A summary of seven elementary facilities studies over the last 22 years and Council action and outcomes can be seen in Attachment O.

XV. How much has been spent on the studies and analysis on school facilities upgrades over the past 22 years? (Morrione)

According to data available since 2005, \$1.2 million has been invested in elementary school studies.

XVI. What are the barriers (natural or otherwise) for students to walk to school? (Hatzenbuehler)

There are many factors to be considered regarding the safety of students walking to school. Some of those factors are: Distance to school, terrain, traffic-related dangers, availability of sidewalks, bike lanes or paths, known locations of sex offenders, weather conditions, crossing guards, student's health, walking partners, neighborhood type, Kindergarten ½ mile walkout vs Grades 1-5 walkout (see Attachment P for walking parameters), and parent's resources are a few of the barriers to walking to school.

XVII. Can we receive an appendix of commonly-used acronyms? (Costa, Strimling)

See Attachments Q and R for this information.

XVIII. Is there a strategy to work with other impacted school districts in applying for and securing state funding or working via the legislature to receive funds? (Suslovic)

Yes, we are working closely with the delegation and surrounding communities.

XIX. Should we plan for using state money in the future for one of the schools? (Ray)

If it appears state funding is available, there would be no hesitation to use it.

XX. Does funding these schools take us out of the running for state money? (Mavodones)

If we fund locally, future requests could only be for other schools.

E. Learning Standards & Programmatic Issues

- I. Do our schools currently meet learning standards? What are the test results?
(Mavodones)

See Attachment S for the February 2016 District Scorecard.

- II. We need a "top-level" discussion of current curriculum. (Mavodones)

Portland Public Schools elementary schools generally follow the Teacher's College Reader and Writer Workshop model for literacy instruction. This requires a 120 minute block for literacy instruction, space organized to allow student conferencing with their teacher and space to move around to various stations. Mathematics instruction is grounded in EveryDay Math, a well established Math program developed by the University of Chicago Center for Math and Science Education. This program also requires flexible classroom organization.

Struggling students, identified through classroom assessments, receive intervention supports, generally through the Leveled Literacy Intervention (LLI) kits developed by Irene Fountas and Gay Sue Pinnell. These interventions generally happen in small flexible groups outside of the literacy block and may require students to move to intervention spaces outside of the classroom.

21st Century Learning requires spaces where students can work collaboratively with each other, discuss and create. It also requires spaces where students can concentrate and focus as well as engage one-on-one with instructors or peer tutors. Maine's Guiding Principles for Learning (part of the Maine Learning Standards) define the dispositions students should acquire such as Integrative and Informed Thinking and Clear and Effective Communication. These dispositions require students to have opportunities to collaborate, present and engage with multiple media. The physical spaces to most effectively foster these dispositions is part of the BFOF plan.

- III. Will the proposed school renovations meet the curriculum needs if the curriculum changes in the future? (Mavodones)

It is expected that the physical changes proposed in BFOF will meet the current and foreseeable curricular needs of schools. Just as the buildings met the curricular needs in place at the time they were built, it is reasonable to expect that in time, as curriculum changes, there will likely be new physical requirements that will require changes to the physical plant.

- IV. Is there a level of autonomy in the curriculum that ensures building-specific approaches?
(Mavodones)

Portland Public Schools holds all schools responsible for the same student outcomes. The district provides common curriculum materials and supports. Some schools have specific approaches to learning that are grounded in a curricular model (i.e., Presumpscot's Expeditionary Learning). There is professional discretion in how individual teachers organize and instruct their classes.

- V. What programmatic changes have been made based on the current state of the facilities?
(Costa)

As highlighted during the site visits, schools have had to make adjustments in how they organize for learning. Some notable examples are:

- ***Interventions for struggling learners are done in hallways, corridors and vestibules.***
- ***Therapies are often provided in rooms that are adjacent to loud classrooms (music rooms, etc) and scheduled so to minimize those interruptions.***
- ***Because of space constraints, combined music and art rooms do not afford educators the full flexibility of exploring all mediums due to lack of space, inadequate design.***
- ***Gyms/lunchrooms/auditoriums are combined. This severely limits the ability to utilize the rooms for physical activity. Serving lunch means that for two to three hours a day, kids cannot utilize the room for physical education. Inclement weather often means holding phys ed in the classrooms. Further, to minimize the impact to gyms, meals are served in classrooms. This impacts cleanliness as well as the ability to isolate food for allergies, etc.***

See Attachment S1 for a fuller list of educational programming in spaces not designed for education.

- VI. What programmatic changes can occur if we perform the proposed renovations? What additional programmatic functions can we do that we aren't doing now? (Strimling)

In addition to the explanation for the previous question and the flexibility the proposed changes would allow, ADA requirements at Reiche and Longfellow can be met so that the District can educate students regardless of physical ability.

F. Finances

a. General

- I. We need a singular financial breakdown of the cost of the proposal and how much it will affect a taxpayer's bill, as well as the impact to the schools and the entire city budget. (All)

Singular breakdown of the all-in cost:

\$70M borrowed and paid back over 20 years would trigger a 78 cent increase in the tax rate (this is slightly variable based on interest rates). This equals a cumulative 3.1% increase in the tax rate, or \$175 added to the tax bill of an average home in Portland (valued at \$225,000).

If the money were borrowed over four years as proposed in the BFOF, in the order proposed by BFOF, the mil rate increase annually would be approximately 19 cents, 22 cents, 17 cents and 20 cents from FY19-FY22. Based on these estimates, if your house is valued at \$225,000, that household would see an annual increase of \$42, \$51, \$37, and \$44 (\$174 total).

As a side note, according to bond counsel, once a bond package is approved by voters, the city could spread out the borrowing as it saw fit. If a project had to be delayed for budgetary concerns, the borrowing could be delayed. Likewise, if funds became available or interest rates were particularly low, the funds could be borrowed sooner.

Impact on the school budget:

Over the past ten years, the school tax rate has increased an average of 2.1% per year. That equates to an annual increase in the overall tax rate of about 1%. The chart below shows the tax rate increases for the past ten years.

School Tax Rate History

Fiscal Year	Rate	%		Fiscal Year	Rate	%
FY'07	8.45	-		FY'13	9.57	3.7%
FY'08	8.98	6.3%		FY'14	9.86	3.0%
FY'09	9.12	1.6%		FY'15	10.11	2.5%
FY'10	8.89	-2.5%		FY'16	10.12	0.1%
FY'11	8.98	1.0%		FY'17	10.33	2.1%
FY'12	9.23	2.8%		Avg. Incr.		2.1%

In looking at the school budget going forward, projecting any municipal budget five years out limits the confidence of the projection (our City projections rarely go beyond three years). That said, preliminary projections before beginning the annual budget process, show that the school mil rate will increase .51, .63, .61, .53 and .46 over the next five years respectively (without funding BFOF at \$70M or CIP). That amounts to approximately 4.8% annually on the school rate and around 2.4% on the overall city rate.

As a side note, with the passage of State Referendum Question 2, projections show that the city of Portland would receive anywhere from \$2.6M-\$11M in additional funding starting in FY'19. The \$2.6M assumes Portland receives the same percent of state funding currently (1.7%). The \$10M figure assumes the new funding is put through the current EPS formula.

Impact on the entire city budget:

Over the past ten years, the city tax rate (not including the schools) has increased an average of 3.2% per year. That equates to an annual increase in the overall tax rate of about 1.7%. The chart below shows the tax rate increases for the past ten years.

City Tax Rate History

Fiscal Year	Rate	%		Fiscal Year	Rate	%
FY'07	7.86	-		FY'13	9.25	2.2%
FY'08	8.12	3.3%		FY'14	9.55	3.2%
FY'09	8.62	6.2%		FY'15	9.89	3.6%
FY'10	8.85	2.7%		FY'16	10.51	6.3%
FY'11	8.94	1.0%		FY'17	10.78	2.6%
FY'12	9.05	1.2%		Avg. Incr.		3.2%

In looking at the city budget going forward, projecting any municipal budget five years out limits the confidence of the projection (our standard projections rarely go beyond three years). That said, before beginning the annual budget process, preliminary projections show that the city mil rate will increase .39, .45, .38, .58 and .64 over the next five years respectively (without any additional CIP funding). That amounts to approximately 4.2% annually on the city rate and around 2.2% on the overall tax rate.

See attachment S2 for more detail.

- II. How will applying for the School Revolving Renovation Fund in 2017 and subsequent years factor into the cost of the bond proposal? (Ray)

The maximum we can apply for in the School Revolving Renovation Fund is \$1M per facility through a competitive statewide process. Half of what we apply for is a loan, the other half a grant. About every other year the State release \$8-\$10M for funding. So the impact of this fund on the \$70 million proposal, assuming we got funded each cycle, might be a couple of million dollars over the five years.

- III. Why does the base projection show that Portland will lose a third of state funding through the formula? Is that really a good assumption? (Costa)

Local valuation plays a large part in the state funding formula and Portland's valuation is expected to increase by \$545M from 2015-2017, as opposed to the (\$358M) decrease we saw from 2011-2014. This is the reason for the expected drop in state Essential Programs & Services (EPS) funding. See Attachment T for a detailed chart outlining the valuation numbers.

While enrollment numbers also impact state funding, the former School Department CFO projected no change in the number of students.

- IV. What are the tax rates in Portland's surrounding communities? (Mavodones)

City/Town	FY 2017	FY 2016	FY 2015	FY 2014	FY 2013	FY 2012
Cape	17.54	\$16.88	\$16.80	\$16.28	\$15.84	\$15.18
Falmouth	15.09	\$14.63	\$14.10	\$14.12	\$13.43	\$12.92
N. Yarmouth	17.62	\$17.52	\$17.15	\$16.38*	\$13.95	\$13.12
Portland	21.11	\$20.63	\$20.00	\$19.41	\$18.82	\$18.28
Scarborough	15.92	\$15.49	\$15.10	\$14.77	\$13.80	\$13.03
S. Portland	17.70	\$17.40	\$17.10	\$16.70	\$16.50	\$16.10
Westbrook	18.40	\$17.96	\$17.20	\$17.20	\$17.40	\$17.40
Yarmouth	18.20*	\$21.56	\$21.60	\$22.00	\$21.20	\$20.28

*Significant Change in Mil Rate Due to Revaluation

11

- V. What are the current tax rates for the schools portion of the budget in Portland's surrounding communities? (Strimling)

City/Town	FY 2017		City/Town	FY 2017
Cape Elizabeth	\$12.40		Scarborough	\$10.42
Falmouth	\$11.41		S. Portland	\$11.66
N. Yarmouth	\$12.47		Westbrook	\$9.66
Portland	\$10.33		Yarmouth	\$12.21

12

¹¹ Maine Revenue Service, City/Town Assessors

¹² City/Town Assessors, School Departments

- VI. How have other jurisdictions in Maine approached funding their schools (local vs. state funding)? Have other communities bonded for their schools? (Strimling, Morrione, Trevorrow)

From 1994 to 2013, the average local share for state-funded school facilities capital projects in Maine was 28%.¹³ In Portland since 1994, local expenditures for state-funded projects (East End, Ocean Avenue and Hall Schools) was \$3,475,249 (7%). State expenditures for those projects was \$53,169,543 (93%).¹⁴

According to the MDOE, a number of communities have bonded locally for the entire cost of their schools. Westbrook, in October, passed a \$30M bond to replace aging schools. Others include: Scarborough High School, Kennebunk High and Elementary Schools (\$56.5M in 2015), Biddeford High School (\$34M in 2009), Wells High School Addition/Reno (\$26.85M in 2013), Windham currently planning large MS, South Portland High School (\$47.3M in 2010), Kittery MS Reno/Addition (\$7M in 2009), Freeport/Durham/Pownal (\$14.5M in 2013). See Attachment U for more information on Portland and surrounding jurisdictions' local/state school spending.

b. CIP

- I. We need the financial analysis to include the needs of other capital projects for the schools as well as the rest of the city. (Brenerman, Mavodones)

See attachment S2 for a financial breakdown of financial impact, including CIP forecasts. Additional information on physical plant needs is expected to be obtained from the school facilities survey, due mid-November.

¹³ "2016 State of Our Schools" (21st Century School Fund, National Council on School Facilities, Center for Green Schools)

¹⁴ MDOE

- II. We need the list of CIP requests by the School Board (including things that were not funded) over the last 15 years? (Thompson)

The City Council supported school capital local funding requests ranging from \$750,000 to \$3.3 million per year between 2000 and 2012. In addition to the building repairs, a renovation and expansion of the Riverton Community School, buses, equipment and technology investments.

Until The City/PPS started to embrace multi-year budgeting, there was no formal Portland Board of Public Education CIP review process. Though the Portland Public Schools, as required by the Maine Department of Education, has maintained a ten-year capital improvement program project list for decades, the City Council typically only saw one year until 2011 when all departments were required to submit 5 year plans as part of the FY2013 CIP. Since the 2013 CIP, PPS have been fortunate to secure funding for security improvements, the first phase of the expansion of Casco Bay High School, a new District Office, and a new Central Kitchen in addition to routine maintenance and repair projects. PPS secured state funding for the replacement of Hall School in 2014 leaving four mainland elementary schools (Longfellow, Lyseth, Presumpscot and Reiche) yet to be renovated. See Attachment V for detailed information.

c. *Construction*

- I. What is the real world construction and cost impact on a November 2016 vs. a Spring 2017 referendum? (Costa)

If the referendum occurs later than March of 2017, a construction season would be lost and costs would rise. A March 2017 vote would mean a spring 2018 construction start date. If the vote occurs before the end of March 2017, Oak Point states that flexibility in the current work plan, as well as the possibility of performing multiple tasks on parallel tracks, would mean that costs difference from the original proposal would be negligible.

- II. If there is a downturn in the economy, would the cost of the proposal decrease? (Mavodones)

Yes. For example, the budget estimate for Ocean Avenue was \$19.7M. The city received bids 14 months later for \$15.2M, a difference of \$5.5M, or 28%.

- III. How do our construction cost estimates compare to others? What is the historical construction cost data in Maine? How does it compare to national construction cost numbers? (Brenerman)

According to a recent survey by the National Association of Home Builders, nationally, the cost of construction per square foot rose from \$80 in 2011 to \$95 in 2013 to \$103 per square foot in 2015. This works out to an annual rate of inflation of just under 9 percent between 2011 and 2013, and a little over 4 percent between 2013 and 2015.¹⁵

According to the 2015 National Building Cost Manual, Maine's construction costs are 7% below the national average, with Portland tracking the same, also at 7% below the national average.¹⁶

d. *Bonding*

- I. How can we word the referendum to ensure the best flexibility to position us to take advantage of the largest amount of available funds? (Costa)

According to Bond Counsel, there is no way to word the referendum that allows us the clarity of bonding for the four schools, while providing the flexibility to apply for state money if it becomes available. Bond Counsel will assist when the proposal has been finalized.

- II. Is the bonding proposal planned over several years rather than all at once? (Costa)

The borrowing is currently planned over four years for the five year buildout. However, once authorized, we can borrow at whatever pace fits our schedule and budget.

- III. We need clarity around the bond spending limits, bond reference limits and an analysis from Bond Counsel on what and how we bond. (Ray, Mavodones)

According to Bond Counsel, the City's debt limit is \$399,827,500. As of June 30, 2016, the City's total outstanding debt was \$294,405,698. This leaves a point-in-time allowance of additional debt of \$105,411,802.

See attachment V1 for a memo from Jim Saffian, Bond Counsel.

¹⁵ <https://www.nahbclassic.org/generic.aspx?genericContentID=248306>

¹⁶ https://www.craftsman-book.com/media/static/previews/2015_NBC_book_preview.pdf

- IV. What are the major projects that the city has bonded which the debt will be retired over the next 15 years? (Costa)

Past borrowing isn't broken out by project, however the schedule of retiring debt can be seen in Attachment W.

- V. What are the pros and cons of authorizing the bonding of all four schools at once? (Ray, Strimling)

Pros

- *Provides clear guidance for planning and scheduling the work*
- *Allows flexibility to start or shift work based on need*
- *Efficiency of scale could reduce overhead/construction costs*
- *Creates predictability for families with children entering elementary school*
- *Frees up school department to apply to state for funds for other schools*
- *One referendum leverages support of one school with another*
- *One election campaign cheaper than four*

Cons

- *Could lock district into locally funding schools*
- *Locks us into a plan that may need to change midstream*
- *Harder to project costs for a school being rehabbed four years from now*
- *Voters must approve one larger tax increase (although spread out), as opposed to four smaller ones*
- *Voters may feel compelled to vote to rehab all four schools, even if they don't support all four*

IV. Plan

A. Facilities Equity Model

The Task Force had substantive discussion regarding what constitutes facility equity after reviewing the extent of the challenge, as well as volumes of material attached and/or referenced in this report. As noted in the previous section on existing facility conditions, the size and complement of institutional spaces varies significantly from school to school and though there are some common deficiencies, each building has its own set of challenges. Using East End Community School and other layouts presented by WBRC from the Ocean Ave School to schools across the country and Europe, the task force arrived at a list of elements thought to be essential in achieving facility equity.

- Safe, secure, and accessible learning and working environments
(Secure building, Clearly defined single point of entry, Telephones in every occupied space)
- New schools and renovations shall follow LEED standards
- Separate gym and cafeteria
- Performance space/stage
- Small group learning spaces
- Designated student support services/special education spaces
- Multiple designated professional and administrative staff support spaces/offices
- Additional learning spaces (Hands-On Learning Lab, Discovery Room, etc.)
- Data infrastructure that supports enhanced computer networking
- Site features that include: Adequate parking and circulation to include pickup and drop off, Outdoor learning and play space, ADA accessibility
- Library/Media Center
- Computer lab
- Properly accommodated art space
- Appropriately appointed music room
- ADA accessible shower
- Finishing kitchen
- Individual restrooms for students
- Community/Volunteer support space
- New program considerations (Pre-Kindergarten)

Many of the elements listed above may be obvious as to the advantage they present, but a quick review of some elements related to the facility space equity is beneficial to further explain their importance. Facilities designed with adequate separate gym and cafeteria spaces offer vastly different scheduling opportunities and more flexibility for use with school activities and after hours events. Small group learning spaces and specialized learning spaces are critical

for educational program delivery and also lessen the burden on already overscheduled multi-use spaces that are limited in many schools. Music, Art, and Library spaces have very specific space needs to allow for appropriate program delivery. These spaces are many times asked to make due in spaces that were designed for regular classrooms that do not meet layout, lighting, acoustic, finishes, and storage needs. Finally, designing facilities to LEED or other environmental and energy standards has a financial as well as educational return on investment. Studies show students learning in these environments have improved test scores and staff and students working in these facilities have lower absenteeism rates in addition to optimized performance.

B. Funding Source Options

Capital Planning is a critical element of the Portland Public Schools' Comprehensive Educational Planning process. Safe and healthy schools with robust technology provide the foundation for 21st century teaching and learning. Just as Portland Public Schools (PPS) continues to invest in students' futures, they must continue to invest in facilities and related infrastructure. Best practices recommend an annual capital renewal investment of 1 - 2% of the current replacement value or approximately \$2,500,000 to \$5,000,000. Even as the East End Community School was built, this level of investment was not met and required repairs and upgrades continued to be deferred. The backlog of maintenance and repair work remains as daunting as it was over ten years ago when the first Elementary Facilities Task Force (EFTF) report indicated that investments over \$80,000,000 were needed to bring the elementary schools up to current standards, but we now have a diversified funding strategy that has the opportunity to bring all of the elementary schools up to 21st century standards.

The Elementary School Capital Needs Task Force has reviewed previous reports, updated condition assessments, and has developed a financial strategy that should achieve the desired result of the first EFTF with a significantly reduced impact on the local taxpayer. The East End Community School, along with the Ocean Avenue Elementary School currently under construction, are predominantly state funded facilities that have reduced the original burden significantly. The renovations and expansion of the Riverton Community School approved by the taxpayers in 2003, combined with previous roof, mechanical and electrical upgrades, have extended the useful life of the facility. The result is three schools capable of supporting 21st century education and approximately 1,200 students.

There is still the challenge of 5 mainland elementary schools built between 1952 and 1972 that do not meet 21st century standards and are doing their best to accommodate programs and new technology standards for over 1,800 students. It has been estimated that it would take approximately \$21.5 million in new construction, renovations, and other upgrades to achieve facility space equity at the five remaining mainland elementary schools as outlined in the facilities model in the last section. It is important to remember that these figures are for addressing space equity needs only and do not include improvements such as roofs, floors, and

**Elementary Repairs, Renovations, System Upgrades and Replacements,
6/28/2016**

Presumpscot- 2009-2016 (\$550,000)

Boiler replacement
Replaced windows and doors
Abated all asbestos
Interior lighting upgraded w/ controls
Security system upgrades:
 Installed Access Control (keypads and main entrance buzzer)
 Installed all new classroom security locks and keying system
Metal siding at roof edge replaced
Exterior lighting upgrades
New deck and ramps at modular classrooms
Bathroom fixtures upgrades
Kitchen prep area upgraded
Ongoing flooring replacement

Longfellow-2009-2016 (\$200,000)

Interior lighting upgrades
Security system upgrades:
 Installed access control (keypads and main entrance buzzer)
 All new classroom security locks and keying system
Replaced gym ceiling
Relocated library for better use
Ongoing abatement removal
Ongoing flooring replacement

Lyseth- 2009-2016 (\$1,100,000)

Replaced roof
Replaced windows
Removed all asbestos
Updated security system:
 Installed access control (keypads and main entrance buzzer)
 All new classroom security locks and keying system
Upgraded many electrical panels
Upgraded IT throughout
Created new main conference room
Relocated teachers room for additional learning space
Upgraded bathroom fixtures
Removed 2 modulars
Repaired Lake Lyseth at playground
Ongoing flooring replacement
Replaced guard rail system around the campus
Replaced heat piping from Moore

Reiche- 2009-2016 (\$1,100,000)

Replaced 2 boilers
Replaced windows and doors
Security system upgrades:
 Updated security system
 Installed access control (keypads and main entrance buzzer)
Renovated locker rooms
Replaced flooring in sunken area of the stage
Installed lift to stage area
Replaced upper concrete deck
Enlarged music room, replaced ceiling and lighting
Vented kilns in art room
Bathroom renovations
Installed student access from stage to gym
Modified existing bathroom for gym use
Removed ramp on Clark Street side
Addition separating students/public

All Campuses- 2009-2016

Exterior lighting upgraded
Video communications system installed for school camera network

Attachment B

School Capital Spending

Fiscal Year	Total Funding	State Funding	Local Funding	Projects over \$1 million
1995	7,330,000		7,330,000	
1996	1,310,000		1,310,000	Middle Schools PH 1 (\$7.3)
1997	36,000		36,000	Middles Schools Ph 2 (\$1.2)
1998	1,767,000		1,767,000	
1999	1,709,000		1,709,000	
2000	2,355,000		2,355,000	
2001	1,453,000		1,453,000	
2002	1,104,000		1,104,000	
2003*	-		-	
2004	4,600,000	(2,272,000)	2,328,000	East End (\$3.55)
2005	7,650,000	(6,900,000)	750,000	East End (\$7.6)
2006	3,308,000		3,308,000	Riverton (\$3.0)
2007	1,486,200		1,486,200	
2008	15,159,000	(14,275,000)	884,000	Ocean Ave (\$14.4)
2009	1,611,000		1,611,000	
2010	2,989,000		2,989,000	Central Kitchen (\$2.98)
2011	3,314,500		3,314,500	Energy Conservation (\$3.3)
2012	3,314,500		3,314,500	Energy Conservation (\$3.3)
2013	2,920,000		2,920,000	Technology (\$2.0)
2014	5,887,000		5,887,000	Central Office (\$3.15)
2015	1,525,000		1,525,000	
2016	1,403,000		1,403,000	
2017	2,564,000		2,564,000	
TOTALS	74,795,200	(23,447,000)	51,348,200	
2018	29,720,000	(28,330,000)	1,390,000	Hall School (\$29.7) **

* There was no CIP in 2003

** Concept budget, not final

Table 4-1 continued

Type of Building ² or Occupancy	Water Closets ¹⁴ (Fixtures per Person)	Urinals ^{5,10} (Fixtures per Person)	Lavatories (Fixtures per Person)	Bathtubs or Showers (Fixtures per Person)	Drinking ^{3,13,17} Fountains (Fixtures per Person)
Public or professional offices ¹⁵	Same as Office or Public Buildings for employee use ¹⁵	Same as Office or Public Buildings for employee use ¹⁵	Same as Office or Public Buildings for employee use ¹⁵		Same as Office or Public Buildings for employee use ¹⁵
Restaurants, pubs, and lounges ^{11,15}	Male Female 1: 1-50 1: 1-50 2: 51-150 2: 51-150 3: 151-300 4: 151-300 Over 300, add 1 fixture for each additional 200 persons.	Male 1: 1-150 Over 150, add 1 fixture for each additional 150 males.	Male Female 1: 1-150 1: 1-150 2: 151-200 2: 151-200 3: 201-400 3: 201-400 Over 400, add 1 fixture for each additional 400 persons.		
Retail or Wholesale Stores	Male Female 1:1-100 1:1-25 2:101-200 2:26-100 3:201-400 4:101-200 6:201-300 8: 301-400 Over 400, add one fixture for each additional 500 males and one for each 150 females	Male 0:0-25 1:26-100 2:101-200 3:201-400 4:401-600 Over 600, add one fixture for each additional 300 males	1 per 2 water closets		0: 1-30 ¹⁷ 1:31-150 One additional drinking fountain for each 150 persons thereafter
Schools – for staff use All schools	Male Female 1: 1-15 1: 1-15 2: 16-35 2: 16-35 3: 36-55 3: 36-55 Over 55, add 1 fixture for each additional 40 persons.	Male 1 per 50	Male Female 1 per 40 1 per 40		
Schools – for student use Nursery	Male Female 1: 1-20 1: 1-20 2: 21-50 2: 21-50 Over 50, add 1 fixture for each additional 50 persons.		Male Female 1: 1-25 1: 1-25 2: 26-50 2: 26-50 Over 50, add 1 fixture for each additional 50 persons.		1 per 150 ¹²
Elementary	Male Female 1 per 30 1 per 25	Male 1 per 75	Male Female 1 per 35 1 per 35		1 per 150 ¹²
Secondary	Male Female 1 per 40 1 per 30	Male 1 per 35	Male Female 1 per 40 1 per 40		1 per 150 ¹²
Others (colleges, universities, adult centers, etc.)	Male Female 1 per 40 1 per 30	Male 1 per 35	Male Female 1 per 40 1 per 40		1 per 150 ¹²
Worship places educational and activities Unit	Male Female 1 per 150 1 per 75	Male 1 per 150	1 per 2 water closets		1 per 150 ¹²
Worship places principal assembly place	Male Female 1 per 150 1 per 75	Male 1 per 150	1 per 2 water closets		1 per 150 ¹²



Multilingual and Multicultural Center

2015-16 School Year					
	Total Enrollment	Language Minority (n)	Percentage	ELL (n)	Percentage
CBHS	380	102	27%	54	14%
DHS	902	403	45%	252	28%
PHS	779	202	26%	158	20%
KMS	526	181	34%	135	26%
LMS	481	126	26%	89	18%
MMS	473	137	29%	81	17%
EECS	397	202	51%	164	41%
Hall	392	90	23%	78	20%
Lyseth	481	84	17%	53	11%
Longfellow	336	24	7%	19	6%
OAES	425	119	28%	95	22%
Presumpscot	262	129	49%	89	34%
Reiche	447	223	50%	181	40%
Riverton	456	221	48%	177	39%
TOTALS	6737	2272	34%	1625	24%

Attachment D

School	PrimaryEnrollm ents	Free	Reduced	Paid	TotalFree AndReduc	PercentFree Reduced
Casco Bay High School	377	143	19	215	162	43%
Cliff Island School	4	0	0	4	0	0%
Deering High School	901	506	52	343	558	62%
East End Community School	390	285	24	81	309	79%
Fred P Hall School	390	167	19	204	186	48%
Harrison Lyseth Elem School	478	163	17	298	180	38%
Howard C Reiche Community School	441	312	15	114	327	74%
King Middle School	523	269	17	237	286	55%
Lincoln Middle School	478	198	35	245	233	49%
Longfellow School-Portland	335	64	8	263	72	21%
Lyman Moore Middle School	476	237	23	216	260	55%
Ocean Avenue School	437	193	15	229	208	48%
Peaks Island School	43	6	2	35	8	19%
Portland High School	779	328	34	417	362	46%
Presumpscot School	262	187	10	65	197	75%
Riverton School	455	311	34	110	345	76%
DistrictTotal	6769	3369	324	3076	3693	55%

Portland Public Schools Demographics 2016-2017

School	Total Student Enrollment		% of Total Student Enrollment		TOTAL ELL Students	% of Total Student Enrollment		TOTAL Students both ELL & Special Ed		% of Total ELL Students both ELL & SPED		Total Free Lunch & Reduced Lunch	
	Enrollment	Special Ed	Enrollment	Special Ed		Enrollment	Special Ed	Enrollment	Special Ed	ELL	ELL & SPED	Free Lunch	Reduced Lunch
Longfellow	314	23	7.3%	15	4.8%	0	0	62	8	70	70	0	
Lyseth	472	66	14.0%	58	12.3%	4	6.9%	166	20	186	186	0	
Presumpscot	244	27	11.1%	83	34.0%	10	12.0%	267	0	267	267	0	
Reiche	433	57	13.2%	170	39.3%	14	8.2%	430	0	430	430	0	

*Free and Reduced Lunch based on data dated 10/31/15
 Other Demographics are based on data in Infinite Campus 8/25/16

Attachment F

School	Bldg SF w/o modulars	2009 NESDEC Capacity	2015-2016		Capacity		Comments
			Low	High	Under	Over	
Elementary					Low	High	
Presumpscot	25,394	142	247	268	105	126	
East End	72,620	499	379	410	120	89	
Riverton	113,565	513	419	442	84	71	77 65 G Classroom Modulars
Ocean Avenue	70,315	441	408	427	33	14	325
Longfellow	42,767	338	336	348	2	10	
Lyseth	50,475	439	471	497	32	58	
Reiche	88,481	371	385	416	14	45	

INTRODUCTION AND EXECUTIVE SUMMARY

May 2009

NESDEC entered into an agreement with the Comprehensive Facilities Use and Maintenance Task Force (FTF) of the Portland School Committee to develop a Report which will serve as the basis for the adoption of a PK-12 Long-Range Facilities Plan. Good long-range planning requires a disciplined mind-set, temporarily casting aside more immediate concerns, in order to think long-range. However, aspects of this Report can be useful in making near-term decisions in three respects: 1) providing a better understanding of the long-term educational program future of each building, thereby suggesting the assignment of educational programs to buildings in a manner that is consistent with the District's long-term plan; 2) assisting budget planning, so that funds can be earmarked for purposes that are consistent with intended long-range use of each facility; and 3) moving in the direction of educational equity for all students.

Members of the NESDEC Team visited all of the Portland schools while in session, and met with persons in the schools. We studied prior documents, including facilities reports, district goals and curriculum and program information. The NESDEC Team also conferred with a number of school and municipal officials, as well as others, resulting in the collection of school, community, and municipal data.

Some Portland findings (see Report for details):

- Six schools are enrolled over-capacity in 2008-2009 (Lyseth, Nathan Clifford, Longfellow, Presumpscot, Deering, and Casco Bay); in addition, Riverton will be full of students in 2009-2010 when the Adult Education Job Skills Program moves from Baxter; and the Ocean Avenue Elementary School is projected to be 100% full when it replaces Nathan Clifford in 2011.
- Three schools are quite close to capacity, yet do have room for small numbers of additional students (Hall, Reiche, East End); in addition, Moore which had room in 2008-2009 will be essentially full in 2009-2010 when the Multilingual & Multicultural Center ("MLO") moves from Baxter to Moore this summer.

- The only schools which could accept many additional students are King, Lincoln and Portland High School (see options below for resolving space inequities).
- The District needs to continue to expedite efforts to meet current school security and communication systems standards. See standards on page 21.
- Despite relatively flat future enrollment, a substantial increase is expected in the number of English Language Learners in the K-12 population. Maintaining smaller class size for ELL students in separate classes, or clustered within regular classes, remains a priority.
- The mission of the MLO and Adult Education in supporting families with English Language Learners, is more supportive of (and intertwined with) the K-12 educational program to a greater extent than we have experienced in other school districts; it will be important to maintain this level of support.
- Buildings are surprisingly well-maintained, given their age. The limited funds available in the past few years have been well invested. The appropriateness/ configuration of some space is problematic for 21st Century education.
- Two schools (Riverton and Presumpscot) have Headstart PK programs on-site. More early childhood classes (Preschool) would improve the readiness of in-coming Kindergartners.
- At the elementary level, continued funding for support staff, technology training and equipment such as Smart Boards, wireless networks, projectors and laptops would assist classroom instruction.
- As elementary facilities are built or renovated, a number of improvements are needed to create equity: more small group instructional spaces; teacher workrooms in every school; Science rooms (like Riverton, East End and Reiche); separate cafeteria and gymnasium (needed at Lyseth, Hall, Longfellow, Presumpscot); stage (none at Lyseth, Hall and Presumpscot); and, at Reiche, dividers for multiple staff who are sharing space and permanent walls for classrooms.
- Additional elementary improvements are needed in Special Needs program spaces (FLS at Reiche, dedicated OT/PT room at Longfellow); conference

room (Longfellow); Nurse's stations (Hall, Reiche, Longfellow, Lyseth), building communications and security equipment; ADA compliance (Reiche and Longfellow); kitchen space/equipment (depending on Food Services Program); storage (many more materials needed for today's education); and parking (East End, Reiche, Longfellow, Presumpscot, Lyseth)...because there are many shared staff, it is not cost-effective to have employees spending time looking for parking as they travel from school to school.

- Portland middle school buildings have sufficient space and adequate technology equipment to support instructional program goals.
- There is a need to upgrade Science facilities and equipment at each of the three Portland high schools.
- There is a need to equip all three Portland high schools with an upgraded capacity to meet 21st Century technology instructional needs. This improvement will complement the strong technology program which has been instituted at each of the three middle schools.
- Because Deering High School is overcrowded and parts of its interior facility, furnishings and instructional equipment are in need of an upgrade, the full-implementation of the school's educational program goals is made more challenging.
- Casco Bay High School has had significant success in implementing an expeditionary instructional program. Facilities limitations at the Portland Arts and Technology High School (PATHS) building have made the full-implementation of CBHS instructional program goals more challenging. Because the number of classrooms, office spaces and storage areas is inadequate, and classroom sizes at the school are comparatively small (in most cases fewer than 600 square feet), this restricts any major CBHS enrollment expansion.
- Due to the limited field space near Lincoln Middle School, King Middle School and Portland High School, the full-implementation of the Physical Education and Athletic programs at those schools is affected.

- The PK-12 enrollment decline appears to be near its end. The PK-8 enrollments are forecast to be flat for the next decade (4,580 at present v. 4,549 in 2018-2019); if a Preschool program were added, the enrollments would be a bit higher. The high school enrollment in Grades 9-12 currently is 2,321 students v. 2,109 anticipated in 2018-2019, a decrease of 212 pupils. An improvement in the dropout rate could wipe out the anticipated Grade 9-12 enrollment decline.
- NESDEC received excellent cooperation from the District in obtaining information. Data from the Maine State Planning Office, Maine Department of Education, U. S. Census Bureau, City of Portland, and other sources are noted where they appear in the report.
- The NESDEC Team found that it is advantageous to make choices in a sequence which leads to the most educationally sound, equitable, and cost-effective use of facilities. In the long run, such decisions should benefit both students and taxpayers.

Projections should be updated annually in order to identify any changes in enrollment and/or demographic patterns which might occur. The Maine State Planning Office forecasts that Portland will grow slightly in population to 2015. How many of the new families will have children of school age is a complex issue addressed in the demographic section of the Report.

The Portland Schools are generally well-maintained on a daily basis; however, some school buildings require upgrades, and need to be made handicapped-accessible. Some school programs or services have moved into regular classrooms, storage areas, alcoves and wherever else space could be carved out.

The NESDEC Team has developed several near-term and long-term options for resolving the space, upgrade, and capital improvement problems, each of which assumes some rehabilitation, construction and maintenance of school facilities. Within each option, the NESDEC Team has included a description of the option, as well as some advantages and disadvantages. All of the options are designed to serve as catalysts for further analysis and discussion. **This document should be considered not as an end-product but, rather, as a beginning point for public discussion and planning, followed by decision-making by**

school administrators, School Committee, and City officials. In developing a Long-Range Plan, Portland can “mix-and-match” among the options.

The NESDEC Team found the school staff to be cooperative and forthright in our school visits. We suggest that similar tours be organized for members of city boards (and others), so that they may observe first hand what we have seen and have attempted to describe in this Report.

Good teaching is taking place in Portland classrooms. Staff cheerfully “find” space for new students and programs, and enthusiastically focus on students’ education. The District is engaged in thoughtful planning and prudent use of available resources. The School Committee and Administration deserve to be commended.

“Equity” and “Inequity”

The Facilities Task Force asked NESDEC to be attentive to situations of inequity in school facilities...that is, does a student in School X have a less-equitable experience than a student in School Y? **We find that “inequity” can be the result of two somewhat different issues: “configuration inequity” or “over-crowding inequity” ...or both simultaneously.**

In the configuration of a building for a 21st Century school program, for example, does the school have spaces built for small group instruction and offices as in East End, or does it not as in Nathan Clifford? Or is inequity added to or created by the over-crowding of a school as in Lyseth? Reiche, for example, was built as an open-space school; although divider walls have been added, they cannot extend to the ceiling thereby creating noise issues between classrooms.

As elementary facilities are built or renovated, some improvements are needed to create equity: more small group instructional spaces; teacher workrooms in every school; Science rooms (at Riverton, East End and Reiche); separate cafeteria and gymnasium (needed at Lyseth, Hall, Longfellow, Presumpscot); stage (none at Lyseth, Hall and Presumpscot); and, at Reiche, dividers for the multiple staff who are sharing space and permanent walls for the student classrooms.

I. EDUCATIONAL PROGRAM AND SCHOOL CAPACITIES

Graphic 1 SCHOOL CAPACITIES: K-5

School	2008-09 Students	2008-09 POC	2009-10 POC	2011-12 Students	2011-19 POC	2018-19 Students
Clifford/Ocean	284 NC	254 NC	-	441 OA	440 OA	441 OA
East End	424	499	-	?	-	?
Hall	448	480	-	?	-	?
Longfellow	371	338	-	?	-	?
Lyseth	529	439	-	?	-	?
Presumpscot	254+17 PK	127+16 PK	-	?	-	?
Reiche	317	371	-	?	-	?
Riverton *	427+19 PK	498+15PK	412+15PK	?	-	?
Grade K-5	3022	3006	2920	2993	3106	2997**
Total	+ 36PK	+ 30PK	+30PK	+ PK	+30PK	+PK
Cliff Island	6	12	-	6	-	6
Peaks Island	48	85	-	48	-	48

* With the demolition of Baxter in summer 2009, AE Job skills moves to Riverton thereby decreasing the K-5 capacity by 86 students (4 classrooms)

**3051 K-5 students in Table 12 = 2997 + 54 Island students

Graphic 2 SCHOOL CAPACITIES: GRADE 6-12

School	2008-09 Students	2008-09 POC	2009-10 POC	2011-12 Students	2011-19 POC	2018-19 Students
King MS	488	574	-	-	-	-
Lincoln MS	468	565	-	-	-	-
Moore MS	542	705	636	-	-	-
Grade 6-8 Total	1498	1844	1775	1531	-	1498
Deering HS	1158	1059	-	-	-	-
Portland HS	909	1338	-	-	-	-
Casco Bay HS	231	214	-	-	-	-
Grade 9-12 Total	2298	2611	-	2078	-	2109
PATHS **	310 + 310	384 + 384	-	-	-	-

* With the demolition of Baxter in summer 2009, the Multilingual Office (MLO) moves to Moore thereby decreasing the Grade 6-8 capacity by 69 students (3 classrooms)

** PATHS building has 214,000 s.f. with PATHS using 176,918; CBHS using 18,143; Central Office using 14,229; Facilities Maintenance Shop using 2,777; City Emergency Operations Center using 1,933 s.f.

Graphic 3 Snapshot of Buildings under supervision/control of the Portland School Committee (see detail on pages 14-108)

School/ Building	Current Use	08-09 Students	Built/ Additions	Site Acres	SF perm.	Notes
Baxter	Sp.	no children	1955	12	20,770	Multi-Lingual Office (MLO) and Adult Ed. (demolition scheduled 6/09)
Ocean Ave.			2011	12	72,000+	New K-5 school for 389 stud. on site of Baxter School + 52 FLS, ELL
Clifford	K-5	284	1905	1.5	45,664	
Cliff Island	K-5	6	1895	0.1	1,017	
East End*	K-5	424	2006	6.3	72,620	ELL, Sp Ed Behavior (Gr 1-5), Comm. Cntr, Pub Library, Health Clinic
Hall	K-5	448	1956-67	21.3	54,036	ELL, two FLS classrooms, "Many Rivers" multi-age choice program
Longfellow	K-5	371	1952	2.3	42,767	
Lyseth	K-5	529	1960-63	25.1sh	50,475	Three 1988 portables = 6 cr's (Sp Ed & Language, OT/PT)
Peaks Island	K-5	48	1869-47-58	0.8	13,167	
Presumpscot	PK-5	254+17PK	1962	7	25,394	Three 2002 portables = 6 cr's, Headstart (17PK) lease
Reiche	K-5	317	1972	5.3	88,481	ELL, FLS, Community Center/Pool, Public Library Branch, Public Health
Riverton	PK-5	427+19PK	1976-07	33.1	113,715	ELL, 2 FLS, Comm. Cntr/Pool, Pub Lib Bf, Dental Health, Hdstart (19PK)
West	Sp.	49 adults	1962	0.4	28,508	Two 1988 portables = 4 cr's (K-12 Adult Education, Sp Ed, Library)
King*	6-8	488	1950-96	20.7	89,263	ELL, Health Clinic (acreage as recorded by Assessors)
Lincoln	6-8	468	1897-13-62-96	2.3	103,118	3 ELL, FA and Behavior Center (smaller rooms), Public Health Clinic
Moore	6-8	542	1954-59-96	25.1sh	104,424	Behavior Center, Gifted Prog. (site shared with Lyseth)
Deering	9-12	1,158	1922-24-82	18.8	191,438	2 FA, FLS, Alternate Credit Prog., Read 180, Public Health Clinic***
Portland	9-12	909	1867-23-90	2.7	250,580	ELL, Alternative Ed. Prog., 2 Read 180, Asperger Prog., Health Clinic***
PATHS (VocTech)	9-12	620 (p+**)	1976	30.3	214,000	PATHS = 176,918 sf; CBHS = 18,143 sf; Central Office = 14,229 sf; Facil. Maint. Shop = 2,777 sf; City Emergency Ops Center = 1,933 sf ***
Incl. Casco Bay HS*	9-12	231				
Reed	Kitchen		1926-50-81	2.5	33,692	Central Kitchen (elementary, MS, CBHS) also has warehouse space

* East End, King and Casco Bay HS have Expeditionary Learning Programs

** Students at PATHS already have been counted at their home HS; Portland students' day is split between DHS/PHS/CBHS and PATHS

***Deering High(continued): 2 FA (Functional Academics), JMG (Jobs for Maine Graduates)

***Portland High (continued): FA (Functional Academics), JMG (Jobs for Maine Graduates), Baxter Program for the Deaf

***Casco Bay High: ELL Lev.2, Independent Study, Casco Bay Quest, Health Clinic

***PATHS: Health Clinic; Voc Programs incl: Automotives, Horticulture, Building Construction, Graphic Arts, Video Tech., Culinary, Health Sciences

Recent transfers to Cily, etc.: Sacred Heart; Exposition Building; Adams School; Martin's Point (main building, maintenance and garage)

Recent Relocations: portables from Adams, Baxter, Lincoln, Lyseth, Presumpscot, Riverton Recent demolition: Jack Elementary

Planned 2009 Relocations: Multilingual & Multicultural Center (MLO) from Baxter to Moore; Adult Education Job Skills from Baxter to Riverton

Graphic 4 Facilities Programming Report Card – Elementary (see details on pages 14–64 and 108–109)

School	Cliff Island	East End	Hall	Reiche	Nathan Clifford	Longfellow	Lyseth	Peaks Island	Presumpscot	Riverton
Program										
POC vs. Oct 1, 2008 Enrollment**	S	S	S	S	N	N	N	S	N	S
Technology Instruction Capacity	S	N	N	N	N	N	N	N	N	N
Library	na	S	S	S	N	S	S	N	N	S
Music	na	S	S	S	N	N	N	na	na	S
Gym	na	S	N	S	N	N	N	S	N	S
Stage	na	S	na	S	S	N-stor.	na	S	na	S
Art	na	S	N	S	N	S	N	N	N	S
Small Group Instruction	S	S	N	N	N	N	N	N	N	S
Field Space	S	S	S	N	N	N-DHS	S	N	N	S
Science Rooms/Labs	na	S-spel	na	in prog	na	na	na	na	na	S
Support Services										
Nurse's Area	na	S	N*	N	N	N	N	na	N	S
Guidance/ Social Work/ Other Staff	na	S	N	N	N	N	N	na	N-port.	S
Special Education	na	S	N	N	S	S	N-port.	N	N-port.	S
OT/PT	na	S	S	N	S	N	N-port.	na	N	S
Site										
Storage Space	N	S	N	N	N	N	N	N	N	S
Parking	N	N	N	N	N	N	N	N	S	S
Traffic Flow	na	S	N	N	N	N	N	N	S	S
Cafeteria	na	S	na	na	N	na	na	na	na	S
Kitchen	na	S	S	na	N	na	N	N	N	S
Play Space	S	S	S	S	S	N	S	S	S	S
ADA Compliance	N	S	N	N	N	N	N	N	N	S
Communications and Security										
Phone/PA System	N	S	N*	N*	N	N*	N*	N*	N	S
Security (Access)	N	N	N	N*	N	N*	N*	S	N*	S

Classification Code: S = Satisfactory; N = Needs Improvement; N* = Needs Improvement and should be considered a priority

** Planned Operating Capacity (POC) is defined on pages 9–13; see also pages 14–64 and 108–109

The purpose of this graphic is to assist the FTF in developing priorities by summarizing the detail on pages 14–64. Best professional practice was the NESDEC standard (example: National Science Teachers Association–NSTA for Science facilities). See the Riverton or East End detail for further descriptions. For Communications and Security standard see East End on page 21.

Graphic 5 Facilities Programming Report Card - Middle Schools and High Schools (see detail on pages 65-109)

School	King M.S.	Lincoln M.S.	Moore M.S.	Portland H.S.	Deering H.S.	PATHS H.S.	Casco Bay H.S.
Program							
POC vs Oct 1, 2008 Enrollment**	S	S	S	S	N*	S	N*
Technology Instruction Capacity	S	S	S	N	N*	S	N*
Library	S	S	S	S	N	S	N*
Music	S	S	S	S	S	na	N*
Gym	S	S	S	S	S	na	N*
Auditorium or Stage	Stage S	Stage S	Stage S	S	S	na	N
Art	S	S	S	S	S	S	S
Tech. Ed. / FAC	S	S	S	FAC-S	na	T.Ed-S	na
Small Group Instruction	S	S	S	S	N	S	S
Field Space	N	N	S	N	N	na	N*
Science Rooms/Labs	S	S	S	N	N	na	N
Support Services							
Nurse's Area	S	S	S	S	N*	N*	N*
Guidance/ Social Work/ Other Staff	N	S	S	S	S	na	N
Special Education	S	N	S	S	N	S	S
Site							
Storage Space	S	N	S	S	N	N	N
Parking	S	N	S	N	N	N	N
Traffic Flow	N	N	S	N*	N	S	S
Cafeteria	S	S	S	S	N*	na	N
Kitchen	N	N	N	S	S	na	N*
ADA Compliance	S	N	N	N	N*	N	N
Communications and Security							
Phone/PA System	S	N	S	N	N*	N	N*
Security (Access)	N*	N*	N*	N*	N*	N*	N*

Classification Code: S = Satisfactory; N = Needs Improvement; N* = Needs Improvement and should be considered a priority
 ** Planned Operating Capacity (POC) is defined on pages 9-13; see also pages 65-109

The purpose of this graphic is to assist the FTF in developing priorities by summarizing the detail on pages 65-109. Best professional practice was the NESDEC standard (example: National Science Teachers Association - NSTA for Science Facilities). See the Riverton or East End detail for further descriptions. For Communications and Security standard see East End on page 21.

A. EDUCATIONAL PROGRAMMING IN THE 21ST CENTURY

Portland needs to rehabilitate and/or replace school spaces which do not support 21st Century educational programs. Thus, there are strong reasons to address the lack of equity in the District's school facilities. Portland's educational program is built upon the *Maine Learning Results: Parameters for Essential Instruction* (1997, revised 2007), and similar documents from the Maine Department of Education as well as best educational practice, described in the professional publications of the Association for Supervision and Curriculum Development (ASCD) such as *Habits of Mind Across the Curriculum* (2009); *Content Area Conversations* (2008); *Handbook for Enhancing Professional Practice* (2008); *Classroom Instruction that Works* (2001); and *21st Century Skills* (2008). Also *Tough Choices or Tough Times* (National Center on Education and the Economy, 2006); "What will school look like in 2050?" (Educational Facility Planner, Vol. 43, Issue 1, Council of Educational Facility Planners International – CEFPI, 2008); *Sixteen Trends* (Educational Research Service, 2006); *The Elementary School of the Future: A Focus on Community* (Fletcher Thompson, 2002); *The Middle School of the Future: A Focus on Exploration* (Fletcher Thompson, 2002); *The High School of the Future: A Focus on Technology* (Fletcher Thompson, 2001); *Breaking Ranks in the Middle* (National Association of Secondary School Principals, 2006); *Breaking Ranks* and *Breaking Ranks II* (National Association of Secondary School Principals, 2001, 2004); and *Turning Points 2000* (Carnegie Corporation of America, 2000).

At present, the Portland School District is organized as follows: Elementary = K-5; Middle School = Grades 6-8; High School = Grades 9-12. Parents and faculty are familiar with and supportive of these groupings. Despite the many 21st Century improvements in educational programs sought and planned by Portland, all would be consistent with these combinations of grades. The educational research literature supports these grade groupings as an educationally sound set of choices. "Grade Configuration: Who Goes Where?" (Northwest Regional Educational Laboratory, 1997 and the 2009 conference of the same name, sponsored by *The Economist*); "Grade Configuration in K-12 Schools" (Nancy McEntire, Univ. of Illinois 2002, 2005); "Grade Span" (Ron Renchler, Univ. of Oregon, 2007); "School Grade Configuration: What's Best for Young Adolescents?" (New England League of Middle Schools, 2005); and

books referenced above, *Breaking Ranks*, *Breaking Ranks II*, *Breaking Ranks in the Middle*, and *Turning Points 2000*. It should be noted that "middle school" as understood in the national literature is, in truth, a set of effective practices more than a collection of grade groupings. Outside of the northeast, many, if not most, middle schools include Grades 5-8. "Best practice" usually involves having students remain in a building for at least three years in order to minimize the number of transitions from school to school.

B. "THEN-NOW"

The student capacity of a school is directly related to the changing nature of the school's educational program. Four "Then-Now" charts are included to display the educational program factors which have combined to reduce the student capacity of older school buildings constructed 40-50 years ago. Many schools were designed and built when desks were in straight rows; there were few, if any, Special Education services, and no use of computers. Such buildings served well the programs for which they were designed. Little storage space for educational materials was required. Twenty-First Century schools, however, are expected to provide a broader program to a more comprehensive spectrum of students. Thus, a school which once housed 600 students a generation ago, now may be overcrowded at 500 students. The "Then-Now" charts provide detail in describing this phenomenon, in which new educational programs have decreased the student capacity of older school buildings.

GRAPHIC 6 PROGRAM CHANGES = DECREASED BUILDING CAPACITY

ELEMENTARY: THEN (50 years ago) NOW

Classrooms	500-600 sq. ft. Desks in rows, no water	800-900 sq. ft., learning centers, in-class library, sink & drinking fountain in room (prim. Gr. toilets)
Kindergarten	None, or half-day, in standard classroom	Full-day, 1200 + sq. ft. toilets sink & drinking fountain, etc.; some preschool
Technology	None	In classrooms and Comp. Lab
Science	In classroom, if taught at all	Sometimes in Science Room, equipment requires space
Art/Music	In classroom	Separate Art/Music Rooms; 1000-1500 sq. ft., spec. equip.
Library	Depository for books	Books, computers, media major curr. support; Lib. Sci. instruction

See Rothstein, *The Way We Were: The Myths and Realities of America's Student Achievement (2003)*; Tanner and Lackney, *Educational Facilities Planning (2005)*; Castaldi, *Educational Facilities 4th edition (1993)*; Conrad, *Educational Programs and School Capacity (1952 Ohio-State University doctoral dissertation)* ¹

GRAPHIC 7

ELEMENTARY: THEN (50 years ago) NOW

Special Education	Possibly separate classroom, few students in school	Included in regular classes, plus many small instruction rooms; parent conferences required
Handicapped-Accessibility	Little or no accommodations were made	All areas of the school must be handicapped-accessible
Transportation	Some bussed, but most children walked or rode bicycles to school	Most children ride buses or are driven to school
Security	Buildings unlocked; not a major concern	Schools are secured; outside phones for parent and emergency calls
Storage	Little needed	Schools use many educational materials; space required

GRAPHIC 8

JUNIOR HIGH: THEN (50 years ago) MIDDLE SCHOOL: NOW

Jr. High Departments, Students move <u>throughout building</u>	MS Teams, Students <u>remain in home base wing</u> for most classes
500-600 sq. ft. classrooms	800-900 sq. ft. student projects, <u>In-class computers/library</u>
Science Labs in one area	Lab in each team area
SPED in separate room, few students	Included in regular classes, small instruction rooms, parent conferences required
Library a depository for books	Books plus computers and other media; major curric. support; Lib. Sci. instruction

GRAPHIC 9

HIGH SCHOOLS: THEN (50 years ago) NOW

Technology	None	<u>In classrooms</u> and Comp. Lab
Labs	Ind. Arts; Home Ec. Demonstration in Sciences	Tech Ed; Fam/Consumer Sci. Active projects in Sciences
Special Educ.	Possibly separate classroom, few students in school	Included in regular classes, plus many small instruction rooms
Handicapped-Accessibility	Little or no accommodations were made	All areas of the school must be handicapped-accessible
Library	Depository for books	Books, computers, media Major curr. support; Lib. Sci. instruction
Security	Buildings unlocked; not a major concern	Schools are secured; outside phones for parent and emergency calls
Storage	Little needed	Schools use many educational materials; space required

Portland Board of Public Education

**RESOLUTION AUTHORIZING A TASK FORCE TO SUPPORT EVALUATION OF
ELEMENTARY SCHOOL CAPACITY ISSUES IN PORTLAND PUBLIC SCHOOLS**

WHEREAS, the Portland Public Schools were successful in securing funding from the State of Maine for the construction of a state-of-the-art facility at the East End Community School in 2004;

WHEREAS, the Portland Public Schools undertook significant capital improvements at the Riverton Elementary School in 2007 using local funding;

WHEREAS, the Portland Public Schools were successful in securing funding from the State of Maine for the construction of a state-of-the-art facility at the Ocean Avenue Elementary School in 2009;

WHEREAS, the Portland School Committee accepted in 2009 the report of the Comprehensive Facilities Use and Maintenance Task Force, prepared by the New England School Development Council (NESDEC), which identified among other things certain deficiencies and inequities in our elementary schools across the district;

WHEREAS, the Portland School Committee accepted in 2010 the Elementary School Capital Needs Task Force report, which recommended elementary improvements needed to achieve equity, including expansion, rebuilding and renovations of existing buildings;

WHEREAS, six elementary schools are operating at or above the “planned operating capacity” recommended by NESDEC in the Comprehensive Facilities Use and Maintenance Task Force report (2009);

WHEREAS, recent projections by NESDEC and Planning Decisions, Inc. suggest increasing student enrollment in Portland through 2019, particularly at the elementary school level;

1 **WHEREAS**, approximately 4 percent of students currently attend a Portland school other than their
2 neighborhood school and the district lacks a transparent process for determining eligibility for out-
3 of-neighborhood placements;

4
5 **WHEREAS**, new housing and an increase in homeless families on the Portland peninsula require
6 an assessment of elementary school capacity by the 2013-2014 school year;

7
8 **WHEREAS**, the Portland School Committee approved an Ocean Avenue Elementary School Site
9 Neighborhood Boundary Ad Hoc Committee recommendation in February 2008, establishing the
10 boundaries for that school;

11
12 **WHEREAS**, the Portland School Committee last conducted a comprehensive review and
13 adjustment of elementary school district boundaries in the early 1990s;

14
15 **WHEREAS**, the Portland Public Schools have entered into a contract with Oak Point Associates to
16 create preliminary site plans, construction schedules, and estimated costs for projects at Hall,
17 Presumpscot, Lyseth, Reiche, and Longfellow elementary schools; and to evaluate opportunities to
18 distribute students throughout the city such that, at the completion of the elementary school capital
19 improvements, each elementary school student has access to an equitable physical environment in
20 which to learn no matter where they live within the city;

21
22 **WHEREAS**, Oak Point Associates is engaging district staff, city and school administrators,
23 parents/guardians, other community members, and students throughout their elementary school
24 improvements project and assessment of school capacity issues using design charrettes, public
25 forums, interviews, and electronic communication; and

26
27 **WHEREAS**, the Superintendent will draw upon an internal group of senior staff, led by the Chief
28 Operations Officer, to review draft findings of Oak Point Associates and otherwise provide
29 information and guidance to the consultant on school capacity issues;

30
31 **NOW THEREFORE BE IT RESOLVED**, that in order to support the work of Oak Point
32 Associates and provide a consistent source of parent, guardian and community member feedback on

1 school capacity and boundary issues throughout the project, the Superintendent shall convene a task
2 force to:

- 3
- 4 1. Review data on enrollment trends, student demographics, student support needs, school
5 locations, current district boundaries, out-of-neighborhood school attendance, walking
6 distances, and bus travel times;
- 7 2. Review completed and planned improvements to the elementary schools, including design
8 options developed by Oak Point Associates;
- 9 3. Review and provide feedback on proposed options developed by Oak Point Associates to
10 address any short-term elementary school enrollment trends that should be addressed in time
11 for the 2013-2014 school year, prior to submission to the Board;
- 12 4. Review and provide feedback on options developed by Oak Point Associates to address
13 adjustments to elementary school boundaries associated with long-term enrollment trends as
14 well as construction phasing of planned improvements; recommendations for phasing any
15 changes; and next steps to further explore potential options.

16

17 **BE IT FURTHER RESOLVED**, the Superintendent shall appoint to the task force no more than
18 20 people representing a broad constituency from each existing mainland elementary school district,
19 including families with students who receive school bus transportation; families of students who are
20 not eligible to receive school bus transportation to their assigned school; families of children who
21 have yet to attend our schools; and residents who do not have students in our schools. Interested
22 individuals shall submit to Portland Public Schools their name, address, phone number, email
23 address, constituency group, and brief description of their interest in the task force. The
24 parent/guardian members shall be selected by the Superintendent in consultation with the principals
25 and parent-teacher organizations of the elementary schools, based on a list of individuals who
26 express interest in response to a notice on the District website, Facebook site, and local media
27 sources. Families and other residents without children in our schools shall be selected based on their
28 descriptions of interest and constituency group. The chair of the task force shall be selected from
29 among its members by a majority vote and all meetings shall be conducted in public in accordance
30 with the policies of the Portland Public Schools. The task force shall report directly to Oak Point
31 Associates and will terminate once Oak Point Associates submits a final report to the Board. Oak

1 Point Associates shall facilitate the discussions of the task force, with assistance from the District's
2 Facilities Coordinator and Chief Operations Officer in accessing District staff and information;
3
4 **BE IT FURTHER RESOLVED**, that Oak Point Associates shall update the Board on the progress
5 and findings of the task force in accordance with the project schedule specified in the Oak Point
6 Associates contract, with additional written updates (if any) as requested by the Board and
7 communicated through the Board's Operations Committee; and
8
9 **BE IT FURTHER RESOLVED**, that this effort shall be legally established and authorized to act
10 when this resolution is approved.

Attachment I



Administration
Emmanuel Caulk, Superintendent
David Galin, Chief Academic Officer
Michael Wilson, Chief Financial Officer
Peter Eglinton, Chief Operations Officer

196 Allen Avenue, Portland, Maine 04103
(207) 874-8100

June 20, 2013

TO: Jaimey Caron, Chair, Portland Board of Public Education

FROM: Emmanuel Caulk, Superintendent
Peter Eglinton, Chief Operations Officer
David Galin, Chief Academic Officer

SUBJECT: Requested Materials on the Plan to Address Ocean Avenue Elementary School Enrollment for the 2013-2014 School Year

On June 25, 2013, the Portland Board of Public Education ("Board") is scheduled to vote on a plan to address Ocean Avenue Elementary School (OAES) enrollment for the 2013-2014 school year. Background on the issue and initial recommendation on June 4 can be found online at <http://www2.portlandschools.org/sites/default/files/scp%202013%2006.04.pdf>. We distributed a revised proposal (see Attachment A) on June 18 for a first read and conducted a workshop to hear Board and public comments. Several requests for information were raised by Board members and not addressed at the meeting. Following are our responses:

1. **What is the projected enrollment and capacity for each school and class, before and after the recommended plan to address the OAES situation?** Attachment B includes school capacity and enrollment projections prepared by Oak Point Associates and Davis Demographics without shifting students among schools, both before and after the Buildings for Our Future projects. Scenario A uses the capture rate for new kindergartners that we experience last fall; Scenario B reflects our historical capture rate. The data show the importance of managing our enrollment in the short term, and moving to more comprehensive redistricting (with possible grade configuration changes) in the future.

Attachment C includes projected class sizes by school after implementing the plan, moving class sections to better even out the number of students in each class, and postponing final kindergarten placements until August 16 (see question #5).

2. **What resources are available to support large classrooms? Would combining grades help in some cases?** Current projections do not include classes outside of the district's class size range. If classes at a school grow above the parameters of the district's range we have identified unallocated funds in the FY2014 budget to provide additional classrooms at schools where facilities allow for expansion. In schools where the facilities do not allow for additional classes the district would look to hiring educational technicians to provide smaller group instruction. With the implementation of

the Common Core State Standards multi-grade classrooms present challenges in designing effective curriculum and instruction. Combining grades in one classroom based on enrollment, rather than an educational purpose, would not be our recommendation.

3. **What is the status of out-of-neighborhood requests?** We are not planning to grant any new requests for out-of-neighborhood placements at OAES, Longfellow, and Lyseth.
4. **What is the impact of moving new students to East End Community School (EECS)?** At the time Oak Point Associates did its analysis of students (all grades) residing in the EECS area, the percentage of students receiving free or reduced lunch would increase from 75% to 76%; and the percentage of students with limited English proficiency would increase from 41% to 43%. The changes would be less under the proposed plan, given that we are not planning to redistrict everyone in the Bayside area.
5. **Would the plan affect the Title 1A schoolwide plan for OAES?** According to Designing Schoolwide Programs, Non Regulatory Guidance (U.S. Department of Education, March 2006), "A school may use its Title I funds in a schoolwide program if at least 40 percent of the students in the school, or residing in the attendance area served by the school, are from low-income families. If the population of a school that operates a schoolwide program drops below the required eligibility threshold in any subsequent year, the school may continue to operate as a schoolwide program." The proposed enrollment management plan is not expected to cause the percentage of students from low-income families to drop below 40%.
6. **What is the contingency plan in case the proposed approach does not shift enough students to address high enrollment at OAES?** Regardless of any enrollment management plan, we will continue to face the uncertainty regarding actual enrollment in the fall. Changes made now could fall short of expectations, with the resulting overcrowding at OAES; or sufficient space could be created at OAES, with other schools facing the pressures of additional students. One option for dealing with more students than anticipated would be to operate with higher class sizes. If no OAES students are shifted to other schools, we project that one grade could see class sizes as high as 27, which is not unprecedented. Several other elementary schools have isolated cases where class sizes reach 25 to 27 (see materials for question #1).

Another option would be to cap enrollment of kindergartners for all three areas (bordering Hall, EECS, and Presumpscot) proposed by Oak Point Associates and the School Capacity Task Force (see June 4 packet), and postpone final kindergarten placements until August 16. This scenario is what we used in preparing the projected class sizes by school in Attachment B. Should the Board want to institute this contingency plan, the following amendment could be offered: Cap OAES enrollment from the areas identified by Oak Point Associates for recommended moves to Hall Elementary School and Presumpscot Elementary School to families of children who

have attended through this school year (2012-2013). Kindergarten children of families in this area who register after the Board's vote would attend Hall Elementary School and Presumpscot Elementary School, as recommended by Oak Point Associates and the School Capacity Task Force. Such a shift could also require more resources for the receiving schools based on students' needs.

7. **What would be the wording of a motion to implement the June 4 recommendation, in case an amendment is offered?** The motion, modified to allow siblings to stay together, could read as follows: Consideration and action to reaffirm the elementary school boundaries that were approved in February 2008 as part of an Ocean Avenue Elementary School Site Neighborhood Boundary Ad Hoc Committee recommendation and to pursue the following measures to manage enrollment at Ocean Avenue Elementary School in the 2013-2014 school year:
- a. Send new kindergarten children who live between Preble Street and Franklin Street, bounded by Marginal Way and Commercial Street, to East End Community School. Provide transportation for these students.
 - b. Send new kindergarten children who live between Douglass Street and Bradley Street and between Brighton Avenue, bounded by Brighton Avenue and the Fore River, to Hall. Provide transportation for these students.
 - c. Allow parents of new kindergartners with older siblings to send all of their children to the newly assigned location or to remain at Ocean Avenue Elementary School.
 - d. Provide more resources for receiving schools based on students' needs.
8. **Could the OAES survey and results be distributed to Board members?** See Attachment D for these materials, which were also sent via email to Board members.
9. **What is the status of planning for longer term enrollment trends?** As shown in the Oak Point Associates materials in Attachment B, the "Buildings for Our Future" elementary school improvement initiative is critical to our ability to address capacity pressures in the coming years. Redistricting will also be important – the data in Attachment B show district capacity with the planned expansions but do not reflect the redistricting, which would rebalance the student population across the schools to be below planned capacity. Achieving 90% capacity overall would help the district adjust to the inevitable waves of higher enrollment while minimizing the need for frequent redistricting.

In the meantime, we have recommended to the City Council the approval of \$870,000 in Capital Improvement Program (CIP) funding for the construction, equipment, furniture, and design fee to complete expansion plans at Ocean Avenue to address projected enrollment trends and provide the flexibility for swing space when projects occur at other elementary schools. This option was rejected last year given the lack of information on district-wide capacity and on the potential of redistricting to address over-enrollment. The work of Oak Point Associates since November 2012 suggests that our elementary

schools already exceed 90%, with limited options for redistricting students to neighboring elementary schools.

To create additional flexibility, we also recommend evaluating the opportunities for different grade configurations across the elementary, middle, and high school levels. This approach could take advantage current capacity at the middle and high schools, but requires additional analysis and community input.

ATTACHMENT A

June 18, 2013

TO: Jaimey Caron, Chair, Portland Board of Public Education

FROM: Emmanuel Caulk, Superintendent
Peter Eglinton, Chief Operations Officer
David Galin, Chief Academic Officer

SUBJECT: Proposed language for Board action on Plan to Address Ocean Avenue Elementary School Enrollment for the 2013-2014 School Year

At a workshop on June 4, 2013, the Portland Board of Public Education ("Board") discussed and heard public comments on a proposed approach for addressing potentially high student enrollment at Ocean Avenue Elementary School (OAES) for the 2013-2014 school year. The proposal drew upon recommendations by Oak Point Associates and a School Capacity Task Force composed of community members from across the district. The proposal did not involve a formal redistricting of school boundaries.

District staff have considered revisions to the plan proposed on June 4, based on comments from Board members and the public at the workshop. We also supported OAES in a survey of the school community, and the Multilingual and Multicultural Center is continuing to reach out to non-English-speaking families. Both the Board and the public expressed a strong value in keeping siblings together.

Our revised recommendation is for the Board to vote on the following item:

Consideration and action to reaffirm the elementary school boundaries that were approved in February 2008 as part of an Ocean Avenue Elementary School Site Neighborhood Boundary Ad Hoc Committee recommendation and to pursue the following measures to manage enrollment at Ocean Avenue Elementary School in the 2013-2014 school year:

- 1. Cap OAES enrollment from the area between Preble Street and Franklin Street and between Marginal Way and Commercial Street to families of children who have attended through this school year (2012-2013). Children of families in this area who register after the Board's vote would attend East End Community School.***
- 2. Provide more resources for East End Community School based on students' needs.***

No approach is ideal – some disruption is unavoidable. This revised plan keeps kindergartners together with siblings already at OAES, and begins the transition of the Bayside neighborhood back to East End Community School as envisioned in the Oak Point Associates

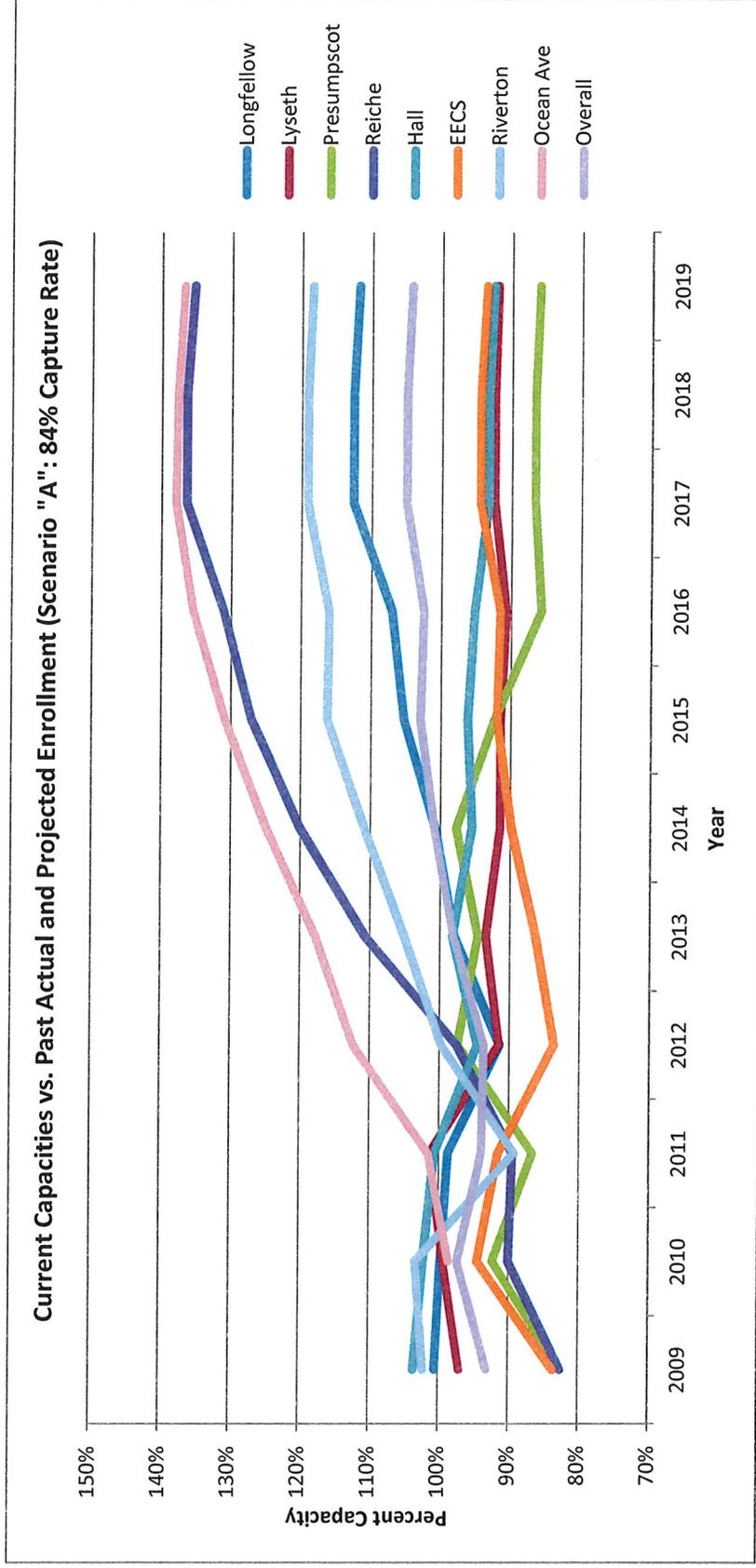
recommendation. The move of families in the Libbytown area between Douglass and Bradley would be postponed until the timing for a new Hall Elementary School is clearer and a more comprehensive revision of neighborhood boundaries is implemented.

Several of our elementary schools are projected to have high enrollment this fall; the current focus on OAES is a result of their physical classroom limitations. Even with no change to address enrollment at OAES, the larger sizes of some classes are similar to those seen at other schools. Moving forward with the district's "Buildings for Our Future" elementary school improvement initiative would help address such capacity pressures in the coming years.

ATTACHMENT B

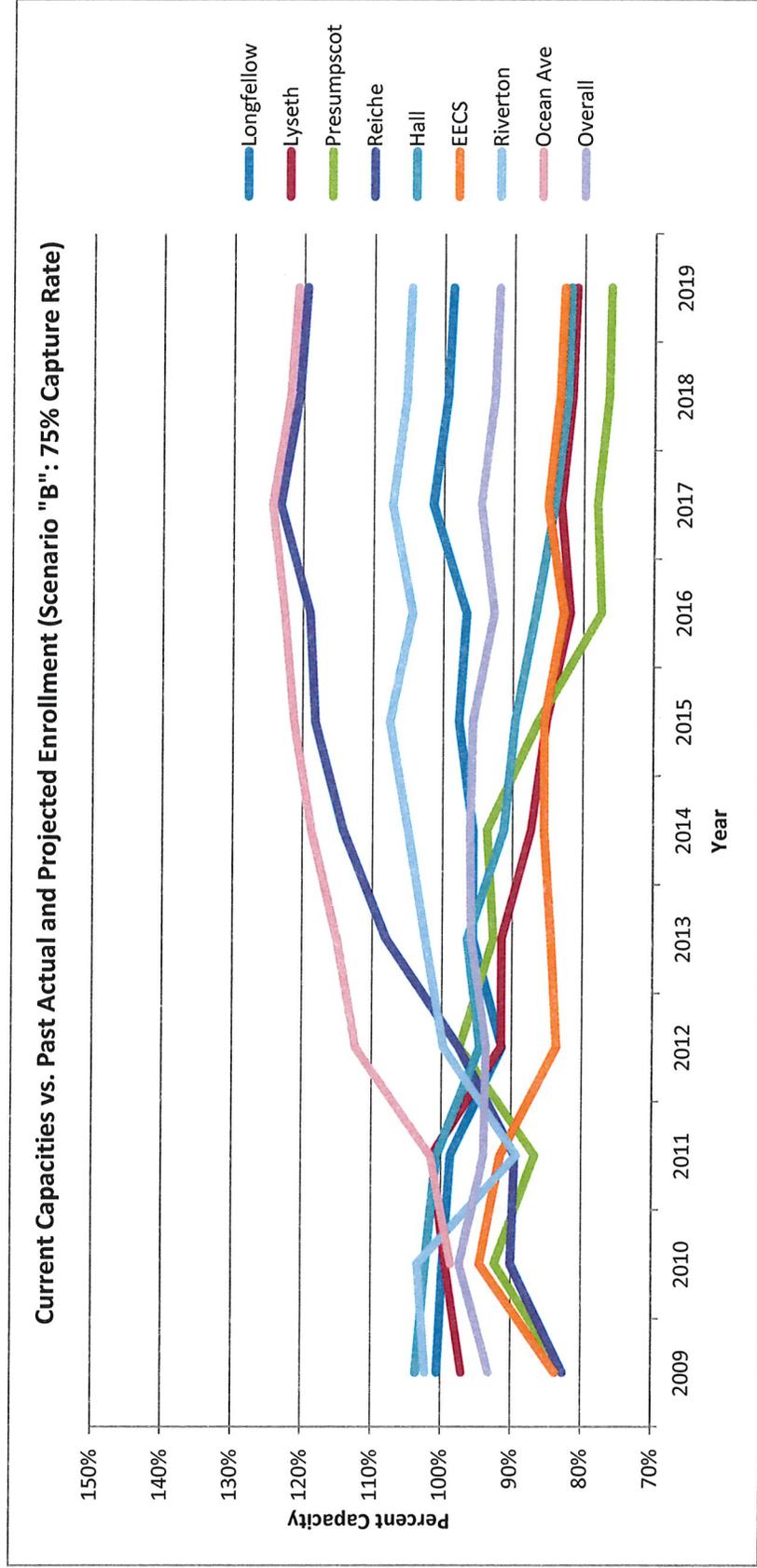
CURRENT CAPACITIES VS. PAST ACTUAL AND PROJECTED ENROLLMENT (SCENARIO "A")

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Longfellow	101%	100%	99%	91%	98%	101%	105%	107%	113%	113%	112%
Lyseth	97%	99%	101%	92%	94%	92%	92%	91%	93%	93%	92%
Presumpscot	83%	92%	87%	97%	95%	98%	92%	86%	87%	87%	86%
Reiche	83%	90%	90%	98%	111%	120%	127%	131%	136%	136%	135%
Hall	104%	102%	101%	95%	98%	96%	96%	95%	93%	93%	93%
EECS	84%	95%	92%	84%	86%	90%	92%	92%	95%	95%	94%
Riverton	102%	103%	89%	100%	105%	111%	116%	116%	119%	119%	118%
Ocean Ave		99%	102%	112%	118%	125%	131%	135%	138%	138%	137%
Overall	93%	97%	94%	94%	98%	101%	103%	103%	105%	105%	104%



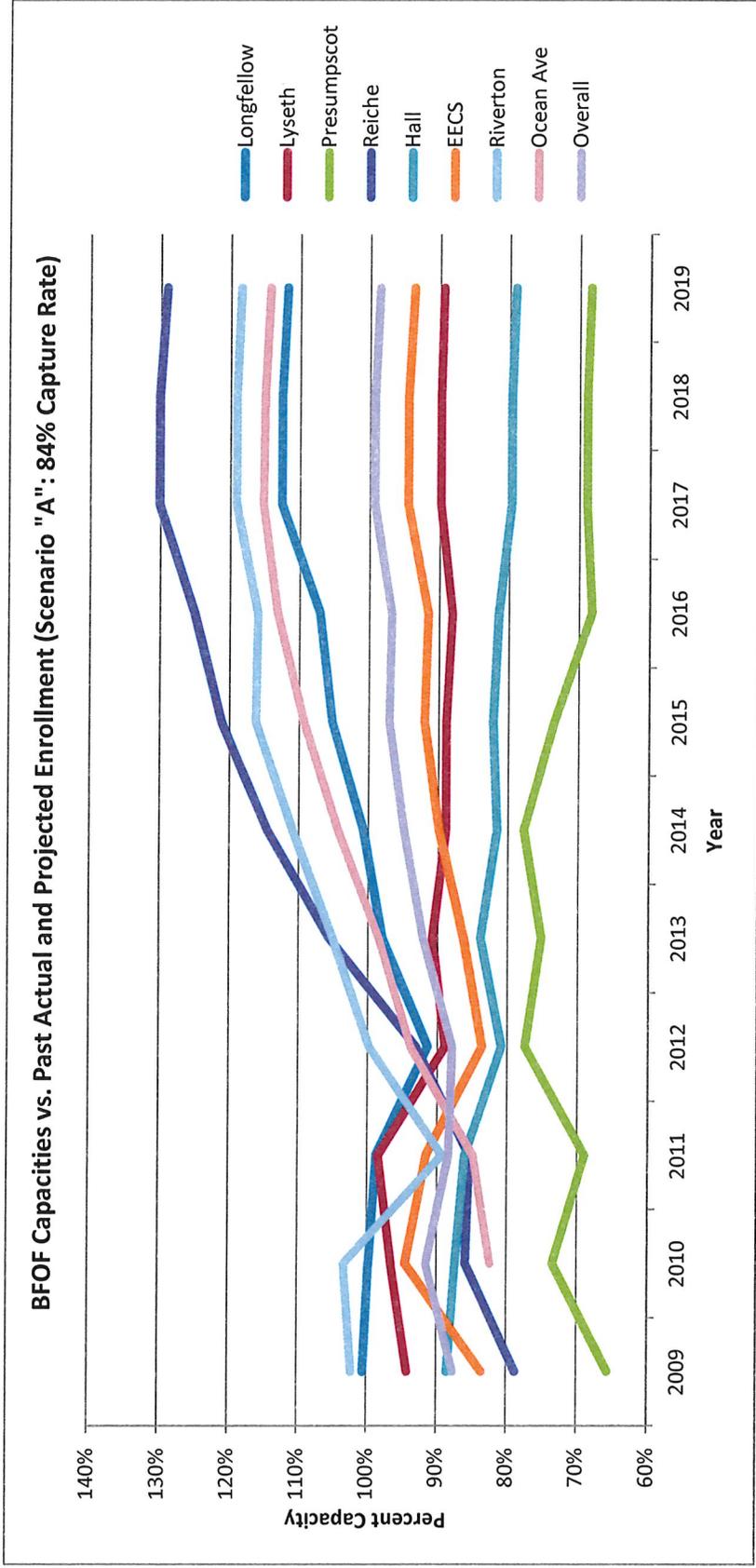
CURRENT CAPACITIES VS. PAST ACTUAL AND PROJECTED ENROLLMENT (SCENARIO "B")

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Longfellow	101%	100%	99%	91%	96%	96%	98%	97%	102%	99%	99%
Lyseth	97%	99%	101%	92%	92%	87%	85%	82%	83%	82%	81%
Presumpscot	83%	92%	87%	97%	93%	94%	86%	77%	78%	77%	76%
Reiche	83%	90%	90%	98%	108%	114%	118%	119%	123%	121%	120%
Hall	104%	102%	101%	95%	96%	91%	90%	87%	84%	82%	82%
EECS	84%	95%	92%	84%	84%	86%	86%	83%	85%	83%	83%
Riverton	102%	103%	89%	100%	102%	105%	108%	104%	107%	105%	105%
Ocean Ave		99%	102%	112%	115%	119%	121%	123%	124%	122%	121%
Overall	93%	97%	94%	94%	96%	96%	96%	93%	95%	93%	92%



BFOF CAPACITIES VS. PAST ACTUAL AND PROJECTED ENROLLMENT (SCENARIO "A")

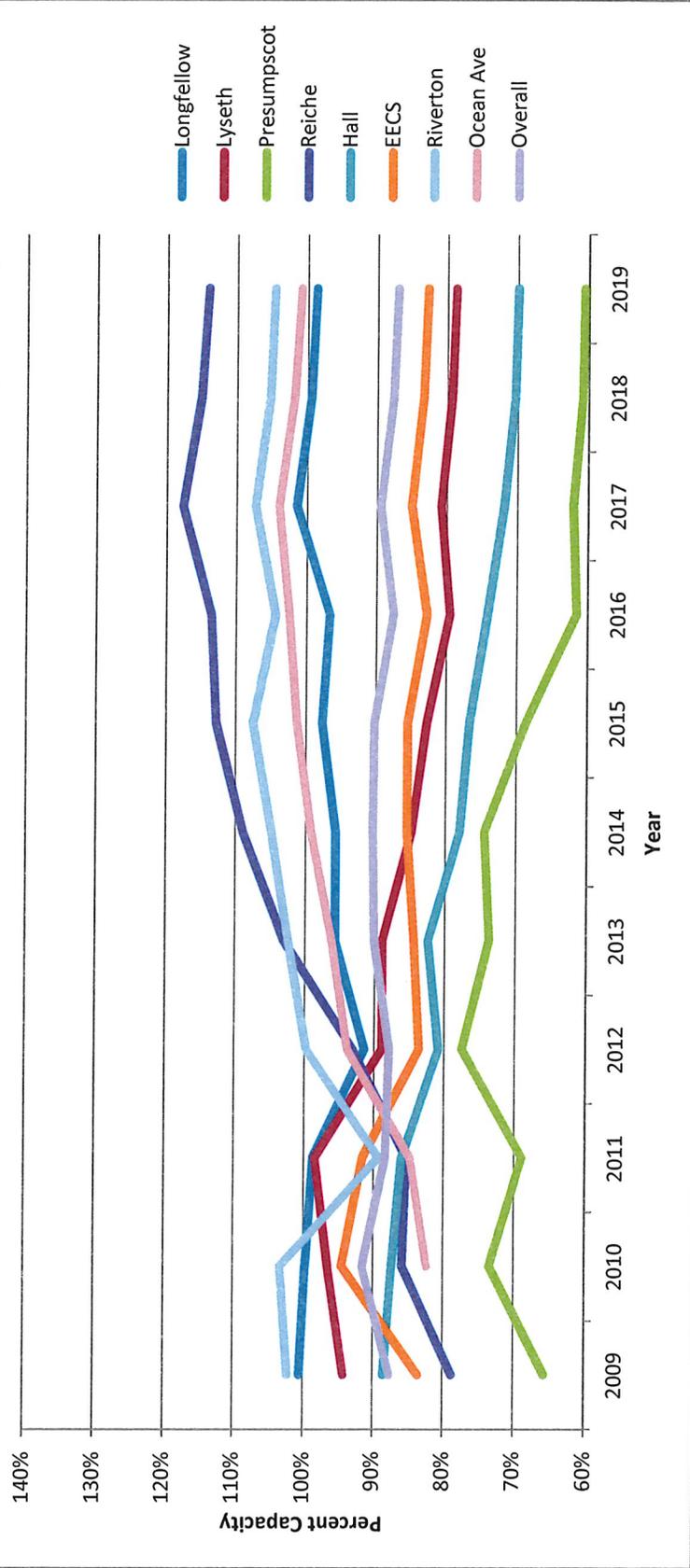
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Longfellow	101%	100%	99%	91%	98%	101%	105%	107%	113%	113%	112%
Lyseth	94%	97%	98%	89%	91%	89%	89%	88%	90%	90%	89%
Presumpscot	66%	73%	69%	78%	75%	78%	73%	68%	69%	69%	68%
Reiche	79%	86%	85%	93%	106%	115%	121%	125%	130%	130%	129%
Hall	89%	87%	86%	81%	84%	82%	82%	81%	80%	80%	79%
EECS	84%	95%	92%	84%	86%	90%	92%	92%	95%	95%	94%
Riverton	102%	103%	89%	100%	105%	111%	116%	116%	119%	119%	118%
Ocean Ave		82%	85%	94%	98%	104%	109%	113%	115%	115%	114%
Overall	88%	92%	88%	88%	92%	95%	97%	97%	99%	99%	99%



BFOF CAPACITIES VS. PAST ACTUAL AND PROJECTED ENROLLMENT (SCENARIO "B")

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Longfellow	101%	100%	99%	91%	96%	96%	98%	97%	102%	99%	99%
Lyseth	94%	97%	98%	89%	89%	85%	83%	80%	81%	79%	79%
Presumpscot	66%	73%	69%	78%	74%	74%	69%	62%	62%	61%	61%
Reiche	79%	86%	85%	93%	103%	109%	113%	114%	118%	115%	114%
Hall	89%	87%	86%	81%	82%	78%	77%	74%	72%	70%	70%
EECS	84%	95%	92%	84%	84%	86%	86%	83%	85%	83%	83%
Riverton	102%	103%	89%	100%	102%	105%	108%	104%	107%	105%	105%
Ocean Ave		82%	85%	94%	96%	99%	101%	102%	104%	102%	101%
Overall	88%	92%	88%	88%	90%	90%	90%	88%	90%	88%	87%

BFOF Capacities vs. Past Actual and Projected Enrollment (Scenario "B": 75% Capture Rate)



ATTACHMENT C

Portland Public Schools
PROJECTED Enrollments 2013-2014 (as of June 12, 2013)

Cliff Island School

Teacher	PreK	K	1	2	3	4	5	Totals
Teacher 1		1	1	1	0	0	1	Staff = 1
Totals	0	1	1	1	0	0	1	4

East End Community School

Teacher	PreK	K	1	2	3	4	5	Totals
Teacher 1	18	21	19	20	19	23	16	Staff = 21
Teacher 2		21	19	23	19	24	16	
Teacher 3		22	19	23	20	24	16	Tchr:Stud = 1:19.9
Teacher 4			20		19		15	
West								
Totals	18	64	77	66	77	71	63	436

Hall Elementary School

Teacher	PreK	K	1	2	3	4	5	Totals
Teacher 1		19	17	23	19	19	25	
Teacher 2		19	17	23	19	19	25	
Teacher 3		19	17	23	19	18		Staff = 21
Teacher 4					3	5	10	
Teacher 5			7	9	8	5	10	Tchr:Stud = 1:19.8
Teacher 6					2	8	9	
FLS		4	4	3	4	4	2	
Homeschool								
West								
attend ood								
Totals	0	61	62	81	74	78	81	437

Longfellow Elementary School

Teacher	PreK	K	1	2	3	4	5	Totals
Teacher 1	18	20	12	10	22	20	24	Staff = 17
Teacher 2		22	12	10	22	20	24	
Teacher 3		21	12	10	22	21	24	Tchr:Stud = 1:22
Teacher 4			12	11				
Teacher 5			12	11				
Teacher 6								
West								
attend ood								
Home schooled								
Totals	18	63	60	52	66	61	72	392

Lyseth Elementary School

Teacher	PreK	K	1	2	3	4	5	Totals
Teacher 1	18	19	18	16	18	21	20	Staff = 24
Teacher 2		19	19	16	19	21	20	
Teacher 3		20	19	16	19	22	20	Tchr:Stud = 1:19
Teacher 4		20	19	16	19	22	21	
Intensive Support		2	2	3	3	3	3	
attend ood								
West								
Home School								
Totals	18	80	77	67	78	89	84	493

Ocean Avenue Elementary School

Teacher	PreK	K	1	2	3	4	5	Totals
Teacher 1		18	21	20	21	22	20	Staff = 21
Teacher 2		19	21	21	21	22	20	
Teacher 3		19	22	20	20	23	20	Tchr:Stud = 1:20.4
Teacher 4		19	22	20				
Teacher 5								
BEACH*		5	5					
BEACH*			0	3	0	0	4	
attend ood								
Home School								
Totals	0	80	91	84	65	67	65	448

Peaks Island School

Teacher	PreK	K	1	2	3	4	5	Totals			
Teacher 1		9	+	10	11	+	12	10	+	6	Staff = 3
Teacher 2											Tchr:Stud = 1:19.3
Totals	0	9		10	11		12	10		6	58

Presumpscot Elementary School

Teacher	PreK	K	1	2	3	4	5	Totals		
Teacher 1		21		22	20	20	19	18	Staff = 14	
Teacher 2		21		22	20	20	18	19		
Teacher 3					21	18			Tchr:Stud = 1:19.9	
West attend ood										
Totals	0	42		44	40	61	55	37		279

Reiche Elementary School

Teacher	PreK	K	1	2	3	4	5	Totals		
Teacher 1		21		24	16	25	24	26	Staff = 18	
Teacher 2		21		24	16	25	24	27		
Teacher 3		20		24	16	15	+	9	Tchr:Stud = 1:22.1	
Teacher 4		21		10	+	10				
West attend ood										
Totals	0	83		82	58	65	57	53		398

Riverton Elementary School

Teacher	PreK	K	1	2	3	4	5	Totals			
Teacher 1	18	19		24	20	25	20	20	Staff = 19		
Teacher 2	18	19		25	20	25	21	20			
Teacher 3		19		25	20	26	21	20	Tchr:Stud = 1:21.5		
Teacher 4					20						
FLS		2	+	2	+	2	1	+	5	+	1
Therapeutic		6	+	6	+	1					
West attend OOD											
Totals	36	65		82	83	77	67	61		471	

****West School**

Teacher	PreK	K	1	2	3	4	5	Totals	
Teacher 1									Staff = 3
Totals		0							

Middle School

Grade	King	Lincoln	Moore	**West	Totals
6	195	149	159		503
7	167	156	169		492
8	171	170	173		514
Totals	533	475	501	0	1509

High School

Grade	Casco Bay	Deering	Portland	**West	Totals
9	87	212	173		472
10	79	223	222		524
11	68	251	232		551
12	70	249	243		562
PG gr 8					
Totals	304	935	870	0	2109

Grade	PATHS
8	0
9	
10	
11	
12	
PG	
Totals	0

Total Enrollment*	7034
--------------------------	-------------

**West students are counted in their neighborhood school
 *BEACH students are included in classroom numbers

ATTACHMENT D

Proposed Plan to Address Ocean Avenue Elementary School Enrollment for the 2013-2014 School Year

Portland Public Schools is experiencing increasing enrollment at the elementary school level. While such trends are welcomed, most of our elementary schools are at or above their planned capacity. Enrollment at Ocean Avenue Elementary School (OAES) was projected to be 30 to 50 students over capacity this year, with an incoming kindergarten class much larger than the outgoing 5th grade class. We were able to handle the higher number of students, but it was crowded. Based on the OAES kindergarten enrollment to date and the late-summer increase in kindergarten registration last year, district staff have been looking at options to effectively manage the potential overcrowding for the 2013-2014 school year.

As part of the “Buildings for Our Future” project facilitated by Oak Point Associates (OPA), the Portland Board of Public Education established the School Capacity Task Force (SCTF) to review data on enrollment trends, student demographics, student support needs, school locations, current district boundaries, out-of-neighborhood school attendance, walking distances, and bus travel times. The group also provided feedback on proposed options developed by OPA to address potentially high enrollment at OAES for the 2013-2014 school year.

District and School leadership considered OPA’s recommendations and looked at other options to effectively manage the situation. Other options included do nothing; expand capacity at OAES; redistrict only the Bayside students; relocate discrete special education programming; and dedicate existing OAES art and music spaces to regular instruction.

The Superintendent presented the following recommendation to the Portland Board of Public Education (“Board”) at a workshop on Tuesday, June 5, 2013:

1. Send incoming (new) kindergarten children who live between Preble Street and Franklin Street (Area A on the attached map) to East End Community School (EECS) and provide transportation for these students.
2. Send incoming (new) kindergarten children who live between Douglas Street and Bradley Street (Area B on the attached map), bounded by Brighton Avenue and the Fore River, to Hall School and provide transportation for these students.
3. Allow parents of kindergartners with older siblings to request out of neighborhood (OON) placement to keep their children together.
4. Address staffing resource requirements in schools that receive and can accommodate additional students.

Recognizing the impact on the families of the OAES community, the Board would like their input on other options before making a final decision (tentatively scheduled for June 18, 2013). The attached survey is an important way to provide input. We should also attend the Portland Board of Public Education’s meetings or deliberations on this topic whenever they occur. If you would like more details regarding the above information, please see the June 5, 2013 Board packet on our website (<http://www2.portlandschools.org/school-committee-packets>).



Ocean Avenue Elementary School Staff and Parent Survey

1. Should the school consider converting the music room and/or art room into additional classroom space for the 2013-2014 school year? Art and music programming would be delivered in the classroom and/or other spaces at the school (such as the stage).

- Yes
 No
 Do not know

2. Should the school consider larger class sizes (such as 21-23 for kindergarten and 25-27 for first graders) for the 2013-2014 school year?

- Yes
 No
 Do not know

3. The following question applies **ONLY** to parents or guardians of an incoming kindergartner AND older elementary school child(ren) living in the area between Douglass St. and Bradley St. (between Brighton Ave. and the Fore River): If your kindergartner was assigned to Hall Elementary School, would you consider the option to send the older sibling(s) as well?

- Yes
 No
 Not a parent or guardian of an incoming kindergartner AND older elementary school child(ren) in that area

4. The following question applies **ONLY** to parents or guardians of an incoming kindergartner AND older elementary school child(ren), living in the area between Preble St. and Franklin St. (between Marginal Way and the harbor): If your kindergartner was assigned to East End Community School, would you consider the option to send the older sibling(s) as well?

- Yes
 No
 Not a parent or guardian of an incoming kindergartner AND older elementary school child(ren) in that area

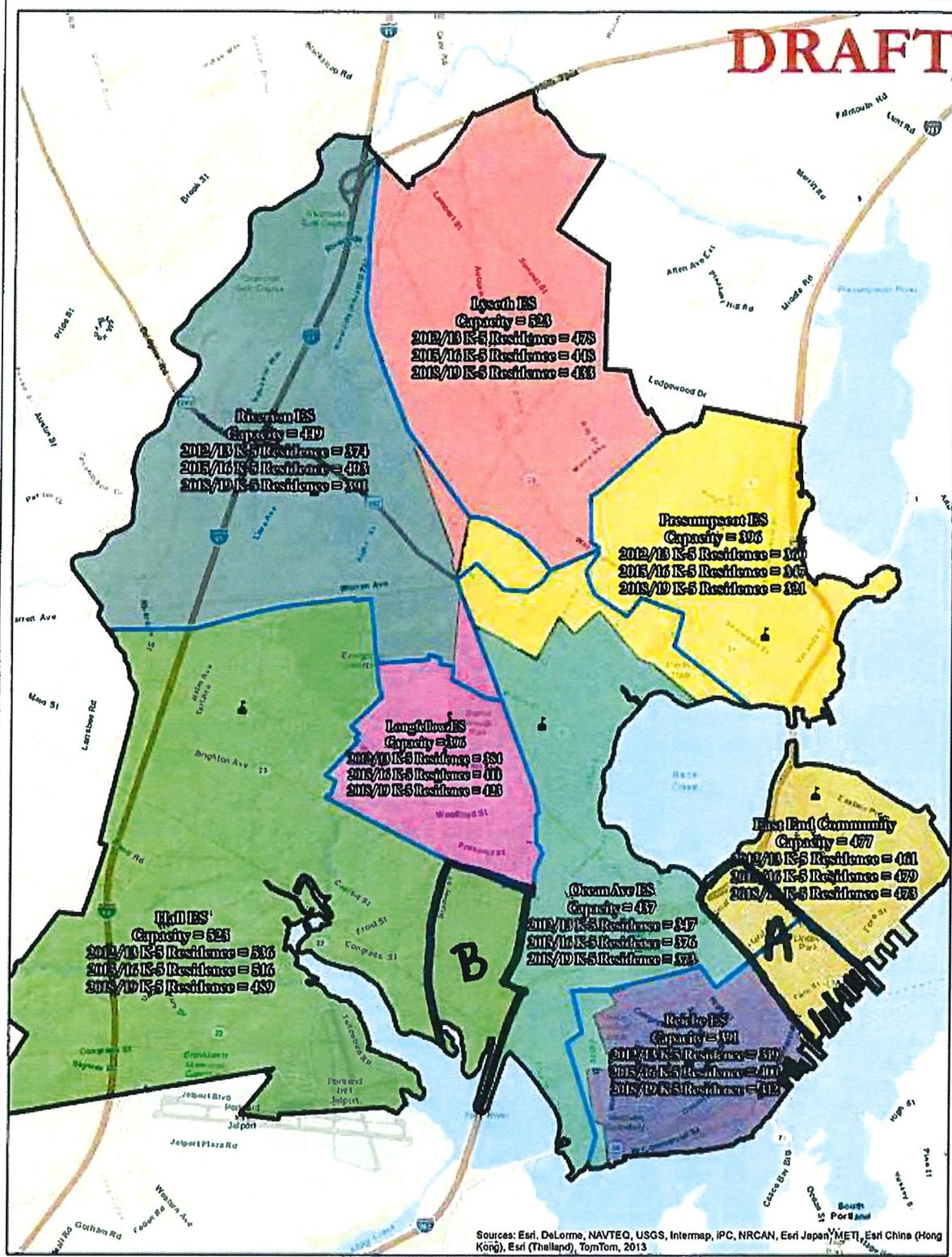


Portland Public Schools

Learning to Succeed

Equal Opportunity Employer

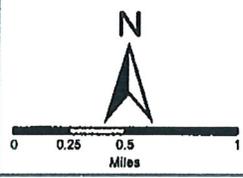
DRAFT



Sources: Esri, DeLorme, NAVTEQ, USGS, Intermap, IPC, NRCAN, Esri Japan, METI, Esri China (Hong Kong), Esri (Thailand), TomTom, 2013

Portland Public Schools

Proposed Long-Term Elementary School District Map



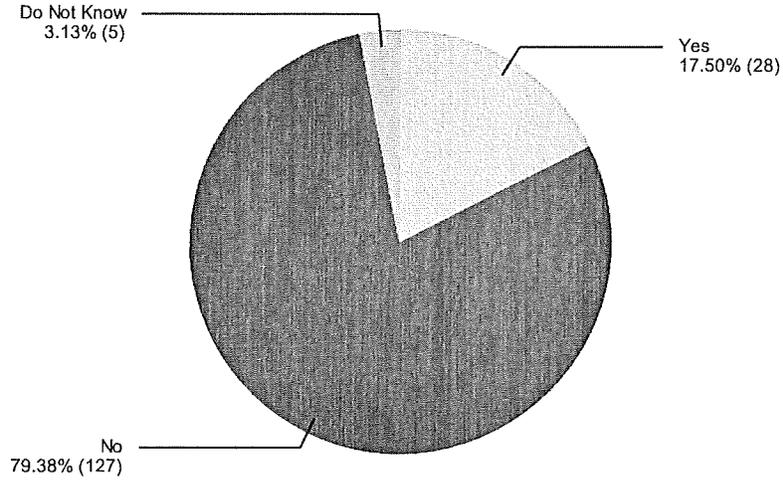
Current ES Boundaries



Data, Demographics, & Planning

Q1 Should the school consider converting the music room and/or art room into additional classroom space for the 2013-2014 school year? Art and music programming would be delivered in the classroom and/or other spaces at the school (such as the stage).

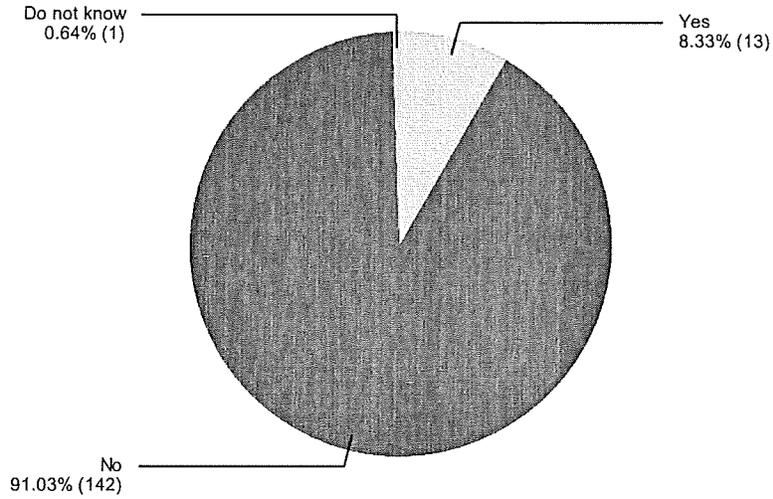
Answered: 160 Skipped: 0



Answer Choices	Responses	
Yes	17.50%	28
No	79.38%	127
Do Not Know	3.13%	5
Total		160

Q2 Should the school consider larger class sizes (such as 21-23 for kindergarten and 25-27 for first graders) for the 2013-2014 school year?

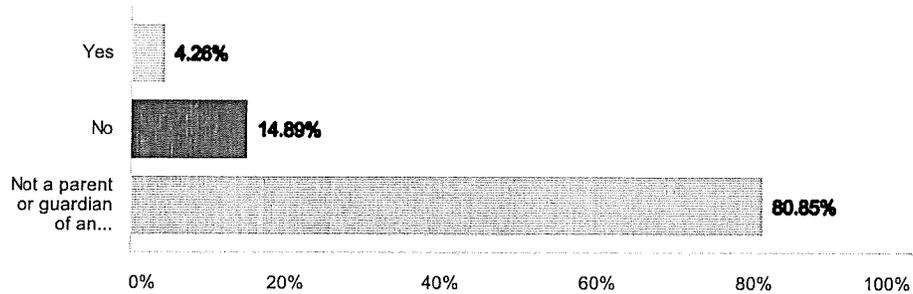
Answered: 156 Skipped: 4



Answer Choices	Responses	
Yes	8.33%	13
No	91.03%	142
Do not know	0.64%	1
Total		156

Q3 The following question applies ONLY to parents or guardians of an incoming kindergartner AND older elementary school child(ren) living in the area between Douglass St. and Bradley St. (between Brighton Ave. and the Fore River): If your kindergartner was assigned to Hall Elementary School, would you consider the option to send the older sibling(s) as well?

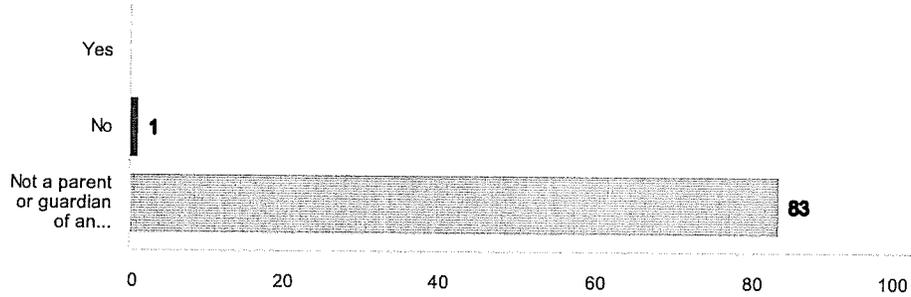
Answered: 94 Skipped: 66



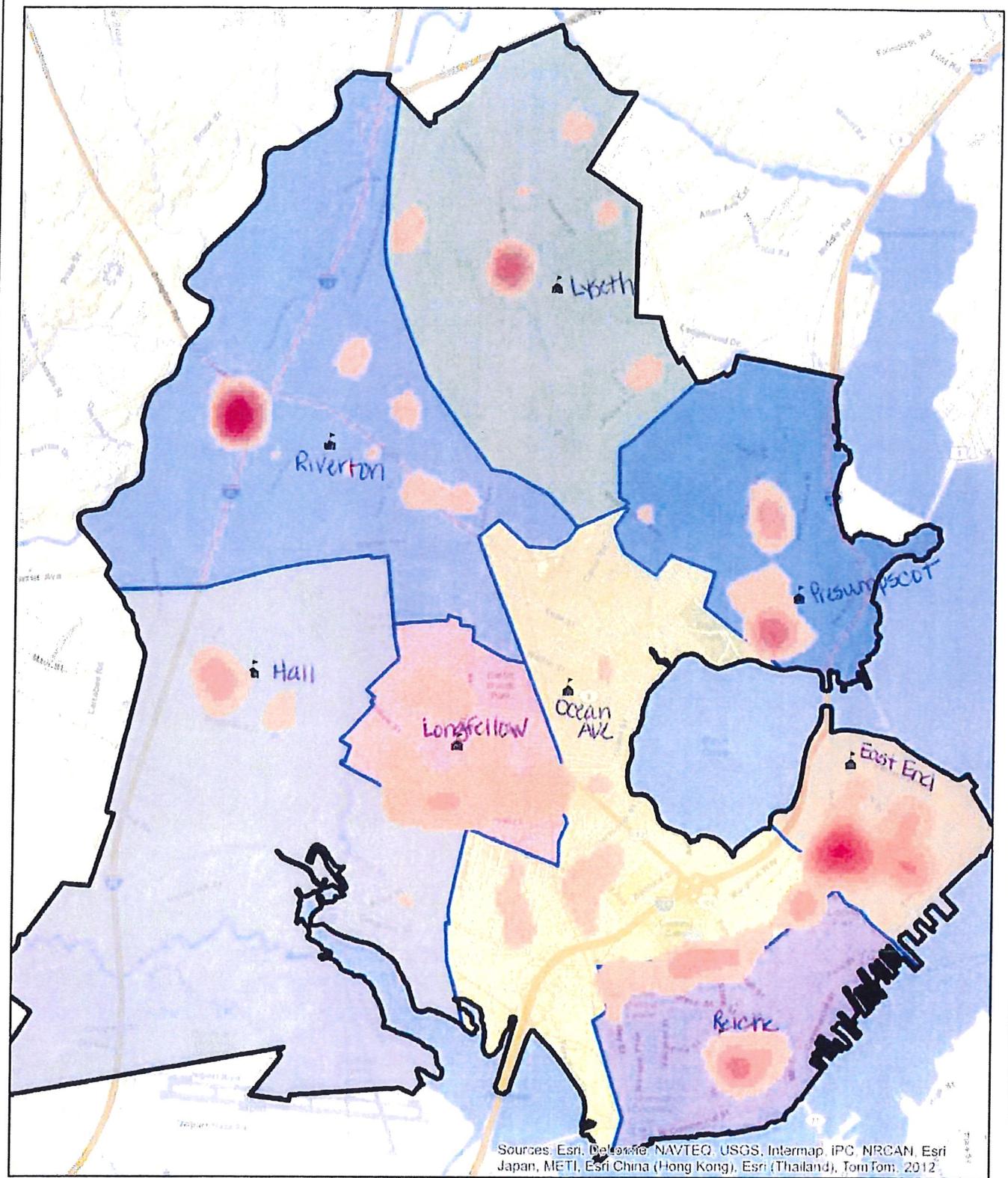
Answer Choices	Responses	
Yes	4.26%	4
No	14.89%	14
Not a parent or guardian of an incoming kindergartner AND older elementary school child(ren) in that area	80.85%	76
Total		94

Q4 The following question applies ONLY to parents or guardians of an incoming kindergartner AND older elementary school child(ren), living in the area between Preble St. and Franklin St. (between Marginal Way and the harbor): If your kindergartner was assigned to East End Community School, would you consider the option to send the older sibling(s) as well?

Answered: 84 Skipped: 76

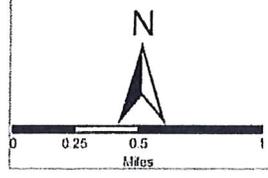


Answer Choices	Responses	
Yes	0%	0
No	1.19%	1
Not a parent or guardian of an incoming kindergartner AND older elementary school child(ren) in that area	98.81%	83
Total		84



Portland Public Schools

K-5 Student Density



Portland Public Schools Proposed 2015 CIP and Multi-Year Outlook
 City Manager's Recommended List
 June 2014

Attachment J

Proposed	2014 Review Score	Project #	Facility	Description	2015	2016	2017	2018	2019	2014 Council Action
2015	31		Hall	BFOF-construct new school-state funded	0	0	0	0	0	0 deferred-see 2016
2015	31		Lyeth	BFOF-expand/renovate-locally funded	0	0	0	0	0	0 deferred
2015	31		Longfellow	BFOF-expand/renovate-state funded?	0	0	0	0	0	0 deferred
2015	31		Reiche	BFOF-expand/renovate-locally funded	0	0	0	0	0	0 deferred
2015	31		Presumpscot	BFOF-expand/renovate-locally funded	0	0	0	0	0	0 deferred
2015	31		Ocean Avenue	BFOF-add four classrooms	0	0	0	0	0	0 deferred
2015	19		Multiple/Moore	Restore/rebuild pavement	0	0	0	0	0	885,000 deferred
2015	27		Lincoln	Masonry restoration	250,000	250,000				dropped from 5 year prog
2015	27		Casco Bay	Expansion/renovation - phase 1	305,000					supported 2014/2015
2015			DHS	Walkway repairs	100,000					supported 2014/2015
2015			Transportation	New bus	95,000					moved up from 2019
2015	17		Deering	Renovate kitchen	0					dropped
2015	29		Multi	Technology investment	775,000	775,000	1,400,000			supported 2013-2016
				2015 Subtotal:	1,525,000					885,000 BFOF total
										885,000 BFOF local only
2016			Multiple	Elementary School Improvements		1,600,000	7,890,000	25,805,000	5,445,000	
2016			Moore	Data Infrastructure		280,000				
2016	28		PHS	Replace roof - phase 1		0				moved up from 2019
2016			Transportation	New bus		0				moved to 2017
				2016 Subtotal:		2,905,000				moved up to 2015
2017	22		PHS	Replace windows			500,000			
2017	28		PHS	Replace roof - phase 1, 2 and 3			250,000	250,000	250,000	moved up from 2019
				2017 Subtotal:			10,040,000			
0			PHS	Repair masonry - phase 2				0		dropped
				2018 Subtotal:				26,055,000		
2019	17		Moore	Rebuild entrance plaza				70,000		
2019	17		DHS	Improve site drainage				0		dropped
2019	33		Food Service	Refrigerated box truck				0		dropped
2019	22		Moore	Replace clock/intercom system				0		moved to 2016
2019	18		PHS	Replace windows				0		moved to 2017
2019	17		Peaks	Replace windows - phase 1				0		dropped
2019	15		King	Renovate restrooms				0		dropped
2019	13		Riverton	Rehabilitate exterior masonry				0		dropped
2019	16		Peaks	Rehabilitate exterior masonry				0		dropped
2019	8		DHS	Replace brick sidewalks				0		moved to 2015
2019			DHS	Install rooftop air handling unit				0		dropped
2019			DHS	Install AC in front office and nurse's station				0		dropped

Attachments + J1

Housing Units Under Construction or Approved by the Planning Board January through December 2014

Under Construction or Complete Project	# of Units	Eff	Bedroom Mix			
			1	2	3	4+
York St Condo	6	0	0	6	0	0
188 on the Hill	12	0	0	6	6	0
Sheridan Street Apts	5	0	1	0	4	0
Marquis Lofts	6	6	0	0	0	0
Washington Ave Efficiencies	18	18	0	0	0	0
Amended Plan Seaport Lofts	35	0	13	18	4	0
Bayside Anchor	45	5	34	6	0	0
West End Place	39	0	25	14	0	0
Munjoy Heights	29	0	2	0	27	0
Nathan Clifford School	22	0	2	15	5	0
671 Forest Ave	5	1	1	0	3	0
Single & Two-Fam Building Permits	42	0	3	7	24	8

Totals	# of Units	Eff	1	2	3	4+
Total # of Units Permitted or Approved by the PB	264	30	81	72	73	8
Total # of Units Under Construction or Complete	264	30	81	72	73	8
total # of Units- UC & Not age restricted	264	30	81	72	73	8

Housing Units Under Construction or Approved by the Planning Board January - December, 2015

Project	# of Units	Eff	Bedroom Mix					Age Restricted
			1	2	3	4+		
East Bayside Lofts	53	10	34	9	0	0	0	
Longfellow Apartments	139	34	97	8	0	0	0	
May Street Townhomes	3	0	0	3	0	0	0	
Pleasant Ave. Church Redevelopment	25	16	9	0	0	0	0	
The Park Danforth	59	0	55	4	0	0	0	
185 Fore Street	8	0	0	4	4	0	0	
72 Munjoy Street	5	0	0	5	0	0	0	
York & High Development	63	0	19	40	4	0	0	
93 St. Lawrence	4	0	0	4	0	0	0	
Briggs Street Apartments	3	0	3	0	0	0	0	
32 Thomas Street Apartments	5	0	0	2	3	0	0	
Eastman Block Condo Project	4	4	0	0	0	0	0	
802 Ocean Ave - Retirement Residence	150	57	78	15	0	0	0	
Westport Lofts- 22 Tate St	8	2	2	4	0	0	0	
Schlotterbeck Block 117 Preble	56	16	40	0	0	0	0	
Single & Two-Fam Building Permits	45	0	5	17	17	5	5	

Project	# of Units	Eff	Bedroom Mix					Age Restricted
			1	2	3	4+		
Midtown Site Plan and Subdivision	440	115	130	195	0	0	0	
Bishop Street Apartments	30	30	0	0	0	0	0	
Motherhouse Senior Housing	88	68	20	0	0	0	0	
17 Carleton St	37	12	23	2	0	0	0	

Total	# of Units	Eff	Bedroom Mix				
			1	2	3	4+	
Total # of Units Permitted or Approved by the PB	1225	364	515	312	28	5	5
Total # of Units Under Construction or Complete	630	139	342	115	28	5	5
Total # of Units- UC & Not age restricted	421	82	209	96	28	5	5

Housing Units Approved by the Planning Board January, 2016- August 9, 2016

Under Construction or Complete

Project	# of units under construction	Eff	Bedroom Mix				Age Restricted
			1	2	3	4+	
East End Lofts, 273 Congress Street	10	0	10	0	0	0	
Luminato Condominiums	26	0	16	7	3	0	
31 Fore Street	4	0	1	1	2	0	
Single & Two Fam Building Permits	28	0	6	7	8	6	

Approved by Planning Board

Project	# of Units Approved	Eff	Bedroom Mix				Age Restricted
			1	2	3	4+	
8 Residential Condos, 65 Munjoy Street	8	0	4	2	2	0	
443 Congress Street	28	4	16	8	0	0	
5-9 Romasco Lane	4	0	2	2	0	0	
62 India	29	0	7	17	5	0	
749 Congress Street	7	0	0	0	7	0	
415 Cumberland Avenue	3	0	1	1	1	0	

Bedroom Mix

Totals	# of Units	Eff	1	2	3	4+
Total # of Units Permitted or Approved by the PB	147	4	63	45	28	6
Total # of Units Under Construction	68	0	33	15	13	6
total # of Units- UC & Not age restricted	68	0	33	15	13	6

Projects Submitted in 2016 for Review but not Approved Yet

Project Name	Address	# of Units	Eff	Bedroom Mix					Age Restricted
				1	2	3	4+		
Washington Ave Condo	180 Washington	5	0	0	5	0	0		
75 Chestnut Street	75 Chestnut Street	54	2	14	38	0	0		
Loft Condos	30 Merrill	7	7	0	0	0	0		
70 Anderson Redevelopment	70 Anderson Street	10	0	0	0	10	0		
23 Ocean Mixed Use	23 Ocean Avenue	4	0	0	4	0	0		
3 unit Residential	40 O'Brion St	3	0	0	3	0	0		
Portland Co. Redevelopment *	58 Fore St (Phased)	630	9	14	50	10	0		
Totals		713	18	28	100	20	0		

*This is a phased project - unclear when housing will come forward - maybe assume 100 /yr starting in 2018

Expected Applications

Project Name	Address	# of Units
Sheridan Street	153-165 Sheridan	34
Single family housing	1728 Washington	6
Mixed use and Multi-family	221 Congress Street	17
Mixed use and Multi-family	300 Allen	6
Hope Lane - SF subdivision	22 Hope Ave	16
Multifamily	218 Washington	45
5 townhouses and 1 multifamily	21 Quebec St	20
4 unit	73 Cumberland	4
McAuley - Elderly housing	Stevens Ave	161
Avesta - Elderly Housing	Brighton	25
PHA - housing	Boyd Street	48
Totals		382

Housing Construction and Approval Summary: Jan. 2014 - Aug. 2016

Year	Approved Projects	Under Construction or Complete	Applications Submitted but not Approved
2014	264	264	0
2015	1225	630	0
2016	147	68	713
Totals	1636	962	713

Sept. 2016

Portland Housing Authority: Long-Term Development Strategy

The Ad Hoc Committee has asked PHA to outline its development plans over the next 20 years to assist in determining future enrollments and facility needs. In 2015, PHA completed a Strategic Vision Plan that identifies opportunities and sets priorities for redevelopment of Public Housing properties. The plan is not a formal road map or master plan. It provides concepts and rational of what's possible. It begins the discussion for moving forward to replace housing at the end of its useful life and adding units to help relieve the city's serious housing shortage. A summary of the plan in table form is outlined below.

It goes without saying that the plans beyond year 5 are very conceptual at this point. Extensive planning and detail design work will be needed to bring them forward. One of the important decisions will be who are we developing these units for, families or the elderly, and if families, what size families. Also, these types of developments are subject to a variety of major factors that will either support or inhibit their success. Some of these factors include; available financing, state and federal housing policy, congressional budget appropriations, local land use policy and planning approvals, as well as market conditions.

	Neighborhood	Project/Location	Units		
			Existing	New	Total
5 Years					
	East Bayside	Bayside Anchor	0	45	45
		58 Boyd Street Apts.	0	55	55
		Anderson Street	6	10	16
	East Deering	Front Street	50	35	85
		Year 5 Total	56	145	201
5 to 10 Years					
	Nason's Corner	Sagamore Village	198	70	268
	East Bayside	Boyd Street (phased)	20	89	109
	Forest Ave. /Baxter Blvd.	PHA Admin. Building	0	24	24
	West End	Harbor Terrace/Salem Street	120	20	140
		Years 5 to 10 Total	338	203	541
10 to 15 Years					
	East Bayside	Mayo, Oxford, Lancaster, Smith (phased)	59	163	222
		Smith, Anderson, Greenleaf, Munroe	52	59	111
	Riverton	Riverton Park	141	60	201
		Years 10 to 15 Total	252	282	534
15 to 20 Years					
	West Bayside	Franklin Tower (phased)	200	161	361
	East Bayside	Franklin, Lancaster, Boyd Streets	24	100	124
	East Deering	Washington Gardens	100	25	125
		Years 15 to 20 Total	324	286	610

		School of Attendance											
		East End Community	Hall ES	Longfellow ES	Lyzeth ES	Ocean Ave ES	Peaks Island ES	Presumpscot ES	Relche Community	Riverton ES	Cliff Island	Residence	% Attending
School of Residence	East End Community	358	0	0	1	2	0	1	4	0	0	375	95%
	Hall ES	15	352	18	2	0	0	2	4	0	0	381	92%
	Longfellow ES	1	8	280	1	7	0	1	1	0	0	299	94%
	Lyzeth ES	2	2	5	445	6	0	8	0	15	0	471	94%
	Ocean Ave ES	27	28	19	1	394	0	1	25	7	0	502	78%
	Peaks Island ES	0	0	0	0	0	50	0	2	0	3	55	91%
	Presumpscot ES	5	7	5	12	1	0	268	0	3	0	301	89%
	Relche Community	3	1	3	3	1	0	0	341	8	0	366	93%
	Riverton ES	6	20	11	12	5	0	4	1	396	0	455	87%
	Out of District	1	1	1	9	1	2	0	0	3	0	24	
	Unmatched	0	0	0	0	1	0	0	0	5	0	6	
	Total Attendance		408	422	340	486	421	62	281	387	435	3	3,235
Transfer Students		50	70	60	41	27	2	13	48	39	3	351	
% of Total		12%	17%	18%	8%	8%	4%	5%	12%	9%	100%	11%	

		School of Attendance					
		King MS*	Lincoln MS	Moore MS	Residence	% Attending	
School of Residence	King MS*	377	14	8	399	94%	
	Lincoln MS	28	427	17	472	90%	
	Moore MS	54	46	464	564	82%	
	Out of District	13	3	6	22		
	Unmatched	1	0	0	1		
	Total Attendance		473	490	495	1,458	Total 2014/15 6-8
	Transfer Students		96	63	31	190	
% of Total		20%	13%	6%	13%		

students living in the Islands attending King MS

		School of Attendance					
		Deering HS	Portland HS	Casco Bay HS	Residence	% Attending	
School of Residence	Deering HS	543	309	184	1,036	52%	
	Portland HS	366	508	167	1,041	49%	
	Out of District	26	21	9	56		
	Unmatched	1	0	0	1		
	Total Attendance		936	838	360	2,134	Total 2014/15 9-12
	Transfer Students		393	330	360	1,083	
% of Total		42%	39%	100%	51%		

students living in the Islands attending Portland HS (21) and Casco Bay HS (8)

Attachment L

Existing PPS Properties					Total SF	Comments
School Name	Year Built	Addition Year(s)	Renovation Year(s)	Total SF	Comments	
Cliff Island School	1895			1,017		
East End Community School	2006			72,620	Replaced Jack and Adams	
Hall School	1956	1967		54,036	State approved replacement 2014	
Longfellow School	1952			42,767		
Lyseth School	1960	19,631,988		51,975	Includes one 1500 SF mod	
Ocean Avenue Elementary School	2011			70,315	Replaced Clifford and Baxter	
Peaks Island School	1869	19,501,953		13,167		
Presumpscot Elementary School	1962	2006	198x	29,762	Includes 3 mods (1,456 SF each)	
Reiche Community School	1972			88,481	Replaced Butler.....	
Riverton Community School	1976	2007		113,715	Replaced	
King Middle School	1950	19,601,996		89,263		
Lincoln Middle School	1897	1,913,196,219,962,000		103,973	Includes geodesic dome	
Moore Middle School	1954	19,591,996		104,424		
Deering High School	1923	1982	19,591,971	191,438		
Casco Bay High School		Part of PATHS (see below)				
Portland High School	1867	19,231,990		250,580		
PATHS	1976			214,000		
Bayside Learning Community		Part of District Office (see below)			Formerly known as West Program	
Portland Adult Education				22,500	Facility use agreement (Diocese)	
District Office	1900			57,364	Acquired from Goodwill NNE 2014	
Central Kitchen	1998			21,180	Acquired in 2013	
Transportation	1999			1,440		
			Total:	1,594,017	Net change since 2001: -29,995 SF	

Former PPS Properties

School Name	Year Built	Addition Year(s)	Renovation Year(s)	Total SF	Comments
Reed School	1926	19,501,981		33,692	Transferred to City/Awtg disposition
West School	1962			28,508	July 2013 transferred to City - demolished 2015. Moved temporarily to Plummer School, Falmouth then re-named to Bayside Learning Community when it moved to Cumberland Ave in 2014
Nathan Clifford School	1909			45,664	2011 - Closed and sold for residential use. Replaced by Ocean Avenue Elementary School
Baxter School	1956			20,770	Demolished 2009 - Replaced in 2011 by Ocean Avenue
Jack Jr which became Jack Elementary	1943	1960		50,363	Closed 2001 - Demolished. Replaced in 2006 by East End Community School
Adams School	1958			16,989	Closed in 2006 - demolished. Replaced by East End Community School
Sacred Heart	1927			13,899	
Exposition Building	1915	1958,20xx		30,774	Subsequent City renovations
Martin's Point Central Office Complex	1859	1920		40,731	Transferred to City/Sold
North School	1867				Closed in the mid 1970's - City converted it to senior housing
Emerson School	1898				Closed in the late 1970's - turned into co-op housing run by Munjoy Hill Housing Association
Shailer School	1880				
Peary School	1930				Closed in 1976 - Demolished in 1982 Students were relocated to Lyseth Elementary School
Roosevelt School	1919				
Cummings School	1899				

Morrill School	1903					July 1993 became their own Town . Only grades 6-12 are part of Portland Public Schools
Long Island School	1908					Replaced by Reiche School - converted to Housing
Butler School	1878					
McLellan School	1886					
Sherman Street Kindergarten	1941					
Rosa E. True School	1844					Closed in 1972 - Greater Portland Landmarks turned it into 8 low income apartments
Walker Vocational School	1901					
Chapman School	1913					Resource Center - 1978
Jackson School	1887					Closed - 1970
Oakdale Kindergarten	1922					Replaced by Nathan Clifford
Staples School	1855					Closed - May 1971. City sold it in 1980, now businesses
Woolson School	1850					Used by Welfare Dept - 1968

Attachment 21

City/Town	School	Yr. Built/Last Renovated	Grades	13-14	14-15	15-16	3 Yr. Enrollment Trend
Cape Elizabeth	Pond Cove Elementary	1999	K-4	570	548	573	+3
Falmouth	Falmouth Elementary	2011	K-5	892	925	929	+37
N. Yarmouth/Cumberland	Mabel I Wilson	1991	K-3	556	537	567	+11
	Greely Middle 4-5	2004	4-5	326	317	307	-19
Scarborough	Blue Point Primary	1993	K-2	230	223	190	-40
	Eight Corners Primary	1993	K-2	234	221	218	-16
	Pleasant Hill Primary	1993	K-2	165	173	173	+8
	Wentworth Intermediate	2014	3-5	705	697	639	-66
South Portland	Dora L Small Elementary	2003	K-5	329	323	319	-10
	Dyer Elementary	2005	K-5	269	260	244	-25
	Frank I Brown Elementary	2004	K-5	302	290	277	-25
	James Otis Kaler Elementary	2003	K-5	226	218	226	0
	Waldo T Skillin Elementary	1993	K-5	400	383	385	-15
Westbrook	Congin	2004	K-4	424	425	425	+1
	Oxford-Cumberland Canal	2000	K-4	313	316	311	-2
	Saccarappa	1991	K-4	323	326	337	+14
Yarmouth	William H. Rowe	2002	K-1	183	192	190	+7
	Yarmouth Elementary	2002	2-5	319	329	338	+19

Attachment M

Students living in Portland and enrolled in a school other than a Portland Public School (as of April 1, 2016)

Bangor Christian Schools - 1
Baxter Academy for Tech and Science - 37
Cape Elizabeth Public Schools - 6
Falmouth Public Schools - 12
Fiddlehead School of Arts and Sciences - 5
Gorham Public Schools - 3
Greater Portland Christian School - 10
Harpwell Coastal Academy - 1
Long Island Public Schools - 1
Maine Academy of Natural Science - 1
Maine Connections Academy - 4
Maine Virtual Academy - 2
Maine School of Science and Mathematics - 3
Non-Maine School Administrative Units - 2
North Yarmouth Academy - 25
RSU 14 (Windham) - 6
RSU 17/MSAD 51 (Cumberland/N. Yarmouth) - 1
RSU 23 (Old Orchard Beach) - 1
Saco Public Schools - 2
South Portland Public Schools - 2
Thornton Academy - 2
Wayfinder Schools - 4
Waynflete School - 222
Westbrook Public Schools - 11
Yarmouth Schools - 8

Attachment N

Count of moves Row Labels	Column Labels							Grand Total
	2011	2012	2013	2014	2015	2016 (blank)	Grand Total	
Transfer to a Correctional Facility	2	3	4	4	2	2	17	
Transfer to a Maine Approved High School Equivalency Program	3	3	3	2	3	3	17	
Transfer to a Maine approved private school				3	12	15	30	
Transfer to a postsecondary education	2	1	1	1			5	
Transfer to a public charter school			1	5	5	7	18	
Transfer to a public school in a different school administrative unit in the same state	15	15	15	15	14	15	89	
Transfer to a school in a different state	14	15	15	14	14	15	87	
Transfer to an approved online curriculum			1		3	1	5	
Transfer to home schooling	9	10	11	11	11	11	63	
Transfer to ME priv. non-religious, different SAU	8	5	6	7	3		29	
Transfer to ME priv. religious, different SAU	3		6	4			13	
Transfer to priv. non-religious school, same SAU	10	12	11	11	1		45	
Transfer to priv. non-religious, out-state	4	2	1	5			12	
Transfer to priv. religious school within SAU	8	7	10	10			35	
Transfer to priv. religious, different state		2	1	6	1		10	
Transfer to school outside of the country (blank)	7	10	8	13	10	13	61	
Grand Total	85	85	94	111	79	82	536	

2014 School Security CIP Fund: C14S02
\$450,000

Riverton	\$22,000.00
Classroom security locks and keying system	
Access control (keypads, video and main entrance buzzer)	
Added Paging Speakers	
Presumpscot	\$14,000.00
Classroom security locks and keying system	
Installed Access Control (keypads and main entrance buzzer)	
Added Paging Speakers	
Outside keypad to Mods	
Longfellow	\$17,000.00
Classroom security locks and keying system	
Access control (keypads and main entrance buzzer)	
Paging System	
Lyseth	\$21,500.00
Classroom security locks and keying system	
Access control (keypads and main entrance buzzer)	
Added Paging Speakers	
East End	\$9,500.00
Create Secure Vestibule	
Access control (keypads and main entrance buzzer)	
Reiche	\$15,000.00
Classroom security locks and keying system	
Access control (keypads and main entrance buzzer)	
Added Paging Speakers	
Hall	\$5,000.00
Access control (keypads and main entrance buzzer)	
Peaks Island	\$6,000.00
Classroom security locks and keying system	
Access control (keypads and main entrance buzzer)	
PHS	\$28,000.00
Classroom security locks and keying system	
Access control (keypads and main entrance buzzer)	
Added Paging Speakers	
Camera System	

DHS \$70,000.00
Classroom security locks and keying system
Access control (keypads and main entrance buzzer)
Create Secure Vestibule
Camera System

PATHS \$24,000.00
Classroom security locks and keying system
Access control (keypads and main entrance buzzer)
Camera System

Moore Middle \$16,000.00
Classroom security locks and keying system
Access control (keypads and main entrance buzzer)
Camera System

King Middle \$12,000.00
Classroom security locks and keying system
Access control (keypads and main entrance buzzer)
Create Secure Vestibule
Keypad Entry

Lincoln Middle \$18,000.00
Classroom security locks and keying system
Access control (keypads and main entrance buzzer)
Create Secure Vestibules

Bayside \$5,000.00
Access control (keypads and main entrance buzzer)
Keypad Entry
Classroom security locks and keying system

Transportation \$107,000.00
Bus Cameras & Software

Total Spent to date **\$390,000.00**

Account balance \$60,000.00

The remaining \$60,000 will be earmarked for cameras, software and hardware installations at:

1. Lincoln
2. Presumpscot
3. Reiche
4. King



Maine Municipal Association

60 Community Drive
PO Box 9109
Augusta, ME 04332-9109

Attachment N2

Action Plan

Member: Portland School Department

Loss Control Consultant: Ann Schneider

Key Contact: Craig Worth, Deputy Chief of Operations

Survey Date:
2/12/2016

The following items requiring attention were noted during my recent visit. These recommendations and proposed completion dates were discussed in detail on 2/12/2016. We agreed the time frames were reasonable. Please indicate your estimated completion dates and return a copy of this form within the next thirty days.

Item Number	Description / Recommendation	Proposed Completion Date	Estimated Completion Date
Location <u>Reiche School</u>			
02-16-01-B	Housekeeping- Clutter Recommendation: There is a lot of clutter and housekeeping issues throughout the school. This increases the fire load, and presents potential trip/fall hazards. Work with staff to clean up and organize their areas to reduce the clutter.	4/29/2016	
Location <u>Reiche School</u>			
02-16-02-B	Hazard Communication Recommendation: The Safety Data Sheets for this building should be reviewed and updated to ensure they are current with the new Global Harmonization System.	4/29/2016	
Location <u>Reiche School</u>			
02-16-03-B	Electrical Hazards Recommendation: There is an over-use of extension cords due to a lack of receptacles. According to the National Electrical Code, extension cords are not to be in permanent use. Have a licensed electrician evaluate and determine if additional receptacles can be added in identified locations to reduce the use of extension cords. Conduit covers should be placed over cords that cannot be removed to prevent a trip/fall hazard.	4/12/2016	
Location			
02-16-04-B	Hazard Communication Recommendation: Staff are bringing in their own cleaning chemicals and air fresheners. The school policy on bringing in chemicals should be reviewed with all staff, and they should be instructed to stop this practice.	4/29/2016	

Our survey of your operation is to assist you in your loss control efforts. We do not assume responsibility for the discovery or elimination of all hazards that could possibly cause accidents or losses. Recommendations are developed from the conditions observed at the time of the survey and may not include every possible cause of loss. Compliance with these recommendations does not guarantee the fulfillment of your obligation under local, state, or federal law.

Location

02-16-05-A Fire Door Hazard 3/29/2016

Recommendation:

Room 101 - remove all paper from the double emergency doors and remove the flag that can present an entanglement hazard in an emergency due to low height. There should not be any paper taped to a designated egress door.

Location

02-16-06-B Egress Door Signage 4/29/2016

Recommendation:

Replace the paper EXIT sign with a real EXIT sign in the 2nd floor Art room. EXIT signage should have letters that are six inches in height, 3/4 inch in width, and be reflective or illuminated.

Location

02-16-07-B Clutter and Securing of Tools 4/29/2016

Recommendation:

2nd Floor Art - clean up the clutter which presents a trip/fall hazard and increases the fire load. Secure the tools (saw, etc.) in a locked cabinet.

Location

02-16-08-B Sprinkler Inspections 4/12/2016

Recommendation:

Ensure that the building sprinkler system is being maintained and inspected per NFPA 25. Contact the Portland Fire Department for the exact language for this standard.

Location

02-16-09-B Ladder Hazard 4/29/2016

Recommendation:

Dispose of the stepladder located in the boiler room. It is faded in color, indicating it has exceeded its age and safe use.

Location

02-16-10-B Tube Light Cover 4/29/2016

Recommendation:

Receiving - place enclosed covers on the tube lights above the door - they are located within 8 feet of the floor.

CC: Superintendent Jeanne Crocker

Our survey of your operation is to assist you in your loss control efforts. We do not assume responsibility for the discovery or elimination of all hazards that could possibly cause accidents or losses. Recommendations are developed from the conditions observed at the time of the survey and may not include every possible cause of loss. Compliance with these recommendations does not guarantee the fulfillment of your obligation under local, state, or federal law.

**Portland Public Schools
Facilities Studies/Action
August 2016**

Attachment O

Study Title	Consultant/Staff Support	Year	Council Action
Portland Middle Schools	Stevens Morton Rose & Thompson	1992	Led to mid-1990s middle school renovations
Portland Elementary Schools	Semple & Drane Architects	1994	Comprehensive A-E study that became EFTF I
Elementary School Facilities Task Force - otherwise known as EFTF I	Semple & Drane Architects	2000/2001	Bundling and Stop Signs
		2004/2005 CIP	East End - later funded by the state
		2006 CIP	Riverton renovation/expansion funded locally
EFTF II		2005/2006	
Facility Assessment (focus on ES)	WBRC Architects-Engineers	2007	
Long Range School Facilities Planning	New England School Development Council	2009	
Elementary School Capital Needs Task Force Report	WBRC Architects-Engineers	2010	Became Buildings For Our Future study
Emergency Preparedness Task Force Final Report	PFD, PPD, and City IT staff along with PPS staff and consultants	2010	\$450,000
Buildings For Our Future-Final Draft Report - School Facilities Adhoc Committee	Oak Point Associates	2013	Hall School funded by State -
		2016	4 x 4 Remaining mainland elementary schools

PROCEDURES FOR THE TRANSPORTATION OF STUDENTS

Portland Public Schools students are eligible for bus transportation based primarily upon the distances a student must travel from home to school, safety considerations, and grade level as established by the School Committee in EEA. The Director of Transportation is responsible for determining the accuracy of travel distances, and his/her determination shall be final. Safety considerations generally include whether a student must travel to school along a high traffic corridor or through a busy intersection. Exceptions to the eligibility requirements below may be made by a student's IEP Team or 504 Team, or at the sole discretion of the Superintendent or his/her designee based on the particular circumstances of a student or group of students

Elementary School Students

- Kindergarten students traveling more than one-half mile from home to school (All kindergarten students must be accompanied at the morning and afternoon bus stop by a parent/guardian or a responsible designee whose name has been provided in advance to transportation services, and whose identification is provided by the designee to the bus driver).

Grades 1 – 5 Students traveling more than one mile from home to school:

- East End Community School students living southwest of Washington Avenue and southeast of Cumberland Avenue;
- Lyseth School students living on Allen Avenue Extension, on the southeast and southwest sides of Allen Avenue, or on Pennell Avenue, Short Street, Cypress Street, Fisher Street, Hennessey Street, or Brewster Street;
- Ocean Avenue School students living southwest of Forest Avenue;
- Presumpscot School students living northwest of Ocean Avenue or on the southwest side of Washington Avenue from Tukey's Bridge to Ocean Avenue;
- Reiche School students in Grades K-3 from the Parkside neighborhood bounded on the north by Park Avenue, on the south by Congress Street, on the east by High Street, and on the west by St. John Street;
- "School of Choice" students to the East end Community School;
- "Many Rivers" students to the Hall School.

Middle School Students

All students traveling more than two miles from home to school

- King Middle School students arriving on the mainland from the Casco Bay Lines ferry or living east of the Franklin Arterial in the King Middle School district
- Lincoln Middle School students living along the entire Forest Avenue corridor from Morrill's Corner to the Westbrook line or in Sagamore Village

High School Students

All students traveling more than two miles from home to any high school

- Portland Arts and Technology High School students traveling to or from Deering High School or Portland High School

Transportation for Child Care

Elementary School students who are eligible for school bus transportation under the above provisions may receive transportation to and from a childcare center only under the following circumstances:

- A seat is available on the bus to accommodate an additional student;
- The bus route's time schedule is not significantly disrupted;
- A parent's permission slip is on file.
- The child care center meets the distance requirement and is on a regularly scheduled route (at the discretion of the Director of Transportation, a regular route may be modified depending upon matters of safety, distance, accessibility, numbers of students and their ages)
- Transportation to or from a child care center outside of a student's neighborhood school district will not be provided

Created: February 6, 1984

Revised: May 29, 1991; April 15, 1992; June 30, 1998; September 19, 2007;
January, 2011

Portland Public Schools Glossary of Acronyms

- ACCESS** (*Assessing Comprehension and Communication in English State-to-State*) - an assessment that measures English language skills (listening, speaking, reading, and writing for students identified as limited English proficient.
- BASE** (*Benefit Association for School Employees*) – collective bargaining unit for maintenance, transportation, food services, computer technicians, accounting specialists, and secretaries.
- BHP** (*Behavioral Health Professional*) – specially trained staff focusing on support behavior skills for students with identified needs.
- CIP** (*Capital Improvement Plan*) – five year financing and construction/acquisition plan for public improvement projects including school facilities.
- CPAA** (*Children's Progress Academic Assessment*) – assessment to measure learning and progress for children in pre-kindergarten and early primary grades
- CTE** (*Career and Technical Education*) – schools that specialize in skilled trades, applied sciences, modern technologies, and career preparation such as PATHS.
- EL** (*Expeditionary Learning*) – a school model that uses project-based, interdisciplinary learning formed in partnership between Harvard Graduate School of Education and Outward Bound.
- ELA** (*English Language Arts*) – a core content area of education that includes skill development in reading, writing, speaking, and listening.
- ELL** (*English Language Learner*) – any individual who is actively in the process of acquiring English and where primary language spoken at home is one other than English.
- ELO** (*Expanded Learning Opportunity*) – learning experiences that may occur outside of the school physical space, outside of the regular school day/year, and/or outside of the regular school program. Examples include – externships, summer course work, and early college/dual enrollment.
- ESEA** (*Elementary and Secondary Education Act*) – federal legislation that appropriate funds for primary and secondary education establishing rules for school access and spending of federal funds which emphasize equal access to education and establishes high standards and accountability.
- ESSA** (*Every Student Succeeds Act*) – federal legislation amending ESEA that establishes rules for states and schools to provide equal opportunity for education to all students. It was approved in 2015 to be fully enacted in school year 2017-2018, replacing NCLB.
- FLS** (*Functional Life Skills*) – learning environments and programs that support students with significant cognitive challenges to learn to become more independent and self-sufficient.
- IB** (*International Baccalaureate*) – a school model focused on delivering the intellectual, personal, emotional, and social skills needed in a rapidly globalizing world.
- IDEA** (*Individuals with Disabilities Education Act*) – federal legislation governing the services and learning environments schools must provide to students with special needs.
- JTG** (*John T. Gorman Foundation*) – a local foundation that has provided support to a number of district initiatives and therefore is often used as a title for the programs that were supported.
- Lau Plan** (*Named after Supreme Court Case Lau vs. Nichols*) – a school district plan to ensure equitable access to education for English language learners.

Portland Public Schools Glossary of Acronyms

- LEP** (*Limited English Proficiency*) – students who have little or no skill to communicate in English.
- MEA** (*Maine Education Assessment*) – annual assessments mandated by federal & state legislation and chosen by the Maine Department of Education.
- MEA** (*Maine Education Association*) – state teachers' association.
- MLTI** (*Maine Learning Technology Initiative*) – Maine Department of Education program focused on supporting 1:1 computer device programs.
- NCLB** (*No Child Left Behind*) – federal legislation amending ESEA that establishes rules for states and schools to provide equal opportunity for education to all students. It was enacted in 2001 and is being replaced with ESSA.
- NEA** (*National Education Association*) – national teachers' association.
- NWEA** (*North West Education Association*) – the developers of an assessment for student learning in math and English language arts, term used to identify and refer to those assessments.
- PEA** (*Portland Education Association*) – city teachers' association and bargaining unit.
- PAA** (*Portland Administrators Association*) – city administrators' bargaining unit.
- PD** (*Professional Development*) – courses, meetings, workshops or other training opportunities for school staff to learn and improve performance.
- PBIS** (*Positive Behavior Interventions and Supports*) – a set of ideas and tools that schools use to promote and maximize appropriate academic and social behavior of students.
- PEVAL** (*Principal Evaluation*) – the district's system of evaluations measuring principal performance and effectiveness.
- PLBSS** (*Professional Learning Based Salary Scale*) – the compensation scale used in the collective bargaining contract between PEA and PPS that awards salary increases for a variety of types of professional learning in addition to university course work.
- PLP** (*Personalized Learning Plan*) – short and long term goals and strategies for learning developed specifically for an individual student's needs and progress.
- PPS** (*Portland Public Schools*)
- PSAT** (*Pre-Scholastic Aptitude Test*) – standardized used to help prepare students for taking the SAT.
- RTI or Rti** (*Response to Intervention*) – a system that defines early, systematic and appropriately intense assistance to children at risk for falling behind.
- SAT** (*Scholastic Aptitude Test*) – standardized test widely used for college admissions in the United States, currently used as the required MEA assessment for 3rd year high school students.
- SIOP** (*Sheltered Instruction Observation Protocol*) – a method of organizing teaching that supports development of all students, particularly English Language Learners.
- TEVAL** (*Teacher Evaluation*) – the district's system of evaluations measuring teacher performance and effectiveness.

Dictionary of Common Special Education Acronyms

ABA: Applied Behavioral Analysis – One research-based method for supporting/teaching children with certain disabilities, most commonly children with autism or autism spectrum disorders.

ADA: Americans with Disabilities Act

ADD: Attention Deficit Disorder: See ADHD (sometimes used to mean ADHD without hyperactivity)

ADHD: Attention Deficit Hyperactivity Disorder: a medical diagnosis; may also be referred to as ADD.

ADL: Activities of Daily Living

Alternative Assessments: ways other than standardized tests, to get information about what students know and where they may need help. Also refers to the different type of testing that is done when the abilities of a student with a disability prevent him or her from taking part in the regular statewide or district-wide testing.

APE: Adaptive Physical Education – physical education that has been adapted or modified to address the individualized needs of children with disabilities.

ASD: Autism Spectrum Disorders, including Autism, Asperger's Syndrome, and Pervasive Developmental Disorders.

AT: Assistive Technology

Behavior Intervention Plan (BIP): a plan of positive behavioral interventions for a child whose behaviors interfere with his/her learning or that of others; based on data gathered through a functional behavioral assessment.

(ED): Emotional disturbance

English as a Second Language (ESL) or English Language Learners (ELL) or EL (English Learners): Refers to students who are learning English as an additional language. These students need specially designed instruction to help them acquire English language skills and to master the required curriculum.

Extended School Year: A provision for special education students to receive instructions during ordinary school "vacation" periods, or at any time when school is not typically in session.

FBA: Functional behavioral assessment - an assessment of a student's behavior. An FBA is used when developing positive behavioral interventions for a child with a disability.

FERPA (Family Educational Rights and Privacy Act): A federal law that regulates the management of confidential student records and disclosure of information from those records.

FAPE (Free Appropriate Public Education): education for children with disabilities provided in the least restrictive environment, and at public expense, under public supervision, and without charge, through an IEP.

IDEA: Individuals with Disabilities Education Improvement Act (IDEIA), which is Public Law 108-446 (generally referred to as the Individuals with Disabilities Education Act). IDEA is the special education law that provides a free appropriate public education in the least restrictive environment to all eligible children with disabilities. MUSER (Maine Unified Special Education Regulations) are the laws/regulations for Maine.

IEP: Individualized Educational Program. The document, developed at a meeting that describes the child's special education program. It sets the standard by which special education services are determined appropriate for a child with a disability.

IEP Team: Develops the IEP

LD or SLD: specific learning disability

Least Restrictive Environment: To the maximum extent appropriate, educating children with disabilities, including children in public or private institutions or other care facilities, with children who are nondisabled; removing children with disabilities to special classes, separate schooling, or other settings apart from the regular education occurs only if the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily.

Limited English Proficient (LEP): refers to students who are not at grade-level in reading and writing English and for whom English is a second language.

OT: occupational therapy or therapist

PT: physical therapy or therapist

PBIS: Positive Behavioral Interventions and Supports

Related Services: a special education term meaning supportive services as are required to assist a child with a disability to benefit from special education.

Resource placement: a special education placement (must consist of no more than 60% of a child's school day).

Self-contained placement: a setting, apart from the regular educational environment, where a child with a disability spends more than 60% of his/her school day.

SLP: Speech and Language Pathologist

Specific Learning Disability: (also referred to as "learning disability") – a disorder in one or more of the basic psychological processes involved in understanding or in using language, spoken or written, which may manifest itself in an imperfect ability to listen, think, speak, write, spell or do math calculations.

Day Treatment Program: a special education program for students with serious disabilities, which incorporates therapeutic supports and services as part of the program.



Portland Public Schools

LEARNING TO SUCCEED

District Scorecard

February 2, 2016

Academic Achievement

Achievement: % of Grade 3 Students Scoring Proficient or Above on NWEA				
	2011-2012	2012-2013	2013-2014	2014-2015
<i>Reading</i>				
District Total	46.3	44.6	47.6	46.5
White	58.3	60.6	62.2	61.7
Black/African American	17.3	14.5	18.6	16.8
Asian	30	22.2	45.2	32
Hispanic/Latino	28.6	31.4	41.7	38.2
Economically Disadvantaged	27.9	24.7	27.1	30.9
Identified Disability	18.1	9.9	12.2	10.6
Limited English Proficiency	15.4	15	18.1	15.5
<i>Math</i>				
District Total	36.3	33.7	44.4	44.1
White	46.4	49	57	57
Black/African American	16.3	6.3	17.3	14.3
Asian	26.7	13.9	38.7	28
Hispanic/Latino	17.9	14.3	38.5	42.9
Economically Disadvantaged	20.3	15.4	24.3	26
Identified Disability	6.1	7.4	15	13.6
Limited English Proficiency	15.4	6.4	13.3	12.1

Academic Achievement Cont.**Achievement: % of Grade 5 Students Scoring Proficient or Above on NWEA**

	2011-2012	2012-2013	2013-2014	2014-2015
<i>Reading</i>				
District Total	54.9	53.6	51.8	52.3
White	71.3	69.9	62.5	68.5
Black/African American	22.6	18.5	29.3	21.4
Asian	38.9	52	42.9	37.5
Hispanic/Latino	20.8	26.1	34.6	42.9
Economically Disadvantaged	31.9	32.8	32.1	32.9
Identified Disability	24.2	27.3	12.3	22.9
Limited English Proficiency	19.7	18.3	24.6	19.4
<i>Math</i>				
District Total	43	43	49.3	40.9
White	56.4	53.1	59	54.9
Black/African American	9.4	17.4	26.1	10.9
Asian	41.7	56	55.6	32.3
Hispanic/Latino	29.2	26.1	15.4	37.9
Economically Disadvantaged	22.4	25.2	31.9	23.4
Identified Disability	13.6	10.1	4.3	9.9
Limited English Proficiency	16.1	19.5	24.2	11.9

Achievement: % of Grade 8 Students Scoring Proficient or Above on NWEA

	2011-2012	2012-2013	2013-2014	2014-2015
<i>Reading</i>				
District Total	56.7	63.9	55.8	69.5
White	71.1	74.2	67.8	83
Black/African American	25.3	36.5	30.2	36.5
Asian	37.8	37.5	41.4	67.6
Hispanic/Latino	36.4	54.5	52.9	56.3
Economically Disadvantaged	36.7	44.2	35.9	51.2
Identified Disability	23.4	29	17.9	37.3
Limited English Proficiency	19.2	26.7	19.1	28.5

Academic Achievement Cont.

Achievement: % of Grade 8 Students Scoring Proficient or Above on NWEA Cont.				
	2011-2012	2012-2013	2013-2014	2014-2015
<i>Math **Uses a higher cut score than the earlier version of this scorecard</i>				
District Total	47.1	49.8	32	58.6
White	58.1	59.7	41.9	72.7
Black/African American	18.5	17.9	12.7	27
Asian	46.7	37.5	34.8	61.8
Hispanic/Latino	22.7	45.5	27.3	44.4
Economically Disadvantaged	28.4	29	18.5	44.3
Identified Disability	4.8	15.4	10.2	12
Limited English Proficiency	20.6	14.4	11.2	23.4
Achievement: % of Grade 11 Students Scoring Proficient or Above on the State Assessment				
	SAT 2011-2012	SAT 2012-2013	SAT 2013-2014	
<i>English Language Arts</i>				
District Total	46	44	43	
White	60	60	59	
Black/African American	19	13	14	
Asian	27	36	29	
Hispanic/Latino	21	27	16	
Economically Disadvantaged	25	21	19	
Identified Disability	23	13	14	
Limited English Proficiency	2	0	2	
<i>Math</i>				
District Total	36	35	39	
White	46	51	51	
Black/African American	9	3	18	
Asian	39	41	48	
Hispanic/Latino	21	15	5	
Economically Disadvantaged	17	13	23	
Identified Disability	16	10	12	
Limited English Proficiency	3	3	17	

Academic Achievement Cont.

Achievement: % of Grade 11 Students Scoring Above Average on SAT			
	SAT 2011-2012	SAT 2012-2013	SAT 2013-2014
<i>English Language Arts</i>			
District Total	12	13	11
White	18	20	16
Black/African American	0	2	1
Asian	5	3	6
Hispanic/Latino	0	8	5
Economically Disadvantaged	5	4	2
Identified Disability	2	2	3
Limited English Proficiency	0	0	0
<i>Math</i>			
District Total	4	6	2
White	6	10	4
Black/African American	0	0	0
Asian	0	3	0
Hispanic/Latino	0	0	0
Economically Disadvantaged	1	1	0
Identified Disability	0	0	0
Limited English Proficiency	0	0	0



In 2014-2015, 11th grade students were required to take the Smarter Balanced Assessment, which should not be compared to SAT data. SAT results will return in 2015-2016.

Academic Growth

Growth: % of Grade 3 Students Meeting or Exceeding Fall – Spring Growth Goal NWEA				
	2014-2015	2015-2016	2016-2017	2017-2018
<i>Reading</i>				
District Total	48%			
White	56%			
Black/African American	39%			
Asian	35%			
Hispanic/Latino	30%			
Economically Disadvantaged	42%			
Identified Disability	37%			
Limited English Proficiency	41%			
<i>Math</i>				
District Total	44%			
White	48%			
Black/African American	40%			
Asian	46%			
Hispanic/Latino	31%			
Economically Disadvantaged	42%			
Identified Disability	33%			
Limited English Proficiency	38%			

2014-15 is the baseline year for collecting data on how many students met their projected growth target on the NWEA.

Academic Growth Cont.

Growth: % of Grade 5 Students Meeting or Exceeding Growth Goal on NWEA				
	2014-2015	2015-2016	2016-2017	2017-2018
<i>Reading</i>				
District Total	49%			
White	49%			
Black/African American	50%			
Asian	42%			
Hispanic/Latino	52%			
Economically Disadvantaged	47%			
Identified Disability	43%			
Limited English Proficiency	49%			
<i>Math</i>				
District Total	46%			
White	46%			
Black/African American	46%			
Asian	41%			
Hispanic/Latino	43%			
Economically Disadvantaged	44%			
Identified Disability	43%			
Limited English Proficiency	45%			

2014-15 is the baseline year for collecting data on how many students met their projected growth target on the NWEA.

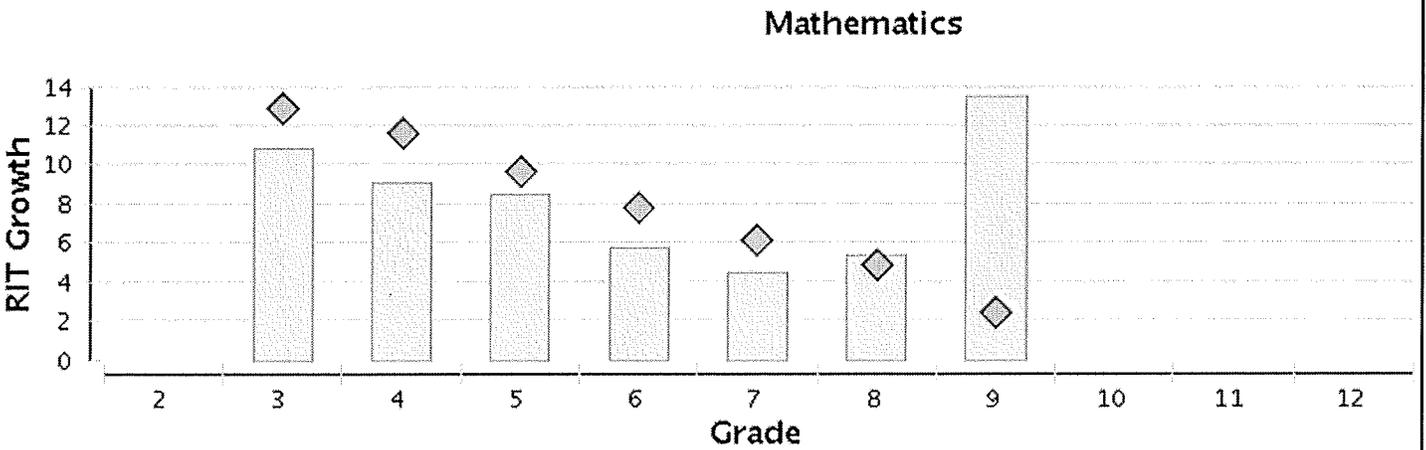
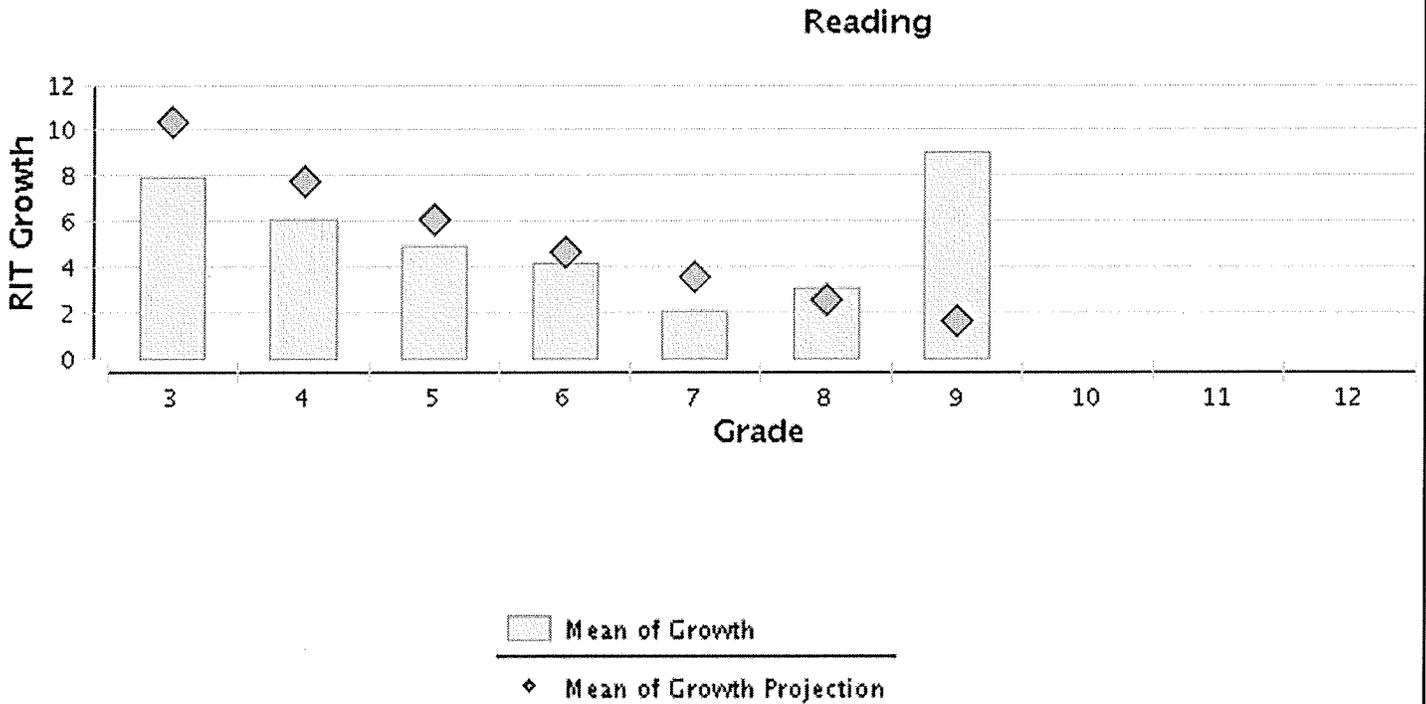
Academic Growth Cont.

Growth: % of Grade 8 Students Meeting or Exceeding Growth Goal on NWEA				
	2014-2015	2015-2016	2016-2017	2017-2018
<i>Reading</i>				
District Total	57%			
White	58%			
Black/African American	55%			
Asian	58%			
Hispanic/Latino	57%			
Economically Disadvantaged	55%			
Identified Disability	60%			
Limited English Proficiency	52%			
<i>Math</i>				
District Total	62%			
White	63%			
Black/African American	62%			
Asian	64%			
Hispanic/Latino	47%			
Economically Disadvantaged	56%			
Identified Disability	42%			
Limited English Proficiency	61%			

2014-15 is the baseline year for collecting data on how many students met their projected growth target on the NWEA.

Academic Growth Cont.

NWEA Student Growth Summary Fall 2014 – Spring 2015



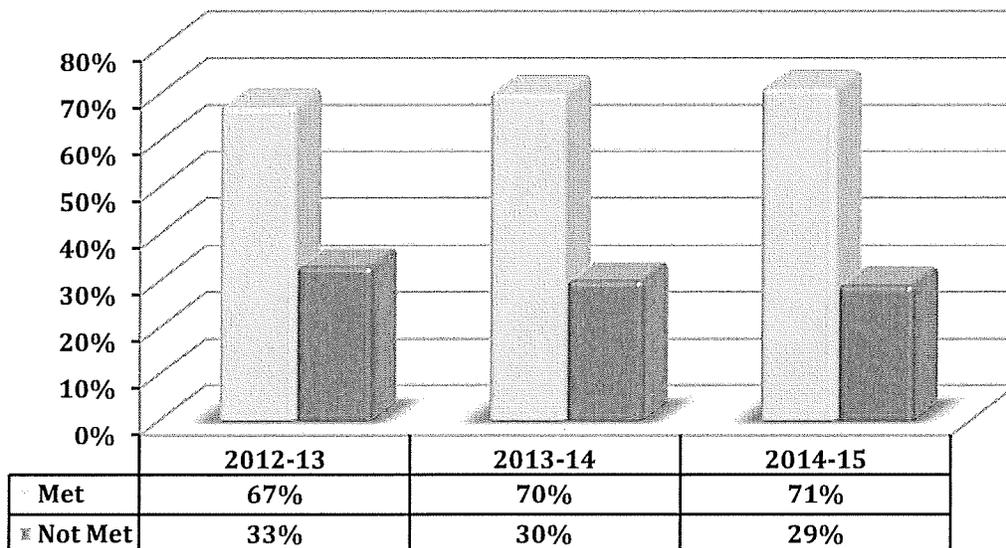
*Grade 9: Only 43 students were assessed in reading, 107 students were assessed in math out of 550 students.

Academic Growth Cont.

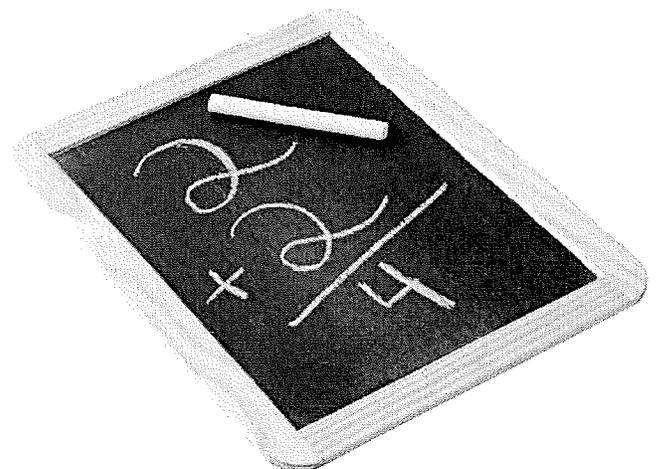
% of English Language Learner Students Meeting or Exceeding Growth Goal on ACCESS

	2012-2013	2013-2014	2014-2015
District-wide	67%	70%	71%
Elementary School	73%	78%	80%
Middle School	56%	53%	61%
High School	69%	79%	71%

District ACCESS Growth Three Years



Data is trending up district wide. There are six levels to the ACCESS test. The last level (6) is the most difficult for ELL students to achieve.



Post Secondary Readiness & Success

High School Graduation Rates	2012 Cohort	2013 Cohort	2014 Cohort
District Total	79%	79%	79%
White	82%	81%	82%
Black/African American	70%	71%	74%
Asian	76%	87%	88%
Hispanic/Latino	67%	74%	62%
Economically Disadvantaged	69%	69%	70%
Identified Disability	69%	58%	59%
Limited English Proficiency	68%	65%	70%
<i>6 Year</i>			
District Total	83%		
White	85%		
Black/African American	81%		
Asian	76%		
Hispanic/Latino	71%		
Economically Disadvantaged	75%		
Identified Disability	70%		
Limited English Proficiency	77%		

Four year graduation rates remain steady; however there is a substantial increase with English Language Learners graduating within 6 years (68% - 77%).

Post Secondary Readiness & Success Cont.

Advanced Courseswork while Enrolled at PPS High Schools			
	2011-2012 & 2012-2013	2013-2014	2014-2015
<i>Percent of 11th and 12th Grade Students Enrolled in Advanced Placement (AP) Courses</i>			
District Total	27%	31%	29%
White	34%	43%	39%
Black/African American	12%	9%	12%
Asian	25%	36%	39%
Hispanic/Latino	17%	16%	14%
Economically Disadvantaged	14%	15%	15%
Identified Disability	4%	2%	2%
Limited English Proficiency	8%	7%	7%
<i>Percent of Advanced Placement (AP) Exams Taken that Result in a Score of 3 or Better</i>			
District Total	60%	64%	61%
White			54%
Black/African American			3%
Asian			3%
Hispanic/Latino			1%
Economically Disadvantaged			5%
Identified Disability			
Limited English Proficiency			
<i>Percent of 11th & 12th Grade Students Participating in Dual Enrollment College Coursework</i>			
District Total	14%	N/A	5%
White			3%
Black/African American			1%
Asian			<1%
Hispanic/Latino			<1%
Economically Disadvantaged			
Identified Disability			
Limited English Proficiency			

Post Secondary Readiness & Success Cont.

Post-Secondary Enrollment and Persistence

* Excludes school populations too small for National Clearinghouse to report. N/A indicates entire district population is too small to report.

	Class of 2010	Class of 2011	Class of 2012	Class of 2013
--	---------------	---------------	---------------	---------------

Percent of Students Enrolling in Post-Secondary Experiences within 1-Year of Graduation

District Total	68%	64%	71%	70%
White	69%	64%	73%	69%
Black/African American	53%*	59%*	61%	74%
Asian	77%*	80%	79%	68%
Hispanic/Latino	N/A	N/A	N/A	76%*
Economically Disadvantaged	53%	56%	59%	68%
Identified Disability	38%	38%	36%*	41%*
Limited English Proficiency	N/A	65%*	64%	76%

Percent of Students who Enrolled in Post-Secondary Experiences and Returned for a 2nd Year

District Total	59%	54%*	60%	Not yet available
White	60%	55%	60%	Not yet available
Black/African American	46%*	48%*	53%*	Not yet available
Asian	86%*	59%	71%*	Not yet available
Hispanic/Latino	N/A	N/A	N/A	Not yet available
Economically Disadvantaged	40%	45%	47%	Not yet available
Identified Disability	100%*	20%*	25%*	Not yet available
Limited English Proficiency	N/A	53%*	54%*	Not yet available



Portland Public Schools' goal is to have 100% of students graduate college or career ready. The program "Make It Happen" assists first generation ELL students to ensure success in undertaking rigorous academic courses that will prepare them for college. We are currently serving about 350 students in this program.

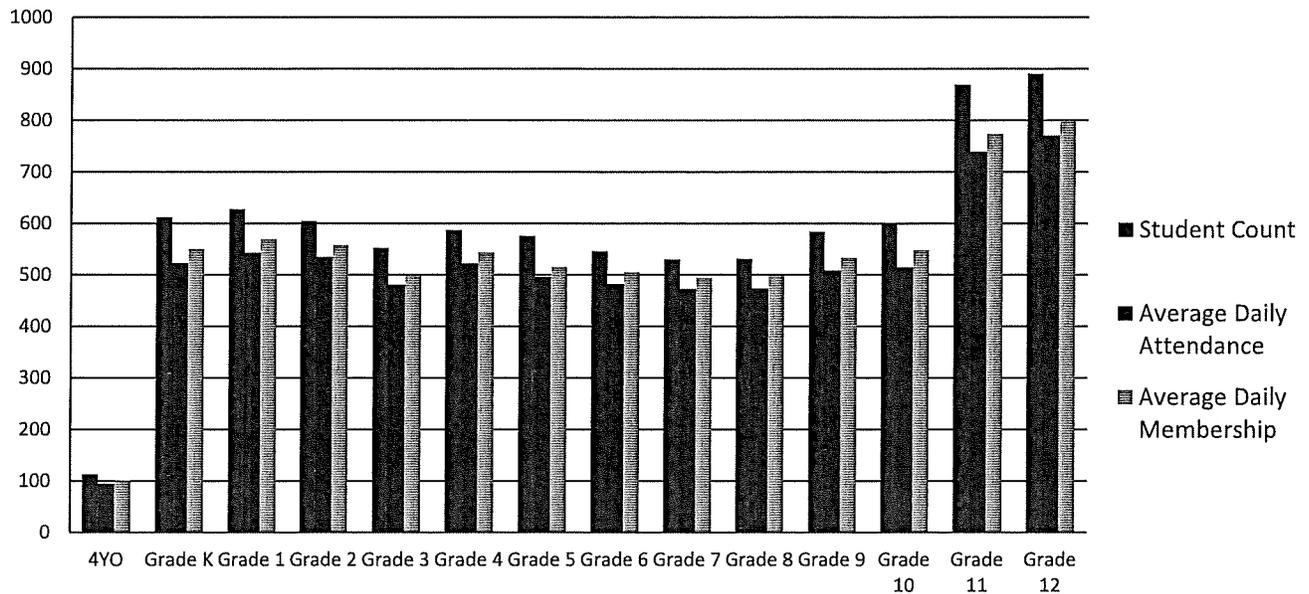
Other Academic Indicators

Pre-K Programs

* <10	2011-2012	2012-2013	2013-2014	2014-2015
<i>Number of Students Enrolled in a Portland Public Schools Sponsored Pre-K Program</i>				
District Total	67	84	80	103
White	29	46	41	50
Black/African American	28	25	26	35
Asian	*	*	*	*
Hispanic/Latino	*	*	*	*
Economically Disadvantaged	54	43	41	65
Identified Disability	*	*	*	*
Limited English Proficiency	14	21	21	28

Portland Public Schools

Average Daily Attendance/Membership - Grades 4YO - Grade 12

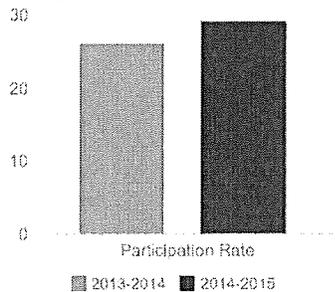


Family Engagement & Satisfaction

PORTLAND PUBLIC SCHOOLS PARENT SURVEY 2014-2015



Survey participation from parents went up from 26% to 29% across the District.

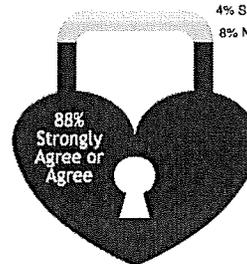


91% of parents indicated that they felt "welcomed and respected" at their child's school.



82% of parents agree that staff and administrators at their child's school "communicate effectively" with them.

Good Job! + Thank you!



4% Strongly Disagree or Disagree
8% Neutral

88% of parents agreed that their child was safe at school.

79% of parents agree that teachers at their child's school "set high expectations" and are "invested" in their child's success.



Strongly Agree or Agree (79%)
Neither Agree Nor Disagree (13%)
Strongly Disagree or Disagree (9%)

86% of parents agreed that "overall" their child enjoys attending his or her school.



Strongly Agree or Agree (86%)
Neither Agree Nor Disagree (8%)
Strongly Disagree or Disagree (6%)

The percent of parents that would strongly recommend their child's school to a family considering education options in the Portland area increased from 68% in 2013-2014 to **72% in 2014-2015.**

Attachment S1

Educational Programming in Spaces Not Designed for Education

Reiche:

- Special Education classroom housed in room that was originally a utility room with one exit, no windows, a ladder to the roof, two utility closets containing electrical and internet systems and multiple old wires draped throughout room
- OT, PT are in a custodial closet
- Small group instruction in a variety of cubicles in hallways
- English Language instruction in Art Room closet
- Nurse is in a 15'x15' space originally a mechanical closet with no bathroom, one exit, no window and contains water main and sprinkler system apparatus
- Two counselors housed in closets off the stage

Longfellow:

- Library is in two former classrooms
- Lunch is in the gym
- Gym stage is used for storage and the PE teacher's office
- Stage closet is used for the rec office
- Hallway closet is used as an office
- Hallways are used for lunch equipment storage, lunch table storage and to work with students

Lyseth:

- Literacy Support is in the main hallway alcove area
- Same alcove area serves as office space for a GT Teacher (1 day per week) and a World Language Teacher (3 days a week)
- Two ELL teachers service students in one modular space
- OT modular "classroom" servicing students for that therapy
- Modified custodial closet for the Spurwink Social Work Clinician.

Presumpscot:

- Shared gym /cafeteria forces gym and other activities outside or to other spaces
 - If there are special events in the gym, students must eat in classrooms
- Music & Art share a space forcing one activity to another space like the library if they are scheduled on the same day
- PE office, social worker and literacy coach each serve students in closets
- Reading and Special Education are combined in one classroom
- A total of six classrooms are in portables

Attachment 52

Tax Rate Projections with Only Currently Authorized Debt

UPDATED W/NEW EPS 11-16-16

	FY17 Approved	FY18 Projected	FY19 Projected	FY20 Projected	FY21 Projected	FY22 Projected
City:						
Valuation	7,780,000,000	7,800,000,000	7,830,000,000	7,860,000,000	7,890,000,000	7,920,000,000
Expenditures	186,271,885	192,479,505	198,324,079	203,679,560	210,379,290	217,912,948
Revenue	(102,409,196)	(105,363,493)	(107,325,348)	(109,380,408)	(111,131,710)	(113,205,521)
Use of Fund Balance						
Taxes	83,862,689	87,116,012	90,998,732	94,299,153	99,247,580	104,707,427
City Tax Rate	10.78	11.17	11.62	12.00	12.58	13.22
Increase	0.27	0.39	0.45	0.38	0.58	0.64
% Increase	2.6%	3.6%	4.1%	3.2%	4.8%	5.1%
School Department:						
Expenditures	103,602,884	106,242,334	111,279,915	113,921,984	116,733,654	120,684,250
Revenue	(22,521,508)	(21,225,959)	(21,005,190)	(18,574,772)	(16,815,719)	(16,753,515)
Use of Fund Balance	(750,000)	(500,000)	(500,000)	(400,000)	(400,000)	(400,000)
Taxes	80,331,376	84,516,375	89,774,725	94,947,212	99,517,935	103,530,735
School Tax Rate	10.33	10.84	11.47	12.08	12.61	13.07
Increase	0.21	0.51	0.63	0.61	0.53	0.46
% Increase	2.0%	4.9%	5.8%	5.4%	4.4%	3.6%
City & Schools Combined:						
Expenditures	289,874,769	298,721,838	309,603,995	317,601,544	327,112,943	338,597,198
Revenue	(124,930,704)	(126,589,452)	(128,330,538)	(127,955,180)	(127,947,429)	(129,959,036)
Fund Balance	(750,000)	(500,000)	(500,000)	(400,000)	(400,000)	(400,000)
Taxes	164,194,065	171,632,387	180,773,457	189,246,364	198,765,515	208,238,162
Total Tax Rate	21.11	22.00	23.09	24.08	25.19	26.29
Increase	0.48	0.89	1.08	0.99	1.11	1.10
% Increase	2.3%	4.2%	4.9%	4.3%	4.6%	4.4%

UPDATED W/NEW EPS 11-16-16

Impact of \$70M Buildings for our Future on Tax Rate

	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022
Valuation (as projected)	7,780,000,000	7,800,000,000	7,830,000,000	7,860,000,000	7,890,000,000	7,920,000,000
City Tax Levy (as projected)	83,862,689	87,116,012	90,998,732	94,299,153	99,247,580	104,707,427
City Tax Rate (as projected)	\$10.78	\$11.17	\$11.62	\$12.00	\$12.58	\$13.22
Rate Increase		0.39	0.45	0.38	0.58	0.64
% Increase		3.6%	4.1%	3.2%	4.8%	5.1%
School Tax Levy (as projected)	80,331,376	84,516,375	89,774,725	94,947,212	99,517,935	103,530,735
School Tax Rate (as projected)	\$10.33	\$10.84	\$11.47	\$12.08	\$12.61	\$13.07
Rate Increase		0.51	0.63	0.61	0.53	0.46
% Increase		4.9%	5.8%	5.4%	4.4%	3.6%
Total Tax Rate (as projected)	\$21.11	\$22.00	\$23.09	\$24.08	\$25.19	\$26.29
Rate Increase		0.89	1.08	0.99	1.11	1.10
% Increase		4.2%	4.9%	4.3%	4.6%	4.4%
Cumulative increase related to BFOF	\$ -	\$ -	\$ 0.19	\$ 0.41	\$ 0.58	\$ 0.78
Cumulative % increase related to BFOF			0.9%	1.8%	2.4%	3.1%
Increased Annual Taxes on \$225,000 home (per tax year)			\$ 42.31	\$ 93.32	\$ 130.08	\$ 174.63
Estimated Total Amount of Additional Taxes on a \$225,000 home due to BFOF over the life of bonds					\$ -	\$ 2,849

* Assumes no additional borrowing other than the \$70M BFOF project, included to illustrate the tax rate impact of the project

UPDATED W/NEW EPS 11-16-16

Impact of "Typical" CIP on Tax Rate (Avg of Past 3 Years) + \$70M BFOF on Tax Rate

	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022
Valuation (as projected)	7,780,000,000	7,800,000,000	7,830,000,000	7,860,000,000	7,890,000,000	7,920,000,000
City Tax Levy (as projected)	83,862,689	87,116,012	92,216,732	96,708,953	102,822,980	109,422,227
City Tax Rate (as projected)	\$10.78	\$11.17	\$11.78	\$12.30	\$13.03	\$13.82
Rate Increase	0.389	0.609	0.609	0.527	0.728	0.784
% Increase		3.6%	5.4%	4.5%	5.9%	6.0%
School Tax Levy (as projected)	80,331,376	84,516,375	91,400,225	98,509,802	104,606,964	110,269,313
School Tax Rate (as projected)	\$10.33	\$10.84	\$11.67	\$12.53	\$13.26	\$13.92
Rate Increase	0.51	0.84	0.84	0.86	0.73	0.66
% Increase		4.9%	7.7%	7.4%	5.8%	5.0%
Total Tax Rate (as projected)	\$21.11	\$22.00	\$23.45	\$24.84	\$26.29	\$27.74
Rate Increase	\$0.894	\$0.894	\$1.446	\$1.387	\$1.453	\$1.449
% Increase		4.2%	6.6%	5.9%	5.9%	5.5%

* Average of the past 3 CIPs

UPDATED W/NEW EPS 11-16-16

Impact of Existing CIP Requests (non-BFOF) on Tax Rate *

	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022
Valuation (as projected)	7,780,000,000	7,800,000,000	7,830,000,000	7,860,000,000	7,890,000,000	7,920,000,000
City Tax Levy (as projected)	83,862,689	87,116,012	92,874,698	98,010,290	104,753,094	111,966,522
City Tax Rate (as projected)	\$10.78	\$11.17	\$11.86	\$12.47	\$13.28	\$14.14
Rate Increase	0.39	0.69	0.69	0.61	0.81	0.86
% Increase	3.6%	3.6%	6.2%	5.1%	6.5%	6.5%
School Tax Levy (as projected)	80,331,376	84,516,375	90,014,125	95,420,692	100,220,175	104,456,415
School Tax Rate (as projected)	\$10.33	\$10.84	\$11.50	\$12.14	\$12.70	\$13.19
Rate Increase	0.51	0.66	0.66	0.64	0.56	0.49
% Increase	4.9%	4.9%	6.1%	5.6%	4.6%	3.8%
Total Tax Rate (as projected)	\$21.11	\$22.00	\$23.36	\$24.61	\$25.98	\$27.33
Rate Increase	0.89	0.89	1.35	1.25	1.37	1.35
% Increase	4.2%	4.2%	6.2%	5.4%	5.6%	5.2%

* Includes all projects in the FY17-21 CIP that have not yet been authorized, allocated equally over the next 5 years (FY18-22)

Attachment T

EPS Valuation			
Fiscal Year	Valuation	Incr/(Decr)	Basis/Methodology
FY14	7,659,250,000		2012 SEV
FY15	7,605,700,000	(53,550,000)	Avg 2012/2013 SEV
FY16	7,587,616,667	(18,083,333)	Avg 2012/2013/2014 SEV
FY17	7,603,600,000	15,983,333	Avg 2013/2014/2015 SEV
FY18	7,751,666,667	148,066,667	Avg 2014/2015/2016 SEV
FY19	7,933,300,000	181,633,333	Avg 2015/2016/2017 SEV
FY20	8,084,683,333	151,383,333	Avg 2016/2017/2018 SEV
FY21	8,151,350,000	66,666,667	Avg 2017/2018/2019 SEV

Year	State Equalized Valuation (SEV)	Incr/(Decr)
2011	7,909,900,000	
2012	7,659,250,000	(250,650,000)
2013	7,552,150,000	(107,100,000)
2014	7,551,450,000	(700,000)
2015	7,707,200,000	155,750,000
2016	7,996,350,000	289,150,000
2017 (Est)	8,096,350,000	100,000,000
2018 (Est)	8,161,350,000	65,000,000
2019 (Est)	8,196,350,000	35,000,000

Attachment U

State & Local Funded School Projects

Updated 9/9/16

	Date	Square Footage	Rated Capacity	Grades	Total Project Cost (\$M)	State Funded Share (\$M)	Local Funded Share (\$M)	Notes
	Funding Approved							
Elementary Schools								
Portland - Hall		84,890		PreK-5				
Falmouth	Apr-11	139,638	917	PreK-5	37.95	31.89	6.06	
Brunswick	Feb-10	94,836	600	3-5	21.71	18.78	2.93	
Durham	Feb-09	82,940	505	PreK-5	20.08	17.84	2.24	
Gorham	Feb-10	82,284	550	PreK-5	20.55	10.08	2.53	
Buxton	Jun-08	126,698	850		27.47	25.96	1.51	
Portland - Ocean Avenue	Oct-09	70,315	441		13.9	13.52	0.38	
Portland-East End	Jul-04	67,700	450		11.15	9.77	1.38	
Portland - Riverton	2006			PreK-5	3	0	3	Reno
Westbrook - Canal	Jul-99	11,550			2.68	1.55	1.13	Reno
Raymond	Jun-98	61,857	450	K-8	7.8	7.8	0.00	
Gray-New Gloucester	Sep-97	43,000	450		3.75	3.75	0.00	
South Portland - Brown	2002-2003			K-5	6.09	0	6.09	
South Portland - Dyer	2002-2003			K-5	5.76	0	5.76	
South Portland - Kaler	2002-2003			PreK-5	5.08	0	5.08	
South Portland - Skillin	Late 90's			PreK-5	Unknown	0	Unknown	
South Portland - Small	2002-2003			K-5	5.15	0	5.15	
Middle Schools								
Westbrook	Jun-08	134,597	600		33.67	26.04	7.63	
Gorham	Dec-01	139,000	750/900		21.93	15.88	6.05	
Scarborough	Aug-94	90,500	600		9.85	9.67	0.18	
South Portland - Mahoney	2002-2004			6-8	.975	0	.975	Windows
South Portland - Mahoney	2010			6-8	Unknown	0	All Local Funds	Library
South Portland - Memorial				6-8	Unknown	0	All Local Funds	Library
South Portland - Memorial	2010			6-8	.951	0	.951	
Portland (all 3 Middle Schools)	1995-1996			6-8	8.64	0	8.64	Reno

State & Local Funded School Projects

Updated 9/9/16									
	Date	Square	Rated	Grades	Total	State	Local		
	Funding	Footage	Capacity		Project	Funded	Funded		
	Approved				Cost (\$M)	Share (\$M)	Share (\$M)	Notes	
High Schools									
Windham	2-Mar	220,000	1100/1150		35.58	27.58	8.00	Reno/Add	
Falmouth	Apr-00	141,800	750		22	16.96	5.04		
Westbrook VoTech	Mar-98	66,940	650		6.92	5.38	1.54		
Gorham	Apr-93	129,940	750		11.65	9.69	1.96		
Brunswick	Nov-92	172,500	1200		18.92	14.71	4.21		
South Portland	1996			9-12	Unknown	0			Cafeteria/Auditorium
South Portland	Late 90's/Early 2000'	315,710		9-12	49	0	49		Library/Science Wing
Freeport	2013			9-12	14.6	0	14.6		
Biddeford	2009			9-12	34	0	34		

Note: Above information was extracted from reports prepared by Mr. Scott Brown, MDOE Director of School Facilities.

Proposed Year	SB Score	City Score	Project#	CIP	Facility	Description	SB2010	City 2010	Actual 2010	SB 2013	City 2013	Actual 2013	SB 2014	City 2014	Actual 2014	SB 2015	City 2015	Actual 2015	SB 2016	City 2016	Actual 2016	SB 2017	City 2017	Actual 2017	
2015			141604		Multi	Pave multiple school campuses																			
2015				C15505	Transportation	School Bus										500,000	95,000	95,000							
2015				C15503	DHS	DHS Walkway Repairs										5,973,122	100,000	100,000							
						2015 Subtotals												1,523,640							
2016					PHS	PHS Fire Alarm Replacement													150,000		150,000				
2016					Multi	Oil Tank Removal													200,000		200,000				
2016					PATHS	PATHS Roadway Reconstruction													450,000		450,000				
2016					Peaks Island	Peaks Island School Masonry & Boiler													400,000		400,000				
2016					DHS	DHS Windows - Phase 1													250,000		250,000				
2016					King	King Inlet Piping													100,000		100,000				
2016					Riverton	Riverton Boiler Replacement													175,000		175,000				
2016					Transportation	30 Passenger Bus													50,000		50,000				
2016					Transportation	Full Size Bus													90,000		90,000				
2018					Transportation	7 Passenger Van													25,000		25,000				
2018					Transportation	7 Passenger Van													25,000		25,000				
						2016 Subtotals												1,915,000			1,136,752				
2017					Transportation	Two 14 Passenger Buses													86,000		86,000				
2017					Transportation	Replacement School Buses													88,000		88,000				
2017					Food Service	Food Service Truck													89,000		89,000				
2017					PATHS	PATHS Fire Alarm Replacement													225,000		225,000				
2017					DHS	DHS Window Replacement													250,000		250,000				
2017					Lincoln	Lincoln Masonry													250,000		250,000				
2017					Reiche	Reiche Ramp Removal													250,000		250,000				
2017					Lyman Moore	Lyman Moore Paving Drainage													400,000		400,000				
2017					Peaks Island	Peaks Island Boiler Replacement/Masonry													500,000		500,000				
2017					Reiche	Reiche Roof Replacement/Engineering													500,000		500,000				
2017					Reiche	(Roof, Ramp, Entry)													50,000		50,000				
2017					CBHS	CBHS New Entrance & Engineering													50,000		50,000				
2017					Maintenance	Box Truck Replacement													50,000		50,000				
						2017 Subtotals															2,188,000				2,089,000

Memo

To: Brendan O'Connell, Director of Finance
Anita R. LaChance, Deputy City Manager

From: Jim Saffian, Bond Counsel

Date: October 27, 2016

Re: School Debt Issues

This memorandum discusses the following issues pertaining to the Portland School Department's proposed "Buildings for Our Future" school projects (the "Proposed School Projects") with an estimated requested bond authorization of \$70.5 million (the "Bonds").

- Bond Debt Limit
- Referendum Requirements
- Impact of Local Referendum
- Timing Issues
- Local Funding vs. State School Construction Subsidy
- Form of Referendum Question / Bonding Flexibility

I. Bond Debt Limit

- Debt Limit – State Law

Title 30-A, Section 5702¹ of the Maine Revised Statutes establishes various municipal debt limits, including a limitation for schools, based on a municipality's then-current state valuation, as certified by the Secretary of State. The City's current (2016) state valuation is \$7,996,350,000. Based on this, the City is subject to the following debt limitations under Section 5702:

1. School debt limit: \$799,635,000 (10% of State Valuation)

¹Note that Title 30-A, Section 5703 excludes certain types of debt from the Section 5702 debt limit, including but not limited to State subsidized school debt and revenue bonds (such as the revenue bonds issued for the Jetport) issued under Chapter 213 of Title 30-A.

- | | |
|---|-----------------------------|
| 2. Sewer debt limit: | \$599,726,250 (7.5%) |
| 3. Water/airport/special purpose district debt limit: | \$239,890,500 (3%) |
| 4. <u>Other debt limit:</u> | <u>\$599,726,250 (7.5%)</u> |
| 5. Total debt limit: | \$1,199,452,500 (15%) |

As of June 30, 2015, the City had \$36,050,000² of school debt outstanding. Thus, under the State law debt limit, this leaves the City with \$734,670,000 of school project bonding capacity.

- Debt Limit – City Debt Management Policy

In addition to the State law debt limit, the City’s Debt Management Policy (the “Policy”) adopted in 2011, establishes a separate debt limit and other debt issuance requirements. While the Policy confirms that City will comply with the above-discussed State law debt limit under Title 30-A, the Policy also establishes a more restrictive debt limit, stating that the City’s total debt should not exceed 5% of the City’s state valuation. This more restrictive debt limit limits the City’s total debt outstanding to \$399,817,500. As of June 30, 2016, the City’s total debt outstanding was \$294,405,698.

In addition, the Policy requires that the City evaluate each bond issue under the following criteria: Demand, Capacity, Affordability, Term and Payment Structure.

1. *Demand*— evaluates the need for borrowing, measured by the City’s Capital Plan and other capital investment opportunities.
2. *Capacity*— evaluates the maximum amount to borrow, based on (a) current and projected annual debt service level, (b) current outstanding debt, (c) market conditions (including opportunities to participate in low interest programs) and (d) economic conditions, including cost of construction.
3. *Affordability*—evaluates the fiscal impact, based on a projection of annual debt service impact including both budgetary impact and tax impact. This element lists the following debt service metrics:
 - a. Net debt service³ should not exceed 15% of general fund expenditures. Currently the City’s net debt service is \$27,518,651, 9.49% of FY17 general fund expenditures.
 - b. Net debt service should not exceed 1.5% of per capita income. Currently the City’s net debt service is 0.9% of per capita income.
 - c. Net debt per capita should not exceed the “moderate” range by Moody’s (currently \$5,000). Currently the City’s debt per capita is \$3,174.

²This amount includes the City’s Ocean Avenue School Bonds, which were approved for State school construction subsidy. Thus a portion of this debt (\$10,650,000 principal amount outstanding as of June 30, 2015) need not be included in the State law debt limit calculation.

³Net of Enterprise Funds and State reimbursed School Debt Service.

4. *Term*—establishes the goal of the shortest economically feasible payback period.

5. *Payment Structure*—establishes a preference for level principal amortization.

II. Referendum Requirements

- Referendum Requirements

City Charter: Article VII, Section 16(a) of the City Charter, states that:

(a) The city council shall submit the following to voter referendum:

- (1) Orders or resolves authorizing the issuance of general obligation securities of the city in a principal amount greater than five one-hundredths of one (1) percent of the last certified state valuation of the city for a single capital improvement or item of capital equipment; or

Based on the City's current 2016 state valuation, a bond order in the amount of \$3,998,175 or more for a single capital improvement or item of capital equipment, unless excepted under Article VII, Section 16(b), triggers the referendum requirement.

Article VII, Section 16(b) provides for the following three exceptions to the referendum requirement: (i) refunding bonds, (ii) street, storm water and sewer bonds and (iii) bonds for a declared emergency.

(b) The provisions of this section shall not be applicable to any order or resolve authorizing (i) the refunding of any securities or other obligations of the city; (ii) the issuance of general obligation securities, or other direct or indirect obligations, of the city for streets, sidewalks, or storm or sanitary sewers; or (iii) any construction or financing of improvements or equipment needed as a result of fire, flood, disaster or other declared emergency. For purposes of this section, the city council may by vote of at least seven (7) of its members adopt emergency orders or resolves authorizing construction or financing of improvements or equipment needed as a result of fire, flood, disaster or other emergency and such orders or resolves shall contain a section in which the emergency is set forth and defined; provided, however, that the declaration of such emergency by the city council shall be conclusive.

Thus, the proposed school Bonds would need to be submitted to a referendum vote unless the City Council were to determine that the Proposed School Projects were so critical that emergency circumstances existed. In that event, the proposed school Bonds would be exempt from the Charter referendum requirement and could be authorized in the usual process by City Council action.

State Law Referendum Requirement for School Construction Projects: There is no requirement under the general Maine statutes that municipal bond questions be submitted to a referendum vote. However, State law does establish a referendum vote in some specific circumstances. One such circumstance applies to school construction projects that have been approved for State subsidy. If any or all of the Proposed School Projects are approved for State subsidy, then the project must comply with the specific approval and referendum requirements under Title 20-A, Section 15904(1) of the Maine Revised Statutes. Please also note, that Title 20-A imposes a variety of approval steps and requirements on a State subsidized project. Thus, if any of the Proposed School Projects are approved for State subsidy, that project would need to be submitted to a referendum vote on a stand-alone basis and not as part of a larger aggregated, bond referendum question.

III. Impact of Local Referendum

Based on conversations with the Department of Education, if a school construction project obtains a local funding approval, it is not eligible for inclusion on the Department's State subsidy Approved Projects List. This has been the State's policy for the last decade. No application will be reviewed and, if the project is already on the list, it will be removed.

Therefore, if the City obtains referendum approval for the Longfellow and Reiche School Projects (currently on the Approved Projects List), this will cause the State to remove those projects from the Approved Projects List and end the possibility of obtaining State subsidy for those projects. Thus, proceeding to a local referendum now would remove the possibility of State school construction subsidy approval for any of the Proposed School Projects, including those already on the list.

IV. Timing Issues

Once a non-State subsidized project is approved by the voters, there is no specific time limit in which the authorized bonds must be issued. If the Bond Order or referendum question does not establish an "issue by" date, the authority to issue the Bonds remains in effect for an indefinite period of time. As long as the project has not been abandoned (a non-specific term of art), the authority will remain in place. For example, if all four Proposed School Projects were approved at referendum, it would be reasonable to assume that those projects would be constructed over some extended period of time. There would be no issue with issuing the authorized over this time frame.

Conversely, a State subsidized project is built off of the date the State has approved for when the debt subsidy will start. So, for example, if the State approves a project for State school construction subsidy, with the debt service subsidy to start in the fall of 2019, then the bonds for that project must be issued in either the spring or the fall of 2018. The Rules impose various other time-requirements. I've attached a pro-forma project schedule that assumes a fall 2019 bond issue.

V. Local Funding vs. State School Construction Subsidy

As discussed above under the "State Law Referendum Requirement" paragraph, State law imposes its own referendum requirement on a State subsidized project. In addition, the State School Construction Rules lay out a detailed project schedule that sets out various project benchmarks

(design approval, public hearings, straw votes, funding approval, etc.) that do not apply to non-State subsidized debt. These involve design review and approval, approval by the State Board of Education and final funding approval by the Commissioner of the Department of Education. The School Construction Rules also establish various time requirements for the project approvals to be put in place.

VI. Form of Referendum Question / Bonding Flexibility

For non-State subsidized projects, the City has a great deal of flexibility in framing the referendum question. The scenarios run the gamut from (a) each project getting its own referendum question to (b) all the projects being submitted in a single question but each with its own bonding amount to (c) all projects being submitted at once with a single aggregate, lump-sum bonding amount that can then be allocated among the various projects at an City administrative level. The underlying Bond Order adopted by the City Council (and submitted to the voters) would specify who has the authority to allocate bonds among the various Proposed School Projects.

In contrast, a State subsidized project must be submitted as a stand-alone question. In addition, the question must be presented in a form established by State law and must be framed to establish: (i) approval of the project and location, (ii) total project costs, (iii) total state subsidized costs and local costs, and (iv) total bonding amount.

I hope this information is helpful to you as you complete your planning for the Proposed School Projects. Please do not hesitate to contact me if you have any further questions.

Attachment W

TAX SUPPORTED DEBT SCHEDULE (excludes enterprise fund and state supported school debt)

Fiscal Yr	SCHOOL	CITY	PENSION	TOTAL TAX SUPPORTED	INCR/(DECR) OVER PRIOR YEAR
2017	3,383,944	11,245,817	12,851,663	27,481,425	
2018	2,693,789	10,271,996	13,674,852	26,640,636	(840,788)
2019	2,166,212	9,761,921	14,547,881	26,476,015	(164,622)
2020	1,913,570	8,510,925	15,472,397	25,896,892	(579,123)
2021	1,801,131	7,883,416	16,448,711	26,133,258	236,366
2022	1,754,756	7,351,405	17,485,795	26,591,956	458,698
2023	1,620,585	6,843,345	18,585,400	27,049,330	457,374
2024	1,545,749	6,239,534	19,752,493	27,537,776	488,446
2025	1,492,711	5,688,333	20,989,817	28,170,861	633,085
2026	1,223,687	5,164,306	22,297,889	28,685,882	515,021
2027	1,026,449	4,494,081	-	5,520,530	(23,165,352)
2028	780,203	3,792,699	-	4,572,903	(947,627)
2029	768,606	3,681,030	-	4,449,636	(123,267)
2030	756,484	3,275,791	-	4,032,274	(417,362)
2031	739,977	3,179,527	-	3,919,505	(112,770)
2032	686,208	2,656,293	-	3,342,502	(577,003)
2033	279,232	2,316,611	-	2,595,842	(746,659)
2034	235,198	1,719,848	-	1,955,046	(640,797)
2035	65,610	1,254,244	-	1,319,854	(635,192)
2036	32,590	807,017	-	839,607	(480,247)
	41,646,695	106,138,140	172,106,898	319,891,734	