The Upper Arlington School District is in the midst of a two-year, three-phase facilities master planning process with a goal of using community feedback to craft a long-term, financially sensible plan for dealing with its aging school buildings.

Although academics are always first and foremost in Upper Arlington, the district can no longer ignore the growing needs of its facilities, which are, on average, more than 60 years old. Although the school buildings are well maintained, as verified by two independent design and engineering firms, the cost associated with maintaining the buildings continues to rise.

In an effort to control those costs and prevent classroom funds from being diverted to cover facilities needs, the Upper Arlington Board of Education directed the administration in 2015 to engage in a community-centered planning process.

The call for creating a facilities master plan came from a group of community volunteers during the 2014 strategic planning process. This group, known as the Productivity and Efficiency Work Group, was composed of residents with expertise in various areas of business and financial management.

The group was tasked with exploring the operational side of the district’s budget and providing recommendations in response to the following question: What are necessary and essential ways to improve school district operating efficiencies and effectiveness?

In a briefing paper summarizing its findings, the group reported:

Findings: The district’s buildings have a cumulative appraised value of more than $150 million, but they are averaging 60 years of age and are currently maintained on a year-by-year basis. The work team feels that the district should take a more proactive approach to allow for future efficiencies and long-term planning. The
The group identified significant deficiencies with deferred maintenance items and a limited capacity for flexibility in district buildings.

Recommendation: There will be a need for future capital to meet these needs, and the team strongly recommends that the district engage the community to help develop a master plan for its facilities as soon as possible. This plan must ensure that the district’s facilities not only remain safe, dry and secure, but also support the educational and instructional needs of current and future generations of Upper Arlington students and staff… the team feels this area of focus is essential to the long-term financial health of the district. This is the team’s main area of concern and it recommends an all-encompassing approach, including employing a comprehensive analysis model to ensure the district is maximizing the tax dollars spent on facilities today and tomorrow.

The Upper Arlington Board of Education agreed with the group’s findings on facilities and quickly began incorporating its recommendation into the district’s 2015-2018 Strategic Plan, which was finalized in December 2014. Two months later, the district officially launched the facilities master planning process at the first annual State of the Schools event.

PROCESS

From the outset, the Upper Arlington Board of Education was clear about its expectations for the master planning process: open and clear communication, transparency and multiple opportunities for community members to get involved and share their feedback. Those expectations inspired the design of the three-phase process spanning from January 2015 through May 2017.

ASSESSMENT PHASE

The assessment phase began with the launch of the master planning process in early 2015 and concluded a year later. In this phase, the district:

- Used a request-for-proposal process to select a design team and construction consultant
- Formed a facilities task force composed of community volunteers;
- Commissioned a facilities assessment based upon a third-party evaluation in 2014 by the Ohio Facilities Construction Commission (OFCC);
- Commissioned an educational adequacy assessment; and
- Formed building teams composed of community volunteers at all nine schools.

The design team and construction consultant selection process started with a release to more than 25 firms across the country with expertise in working with communities during a master planning process. Interested firms were shortlisted and asked to attend a tour of district facilities to help orient them with Upper Arlington’s schools. These firms were then interviewed by the district and the residents on the facilities task force. The same process was used for the selection of a construction consultant.

At the completion of the selection process, the district engaged the services of Moody Nolan and Perkins+Will as the design team and Turner Construction as the construction consultant to help lead the community through the three-phase process created by the Board of Education.
Once selected, the design team got to work building upon the OFCC assessment completed at no cost to the district in late 2014. Although the OFCC assessment was extremely valuable, it did not include several types of spaces essential to the operation of the district such as performing arts venues, athletic sites, parking lots or playgrounds. The district asked the design team to verify and expand on the OFCC findings to include these spaces to help develop a full picture of the district’s facility needs.

In addition, the design team was asked to conduct an educational adequacy assessment of each school. The team spent time observing many qualities of the schools that directly relate to the student experience such as security, classroom size, daylighting, acoustics and collaborative space. In addition, the team held student focus groups with both middle school and high school students to better understand how district facilities were meeting the needs of students.

The facilities task force is made up of twelve community members with expertise in the areas of construction, law, real estate, and business. The volunteer group provides oversight and a community voice in the implementation of the master planning process.

The more than 300 members of the nine building teams serve as experts and committed stakeholders for their school(s) of choice. Many of these volunteers are alumni of the schools, parents/grandparents of current students or parents/grandparents of future students.

The assessment phase also contained the first two community engagement sessions attended by more than 500 residents. These events served as an opportunity for community members to get a firsthand update on the master planning process, ask questions and provide feedback.

OPTIONS PHASE

During the options phase, the design team worked with the volunteers on the building teams to create options for the buildings that fell into the categories of repair, renovate or rebuild. The repair options addressed only the physical needs of the buildings and additional space needed for the projected more than 10 percent enrollment growth through 2025-26; the renovate and rebuild options address physical needs, enrollment growth and educational adequacy issues.

The options were presented for feedback during a third community engagement session. After that meeting, the design team refined the options based on community feedback and brought them back to the building teams for further review.

After the second round of building team meetings in this second phase, the design team provided estimated costs for each of the options, which were then brought back to the community for feedback during a fourth engagement session.

After gathering feedback on the options from the community engagement session, the district asked members of the building teams and the facilities task force to weigh in as well. The district then launched a community-wide
online survey for feedback on the options. The survey remained open for more than three months and garnered more than 2,400 responses.

Meanwhile, building team members at both the high school and Jones Middle School brought additional questions and ideas to the district’s attention, leading to the creation of a second renovate option for Jones and fifth and sixth rebuild options for the high school. These options were shared with community members during a building team summit in September 2016 and through a second online survey, which garnered more than 1,000 responses.

DISTRICT AND CENTRAL OHIO BUILDING TOURS

Two different, but equally important, types of tours were provided to community members throughout the first two phases of this process. First, building team members were given the opportunity during the assessment phase to learn about the district’s buildings through in-depth tours with the building principals. The community had the same opportunity to tour buildings in August 2016, during the options phase, to provide residents the chance to see strengths and weaknesses of the school buildings.

In January 2016, the district organized a bus trip to New Albany to see its newest school building and to the Past Foundation Innovation Lab, designed to provide flexibility and collaboration for its students. Residents experienced how design and space can impact education and saw how today’s students are being educated. As the community continues through the journey of this three-phase process it is important to keep in mind that educators have a responsibility to prepare students for their future and not the experiences of prior generations. During both of these tour residents provided very valuable feedback to the district.

All of this feedback, along with a telephone survey by a professional opinion research firm, was used to formulate a master plan recommendation in October 2016. The recommendation includes the selected option for each school, but it does not include recommendations on how to fund or phase the work on the buildings. Once the Board of Education approves a master plan, the district will move into the third and final phase of the process, the decisions phase, to answer those questions and have a group of volunteers take a second look at the scope of the options and the estimated budgets.

DECISIONS PHASE

The decisions phase is set to begin in January 2017 with the creation of the Financial Advisory Board (FAB). This group will be made up of community residents with experience in financial management or managing businesses that have gone through sizable facilities and construction projects. Two Board of Education members, the superintendent, the treasurer and other members of the administrative team will consult with the Financial Advisory Board as needed.
The FAB will focus on the following areas of consideration:

Another factor that will be examined during the decisions phase is the district’s remaining voted bond debt capacity, which is estimated at $215 million as of the fall of 2016.

The FAB will also review the following needs identified during the master planning process: transitional academic and athletic space to be used by students during potential construction projects; a welcome office to house a central registration point for all district families; overall site layout of the schools including athletic fields and parking; a privately funded alumni room at Upper Arlington High School; and repairs and/or renovations to the central office building at 1950 North Mallway Drive.

After the work team compiles its initial findings on these topics, the district will reconvene the building teams to gather feedback. An additional community engagement session, online survey and professional telephone survey to collect the thoughts and feelings of the community as a whole will also be scheduled in the spring of 2017.

After these meetings take place and the district receives the feedback and survey results, the work team will use that data to refine its findings. The Financial Advisory Board will issue a final findings report to Treasurer Andrew Geistfeld in the spring of 2017. Geistfeld, in turn, will make a recommendation to the Board of Education regarding both a bond issue and an operating levy for the November 2017 ballot.

COMMUNITY ENGAGEMENT

As mentioned earlier, the Board of Education directed from the outset that the master planning process would be grounded in clear and open communication, transparency and ample opportunities for community involvement
and feedback. To hold true to those intentions, the district launched a concerted effort to inform and involve as many residents as possible using all of the tools at its disposal.

COMMUNITY MAILERS
The district mailed oversized postcards to every home in the district before each community engagement session, to announce the opening of the online survey and to invite residents to the building tours held in August 2016.

COMMUNITY NEWSLETTER
The district provided an update on the master planning process in each quarterly community newsletter beginning with the Winter 2014-2015 issue.

NEWSPAPER COVERAGE
The district worked with the Upper Arlington News and The Columbus Dispatch to provide 30 news stories and guest columns during the past two years.

ELECTRONIC MEDIA
The district sent regular emails to district families and volunteers as well as frequent updates on the district website and social media platforms. All master planning documents, feedback and meeting videos are archived on the website at www.uaschools.org/facilities for the public to review.

DATA POINTS
The district gathered, and posted on its website, a total of six data points of community feedback regarding the options for the master plan. The themes that emerged in this data points were used to inform the master plan recommendation.
THE MASTER PLAN RECOMMENDATION

The master plan recommendation presented to the Upper Arlington Board of Education on October 10, 2016 proposes the options listed below. The Board will vote on the recommendation in November or December of 2016, with the specific date announced widely through local news media; the district website, www.uaschools.org; social media and parent/building team emails.

Notes:
• These numbers are preliminary cost estimates for the options.
• The master plan is a long-range plan, and the above recommendation is intended to be phased and implemented over time.
• The remaining voted bond debt capacity is approximately $215,000,000.

The recommendation proposes that the district implement either Rebuild Option E or Rebuild Option F for the high school. Additional community feedback will be gathered during the decisions phase on these two new community-suggested options for Upper Arlington High School before making a final decision.

Either option would include a four-story core academic building. Rebuild Option E would locate the high school’s front door on Brandon Road and involve significant renovations to Marv Moorehead Stadium. The other option,
Rebuild Option F, would locate the high school’s front door on Zollinger Road and would involve relocating and rebuilding Marv Moorehead Stadium to maximize the site.

For the district’s five elementary schools, the recommendation proposes addressing both the physical needs of those buildings identified in professional physical assessments and the educational adequacy needs, such as security, classroom size and daylighting. All elementary schools would either be rebuilt or renovated. Greensview, Wickliffe and Windermere would be rebuilt; Barrington and Tremont would be renovated.

For the district’s middle schools, the recommendation proposes the Repair+ options. These options address the physical needs of both schools and provide the additional space needed to accommodate the projected enrollment increase at Jones Middle School.

The Repair+ option was also recommended for Burbank Early Childhood School, which serves both preschool and kindergarten students and houses district offices as well.

CONCLUSION

The first two phases of the master planning process have revealed extensive needs in our buildings and intense community interest in this topic. The district has been very pleased with the number of community members volunteering to take part in the process, attending community engagement sessions and responding to surveys. In all, there have been more than 5,000 points of contact in the first two phases alone. The district intends to continue to expand that reach during the decisions phase as all parties work together to craft a long-term, financially sensible plan to deal with Upper Arlington’s aging schools.