



LONG-RANGE FACILITIES PLAN

2023/24 Update



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EXECUTIVE SUMMARY

From April through November of 2023, the Mercer Island School District embarked on a process to update its Long-Range Facilities Plan (LRFP). This plan provides guidance and direction for facility improvements and future renovations and/or replacement of facilities.

This plan update was generated, reviewed, and refined with significant input and guidance from the Facilities Planning Committee (FPC), a community-based group of thirty Island residents. The work of this Committee was facilitated by Mahlum Architects. Four straw proposals were reviewed by the Board and taken out for community input.

After many hours of Committee work, significant community outreach, and an extensive survey, the recommendation of the FPC and District staff is to begin concept design and cost estimating work associated with “Scenario C” which consists of the following projects:

1. Islander Middle School: Provide concept design drawings and cost estimates to complete the IMS project for a student capacity of 1,000 students.
2. Mercer Island High School: Identify a prioritized list of program improvements. Provide concept design drawings and cost estimates for the recommended priorities. The total cost for all MIHS projects to be included in this bond should be approximately \$15 Million (total project cost). This will represent only a portion of the need at the High School and future bonds are intended to continue to address the priorities.
3. All Buildings: Identify any “must do” projects related to facility conditions (such as ADA improvements at the Administration Building) and energy efficiency projects to ensure timely compliance with the State of Washington’s Clean Building Act.
4. Proceed with the 3-Year Cap/Tech Levy Projects included in this update with a focus on improving the student experience, system reliability, and asset preservation at the (3) older elementary schools.

Staff should provide the School Board with regular updates on the progress of this work and be prepared to provide the information for items 1-3 in the fall of 2024 for Board consideration to place a bond measure on the ballot when the Board believes the community is ready.

Staff will plan for a potential bond in April 2025 for these projects and will also provide a schedule for potential future bonds for the elementary schools and additional Mercer Island High School work per the Island Elections and Bond Schedule (included in this Report).

PURPOSE, PARTICIPANTS, & PROCESS

PURPOSE OF THE LONG-RANGE FACILITIES PLAN

The primary purpose the District’s Long-Range Facilities Plan (LRFP) is to evaluate the adequacy of existing educational facilities within the context of current educational objectives, make necessary improvements for maintaining the facilities, to plan for future capital improvements for the facilities, and address how student population will be accommodated over the next ten years and beyond. The Plan provides a strategic framework for management of the District’s facilities over time, such that they continually support the ongoing success of District students, staff, and community.

In the fall of 2022, the Mercer Island School District (the District) began the process to update the LRFP. The previous update had been done in 2019/2020 and due to the Covid-19 pandemic, no community outreach of that committee’s recommendations was undertaken.

PARTICIPANTS

The District sent a letter to all school district families and former FPC members to solicit interest in serving on the 2023 FPC. Sixty-nine responses were received and a diverse group of thirty members was selected for the 2023 FPC Committee. Selected members were parents with current students, parents with former students, leaders of Island non-profits, MIHS students, CMIPS volunteers, and parents of future students. Several of the 2023 FPC members also served on the 2019/2020 FPC which helped bring continuity to the discussions and history of prior work completed.

FPC MEMBERS

- | | |
|-----------------------|---------------------|
| Andrew Howison | Julie Ogata Ciobanu |
| Asha Woerner | Kate Wise Knecht |
| Ava Zhang | Kim Thomas |
| Becky Shaddle | Lee Tortorelli |
| Brian Mock | Linhui Hao |
| Carrie Beckner Savage | Marcus Engelman-Ost |
| Colin Brandt | Matt Hall |
| Dan Glowitz | Ralph Jorgenson |
| Debbie Burke | Rich Nakatsu |
| Deborah Lurie | Sandra Levin |
| Diana Lein | Sophie Cartwright |
| Jaime Page | Susan Conrad-Wang |
| Janelle Honeycutt | Toby Suhm |
| Jennifer Crespi | Wen Hu |
| Jenny Harrington | ⌘ |
| Jessica Clawson | |

DISTRICT

Fred Rundle, Superintendent
Matt Sullivan, Executive Director of Finance & Operations
Tony Kuhn, Director of Maintenance & Operations
Andreeves Ronser, Director of Technology
Ian Henrey, Communications & Alumni Relations Coordinator
Brandy Fox, Consultant, Capital Projects

MAHLUM ARCHITECTS

LeRoy Landers, David Mount, and Jennifer Lubin with Mahlum Architects facilitated the FPC meetings and report preparation for the Long-Range Facilities Plan update in 2019/2020. In 2019, the District issued a Request for Proposal (RFP), received four Statement of Qualifications (SOQ), and interviewed two firms, selecting Mahlum. Given the effort put towards the previous LRFP update and the inability to finish the process due to the Covid-19 pandemic, the District reengaged Mahlum Architects to facilitate the 2023 FPC meetings and assist with this latest update to the Plan.

PROCESS – WORK OF THE FPC

The FPC met seven times in 3-hour sessions from April 2023 through November 2023. Each of these meetings is listed below along with the agenda topics. Slide decks and meeting minutes for each of these sessions are included in the Appendix of this Update and these, along with video recordings are archived on the District's website.

Prior to the first meeting, the FPC members were provided with four Issue Papers. A copy of each of these is provided in the Appendix to this Update:

- Issue Paper 1 – MISD Vision & Goals
- Issue Paper 2 – Educational Program
- Issue Paper 3 – Capacity & Enrollment
- Issue Paper 4 – Existing Facility Conditions

Meeting #1, 4/17/23

Agenda: Previous LRFP Work, Vision & Educational Program, Facility Condition, Enrollment & Capacity, School District Financing.

Meeting #2, 5/1/23

Agenda: Need Summary, Confirmation of 2020 LRFP Findings, Items for Consideration, Potential Projects/Improvements, Bond Information, Planning Exercise.

Meeting #3, 5/25/23

Agenda: Recent Bond & Levy Successes, What we heard, Planning Exercise Round 1, Share-Back and Discussion, Planning Exercise Round 2, Share-Back and Discussion.

Meeting #4, 6/6/23

Agenda: Initial Planning Exercise Results, Plan Scenarios, Planning Exercise: Bond Scenarios, Share-Back and Discussion, Planning Exercise: Consolidation, Share-Back and Discussion.

Meeting #5, 6/26/23

Agenda: School Consolidation Impacts, School Consolidation Discussion, Plan Approach

Meeting #6, 9/11/23

Agenda: Preview of draft Community Outreach presentation, feedback, and revisions.

Meeting #7, 11/13/23

Agenda: Follow-up meeting to discuss community feedback, Board's decision on the potential consolidation of an elementary school, discussion around Plan C, Finish the Middle School, select High School program and facility improvements.

All the information contained in this update of the LRFP, including all the Appendix materials, was reviewed with the FPC. Their feedback, comments, and refinements formed the basis for the recommendations.

VISION, GOALS, & EDUCATIONAL PROGRAM NEED

BOARD EXPECTATIONS & DISTRICT VISION

The Board of Directors expects the District to embrace students and their individual uniqueness, challenge them to excel in and out of the classroom, and prepare them to succeed in their future academic and career endeavors beyond MISD.

Students are the priority, and the District believes in:

- Supporting the whole child.
- Creating inclusive and equitable learning settings.
- Ensuring our school communities are safe and supportive.
- Providing rigorous and challenging learning.

The District is committed to facilities that:

- Are safe, supportive, and healthy.
- Promote rigorous and challenging learning.
- Serve as a point of pride for the community.
- Attract and retain staff.
- Represent responsible stewardship of public funds.
- Provide spaces for convening, playing, and belonging.
- Align with our Values and facilitate achieving our Vision and Mission.

FACILITIES PLANNING COMMITTEE GOALS

The FPC reviewed the goals of the 2019 committee and confirmed their validity and accuracy. They also added two additional goals. The table graphic below reflects the original goals established by the 2019/2020 committee with the addition of the 2023 committee's additional goals around facility improvements for the Arts as well as College & Career Readiness at MIHS:

2019 FPC Goals

- Provide built-in, **flexible**, and adaptable spaces
- Provide more opportunities for **occupation learning**
- Provide visible **sustainability** (and explain why)
- **Improve traffic impact** around schools
- Provide next generation **project-based learning** labs for science
- Create spaces that students are **excited to be in**
- Provide small **collaborative spaces** throughout the schools
- Plan for **safer pedestrian / bike access** to school
- Provide support **spaces for teachers**
- Improve **gymnasium / athletic spaces** and fields
- Rethink **outdoor spaces** (for use during the rainy season)
- Create adaptable environments that accommodate **future technology**

2023 FPC Added Goals

- Include facility improvements to support fine and performing arts at the high school
- Include facility improvements to support College & Career Readiness at the high school

EDUCATIONAL PROGRAM NEED

The educational program needs for each of the schools were shared with the FPC:

All Older Elementary Schools (Island Park, Lakeridge, West Mercer) lack:

- Separate gymnasium and cafeteria/dining spaces.
- Extended learning / flex spaces and small group learning.
- Distributed sensory rooms or “safe spaces.”
- Properly configured special education spaces.
- Properly sized general classrooms with sufficient storage and adequate acoustical separation.

Specific School Limitations and Needs:

Island Park

- Two disconnected buildings
- Vehicular access and site safety (Island Crest Way)
- Limited collaboration space

Lakeridge

- The music room is too far from the stage.
- Hard-surface play is too far from classrooms.
- Poorly configured and undersized administration area.

West Mercer

- Limited collaboration space
- Poor field drainage that limits use

Islander Middle School

- Multiple detached buildings create a lack of connection between both students, staff, programs, and create safety/security issues.

Older Buildings (100/200/300)

- Need for smaller, personalized learning communities.
- Lack of extended learning / flex spaces.
- Common areas in 100/200 buildings are difficult to supervise.
- Science classrooms in 300 building do not support STEM and do not have enough storage.
- Poor acoustic separation between classrooms causes disruption.
- Need for a black box theater space.

Mercer Island High School

College & Career Readiness

- Robotics lab expansion.

- Broadcast (Radio) studio expansion
- Radio classroom connection to studio.
- New journalism classroom
- New hands-on (STEM/maker space/skills) lab and support

Science

- Improvements/renovation to older science labs.

Art

- Improvements/renovation to art studios.

Performing Arts

- Dedicated teaching space for drama, dance, performance (black box theater).
- Theater seating and acoustic improvements.

PE / Athletics

- Locker room and team room improvements

General Education

- Shared learning and study areas to increase flexibility and opportunities for collaboration.
- General classroom improvements/renovation to older rooms.

Shared Support

- Improvements/renovation of counseling, principals, nursing offices.
- Improvements/renovation of teacher offices and support spaces.
- Additional gender-inclusive restrooms.

Crest Learning Center

- Renovate classrooms to support high school science.
- Renovate art room.
- Add additional greenhouse space.

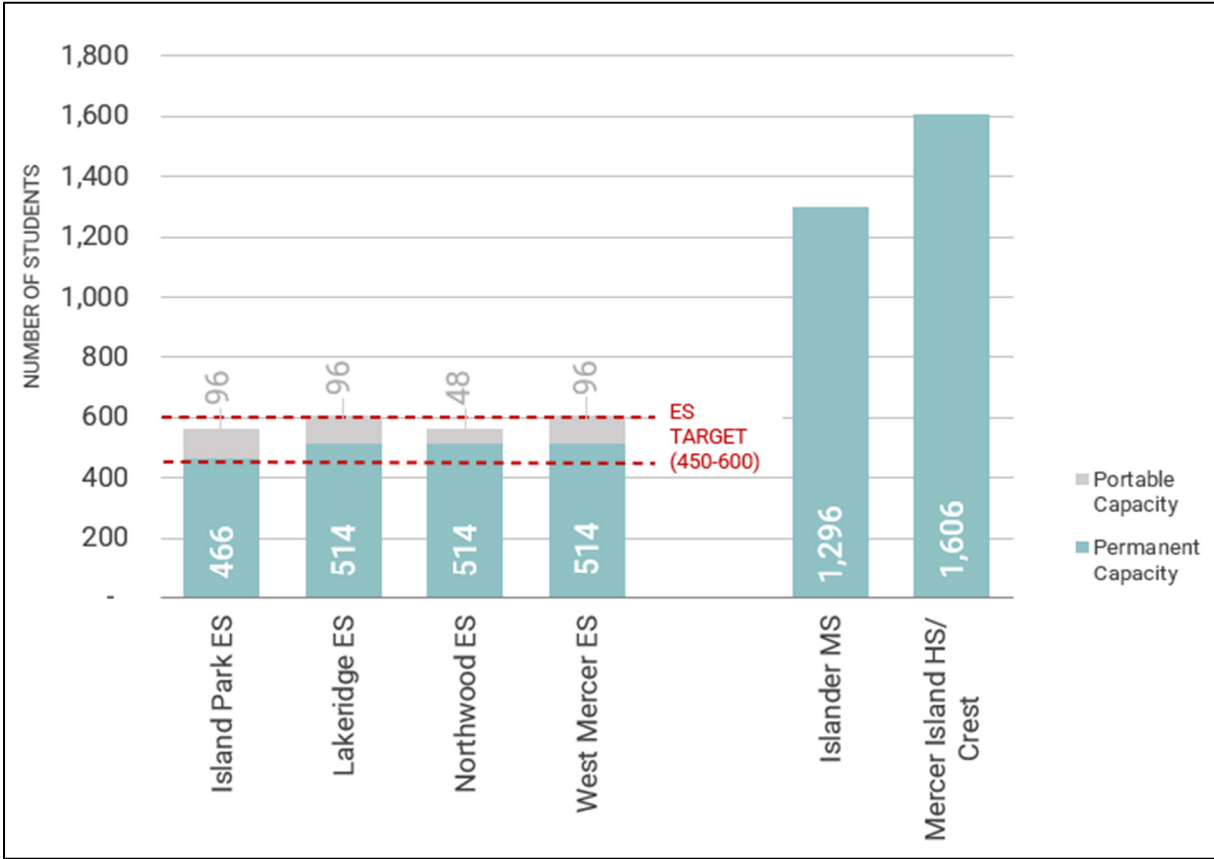
CAPACITY & UTILIZATION

Issue Paper #3 in the Appendix of this Plan provides an in-depth summary of how MISD determined the student capacity of each school, the 2022/23 enrollment, and demographic projections used for the LRFP update.

EXISTING CAPACITY

The District’s permanent student capacity across the four elementary schools, Islander Middle School, and Mercer Island High School/Crest Learning Center are shown in the graph below. Permanent capacity refers to the site-built structures only and does not include portable/modular classrooms. Note each of the older elementary sites currently has four portable/modular classrooms, Northwood has two. This additional capacity is shown in grey and is not part of the permanent capacity.

Existing District Capacity (2023)



The capacity numbers above are determined for each school based on the number of classrooms (elementary) or periods (middle school and high school) available in the building, multiplied by the average target number of students in each classroom/period, multiplied by the anticipated Utilization rate:

Elementary: # of classrooms x target average # of students per per class x utilization rate.

Middle & High School: # of classrooms x # of available periods x average # of students per class x utilization rate.

The following methodology was used to determine the available number of classrooms:

Elementary: All classrooms are counted **except** for music, library, and the gym. One classroom per school is allocated for Special Education.

Northwood's count is slightly different in that it has a purpose-built art room that is also excluded from its capacity.

Middle School: All teaching stations are counted.

High School & Crest: All teaching stations are counted.

Students per classroom is a target average. There will always be classes with more, or less students, but for planning purposes, the following was used:

Elementary: 24-student per classroom (22 for K-1, 24 for 2-3, 26 for 5-6).
10-students per classroom for Special Education.

Middle School: 28-students per classroom
10-students per classroom for Special Education.

High School: 29-students per classroom
10-students per classroom for Special Education.

UTILIZATION

Utilization is a function of the rooms (elementary) or number of periods (middle and high school) available for class assignment vs. the amount of time it is used for that purpose. For an elementary, where students are assigned to a single classroom, the target is 100% utilization since a room is not expected to be used for anything else when students are at lunch, music, or other pull-out services.

Target utilization at the middle school level assumes a classroom to be used five out of six periods per day. In this model, there is no expectation for another class to fill the open period. This model allows teachers to use the classroom for their planning period.

Target utilization at the high school level assumes general education, science, art, career/tech, and Crest classrooms are in use six out of seven periods per day and Special Education, Music, Drama and PE classrooms are in use five out of seven periods per day. This is an average of 5.8 out of seven periods per day. Teachers may have office space and may teach from one or more spaces during the day.

When a school is programmed at its full Utilization Target, it feels full and is operating at peak efficiency. When it is underutilized, it will feel more comfortable since staff and programs can spread out, but it is less efficient. Efficiency when looking through the lens of utilization is based on classrooms being used for general education or the purpose for which it was built.

Capacity and Utilization together are used to determine if the District is using its facilities to their potential or if there is excess space. In the table below, actual school utilization for the 2023/24 school year is compared to the planning capacity and utilization targets established in the LRF and described below.

Current Utilization based on Planned Capacity

	LRFP PLANNING METRIC			CURRENT USAGE (2023/24)	
	Planning Capacity	Allocated Gen CL	Target Utilization	Gen CL	Actual Utilization
Island Park	466	19 classrooms	100.0%	16 classrooms	84.2%
Lakeridge	514	21 classrooms	100.0%	17 classrooms	81.0%
West Mercer	514	21 classrooms	100.0%	19 classrooms	90.5%
Northwood	514	21 classrooms	100.0%	16 classrooms	76.2%
Islander Middle School	1,296	354 periods	83.0%	232 periods	65.5%
Mercer Island High School *	1,606	490 periods	83.0%	348 periods	71.0%

The table below compares actual school utilization for the 2023/24 school year with a less efficient alternate capacity at the elementary sites that allows for a dedicated art room and a second special education room at each school.

Current Utilization based on Alternate Capacity

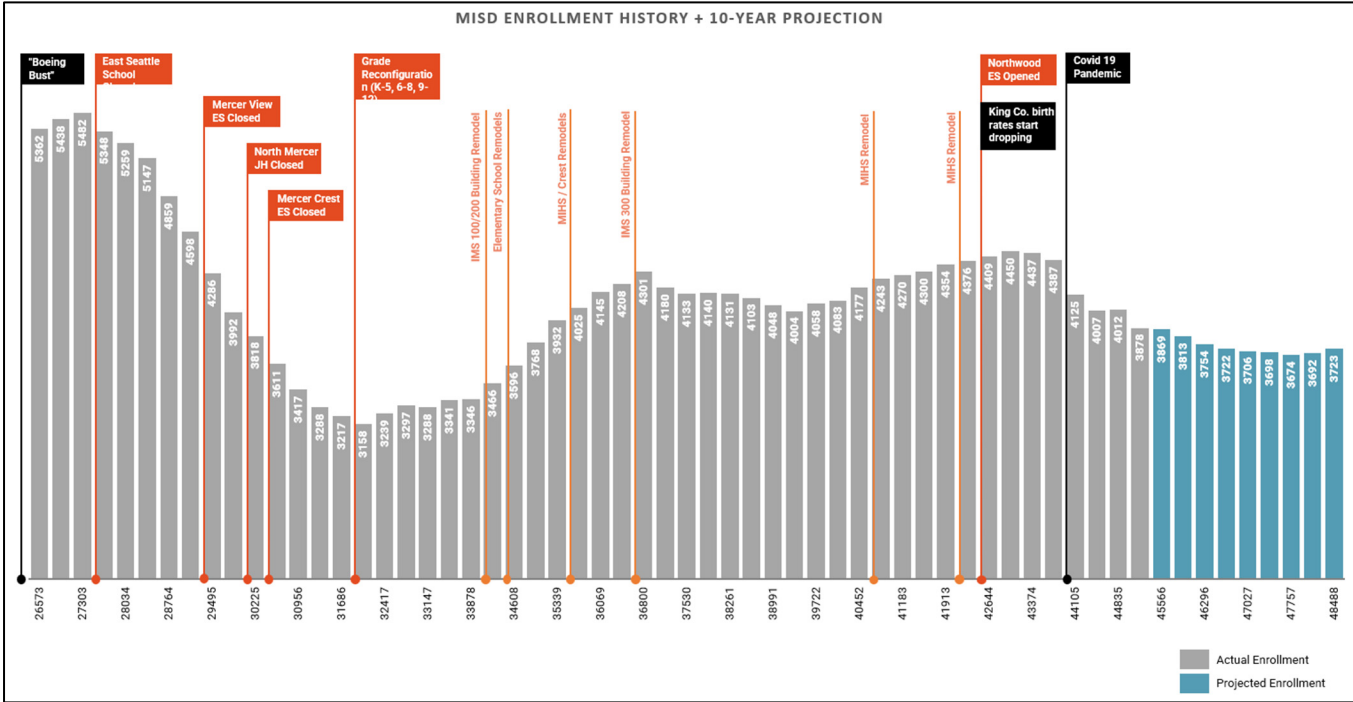
	ALTLERNATE PLANNING METRIC			CURRENT USAGE (2023/24)	
	Alternate Capacity	Allocated Gen CL	Target Utilization	Gen CL	Actual Utilization
Island Park	418	17 classrooms	100.0%	16 classrooms	94.1%
Lakeridge	466	19 classrooms	100.0%	17 classrooms	89.5%
West Mercer	466	19 classrooms	100.0%	19 classrooms	100.0%
Northwood	490	20 classrooms	100.0%	16 classrooms	80.0%

ENROLLMENT & DEMOGRAPHIC PROJECTIONS

ENROLMENT HISTORY

Enrollment in the Island schools has varied decade to decade for the past 50 years. At its peak, the District had 5,482 students in 1974. Over the course of 10-years, enrollment dropped to 3,818 students and fell further to a low of 3,158 in 1987. This notable change was likely due to early housing development on the Island filled with families, then students aging out of the schools while aging parents remained on the Island. The Boeing bust in the early 1970's may have also contributed to the decline.

Enrollment grew moderately but steadily until 2000 when enrollment was 4,301. It declined for the next decade and then began increasing again with a peak of 4,450 students in 2017 (the year after Northwood Elementary opened). The Covid-19 pandemic had a significant impact on student enrollment in the District between 2019 and 2021. The graph below summarizes enrollment over this 50-year period and notes significant events.



The post-Covid drop in student enrollment seen on Mercer Island has also been seen in neighboring districts. As noted in the introduction to the Educational Data Solutions 2023 Demographic Study, “In early 2023, public school enrollment in the four-county Puget Sound region (King, Kitsap, Pierce, and Snohomish Counties) was still about 23,000 students below where it was in October 2019, prior to the start of the pandemic. In King County, enrollment is about 13,000 less [students] than it was before the pandemic.

DEMOGRAPHIC STUDIES

As the District was preparing this LRFP update, neighboring districts including Bellevue and Seattle were discussing and/or consolidating schools. Given the impact of the pandemic, and this discussion in

neighboring districts, the Board decided to engage two demographers to provide independent projections.

Dr. Les Kendrick, with Educational Data Solutions, LLC (EDS) was retained and has provided these projections for the District historically. A full copy of Dr. Kendrick’s study can be found in the Appendix to this Plan. Davis Demographics was also retained to provide a second study and a full copy of their study is also included in the Appendix. The District reviewed these two studies and decided the 10-year projection by Davis Demographics, Version 2, was the best reflection of the Island’s unique challenges with housing prices and development potential. This Version 2 from Davis and the “medium” projection from EDS are similar.

ENROLLMENT AS A DRIVER FOR BUDGETING VS. FACILITIES PLANNING

It is important to understand that these demographic projections are used differently for budgeting and long-range facility planning. The Business Office builds a budget each year that attempts to project the next year’s student enrollment as closely as possible to ensure there are no budget impacts. Facilities planning wants to ensure that there is adequate, but not too much space in the long term. When the District talks about meeting projections for a particular year, they are not referring to the numbers included in this report; they are referring to the projection used in budgeting. This reflects the more granular level our finance team works on a yearly and monthly basis verses the more macro indicators used when making projections.

For 2023, the Business Office did a particularly good job of taking this demographic information and projecting their budget on a slightly lower student count. The results have been no loss in anticipated State or Levy funding. However, when we look at these projections for facilities, the number of students is lower than the studies projected.

Demographic projections are made on an FTE or Full-Time Equivalent basis. If there are 1,500 total students and 50 of them, or the FTE of 50 are in Running Start, they are counted as 1,450 FTE enrollment. This has a negligible effect at the Elementary and Middle School levels but does impact the High School numbers for both the budget and facilities planning.

Additional information on the demographic studies is provided in Issue Paper 3 in the Appendix of this LRFP update.

The table below is from the Davis Demographics study, Version 2, that was used as the basis of enrollment projections for the LRFP:

Historic and Projected Student Enrollment,
Davis Demographics, February 2023

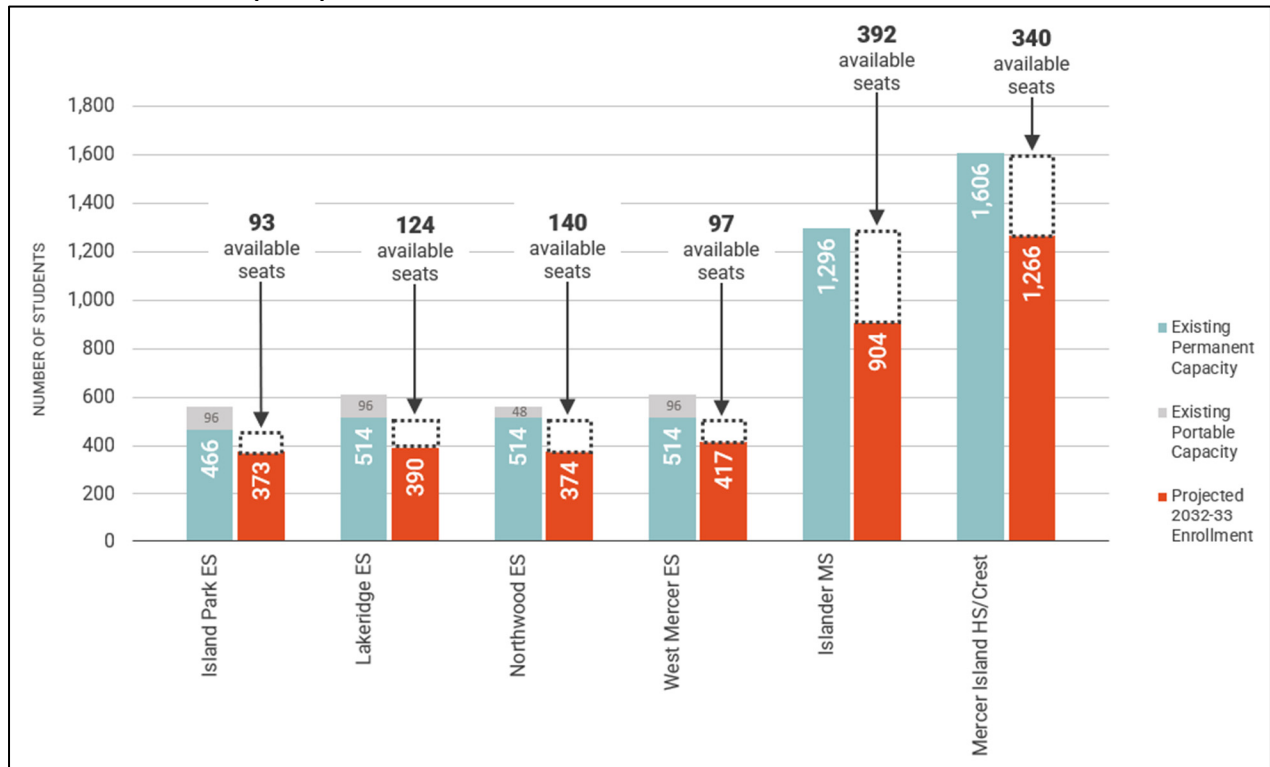
Historic In-District Counts				Current	Forecasted In-District Counts									
Grade	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
In-District Student Totals by Grade Configuration														
K-5	1,704	1,533	1,509	1,563	1,523.2	1,559.6	1,593.4	1,587.4	1,564.3	1,535.5	1,559.2	1,529.0	1,530.3	1,534.2
6-8	1,115	1,008	937	912	907.7	878.9	841.0	819.5	853.6	914.0	885.9	894.9	863.7	885.3
9-12	1,505	1,515	1,516	1,492	1,428.5	1,368.8	1,318.2	1,287.6	1,245.0	1,197.0	1,193.6	1,191.5	1,238.5	1,243.9
K-12	4,324	4,056	3,962	3,967	3,859.4	3,807.3	3,752.6	3,694.5	3,662.9	3,646.5	3,638.7	3,615.4	3,632.5	3,663.4
Out-of-District Students														
K-5	35	35	26	20	19.5	20.0	20.4	20.3	20.0	19.6	20.0	19.6	19.6	19.6
6-8	24	23	23	19	18.9	18.3	17.5	17.1	17.8	19.0	18.5	18.6	18.0	18.4
9-12	29	27	25	26	24.9	23.9	23.0	22.4	21.7	20.9	20.8	20.8	21.6	21.7
K-12	88	85	74	65	63.3	62.1	60.9	59.8	59.5	59.5	59.2	59.0	59.2	59.8
Total Students														
K-5	1,739	1,568	1,535	1,583	1,542.7	1,579.6	1,613.8	1,607.7	1,584.3	1,555.1	1,579.2	1,548.6	1,549.9	1,553.8
6-8	1,139	1,031	960	931	926.6	897.2	858.5	836.6	871.4	933.0	904.4	913.5	881.7	903.7
9-12	1,534	1,542	1,541	1,518	1,453.4	1,392.7	1,341.2	1,310.0	1,266.7	1,217.9	1,214.4	1,212.3	1,260.1	1,265.6
K-12	4,412	4,141	4,036	4,032	3,922.7	3,869.4	3,813.5	3,754.3	3,722.4	3,706.0	3,697.9	3,674.4	3,691.7	3,723.2
Annual Change														
K-5 Difference	-171	-33	48	-40.3	36.9	34.2	-6.1	-23.4	-29.2	24.0	-30.6	1.3	3.9	
6-8 Difference	-108	-71	-29	-4.4	-29.4	-38.7	-21.9	34.8	61.7	-28.7	9.2	-31.8	22.1	
9-12 Difference	8	-1	-23	-64.6	-60.7	-51.5	-31.1	-43.3	-48.8	-3.5	-2.1	47.8	5.5	
K-12 Difference	-271	-105	-4	-109.3	-53.3	-55.9	-59.2	-31.9	-16.3	-8.1	-23.5	17.3	31.5	

The table below shows projections for the 2023/2024 school year, along with the actual enrollment counts for November 2023 and January 2024:

Grade Level	January 2024		Delta Head Count	Delta FTE
	Davis Version 2 Projections	Actual Enrollment Head Count		
K-5	1,543	1,543	0	(5)
6-8	927	946	19	17
9-12	1,453	1,455	2	(55)

The graphic below summarizes each of the schools' permanent and portable/modular capacities and compares that with projected enrollment. Remember that permanent capacity is defined as the built structures on site and does not include any portable or modular structures.

Existing District Capacity and Projected Student Enrollment (2032)



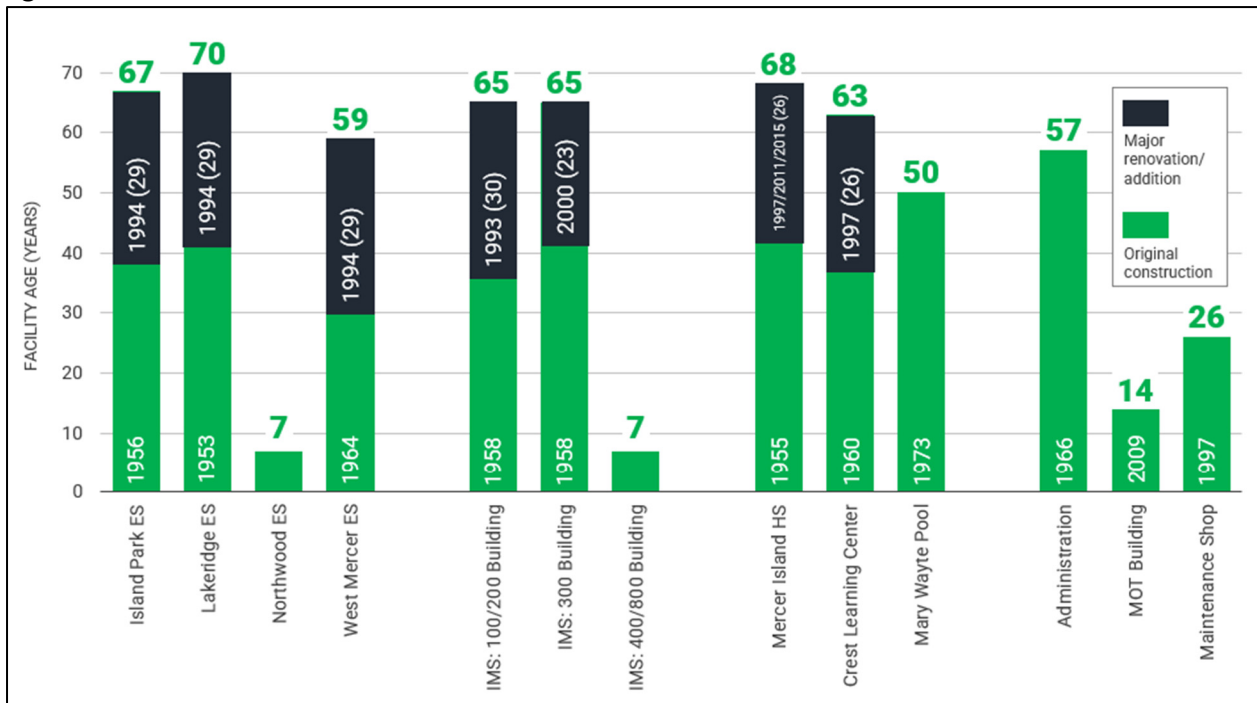
EXISTING CONDITIONS

A detailed review of the District owned buildings and their condition is provided in Issue Paper #4 included in the Appendix of this Plan. The table below lists the District buildings, their original construction date, ICOS Score (an annual review required by OSPI that rates the physical condition of the facility), and the building square footage:

Facility	FACILITY CONDITION		FACILITY SIZE
	Original Construction Date	ICOS Score (2022)	Building Area (Perm. GSF)
ELEMENTARY SCHOOL			
Island Park Elementary	1956	76.72	49,399
Lakeridge Elementary	1953	79.28	52,269
Northwood Elementary	2016	96.86	83,128
West Mercer Elementary	1964	84.82	54,221
			239,017
MIDDLE SCHOOL			
Islander MS: 100/200 Building	1958	75.01	64,224
Islander MS: 300 Building	1958	68.83	15,637
Islander MS: 400/800 Building	2016	99.11	91,665
			171,526
HIGH SCHOOL / OTHER			
Mercer Island High School	1955	86.27	231,018
Crest Learning Center	1960	83.69	10,058
Mary Wayte Pool	1973	-	16,263
			257,339
SUPPORT FACILITIES			
Administration Building	1966	-	16,100
MOT Building	2009	-	2,532
Maintenance Shop/Bus Lot	1997	-	4,778
			23,410
DISTRICT TOTAL			691,292

The table below summarizes the age of the buildings along with significant renovations and additions over the years:

Age of Facilities



BOND AND LEVY SUCCESSES

The District has used both Capital/Technology Levy (Cap/Tech) dollars along with Bond dollars to complete a number of projects over the years. Cap/Tech dollars available for facilities can accomplish small projects such as boiler replacements, roofs, secure vestibules, but they are not enough to provide a significant renovation or replacement of a building.

The most recent bond was passed in 2014 and followed a failed bond in 2012. The Island has a history of initially presenting very comprehensive bond packages (1990 and 2012) that were not well received by the community. After each failed bond attempt, the District has scaled down the scope and cost of the bond and been very successful in passing these bonds (1993, 1994, 1996, and 2014).

Significant Capital Project Work

2010 & 2011 **PEAK:** Boys and Girls Club (Partnership)

2012 & 2013 **MIHS:** Music wing renovation and addition, including recording capabilities and new Jazz Room (Cap/Tech)

MIHS Stadium: Press Box (Cap/Tech)

2014 & 2015 **MIHS:** Additions and select renovation, including Materials Science, General Science, General Classrooms, Street Frontage, Main Parking Lot Reconfiguration (Bond)

2015 & 2016 **Northwood Elementary:** relocation of North Mercer tenants, demolition and new construction (Bond)

Islander Middle School: Partial replacement of Islander Middle School (common spaces, library, gyms, admin, and new music wing with dedicated Band, Choir/Orchestra, Jazz Band rooms and multiple high-tech recording and practice rooms, instrument storage (Bond)

2017 & 2018 **Elementary Schools:** Added secure entries (Cap/Tech)

West Mercer: Front office remodel and generator replacement (Cap/Tech)

Island Park: Front office remodel (Cap/Tech)

MIHS Stadium: Turf replacement, convert lights to LEDs (Cap/Tech)

MIHS: Reroof entire building (Cap/Tech)

2019 & 2020 **MIHS:** Main entry vestibule and main office remodel (Cap/Tech)

Mary Wayte Pool: Pipe lining, boilers, HVAC replacement (Cap/Tech + Grant)

2021 & 2022 **Lakeridge Elementary:** Reroof (Cap/Tech)

Bus Lot: Charging for 4 EV buses (Cap/Tech)

MIHS: Main gym bleacher replacement (Cap/Tech)

MIHS PAC: Rigging/safety compliance and projection system (Cap/Tech)

MIHS Library: Interior remodel and reconfiguration (Cap/Tech + PTA)

MIHS: Create Culinary Classroom and reconfigure Robotics (Cap/Tech + CCR)

South Mercer Playfields: Softball field, infields, new lighting & multipurpose field (Cap/Tech + City)

2023

©MAHLUM

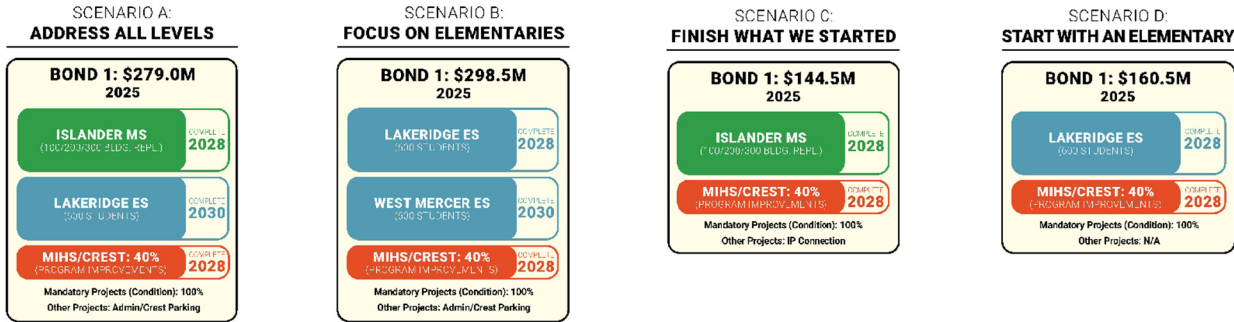
MIHS PAC: New main stage curtain, scrim, and Steinway grand piano (Cap/Tech)

FACILITY PLANNING COMMITTEE’S INITIAL PLAN DEVELOPMENT

The first (2) FPC meetings focused on learning about the history of the 2019/20 Plan as well as current information on the vision, goals, educational need, condition of the facilities, school capacity, current enrollment, and the demographic projections for enrollment over a 10-year period.

The 3rd and 4th meetings focused on the history of MISD’s bond and levy successes. The committee worked through several planning exercises that created options for discussion around which projects to fund, at what size and in the cases of the High School, how much of the need would be funded in a first bond. For the elementary sites, the committee was given two options that accommodated the demographic projections: replace the three older schools with three new buildings at a capacity of 450-students each or consolidate and replace three schools with two, each a 600-student capacity. The latter option would create a consolidation of one of the Island’s elementary schools.

The committee broke into smaller groups and developed options for an initial bond that grouped projects into a potential bond package. The results are shown below:



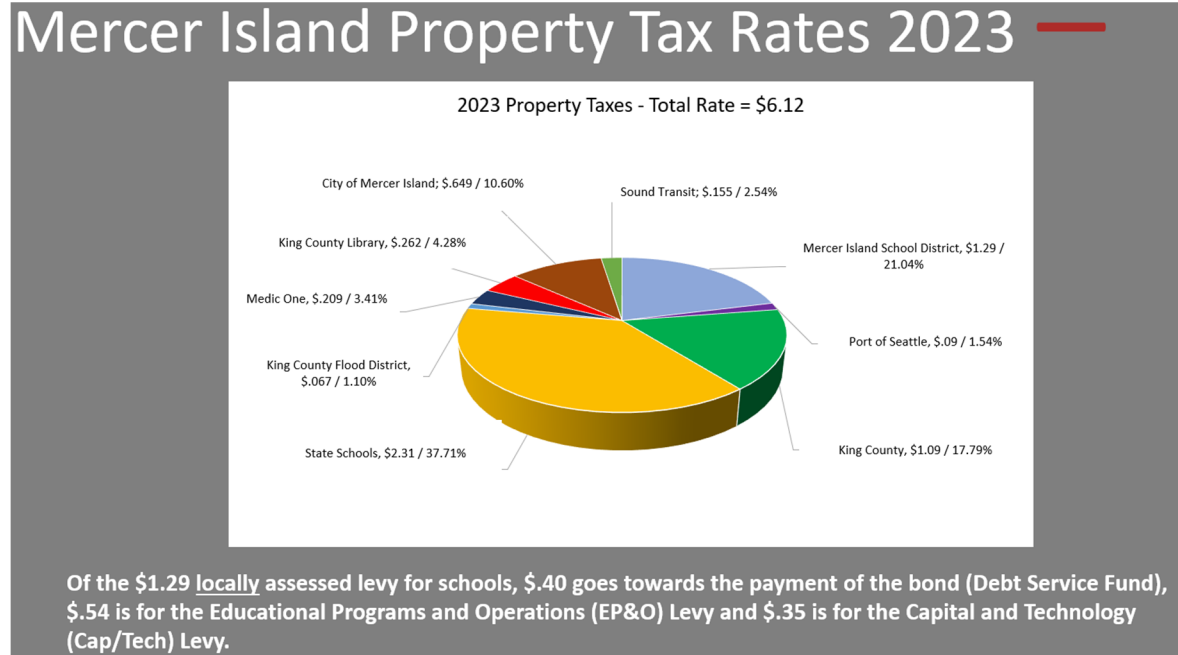
Each table shared their reasoning for the suggested scenario, and it is important to note that in each scenario where an elementary was included (A, B, D), the suggestion was to build a larger, 600-student school.

While a fifth meeting was not initially scheduled, the committee was asked to meet again to further discuss the implications of building 600-student elementary schools (potentially consolidating to (3) schools). It was acknowledged by all committee members and District staff that consolidation was a “third rail” issue for the community. After discussion, it was decided that the potential consolidation should be discussed openly with the community due to the financial implications and potential cost savings of \$800K per year.

Through several exercises it was apparent that after learning about the need and the condition of the existing buildings, most of the committee members “personally” supported Scenario A – Finish the Middle School, rebuild one Elementary, and fund a portion of the need at the High School. However, when asked what they thought the “Community” would support, most of the committee suggested Scenario C – Finish the Middle School and fund a portion of the need at the High School. All four plan options were taken out to the community for input.

TAX RATES AND POTENTIAL BOND INCREASE

The Committee also reviewed the current tax rates and potential implications of bond cost and tax increases associated with each of the plans.



POTENTIAL BOND AMOUNT AND TAX IMPLICATIONS

Piper Sandler, the District’s bond partner, has provided the following information to assist in planning and understanding the potential tax increase associated with a bond.

The following is based on “Scenario C,” to finish Islander Middle School, fund a portion of the program needs at MI High School, and fund must do items such as State of Washington Clean Buildings Compliance (energy efficiency) and ADA, accessibility issues at the Administration Building. The budgeted amount of \$119,255,000 is for planning and example purposes only. Design and estimating for each project will be necessary to determine a final amount. This hypothetical scenario is meant to illustrate and promote understanding of possible tax implications. This is not meant to presuppose a bond measure.

Scenario Number	POTENTIAL 2025 Request	EXISTING Estimated 2023 Total SD Tax Rate per \$1K/assessed value	POTENTIAL 2025 Bond Added Tax Rate per \$1K/assessed value	POTENTIAL Total SD Tax Rate with Bond per \$1K/assessed value
MI_294	\$ 119,255,000	\$1.40	\$0.49	\$1.89

Mercer Island School District No. 400		
TAX IMPACT ANALYSIS		
Bond Authorization Amount:	\$119,255,000	
Estimated 2026 Total Tax Rate Increase over 2025 Total Tax Rate (per \$1,000 assessed value):	\$0.49	
Assessed Value of Property	Annual Gross Property Tax Increase	Monthly Gross Property Increase
\$1,000,000	\$490.00	\$40.83
2,000,000	980.00	81.67
3,000,000	1,470.00	122.50
4,000,000	1,960.00	163.33
5,000,000	2,450.00	204.17
6,000,000	2,940.00	245.00
7,000,000	3,430.00	285.83
8,000,000	3,920.00	326.67
9,000,000	4,410.00	367.50
10,000,000	4,900.00	408.33
11,000,000	5,390.00	449.17
12,000,000	5,880.00	490.00
13,000,000	6,370.00	530.83
14,000,000	6,860.00	571.67

Qualified homeowners may apply for a senior exemption.
Contact the King County Assessor at (206) 296-7300 with questions.

DISTRICT ELECTION CALENDAR AND POTENTIAL BOND SCHEDULE

17-Year Plan	Potential Bond Amount	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042
General / Presidential Election		Nov				Nov				Nov				Nov				Nov		
EP&O Levy				FEB				FEB				FEB				FEB				FEB
Cap/Tech Levy						FEB						FEB						FEB		
Transportation Levy																				
Plan C FINISH MIDDLE SCHOOL HIGH SCHOOL-Select Project																				
Bond #1 - April 2025	\$ 119,000,000	Concept Design	Design + Permitting	Bid	Construction															
ELEMENTARY 1 ADMINISTRATION & CREST																				
Bond #2					Concept Design	Design + Permitting	Bid	Construction												
ELEMENTARY 2 HIGH SCHOOL-Select Project																				
Bond #									Concept Design	Design + Permitting	Bid	Construction								
ELEMENTARY 3 HIGH SCHOOL-Select Project																				
Bond #											Concept Design	Design + Permitting	Bid	Construction						
City of Mercer Island																				

● BOND
◆ OCCUPANCY

COMMUNITY OUTREACH

PRESENTATIONS (IN PERSON AND HYBRID)

The District scheduled and presented an abbreviated version of what the Facility Planning Committee had reviewed along with the (4) plan scenarios. A copy of this presentation is included in the Appendix. The Board was provided regular updates of the work from April through November 2023. The outreach meetings included:

Staff Outreach: 10/4/23, 7:30-8:30 AM at MIHS

PTA Presidents Outreach: 10/4/23, evening at IMS

Staff Outreach: 10/4/23, 2:45-3:45 PM at NWE

IPE PTA Outreach: 10/4/23, afternoon at IPE

Community Outreach: 10/10/23 6:00 PM at IMS

Community Outreach: 10/11/23, 10:00 AM at MI Community and Events Center
(Hybrid meeting with Zoom link, recorded, post on District webpage)

Community Outreach: 10/11/23, 6:00 PM at MIHS Library

PTA Council Outreach 10/18/23, 9:30 AM, Board Room

SURVEY

The District also worked with Qualtrics, a data analytics company, to provide an interactive survey that was available at the conclusion of each Community Outreach Session, at the end of the recorded session, and via the District website. A summary of the survey results was shared with the FPC at their seventh meeting and a copy of that presentation is included in the Appendix. Summary information is included below:

568 Total Respondents

61% responded that the District should pursue a bond measure to improve school facilities.

18% were undecided.

22% responded no.

62% of respondents support finishing the Middle School.

34% of respondents support the Middle School and High School Scenario.

28% of respondents support the Middle School, High School, and Elementary Scenario.

ELEMENTARY CONSOLIDATION

As expected, the open conversation around the potential consolidation of an elementary school elicited a great deal of emotion and feedback from teaching staff and the community. The passion and interest shown by members of the community affirm the commitment shared across Mercer Island to the schools and education.

While the enrollment projections show there will be classroom space available at all four elementary schools, the community felt that given the status of the District’s Operations Budget and the potential \$800K savings that could be realized through consolidation, there was not a compelling reason to close or take an elementary school “off-line” at this time.

The Board received an update from staff at their October 12th, 2023, meeting and felt it was important to discuss the community feedback and scheduled a study session at Islander Middle School on October 24th, 2023.

On November 9th, the Board finalized and voted unanimously to approve the following position regarding consolidation and the current LRFP update:

2023 Long Range Facilities Plan Update Elementary Consolidation Consideration

November 9, 2023

As part of the District’s 2023 Long Range Facilities Plan Update, the Board and Facilities Planning Committee reviewed (2) ten-year demographic and enrollment projections, elementary school capacity, classroom utilization, facility conditions, educational adequacy, and building replacement costs.

Potential building replacement plan options included several scenarios that suggested the possibility of consolidating the existing four (4) elementary schools to three (3). These scenarios were shared with the Board and presented during the community outreach phase of the Long Range Facilities Plan Update along with other information related to improvements at Mercer Island High School, Islander Middle School, Crest Learning Center, and the Administration Building.

Feedback from the community and staff during the seven (7) outreach meetings, through emails, and via the electronic survey, revealed that there is significant support to retain four (4) smaller elementary schools rather than consider potential consolidation to three (3) larger elementary schools.

Based on this information, the Board’s decision is to remove consolidation from the 2023 Long Range Facilities Plan. With consolidation no longer under consideration at this time, the superintendent and staff will move forward and return to the Board in January with the next version of the Long Range Facilities Plan that maintains (4) elementary schools with a permanent capacity at the lower range of (450) students vs. the (600) student capacity.

This Board urges future boards to consider the following variables along with other important factors when considering school consolidation or expansion:

Annual enrollment counts, demographic projections, and the rate of any forecasted change;

Annual elementary school facility student capacity and utilization – staff shall provide an annual update to the Board with this information as part of OE-11 and should include both the maximum capacity (dedicated Music Room and (1) Special Services classroom) along with a slightly more generous capacity calculation (dedicated Music, Art, and (2) Special Services classrooms).;

Current values and perspectives of the community related to the size and number of elementary schools;

Meeting the objectives of OE-4 (Staff Compensation);

Meeting the objectives of OE-6 (Budgeting/Financial Planning); and

Meeting the objectives of OE-7 (Financial Administration).

FIRST READING: October 26, 2023

SECOND READING/VOTE: November 9, 2023 (Approved 5-0 Elected Board Members and 2-0 Student Board Members)

CAPITAL & TECHNOLOGY LEVY (Cap/Tech) 3-YEAR PLAN

One of the primary functions of this LRFP update is to provide guidance to staff on where to direct current Cap/Tech Levy funding to enhance the student experience and to ensure continuity of building systems and asset preservation. The community made an investment in the schools when approving the levy, and the District is resolute in its commitment to carrying out the necessary repairs, replacements, and enhancements to maintain the very best facilities across the District.

Based on the recommendations of this 2023 Plan update (further explained below), to finish Islander Middle School, make select program improvements at Mercer Island High School, and make ADA improvements at the Administration building, any significant work (facility replacement or full-scale renovation) at the elementary sites will be pushed out to future bond considerations between 2031 and 2040. It is also not clear at this time what the sequence of replacement will be.

The District delayed significant capital investments at the three older elementary buildings since pre-Covid. Given the recommendations of this plan, Cap/Tech dollars are expected to fund the improvements noted below in the next three-year period. This plan will be updated on a three-year rolling timeline and may be amended based on emergent issues.

See next page for worksheet.

Mercer Island School District
3-Year Cap/Tech Projects for LRFP
 January 10, 2024 (b1)

SUMMER 2024	SUMMER 2025	SUMMER 2026	3-Year Total
HIGH SCHOOL & CREST Crest Secure Vestibule Parking Lot Seal Coat and Stripe Replace Commons, Kitchen, DECA Roll-up Fire doors Energy Upgrades DOE Landscape Maint	HIGH SCHOOL & CREST Partial Furniture Replacement Energy Upgrades DOE Landscape Maint	HIGH SCHOOL & CREST Paint Exterior DOE Landscape Maint Partial Furniture Replacement	HIGH SCHOOL \$ 2,974,640
MIDDLE SCHOOL Parking Lot Seal Coat and Stripe DOE Landscape Maintenance	MIDDLE SCHOOL DOE Landscape Maintenance	MIDDLE SCHOOL DOE Landscape Maintenance	MIDDLE SCHOOL \$ 98,100
ISLAND PARK ELEMENTARY Carpet full school Boiler Replacement Parking Lot Seal Coat and Stripe Classroom Security Door Hardware	ISLAND PARK ELEMENTARY Paint 1/2 Interior Classrooms + Corridors Paint Exterior Energy Upgrades Roof Replacement	ISLAND PARK ELEMENTARY Paint 1/2 Interior Classrooms	ISLAND PARK \$ 1,718,089.76
LAKERIDGE Carpet full school Boiler Replacement Parking Lot Seal Coat and Stripe Classroom Security Door Hardware	LAKERIDGE Paint 1/2 Interior Classrooms + Corridors Energy Upgrades	LAKERIDGE Paint 1/2 Interior Classrooms Paint Exterior	LAKERIDGE \$ 1,040,959
NORTHWOOD Parking Lot Seal Coat and Stripe DOE Landscape Maintenance	NORTHWOOD DOE Landscape Maintenance	NORTHWOOD DOE Landscape Maintenance	NORTHWOOD \$ 112,050
WEST MERCER Carpet full school Boiler Replacement Parking Lot Seal Coat and Stripe Roof Replacement Classroom Security Door Hardware	WEST MERCER Paint 1/2 Interior Classrooms + Corridors Paint Exterior	WEST MERCER Paint 1/2 Interior Classrooms	WEST MERCER \$ 1,626,578
BUS LOT EV Charging Infrastructure Design	BUS LOT Fuel Tank Solution - Design EV Charging Infrastructure Design	BUS LOT EV Charging Construction Fuel Tank Solution - Construction	BUS LOT \$ 1,175,000
ADMINISTRATION BUILDING Parking Lot Seal Coat and Stripe	ADMINISTRATION BUILDING Minor interior reconfigurations	ADMINISTRATION BUILDING Minor interior reconfigurations Paint Exterior	ADMINISTRATION \$ 490,005
MARY WAYTE POOL KC Grant Design	MARY WAYTE POOL KC Grant Design & Construction	MARY WAYTE POOL KC Grant Construction ???	MARY WAYTE \$ 2,200,000
FURNITURE Elementary Schools	FURNITURE Elementary Schools	FURNITURE Elementary Schools	REIMBURSABLE BOND DESIGN FEES \$ 1,150,000

Total: \$ 12,585,422
 Reimbursable Bond Costs: \$ 1,150,000
 TOTAL: \$ 11,435,422
 CAPITECH TARGET: \$ 11,500,000
 (Over Budget) / Under Budget: \$ 64,578

CONCLUSION AND RECOMMENDATIONS

The 2023/2024 update of the Long-Range Facilities Plan was extensive and included significant community involvement and outreach. The initial plans suggested the possibility of rebuilding (2) of the (3) older elementary schools at a larger size of 600-students to allow for future consolidation and flexibility if necessary. This option elicited a great deal of emotion and concern from staff, community, and parents from Island Park Elementary since they were the perceived school that could be consolidated.

The sense from the community outreach meetings and feedback was that any school suggested in the plan examples would have elicited a similar reaction. The community did not believe the potential \$800K annual savings and prospective savings on a future bond were compelling reasons now to consolidate. While the elementary schools have excess space, and from a number’s standpoint could be consolidated from four schools to three schools, the impact to the students and the community would be significant and the community and Board did not feel there was a strong enough reason to continuing consideration at this time.

There is some thought in the community that over the next few years, enrollment at the elementary level may increase due to several factors including home sales, increased density, and students leaving home schooling or independent schools to rejoin the District. The current plan is to study the actual enrollment data—increase, decrease, stagnate—in the coming years before returning to a discussion about plans for the three older elementary schools. The Board codified plans to receive annual updates as part of the Operation Expectations of the Superintendent. See the Consolidation portion of this Update for a copy of the document approved by the Board.

Despite the outcry over potential consolidation, the results of the survey, multiple emails, and other feedback indicate there is a desire by the community to improve Islander Middle School, Mercer Island High School, and facilities with ADA accessibility deficiencies and proceed with capital improvements through the Cap/Tech Levy. It is therefore recommended that the District begin concept design and estimating work associated with “Scenario C” which consists of the following projects:

1. Islander Middle School: Provide concept design drawings and cost estimates to complete the IMS project for a student capacity of 1,000 students.
2. Mercer Island High School: Identify a prioritized list of program improvements. Provide concept design drawings and cost estimates for the recommended priorities. The total cost for all MIHS projects to be included in this bond should be approximately \$15 Million (total project cost). This will represent only a portion of the need at the High School and future bonds are intended to continue to address the priorities.
3. All Buildings: Identify any “must do” projects related to facility conditions (such as ADA improvements at the Administration Building) and energy efficiency projects to ensure timely compliance with the State of Washington’s Clean Building Act.

- Proceed with the 3-Year Cap/Tech Levy Projects included in this update with a focus on improving the student experience, system reliability, and asset preservation at the (3) older elementary schools.

Staff should provide the School Board with regular updates on the progress of this work and be prepared to provide the information for items 1-3 in the fall of 2024 for Board consideration to place a bond measure on the ballot when the Board believes the community is ready.

Staff will plan for a potential bond in April 2025 for these projects and will also provide a schedule for potential future bonds for the elementary schools and additional Mercer Island High School work per the Island Elections and Bond Schedule below:

