INTRODUCTION

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

UA Schools is a premier district in both Ohio and the nation. Its legacy is built on a history of focusing on what matters most for students and taking a leadership position in education. UA Schools focuses on continuous improvement and adapting to the changing needs of students as it seeks to fulfill its vision of uniquely accomplished students prepared to serve, lead and succeed.

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 and repairing the aging buildings and mechanical systems 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.

BACKGROUND

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 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 enrollment growth of more than 10 percent 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. During both of these tours 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 Board of Education spent two months taking feedback on the recommendation before taking action. The recommendation was approved with a unanimous vote on December 13, 2016.

DECISIONS PHASE

During the decisions phase, district Treasurer/CFO Andrew Geistfeld formed the Financial Advisory Board (FAB), a team of community volunteers with significant experience in business management and the financing and management of facilities improvement projects. During the months of January and February 2017, the FAB met four times to review the master plan and the district’s need for an operating levy in the fall of 2017.

At the March 7, 2017, Board of Education meeting, the Financial Advisory Board issued a report with its initial draft findings on the district’s need for an operating levy in November 2017; the phasing, scope and funding of the master plan; and additional needs identified during the master planning process.

District administration then began a weeks-long process to gather feedback on the FAB’s initial findings from as many residents as possible so that the Financial Advisory Board could come back together in late April 2017 to review the feedback and finalize its findings.
The district gathered feedback on the initial findings from five key data points:

- Community engagement sessions, the morning and evening of April 4;
- Building team survey, filled out in paper form at a meeting on April 3 or online from April 4 through April 12;
- Community-wide online survey, April 5 through April 19;
- Facilities Task Force online survey; and
- A professional phone survey, including cellphones, conducted from April 10 through April 14.

In all, approximately 2,400 community members shared their thoughts on the initial findings of the FAB through these meetings and surveys.

The Financial Advisory Board reconvened on April 24, 2017, to review all of the community feedback and refine its initial findings. The team’s final report was presented to the Board of Education on May 9, 2017. At the same meeting, Superintendent Paul Imhoff and Treasurer/CFO Andrew Geistfeld made recommendations to the Board regarding final updates to the master plan and the November 2017 ballot issue.

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 surveys and to invite residents to the building tours held in August 2016. Eight oversized postcards in all were mailed to community members through April 2017. In addition, the district sent a bifold mailer to all residents in February 2017 providing important updates on the Board of Education-approved master plan and next steps in the process.

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 approximately 40 guest columns and news stories about or relating to the facilities master planning process over the past two and a half 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.

THE MASTER PLAN

The master plan recommendation presented to the Upper Arlington Board of Education on October 10, 2016, and approved on December 13, 2016, outlines the options described below. All numbers are preliminary cost estimates based on first-quarter 2019 dollars.

<table>
<thead>
<tr>
<th>School</th>
<th>Option</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burbank</td>
<td>Repair+</td>
<td>$7,293,000</td>
</tr>
<tr>
<td>Barrington</td>
<td>Renovate+</td>
<td>$31,024,000</td>
</tr>
<tr>
<td>Greensview</td>
<td>Rebuild</td>
<td>$22,636,000</td>
</tr>
<tr>
<td>Tremont</td>
<td>Renovate+ A</td>
<td>$14,906,000</td>
</tr>
<tr>
<td>Wickliffe</td>
<td>Rebuild</td>
<td>$23,848,000</td>
</tr>
<tr>
<td>Windermere</td>
<td>Rebuild</td>
<td>$22,181,000</td>
</tr>
<tr>
<td>Hastings</td>
<td>Repair+</td>
<td>$27,677,000</td>
</tr>
<tr>
<td>Jones</td>
<td>Repair+</td>
<td>$18,208,000</td>
</tr>
<tr>
<td>UAHS</td>
<td>Rebuild</td>
<td>$137,037,000 - $142,111,000</td>
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</tbody>
</table>

**Total:** $304,810,000 - $309,884,000

Notes: These numbers are preliminary cost estimates for the options based on first-quarter 2019 dollars. The master plan is a long-range plan, and the above recommendation is intended to be phased and implemented over time.

The recommendation approved in December 2016 proposes that the district implement either the Zollinger Road or Brandon Road rebuild option for the high school. Both options include a four-story core academic building. The Brandon Road option (previously known as Rebuild Option E) would locate the high school’s front door on Brandon Road and involve significant renovations to Marv Moorehead Stadium. The Zollinger Road option (previously known as Rebuild Option F) would locate the high school’s front door on Zollinger Road and would involve relocating and rebuilding Marv Moorehead Stadium to make the most efficient use of the site long term.
For the district’s five elementary schools, the master plan calls for 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 as follows: Wickliffe and Windermere would be rebuilt in their entirety; Greensview would be rebuilt except for the 1997 and the 2009 additions; and Barrington and Tremont would be renovated.

For the district’s middle schools, the master plan calls for 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 is also planned for Burbank Early Childhood School, which serves both preschool and kindergarten students and houses district offices as well.

**FINAL RECOMMENDATIONS**

As the community wraps up this two-year, three-phase process, the district is recommending final updates to the master plan. These updates are based upon the recommendations included in the Financial Advisory Board’s final report as well as the community feedback gathered during the decisions phase.

**HIGH SCHOOL OPTION**

The district recommends pursuing the Zollinger Road option for the high school rebuild based upon the principles of easier access for community members and first responders, a more efficient layout of the site and a logical location for a future addition, if needed. The results of the online surveys also strongly support this option.

**TRANSITIONAL ATHLETIC SPACE BEHIND TREMONT ELEMENTARY SCHOOL**

The district recommends adding a softball diamond, baseball diamond and turf field on the school-owned land behind Tremont Elementary School that is adjacent to Northam Park. This site is already used by many high school teams for practice and competition. During construction, the turf field would provide for extended use by teams displaced by work crews. After construction, it would provide for more flexibility for student-athletes.

**CENTRAL OFFICE BUILDING**

The district recommends not spending bond money on the current central office location at 1950 North Mallway Drive. While a physical assessment found needs at the site totaling approximately $1.5 million, the district recommends looking for other ways to house the staff members that support all district schools. Other options may include selling the site and using the proceeds toward adding office space.
in one of the renovated or rebuilt schools. If the Board of Education were to pursue selling the 1950 North Mallway location, it would follow the transparent and open process outlined in state law and Board policy.

MASTER PLAN SUMMARY

If the Board of Education approves these final updates, the master plan will include repairing the two middle schools and Burbank Early Childhood School; renovating or rebuilding all five elementary schools; rebuilding the high school using the Zollinger Road option; and adding a turf field, baseball diamond and softball diamond behind Tremont Elementary School.

### PHASING RECOMMENDATION

The district recommendation calls for the plan to be implemented in two phases, with the high school, elementary schools and athletic fields comprising phase one and the remaining projects comprising phase two in approximately ten years.

### SCOPE REDUCTIONS AND PRIVATE FUNDRAISING

Note: These numbers are preliminary cost estimates for the options based on first-quarter 2019 dollars.
The district further recommends identifying approximately $23 million in scope reductions and raising at least $5 million in private donations during the first phase to reduce the cost of the master plan to taxpayers.

<table>
<thead>
<tr>
<th>SCHOOL</th>
<th>ACTION/SCOPE REDUCTION</th>
<th>COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>BARRINGTON</td>
<td>RENOVATE+</td>
<td>$31,024,000</td>
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<tr>
<td>GREENSVIEW</td>
<td>REBUILD</td>
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<td>UAHS</td>
<td>REBUILD (ZOLLINGER RD OPTION)</td>
<td>$142,111,000</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>TREMONT ATHLETIC FIELDS</th>
<th>COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>LESS: PRIVATE FUNDING</td>
<td>($5,000,000)</td>
</tr>
<tr>
<td>LESS: SCOPE REDUCTIONS</td>
<td>($23,506,000)</td>
</tr>
</tbody>
</table>

FIRST PHASE TOTAL PROJECT COST: $230,000,000

Note: These numbers are preliminary cost estimates for the options based on first-quarter 2019 dollars.

Members of the Financial Advisory Board went through several exercises identifying potential scope reductions to ensure that a figure of approximately $23,000,000 was attainable and realistic without having a negative impact on the student experience. It is important to note that specific scope reductions will be identified during the design process, which would begin immediately following the successful passage of a combined ballot issue and would involve any and all community members who wish to take part.

CONCLUSION

The theme of this two-year process has been “Your Voice Matters,” and, indeed, thousands of community members have shared their voices, their thoughts and their time. In all, there have been approximately 8,400 points of contact throughout the three phases of this journey to create a long-term, financially sensible plan to deal with Upper Arlington’s aging schools.

The ideas and feedback from staff and community members were essential to the creation of this master plan, which, when implemented, will provide generations of Upper Arlington students with safe, reliable and flexible spaces to learn and develop the skills needed for fulfilling and successful lives.