Agenda Item #6.4  Elementary Task Force Recommendation

Purpose of the Agenda Item – Information

The Executive Director of Elementary Programs will present the Elementary Task Force's recommendation. To manage urgent capacity issues, the administration will also discuss its seven interim recommendations. School Board members will review the recommendations, ask questions, solicit input, and refer the information to the Long Range Facilities Planning Committee and administration for further investigation. The administration will then be tasked with creating a strategy, in partnership with the community, on how best to move forward with task force draft recommendations.

Mr. Luzaich
Executive Summary

Introduction

The following report summarizes the findings of Lake Oswego School District’s Elementary Facilities Task Force. The Elementary Facilities Task Force was established in December 2018 by the Lake Oswego School Board. The Elementary Facilities Task Force included representatives from each elementary school attendance area as well as DEI, SSPAC, Pre-K liaisons. Additionally, the Task Force included a DEI Committee liaison, SSPAC liaison, Pre-K parent liaison, and an ex-officio board member.

Gina Johnston – Forest Hills Elementary
Nancy Wakefield – Hallinan Elementary
Jennifer Dale – Lake Grove Elementary
Laura Coyle – Oak Creek Elementary
Rachel Shafer – River Grove Elementary
Jennifer Harvey – Westridge Elementary
Kirsten Aird – Palisades Neighborhood
Carey Blem – Uplands Neighborhood
Neelam Gupta – Diversity, Equity & Inclusion
Cyndi Spear – SSPAC
Mini Zhang – Pre-school/Pre-K
Facilitator: Karina Ruiz, BRIC
School Board Ex-Officio: Bob Barman
Mike Musick – Superintendent
Dan Draper – Principal, River Grove Elementary
Lilian Sarlos – Principal, Oak Creek Elementary
Frank Luzaich – Executive Director of Elementary Programs
Morgan Rauch – Director of Community Schools

The Elementary Facilities Task Force met seven (7) times from December 2018 through April 2019. Meetings provided an opportunity to review and discuss information related to the District’s programmatic needs, spatial constraints/resources, and enrollment trends.
Task Force Charge

Per the Board resolution, the Elementary Facilities Task Force was charged with addressing the following issue:

*Which elementary school configurations, boundary changes, or alternative solutions should the LOSD Board of Education consider to harmonize elementary programs, facilities and productive learning based on guiding principles, district strategic plan, and the district’s decision-making model?*

Specifically, the Task Force was asked to perform the following tasks:

- Review current and planned elementary programming
- Identify limitations in current facility footprints
- Understand student needs
- Develop solutions options that harmonize programs, facilities and productive learning

The Lake Oswego School Board identified the following initial guidelines to guide the Task Force’s discussions:

- Elementary school classrooms (general education, dedicated special education, immersion) will operate at no more than 80% of maximum school capacity to allow for “bubble classes,” kindergarten overflow, and specialty programming (e.g. 6th grade math, Title I, science, etc.).
- Elementary special education K-5 strands (e.g. DELTA, Pathways) will not require special education students to change elementary schools to continue within their strand.
- All elementary school spaces where regular daily learning will occur will have windows.

Guiding Principles

The Elementary Facilities Task Force developed the following set of guiding principles to serve as a foundation for programmatic and/or capacity-related discussions.

- Every Lake Oswego Elementary School Shall Provide an Inclusive Environment that is Designed and Operated to Meet the Needs of ALL Students.
- Every Lake Oswego Elementary School Shall Function as a Neighborhood School for those that Live in the School’s Vicinity.
- Every Lake Oswego Elementary School Shall be Equipped with Adequate Administrative Staffing and Resources.
- Every Lake Oswego Elementary School Shall Provide Access to a Rich Variety of Flexible Learning Environments that Support a Wide Range of Activities and Experiences.
- Every Lake Oswego Elementary School Shall offer a Variety of Spaces and Resources to Support STEAM Activities.
- Every Lake Oswego Elementary School Shall Provide Indoor and Outdoor Spaces that Encourage Daily Physical Activity among Students.
- Every Lake Oswego Elementary School Shall Actively Support the Social, Emotional, and Physical Wellness, Comfort and Safety of Students.
Issues Considered

The Elementary Facilities Task Force weighed a number of factors during their discussions in order to develop a plan for meeting the District’s elementary capacity and programmatic challenges. Some of the major issues considered are summarized below.

Lake Oswego’s Elementary Schools are Overcrowded

Most of the District’s elementary schools are at or near full-capacity. The District has experienced an enrollment increase of 125 elementary students since 2010. Although the District’s class size goal for elementary classes ranges from 24-27 students, target staffing ratios are higher (Table 1). Additionally, the District has been faced with diverting kindergarteners to “overflow” schools when neighborhood schools exceed the enrollment cap of 26 students per class.

<table>
<thead>
<tr>
<th>Grade Level</th>
<th>Class Size Goal</th>
<th>Target Staffing Ratios</th>
</tr>
</thead>
<tbody>
<tr>
<td>K</td>
<td>24</td>
<td>1:26(^1)</td>
</tr>
<tr>
<td>1-2</td>
<td>25</td>
<td>1:27</td>
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<tr>
<td>3-4</td>
<td>26</td>
<td>1:28</td>
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<td>5</td>
<td>27</td>
<td>1:29</td>
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</tbody>
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\(^1\) The kindergarten staffing target is an upper limit that the District does not want to exceed. Average ranges for other grades are not a cap but rather are a target for allocating staffing for classroom teachers. Average ranges are calculated across the district, not by individual school.

Overcrowding is Limiting Schools’ Ability to Accommodate Enrollment Bubbles or Program Changes

At elementary schools where every general classroom is fully utilized, it is difficult to accommodate “enrollment bubbles” without creating blended classes of multiple grades in one room. Additionally, at many schools, facility constraints make it difficult to find a dedicated space for small group instruction for Math Advancement Program classes, TAG, or reading support. Operating schools at 80% capacity would provide elementary schools with sufficient flexibility to adapt to enrollment fluctuations and/or programmatic changes.

Space Constraints are Limiting Educational Opportunities at the Elementary Level

Spatial disparities among elementary facilities have resulted in unequal access to resources such as makerspaces, art literacy rooms, and music rooms. Additionally, some schools have multiple extended learning areas available for individual or small group work, whereas other schools cannot provide such opportunities without taking over a classroom or a corridor. While school facilities will never be identical, they should have access to similar resources and be “right-sized” in terms of their student populations.

Overcrowded Schools Create Additional Challenges for Special Education Programs

In recent years, Lake Oswego School District has experienced an increase in the number and type of specialized classroom placements, with associated spatial requirements. Lake Oswego School District’s special education model of inclusion brings SPED students and their accompanying specialists into general
classrooms for instruction. This increases the number of room occupants within the general classrooms (many of which are already overcrowded). Additionally, spatial constraints make it difficult to ensure continuity of special education programs and services. For example, the distribution of the District’s DELTA program is currently spread between multiple facilities, requiring students to change schools two (2) times before 6th grade. DELTA students should be able to enroll in a K-5 program that allows them to attend one (1) school through all years of elementary education.

Overcrowded Schools Require Additional Support Staff

Overcrowded schools are feeling the strain of trying to do more with less; this applies to staffing as well as facilities. The District should ensure that staffing levels are commensurate with the number of students served at each school. This applies to both instructional and support staff. Maintaining adequate staffing ratios will help balance class sizes and ensure equitable access to specialized services across all elementary schools.

A Balance Must be Struck between Maintaining Neighborhood Schools and Supporting Magnet Programs

Every Lake Oswego elementary school should serve as a neighborhood school for those that live in the school’s vicinity. The District should seek ways to support magnet options while maintaining a “neighborhood schools” model. While magnet programs can provide valuable and unique learning opportunities, such programs should not forestall students from attending their local school.

Short-term Fixes may Provide Temporary Relief of Classroom Overcrowding but will not Resolve Long-term Capacity Deficits

Facing a district-wide elementary classroom shortage, the District has adapted by converting storage rooms into classrooms and adding portables where feasible. Storage rooms repurposed into small, windowless classrooms do not provide ideal learning environments for students. Additionally, such strategies amount to a “band-aid” approach; while classroom capacity is increased, “core” capacity (e.g. administrative areas, gymnasium, etc.) is increasingly strained by the larger student population.

New Funds may be Available to Hire More Elementary Teachers but there are Insufficient Classrooms in which to Place Them

The Lake Oswego local option levy and proposed state tax bill for education funding may enable the District to hire additional teachers to improve student/teacher ratios for certain grade
levels. However, the District does not currently have enough elementary classrooms to accommodate a sudden influx of new teachers. This could delay or prevent the hiring of additional elementary instructors as the District scrambles to maximize and/or increase available teaching stations.

Need for “Swing Site” Potentially Limits Future Use of Uplands

The District recently completed a significant renovation of Uplands to enable its use as a “swing site” for schools temporarily displaced by bond-funded construction projects. There is some degree of uncertainty on how Uplands will be used during gap years between projects, as well as its long-term use. If Uplands is reopened as an elementary school to relieve overcrowding, an alternative site will be needed as a “swing school.”

Options Reviewed

Following lengthy consideration of the numerous issues influencing the District’s ability to meet elementary capacity and programmatic needs, the Task Force distilled possible strategies into seven (7) options. For each option, the Task Force weighed pros and cons, and then arrived at a decision as to the effectiveness of the approach.

Balance Enrollment Among Existing Six (6) Elementary Schools

The Task Force discussed the option of enacting school boundary changes to redistribute enrollment between the six (6) elementary schools to alleviate overcrowding at certain facilities.

Pros: This would be the lowest-cost option. It could be implemented in a relatively short time frame. Boundary changes would allow the District to move closer to “right-sizing” most schools to 400-450 students.

Cons: School boundary changes alone would only partially address the District’s capacity challenges. Even collectively, the current six elementary facilities have insufficient classrooms to maintain 80% capacity at all schools. Consequently, schools would still be limited in their ability to accommodate enrollment bubbles and programmatic changes. School boundary changes are often controversial, requiring a high level of community discussion. Boundary changes at the elementary level may not align with junior high and high school feeder systems. This option does not create a plan for the long-term use of Uplands and Palisades.

Conclusion: While elementary school boundary changes will likely be required under any scenario, boundary changes alone will not resolve the District’s capacity challenges.
Continue to Operate Six (6) Schools while Using Uplands as a Temporary Satellite for River Grove

The Task Force discussed the option of continuing to operate the current six (6) elementary schools while using Uplands as a temporary satellite location for the language immersion program, thereby alleviating overcrowding at River Grove Elementary.

**Pros:** This option would provide short-term space relief for River Grove through 2021. It would also provide an effective use of the recently-renovated Uplands facility.

**Cons:** Although this strategy would provide some short-term relief at River Grove, it would not address long-term capacity issues within the District. The language immersion program would not require use of the entire Uplands facility; the building would have underutilized areas. This approach would require language immersion students to change schools. There would be associated staffing costs with the additional FTE needed to operate Uplands (e.g. VP, Advanced Math, SPED, TAG, PE, Library, etc.).

**Conclusion:** This option would only be partially-effective as a short-term strategy; additional measures would be required to address long-term district-wide elementary capacity challenges.

Open Palisades as a Magnet Immersion School

The Task Force discussed the option of opening Palisades as a new magnet immersion school. This would make Palisades the District’s only facility that does not serve as a neighborhood school; instead, it would draw students from across the district.

**Pros:** Opening Palisades as a magnet school would increase the District’s overall elementary capacity, opening up space at the other six (6) schools. Additionally, a magnet school would expand program opportunities for Lake Oswego students.

**Cons:** The District would need to find alternative locations for programs currently housed at Palisades (e.g. community programs, pre-K, extended care). All space gains would go to the magnet program instead of neighborhood schools (though schools should see an associated decrease in enrollment levels). There would be additional expenses associated with renovating and operating Palisades as a 7th school. Palisades is not centrally-located and may present transportation challenges for some families. A dedicated magnet that is not integrated into a standard elementary may result in a more isolated experience for students. This approach would displace some administrative staff and/or programs. Language immersion as a magnet may be too limiting; the District may want to consider other magnet options as well. There would be higher costs associated with relocating services as the immersion strand grows.

**Conclusion:** A neighborhood school is preferred over an exclusive magnet.

Open Palisades as a Neighborhood School (that could support a magnet strand)

The Task Force discussed the possibility of opening Palisades as a neighborhood school that could potentially support a magnet strand. This would be similar to how River Grove operates, where the school serves the surrounding neighborhood yet has certain classrooms dedicated to the language immersion program.

**Pros:** Opening Palisades as a neighborhood school would help balance the number of classrooms in schools on the north vs. south sides of the lake. Use of Palisades would open up space in the neighborhood schools for Pre-K, extended care and community school programs. The magnet strand option could potentially provide space relief for River Grove if a second language immersion strand was added.

**Cons:** The District would need to find alternative locations for programs currently housed at Palisades (e.g. community programs, pre-K, extended care). This approach would require relocation of some administrative staff and/or programs. There would be additional expenses associated with renovating and operating Palisades as a 7th school. Use of Palisades would alleviate overcrowding on the south side but may not have much of an impact on north side schools without major boundary changes.

**Conclusion:** Task Force members identified this approach as a feasible option with many potential benefits. Neighborhood school concept with option of a magnet strand was the preferred approach.
Open Uplands as a Magnet Immersion School and Designate Another School as the Swing Site

The Task Force discussed the possibility of opening Uplands as a magnet immersion school. Another facility would then be used as the swing site for schools temporarily displaced by construction projects.

Pros: Opening Uplands as a 7th elementary school would alleviate overcrowding at other District schools. This approach could also provide the District with the option of selling or leasing Lake Grove (prime location has income-generating potential).

Cons: This approach would have significant impacts to other schools. Realistically, this option would not be implemented until 2020-21 at earliest. Language immersion as a magnet may be too limiting.

Conclusion: A magnet school may not represent the “highest and best use” of the Uplands facility.

Operate Eight (8) Elementary Schools

The Task Force discussed the possibility of the District opening both Uplands and Palisades, operating a total of eight (8) elementary schools.

Pros: This approach provides the highest level of elementary school capacity district-wide and opens up a wide range of magnet options. Operating eight facilities at a lower utilization rate would provide schools with a high degree of flexibility in responding to enrollment bubbles or program expansions.

Cons: This is the most expensive option from an operational standpoint. Smaller school populations are associated with a greater likelihood of blended (multi-grade) classes. This option would require the loss of a “swing site” for schools temporarily displaced by construction projects; portables would be required (costly). This option would require displacement of community programs, extended care and pre-k (though they could be decentralized and distributed among schools). The low utilization rate of facilities may not be sellable to the community.

Conclusion: This is a costly option that does not present the most efficient use of spaces. Eight (8) elementary campuses would be excessively expensive to operate and would provide more space than what is needed to meet the District’s capacity and programmatic needs.

Assign Committee to Research Magnet Options

Following extensive discussions of magnet options, the Task Force identified the need for a district-wide committee to research different magnet programs for Lake Oswego School District.

Pros: Presents the opportunity to expand the language immersion magnet program or introduce a new magnet program. Increases the types of educational opportunities offered to Lake Oswego students. There are enrichment opportunities associated with magnet options.

Cons: The District should ensure that education “basics” are covered at neighborhood schools (e.g. RTI, literacy, SPED, STEM, etc.) before investing in a new magnet. It is also important to avoid impression of exclusivity.

Conclusion: This option should be implemented in conjunction with other strategies.
Task Force Recommendations

Following a lengthy consideration of the presented issues and options, the Elementary Facilities Task Force recommends that Lake Oswego School District undertake the following actions to address long-term elementary capacity and programmatic needs:

Develop a Plan to Open a 7th Neighborhood Elementary School that Could Potentially Support a Magnet Program

The Elementary Facilities Task Force recommends that Lake Oswego School District open either Uplands or Palisades as a seventh neighborhood elementary school. By opening a seventh elementary school and redistributing enrollment, the District will be able to operate all elementary schools at a maximum of 80% capacity. This will provide adequate space at each school to meet class size goals while accommodating enrollment bubbles, programmatic changes, and flexible use of learning spaces. While the seventh elementary facility should operate primarily as a neighborhood school, it may also include classroom strands in support of a magnet program.

Research Options for Future Elementary Magnet Programs

The Elementary Facilities Task Force recommends that the Lake Oswego School Board form a district-wide committee charged with researching possible elementary magnet options. Some of the magnet options discussed during the course of the Task Force’s work included: new or expanded language immersion program(s); intellectually gifted; environmental sustainability; STEM; or visual/performing arts. Additional research is needed to determine which magnet option(s) would be best for Lake Oswego based on local interest and resources.

Determine the Long-term Use of the Uplands Facility

The Elementary Facilities Task Force recommends that Lake Oswego School District solidify long-term plans for the Uplands campus. The District invested a sizable sum of money in upgrading the Uplands facility to serve as a temporary “swing site” for schools during construction projects. It is important for the District to make the most of this capital investment moving forward. Although the District has a tentative schedule for short-term use of Uplands as a swing site for Oak Creek/LOJH and possible satellite location for River Grove’s language immersion program, a well-defined plan is needed for the campus’ long-term use past 2024.
Interim Recommendations by Staff

District staff developed several operational suggestions to address overcrowding in the interim until the Task Force’s recommendations can be fully implemented.

**Timeline: 2019**

**Grant Oak Creek Students the Option of Transferring to Lake Grove or Forest Hills to Minimize Construction-related Relocations**

Per Policy JC (http://policy.osba.org/loswego/J/JC%20D1.PDF), current Oak Creek students (and siblings) may transfer for 2019-20 to Lake Grove or Forest Hills and may remain in that school throughout their elementary tenure without having to reapply.

**Support vertical articulation of DELTA students by providing two (2) K-5 programs at Westridge and Hallinan.**

The Task Force recognizes the importance of vertical articulation of students served by the Delta program. As such, the District supports expanding Delta program offerings at Westridge and Hallinan to support all elementary grades at each school (rather than offering K-3 / 4-5 Delta programs at different sites). This shift will allow Delta students to remain at one campus through all years of elementary school, rather than changing schools in 4th grade. As part of this shift, Delta program students at Forest Hills will relocate to Westridge or Hallinan.

**Ensure that Support Staffing Levels are Aligned with Student Enrollment**

Based on input received by the Elementary Facilities Task Force, staff recommend that the District align the number of student support personnel (e.g. RTI and Literacy Specialists) with student enrollment, ensuring that larger schools have access to appropriate support staff.

**Work with Long Range Facilities Planning Committee to Align Elementary School Facilities with the District’s Educational Specifications**

Lake Oswego School District is currently in the process of developing Elementary Educational Specifications in order to outline minimum facilities requirements for the District’s elementary schools. As the Elementary Educational Specifications are developed, the District shall engage the Bond Team and Long Range Facilities Committee in discussions on the feasibility of meeting these requirements in new and existing schools.

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2 This change will impact one (1) Forest Hills student.
Timeline: 2020-21

Redistribute Elementary Enrollment by Enacting School Boundary Changes

Per School District policy JC (http://policy.osba.org/loswego/J/ JC%20D1.PDF), the superintendent will recommend that the school district embarks on an elementary boundary discussion/ process to be concluded before the end of the 2020 school year so that new elementary boundaries can be implemented at the start of the 2020-21 school year. The goal of the boundary/ attendance area discussion will be to align school enrollments to DEI goals and the District’s Educational Specifications.