

September 22, 2023

CBJ Juneau School District Facility Master Plan (JYW No. 23036 / 16040)

Updated Executive Overview

Introduction

In 2016, Jensen Yorba Lott and a consultant team including educational planning and financial experts were selected to assist CBJ and the Juneau School District (JSD) to complete a Comprehensive Facilities Master Plan. The initial tasks—including in-depth analysis of JSD needs and capacities—were completed with a final “Draft Summary of Findings” (hereafter referred to as the “2017 Summary”) submitted in June 2017.

The 2017 Summary found that JSD facilities had excess capacity and that projected decreasing student enrollments would exacerbate the situation into the foreseeable future. Although the 2017 Summary suggested possible alternatives to reduce facility capacity, the planning team was not authorized to develop the recommendations into a final Plan. The 2017 Summary was not formally approved or adopted by CBJ or JSD.

In September 2023, JYW was contacted to determine if and how the 2017 Summary could be updated and developed into an adoptable Comprehensive Facilities Master Plan. Understanding that updating all the detailed information in the 2017 Summary with current data could be a significant undertaking, JYW recommended first providing a more limited review. This Updated Executive Overview reviews the 2017 Summary, highlighting important data points and updating some information. Intended to be a companion to the 2017 Summary rather than a replacement, this Overview will refer to the Sections and page numbers of that original document.

To keep this Overview effort to a minimum, JYW completed the work without the assistance of the other experts from the 2017 consultant team. In addition, we did not perform any site visits or interviews with JSD, so there certainly may be minor errors in this Overview which could be corrected if the 2017 Summary was to be updated.

Section 1: Executive Summary

See Conclusion at the end of this Overview.

Section 2: JSD Budget Overview

Current JSD budgets were not analyzed for this Overview.

2017 Budget Summary: In 2017, 12% of the total JSD budget went to facilities-related costs. At the time of the 2017 Summary, JSD had made significant cost-reduction and energy-saving efforts and did not anticipate finding significant additional operational savings in future years (page 5).

Section 3: Enrollment

Enrollment Summary: The actual student enrollment in the 2016-2017 Academic Year when the 2017 Summary was developed, was 4,695.

2017 Projections vs. Reality: The enrollment projections in the 2017 Summary were taken from the 2017 Erickson & Associates Enrollment Forecast prepared for JSD in February 2017. Erickson's projections for the 2022-2023 Academic Year were 4,308 (low), 4,612 (medium), and 4,815 (high). The 2023 Erickson report shows that the **actual enrollment for 2022-2023 was 4,204, 104 students fewer than the 2017 low-end projections.**

The reduction of 491 students from 2016 to 2022 was a significant decrease from the projections used in the 2017 Summary, which anticipated a range of possible change from +24 to -191 students (page 11). Obviously the pandemic and other factors made this period a very challenging one for education and education enrollment forecasting, but overall, the Erickson forecasts provide very helpful information. See Erickson's reports for more detail about methodology and forecast accuracy.

Future Scenarios: Erickson & Associates anticipates enrollments will continue to decline over the forecast period, with **projected reductions of 700 students over the next ten years.** Projected enrollment in 2032-2023 is 3,504 students.

Erickson & Associates forecasts are based on demographic factors, assuming no material change in Juneau's future economy (see 'Caveat – The steady state assumption,' the final section of the Feb. 23 Enrollment Forecast). JEDC and other analysts see possibilities for more optimistic population forecasts, but specifics are difficult to quantify. However, even a significant positive event—like the USCG locating an icebreaker in town—would likely not provide the 500 students needed to bring enrollment back to 2016-2017 levels in the near future.

Enrollment Takeaway: *Enrollment has fallen since 2017. Future projections show enrollment continuing to decline.*

Section 4: Projected Funding vs. Operational Expenditures

Current state funding levels were not analyzed for this Overview. It has been well reported that state funding levels have not been increasing with need.

2017 Funding Summary: The 2017 Summary noted that Projected Operational Expenses were already higher than Projected Funding at even the high-end enrollment projections. A \$2M fund balance from prior years was being used to balance the 2018 budget (page 41). The funding gap got worse as future enrollments decreased (see chart, page 42).

Section 5: Facility Educational Assessment

Current educational assessments were not analyzed for this Overview.

2017 Facility Educational Assessment Summary: The 2017 Summary evaluated all the school facilities through several qualitative and quantitative processes. A Long-Term Viability Matrix compiled all the analysis into a single score as follows (page 72). It should be noted that some upgrades to the facilities (such as the new roof installed at DHMS and Kaḵdigoowu Héen) may impact the Matrix scores.

- 2.0 Mendenhall River Community School
- 2.3 Marie Drake
- 2.7 Dzantik'i Heeni Middle School
- 3.0 Floyd Dryden Middle School
- 3.0 Kaḵdigoowu Héen (formerly Riverbend) Elementary
- 3.3 Juneau-Douglas High School: Yadaa.At Kalé
- 3.3 Sayéik: Gastineau Community School
- 3.7 Sít' Eetí Shaanáḵ - Glacier Valley Elementary School
- 4.0 Auke Bay Elementary
- 4.0 Thunder Mountain High School
- 4.7 Harborview Elementary

An important component of the Matrix scores were the qualitative educational assessments of the physical layout of the schools (summarized on page 43). Rectifying these issues will be expensive or even impossible. All of the schools were ranked 80% or higher in this analysis except for 3:

- 55% Marie Drake, due to a restricted outdoor site, lack of special program spaces, and no Commons
- 65% Floyd Dryden Middle School, due to a lack of small group instruction areas, no large Commons, and limited daylighting in the classrooms.
- 67% Mendenhall River Community School, due in large part to the lack of designated space for dining/Commons and Gym.

Facility Assessment Takeaway: Marie Drake, Mendenhall River, and Floyd Dryden are at the bottom of facility assessment lists for reasons that may be expensive or impossible to correct.

Section 6: Energy Use

Current energy use assessments were not analyzed for this Overview. Energy use is discussed on page 89.

Section 7: Capital Improvement Project

Current CIP lists were not analyzed for this Overview. The major projects from 2014 CIP List (page 133), including a \$22.6M renovation of Mendenhall River Community School, and a \$36.2M renovation of Marie Drake have not been undertaken. Smaller projects, including the roof replacement of Dzantik'i Heeni Middle School have been completed.

Section 8: Design Capacity

Current Design Capacities were not analyzed for this Overview. However, we do not believe any major building reconfiguration has occurred since the 2017 Summary although the relocation of the Juneau Community Charter School to JDHS appears to have occurred after the report was written.

As identified on Page 135, there are several ways to calculate building capacity. The most sophisticated method calculates that each classroom space is taken up by a class meeting the district’s Pupil Teacher Ratio (PTR). This method typically results in lower capacities for each building than the “DEED Capacity” which is calculated on an overall building area. PTR and DEED capacity will be summarized below with additional information and alternative capacities available in each building’s information starting on page 137.

Notes: “2017 Actual” are modified enrollments which put Tlingit Immersion into HBV, Charter into JDHS, JYS into TMHS, and Montessori and Yakoosge into Marie Drake to match current program locations (program locations in 2017 were slightly different). Totals also include Pre-K in each school, so total enrollment is 4,734 (4,673 + 91 Pre-K).

	<u>DEED</u>	<u>PTR</u>	<u>2017 Actual</u>	<u>Difference</u>	
Auke Bay Elementary	424	398	387	11	97%
Sayéik: Gastineau Community School	386	302	276	29	91%
Sít’ Eetí Shaanáx - Glacier Valley Elem. School	453	440	367	73	83%
Harborview Elementary	578	424	370	54	87%
Mendenhall River Community School	503	398	353	45	89%
Kaxdigoowu Héen (formerly Riverbend) Elem.	499	408	310	98	76%
Dzantik’i Heeni Middle School	634	589	490	99	83%
Floyd Dryden Middle School	447	538	452	86	84%
Juneau-Douglas High School: Yadaa.At Kalé	1156	1091	671	420	62%
Thunder Mountain High School	1023	753	737	16	98%
Marie Drake	396	454	272	182	60%
TOTAL	6,499	5,795	4,734	1,061	82%

Capacity Takeaway: There was excess capacity in 2017 even prior to recent enrollment decreases. Balancing overall district capacity with individual building layouts, grade divisions, separate program needs, and geographic boundaries are very complex issues.

Section 9: Boundary & Housing Trend Summary

Current Boundaries and Housing Trends were not analyzed for this Overview.

Conclusion

The 2017 Summary concluded that wide-scale changes might be needed to align district facilities with district needs. Changes in enrollment and funding since 2017 have likely just exacerbated the issues highlighted in 2017.

Possible initial solutions were outlined in the Executive Summary (page 2). These solutions included potential facility reorganization/closure and even changes in the divisions between the different grades levels in each type of school. The proposed solutions all created difficulties and complexities with none providing an easy path forward.

It is hoped that this Overview can re-start the conversation about how to move towards adoption of a Comprehensive Facilities Master Plan to guide future decision making and capital project planning. Some possible future steps may include:

- Updating the 2017 Summary to include current data.
- Creation of economic forecast models which detail out pure financial costs of different facility options, including repair, reconfiguration, deactivation, or even demolition.
- Examination of the areas required for administration and other functions which are also taking up spaces in district buildings.
- Creation of a more comprehensive School Facilities Matrix for facility evaluation which combines the Long-Term Viability data from the 2017 Summary with other qualitative and quantitative variables as identified by the decision-making team. See “Draft School Facilities Evaluation matrix Version 9.26.23” memo from Katie Koester.
- A planning project which explores whether the community could use some educational facilities for different uses, public or private.
- Creation of a process to bring options to the public and decision-makers for discussion and exploration. Determine how to develop consensus on these difficult issues.