

7 APPENDIX OF DETAILED FACTS AND INFORMATION

The following Appendix provides the detailed facts and information relevant to the subject application:

7.1 Application Materials

7.1.1 Jackson County Application Forms

7.1.2 City of Talent Application Forms

7.1.3 TA-1 Conceptual Master Plan

7.1.4 Phoenix-Talent School District Long Range Facilities Master Plan (Adopted by Phoenix-Talent School District Board)

7.2 Subject Property Details

7.2.1 Assessor's Account Information

7.2.2 Lot Creation Document Warranty Deed found at Volume 234 Page 214

7.2.3 Summary of Historic County Permits

7.3 Other Materials

7.3.1 Jackson County Board of Commissioners Order 402-05

7.3.2 Phoenix-Talent Little League Letter of Intent

7.3.3 Boys and Girls Club of the Rogue Valley Letter of Intent

Appendix 7.1.1
Jackson County Application Form

COPY
JACKSON COUNTY, OREGON

Type 4-Amend App.wpd (10/19/07)

**TYPE 4 APPLICATION -
AMENDMENT**

MINOR COMPREHENSIVE PLAN
MAP AMENDMENT ~~AND ZONE CHANGE~~
OR

MINOR ZONE CHANGE, NO PLAN
MAP AMENDMENT REQUESTED

(Please print in black ink, or type all
information except where a signature is required)

Current
Plan Map Designation: Agricultural Land
Current Zoning: EFU
Legal description of subject property:
Township 38
Range 1W
Section 22D
Tax Lot(s) 1000

OFFICE USE ONLY	
File N ^o	_____
Fee Pd	_____
Receipt N ^o	_____
App. Type:	_____
App. Received by	_____
Date Received	_____
Comp Plan/Zoning:	_____

Proposed
Plan Map Designation: No Change
Proposed Zoning: No Change

Date of Tax Lot Creation Jan 7th, 1942
Acreage 43.00
Assessor Property Class Code 204

Is the purpose of this application to complete a Measure 49 Approval? YES NO

NOTE: Applications for review and approval of all development proposals may be initiated by the property owner, purchaser under a recorded land sale contract, condemner who has been granted immediate possession by a court of competent jurisdiction, agent duly authorized in writing, or a public agency.

PROPERTY OWNER:

At Time Application is Submitted

Name: Phoenix-Talent School District 4
Mailing Address: PO Box 698
City: Phoenix
State: OR Zip: 97535
Daytime Phone: 541-535-1511 (Brent Barry)
E-Mail Address: brent.barry@phoenix.k12.or.us

AGENT:

If Other than Applicant

Name: CSA Planning Ltd/Jay Harland
Mailing Address: 4497 Brownridge Ste 101
City: Medford
State: OR Zip: 97504
Daytime Phone: 541-779-0569
E-Mail Address: jay@csaplanning.net

APPLICANT:

If Other than Property Owner

Name: SAME AS OWNER
Mailing Address: _____
City: _____
State: _____ Zip: _____
Daytime Phone: _____
E-Mail Address: _____

OTHER:

Specify: _____

Name: _____
Mailing Address: _____
City: _____
State: _____ Zip: _____
Daytime Phone: _____
E-Mail Address: _____

IF AN AGENT, APPLICANT, OR "OTHER" IS ACTING ON BEHALF OF THE OWNER OR PURCHASER, A SIGNED STATEMENT OF OWNER AUTHORIZATION MUST BE SUBMITTED WITH THIS APPLICATION. THIS APPLICATION MUST BE ACCOMPANIED BY AN ACCURATE PLOT PLAN (MAP). SEE USER'S GUIDE FOR ASSISTANCE. THE BURDEN OF PROOF FOR APPROVAL OF AN APPLICATION RESTS WITH THE APPLICANT. YOU MUST PROVIDE DOCUMENTATION REGARDING THE PROPERTY AND APPLICATION CRITERIA IN SUFFICIENT DETAIL AND ACCURACY TO ENABLE THE DEPARTMENT TO FIND THAT YOUR APPLICATION COMPLIES WITH ALL APPLICABLE APPROVAL CRITERIA.

On the following pages, describe how your application complies with the criteria identified as applicable below:

VIII. AMENDMENT PROCEDURES AND INSTRUCTIONS:

- 1) The first step to file an Official Comprehensive Plan and Minor Zoning Map amendment is to schedule a Pre-Application conference. At the conference, staff will provide a copy of the criteria you need to address, as well as comments from agencies and other interested parties. The criteria includes:
 - A) Compliance with the criteria in the Jackson County Land Development Ordinance;
 - B) Compliance with the Jackson County Comprehensive Plan;
 - C) Compliance with the Statewide Planning Goals; and
 - D) Compliance with applicable Oregon Revised Statutes (ORS) and Oregon Administrative Rules (OAR).
- 2) The second step is to complete the Comprehensive Plan Map Amendment and/or Zone Change application. This application may be filed by a property owner or an authorized agent. Please answer all questions in this application as completely as possible. Not all of the questions may apply, and in those cases, please indicate does not apply (N.A.) In order to fully answer some questions, or address the required criteria, you may find it advantageous to answer the questions on a separate sheet of paper, or attach separate support documents to the application form. If so, indicate that there is an attachment, next to the question or criteria.
- 3) All applications receive preliminary review to assure that the application is complete, and sufficient information has been submitted so that the proposal can be processed. There are no statutory processing deadlines when a comprehensive plan amendment is requested. A zone change application consistent with the existing comprehensive plan map designation, where an exception to a Statewide Planning Goal is not required, is subject to statutory processing deadlines and will be processed accordingly.
- 4) The staff report and hearing packet will be mailed to you at least one week prior to the Planning Commission public hearing. Either you or your agent is required to be present. The burden of proof lies with the applicant. You must prove to the Planning Commission that your application meets all the approval criteria. You may present additional evidence or produce witnesses at the public hearing. Any exhibits entered into the record of the public hearing process must remain as part of the official record and are not returnable, unless by prior arrangement.
- 5) Written information submitted as an addendum to the application after the staff report has been prepared, or at the hearing, may result in a postponement or continuance of that hearing to allow for analysis of the newly submitted information.

NOTE: Additional information may be submitted on 8½ 11 inch white paper

II. BASIC PROPOSAL: Specifically identify any comprehensive plan map amendment, zone change, and associated development plan approvals requested. Also specify if an exception to any Statewide Planning Goal is requested, and outline the type and nature of the requested exception(s):

1. Minor UGB Amendment to add approximately 34 acres of land, consisting of approx. 2.8 acres of public ROW and a portion of a single property zoned EFU owned by the Phoenix-Talent School District and situated next to the northwestern extent of the existing Talent municipal limits.

2. Amend the City's Comprehensive Plan Map to map the subject property as a combination of Parks and Public Facilities-Civic

NOTE: Additional information may be submitted on 8½ 11 inch white paper

III. **FINDINGS OF FACT PERTAINING TO THE SUBJECT PROPERTY AND SURROUNDING AREA:**

- 1) Describe current and historic use of the subject property:

See Applicant's Volume 1 - Findings of Fact and Conclusions of Law

- 2) List and describe any improvements that exist on the property:

See Applicant's Volume 1 - Findings of Fact and Conclusions of Law

- 3) Describe adjacent land uses and size of parcels in the area (up to 1,000 feet of this property boundary) by tax lot:

See Applicant's Volume 1 - Findings of Fact and Conclusions of Law

NOTE: Additional information may be submitted on 8½ 11 inch white paper

4) Does the subject property have special assessment? Yes _____ No X
If yes, acreage assessed: _____ Type of special assessment: _____

5) Soil types and conditions: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law

A) Does the property contain any of the following:

i) Agricultural Soil Class I-IV? Yes X No _____ If Yes, please list the Class and acreage for each.

~28 acres Map Unit 127A - Type I Irr Soil, ~15 acres Map Unit 34B - Type II Irr Soil

ii) Forest Capability Class 2-6? Yes _____ No X If Yes, please list the Class and acreage for each.

Not relevant

iii) Significant Aggregate Resources? Yes _____ No X If Yes, please list the quantity and quality of the resource.

iv) Significant Mineral Resources? Yes _____ No _____ If Yes, please list the quantity and quality of each resource.

Not to applicant's knowledge

B) Describe soil types and characteristics: (*drainage, dwelling and road construction suitability, shrink-swell, etc.*)

See Applicant's Volume 1 - Findings of Fact and Conclusions of Law

6) Describe the on-site vegetation or landscaping: _____

See Applicant's Volume 1 - Findings of Fact and Conclusions of Law

7) Topography: (*i.e. slopes, gullies, drainage patterns*)

See Applicant's Volume 1 - Findings of Fact and Conclusions of Law

8) Does the property contain sensitive fish or wildlife habitat? Yes _____ No X If Yes, please explain how conflicts will be mitigated.

NOTE: Additional information may be submitted on 8½ 11 inch white paper

9) Does the property contain any identified wetland areas? Yes _____ No X If Yes, please explain how conflicts will be mitigated.

10) Is the property irrigated or does it have access to irrigation: Yes X No _____

If yes, explain: (Acreage irrigated, name of irrigation district or source of water)

Talent Irrigation District-See Applicants Volume 1-Findings of Fact and Conclusions of Law

11) Please list adjoining properties under the same ownership:

None

12) Is the property subject to flooding or other natural hazards:

None

13) What is the existing or proposed water supply? Well _____ Water Dist. Name See Findings

Has a well been drilled? Yes ___ No ___ If well drilled, gallons per minute: _____

14) What is the existing or proposed sewage disposal system? Community System _____

On-site System X, # of lots served _____ Other: (please describe) _____

See Applicant's Volume 1 - Findings of Fact and Conclusions of Law

15) Fire Protection: Fire District #5 (Name of Fire District)

A) Location of nearest fire station: 5811 S Pacific Hwy, Talent OR

B) Distance to nearest fire station in miles: .5 miles

16) Name of School District: Phoenix-Talent School District 4

	Name	Capacity	Curr. Enrollment
Elementary School:	<u>Talent</u>		<u>495</u>
Middle/Jr High School:	<u>Talent Middle School</u>		<u>575</u>
High School:	<u>Phoenix High School</u>		<u>746</u>

NOTE: Additional information may be submitted on 8½ 11 inch white paper

- 17) Access - Status and classification of roads or other significant transportation facilities on or adjacent to the property. Also indicate whether the crossing over a railroad right-of-way is required to access the subject property: *(attach any supporting traffic studies and statements from the agencies having jurisdiction over any affected transportation facilities).*

See Applicant's Volume 1 - Findings of Fact and Conclusions of Law

- 18) Minor map amendments in an Area of Special Concern (ASC) are governed by any conditions specified by LDO Chapter 7 or the Ordinance which created the ASC, or both. The following ASCs apply to this property. Please complete the attachments which include the policies and standards for these ASCs.

80-2 Ashland Watershed _____	82-1 WhetstonePark _____	82-2 Bear Creek Greenway _____
90-1 Wildlife Habitat _____	90-2 Eagles/Osprey _____	90-3 Jenny Cr Sucker _____
90-4 Historic Landmarks _____	90-5 Historic Survey _____	90-6 Archeologic Sites _____
90-7 N Fork Rogue River _____	90-8 Groundwater _____	90-9 Scenic Resources _____
90-10 Ecologic/Scientific _____	93-1 Hwy 62 Corridor _____	93-2 Transit Trunk Route _____
2003-1 Goal 11 Exception Areas _____	2003-2 Jackson County Sports Park Noise Overlay _____	

- 19) List previous official land use actions by application number and date:

See Applicant's Volume 1 - Findings of Fact and Conclusions of Law

IV. JACKSON COUNTY COMPREHENSIVE PLAN: As set forth in Section 3.7.3 of the Land Development Ordinance, you must develop adequate findings of fact to show compliance with the Jackson County Comprehensive Plan. Reference applicable Policy numbers here, as provided

NOTE: Additional information may be submitted on 8½ 11 inch white paper

by Staff at the Pre-Application conference, and describe how this request complies with these Goals and the applicable Policies on separate sheets of paper.

- 1) Aggregate and Mineral Resources: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 2) Agricultural Lands: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 3) Citizen Involvement: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 4) Economy: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 5) Energy Conservation: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 6) Environmental Quality: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 7) Forest Lands: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 8) Goal Exceptions: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 9) Housing: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 10) Natural and Historic Resources: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 11) Natural Hazards: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 12) Population: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 13) Public Facilities and Services: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 14) Recreation: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 15) Rural and Suburban Lands: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 16) Transportation: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 17) Urban Lands: See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 18) Mapping Criteria: Information must show that the requested plan/zoning mapping criteria are equally or more appropriate for the subject property. Refer to the Map Designations Element of the Jackson County Comprehensive Plan. Address the mapping criteria for both the existing plan map designation and the requested plan map designation. If a Goal 2 exception to a Statewide Planning Goal is indicated, provide evidence and findings to demonstrate compliance with ORS 197.732, Statewide Planning Goal 2, Part II, and any Oregon Administrative Rules, Chapter 660, found to be applicable for the requested Goal Exception. Each applicable criterion must be addressed in order for this application to be processed.

- V. **STATEWIDE PLANNING GOALS:** In order to approve an Official Comprehensive Plan and Minor Map Amendment, compliance with applicable Statewide Planning Goals must be demonstrated. Statewide Planning Goals 1 through 14 are all applicable to Jackson County. Attach additional sheets as necessary to adequately address the issues.

NOTE: Additional information may be submitted on 8½ 11 inch white paper

- 1) Goal 1, Citizen Involvement: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 2) Goal 2, Land Use Planning: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 3) Goal 3, Agricultural Lands: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 4) Goal 4, Forest Lands: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 5) Goal 5, Open Spaces, Scenic and Historic Areas and Natural Resources: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 6) Goal 6, Air, Water and Land Resources Quality: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 7) Goal 7, Areas Subject to Natural Disasters and Hazards: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 8) Goal 8, Recreational Needs: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 9) Goal 9, Economic Development: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 10) Goal 10, Housing: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 11) Goal 11, Public Facilities and Services: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 12) Goal 12, Transportation: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law
- 13) Goal 13, Energy Conservation: _____
See Applicant's Volume 1 - Findings of Fact and Conclusions of Law

NOTE: Additional information may be submitted on 8½ 11 inch white paper

VIII. Are you either the owner of the property or do you have written authorization from the property owner to submit this application in their behalf?

Yes No

PLEASE UNDERSTAND THAT THIS APPLICATION WILL NOT BE OFFICIALLY ACCEPTED UNTIL DEPARTMENT STAFF HAS DETERMINED THE APPLICATION HAS BEEN COMPLETELY FILLED-OUT AND THE MAP HAS BEEN COMPLETED CONSISTENT WITH MAPPING REQUIREMENTS AS SET FORTH WITHIN THE APPLICATION. Unless advised in writing by the Department that the application and/or map is unacceptable, the application will be officially accepted.

THIS APPLICATION IS HEREBY SUBMITTED AND THE STATEMENTS AND INFORMATION HEREIN CONTAINED ARE IN ALL RESPECTS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE AND BELIEF.

APPLICANT(S)

Please Print Your Name: SEE CONTRACT

Your Signature: _____

Please Print Your Name: _____

Your Signature: _____

AGENT: Your Signature:  _____
CSA Planning, Ltd/Jay Harland

Please provide simple directions from Medford on how to get to, and recognize, your site.

Take Highway 99 S from Medford to Talent. At the edge of Talent City limits, turn right (heading west) onto Colver Road. Continue on the road for approximately 1/3rd of a mile, past the railroad tracks, Front St, and the residences. The subject property will be on the left. The first structure is a metal maintenance building. Thereafter the soccer and baseball fields will be visible.

NOTE: Additional information may be submitted on 8½ 11 inch white paper

Appendix 7.1.2
City of Talent Application Form



COPY
CITY OF TALENT • COMMUNITY DEVELOPMENT
 PO Box 445, Talent, Oregon 97540
 Phone: (541) 535-7401 Fax: (541) 535-7423 www.cityoftalent.or.

GENERAL LAND USE APPLICATION

Project Description Urban Growth Boundary Amendment		
Property Owner Phoenix-Talent School District 4	Mailing Address (include city, state, zip) PO Box 698, Phoenix, OR 97535	Phone 541-535-1511 (Brent Barry)
Street Address or Property Location 6100/6184 Colver Road	Email Address Brent Barry-Superintendent: brent.barry@phoenix.k12.or.us	
Consultant (if not owner) CSA Planning Ltd/Jay Harland	Mailing Address (Include city, state, zip) 4497 Brownridge Ste 101, Medford, OR 97504	Phone 541-779-0569
Email: jay@csaplanning.net		

Assessor's Map Number (Township, Range, Section, Quarter Section)	Tax Lot Number	Acres	Zone
38-1W- 22D	1000	43.09	EFU
38-1W-			

Subzone (if applicable) _____

Pre-Application Meeting Completed? Yes No N/A Date Completed: June 24, 2020

APPLICATION TYPE (check all boxes that apply)

<input type="checkbox"/> Site Development Plan Review <input type="checkbox"/> Variance <input type="checkbox"/> Fence <input type="checkbox"/> Annexation <input type="checkbox"/> Accessory Dwelling Unit <input type="checkbox"/> Appeal	<input type="checkbox"/> Conditional Use Permit <input type="checkbox"/> Home Occupation <input type="checkbox"/> Code Interpretation <input type="checkbox"/> Comprehensive Plan Amendment (text) <input type="checkbox"/> Comprehensive Plan Map/Zoning Map Change <input checked="" type="checkbox"/> UGB Amendment
--	---

ACCURACY STATEMENT

I hereby certify that the statements and information contained in this application, including the enclosed drawings and the required findings of fact, are in all respects, true and correct. I understand that all property pins must be shown on the drawings and visible upon the site inspection. In the event the pins are not shown or their location is found to be incorrect, the owner assumes full responsibility.

Applicant's Signature

Property owner's Signature (required)

4/13/21

Date
4/13/21

Date

APPLICATION FEES & DEPOSITS

(Application fees are calculated by ACTUAL PROCESSING COSTS)

Fees and deposits are intended to cover the full cost for processing applications. Applicants seeking development which requires more than one type of review (such as site plans and conditional use permits) must pay all applicable fees and deposits.

Application Deposits: Certain application fees are represented by a deposit amount. Applicants shall be charged for actual processing costs incurred by the City. The actual costs charged to the City for technical review of land use applications, including but not limited to City's planning, public works, engineering, administration, legal, wetland specialists, geologists, biologists, arborist, and any other services provided in processing applications, shall be charged to Applicant, at the rate(s) charged to the City. In addition, the actual costs of preparing and mailing notices to abutting property owners or others required to be notified, the costs of publishing notices in newspapers, and any other mandated costs shall be charged to applicant. Any additional costs incurred beyond the deposit amount shall be charged to and paid by the applicant on a monthly basis. The applicant agrees that any deficiencies shall be collected from applicant, and that applicant's failure to pay these amounts triggers the City's option to pursue any or all remedies, as listed below.

Fixed Fee Applications: Fees are non-refundable and are based on average application processing costs rounded to the nearest dollar.

Applicant acknowledges and agrees that Applicant's failure to pay City costs over the deposit fee amounts, as charged monthly by the City, may result in the City pursuing any or all legal remedies available, including but not limited to liening property in the amount owed; prosecution for violation of the City's current fee resolution and City land development or division ordinances; issuance of a stop work order, non-issuance of building permits for property, or cessation of related proceedings; set-off against any reimbursement owed; and turning amounts owed over to a collection agency.

RTM
Applicant's Signature

4/13/21
Date

RTM
Property owner's Signature (required)

4/13/21
Date

I hereby acknowledge that my applications may be consolidated. When an applicant applies for more than one type of land use or development permit (e.g., Type-II and III) for the same one or more parcels of land, the proceedings shall be consolidated for review and decision. If more than one approval authority would be required to decide on the applications if submitted separately, then the decision shall be made by the approval authority having original jurisdiction over one of the applications in the following order of preference: (1) City Planner, (2) the Planning Commission, and (3) the City Council. Joint meetings between governing bodies may be held to streamline the decision process.

RTM
Applicant's Signature

4/13/21
Date

RTM
Property owner's Signature (required)

4/13/21
Date

FOR OFFICE USE ONLY			
Deposit Paid (Amount)	Date	Received by	File Number

In compliance with the Americans with Disabilities Act, if you need special assistance, please contact TTY phone number 1-800-735-2900 for English and for Spanish please contact TTY phone number 1-800-735-3896.

The City of Talent is an Equal Opportunity Provider

Appendix 7.1.3

TA-1 Conceptual Master Plan

FUTURE AG BUFFER. TO BE INSTALLED UPON REDEVELOPMENT WITHIN 400 FEET OF THE WEST PROPERTY LINE*

COLVER ROAD

- Uses Permitted in Conceptual Master Planned Area Include:**
- Type I:
 - Basic utilities
 - Parks and Open Space (existing or approved)
 - Accessory uses and structures subordinate to the primary use
 - Type II:
 - Changes to existing Parks and Open Space
 - Type III:
 - Community service facilities
 - Changes to Existing Public Works yard and building
 - Conditionally Permitted Uses:
 - Educational facility

OWNED BY CITY OF TALENT

FUTURE WAGNER CREEK ROAD CORRIDOR

.83 ACRES



AG BUFFER

AG BUFFER

* REDEVELOPMENT EXCLUDES REHABILITATION OF EXISTING FIELDS

PHOENIX-TALENT SCHOOLS

COLVER ROAD EDUCATIONAL FACILITIES PROPERTY



DATE: 4/8/22

SCALE: NTS

NOTE: THIS MAP WAS DEVELOPED FOR ILLUSTRATION ONLY AND IS NOT A SURVEY. ACTUAL CONDITIONS MAY VARY.

Appendix 7.1.4

Phoenix-Talent School District Long Range Facility Master Plan (Adopted by Phoenix-Talent School District Board)



November 10, 2018

Phoenix Talent School District

CSA Planning, Ltd

4497 Brownridge, Suite 101
Medford, OR 97504

Telephone 541.779.0569
Fax 541.779.0114

jay@CSAplanning.net

RE: Phoenix Talent School District Long-Range Facilities Master Plan (Updated)

Dear Phoenix-Talent School District,

CSA Planning Ltd. is pleased to transmit the District an updated Long-Range Facilities Master Plan under cover of this letter. On behalf of our entire team, CSA continues to be honored to work on this project for the District.

In the original master plan, Straus and Seibert Architects did a great job developing cost-effective design solutions to address identified needs. They also engaged sub-consultants to work on key specialty areas of the project. Architectural Cost Consultants provided timely and detailed cost estimating to keep the project moving forward. District Staff was excellent to work with throughout the planning process.

We expect the updated Long-Range Facilities Master Plan will serve the District well over the coming years. The updates to the plan reflect the consequences of the bond measure approval and resolution of certain land-holding policy decisions of the District. The Plan will continue to guide the District's decision-making with respect to its school campuses and other real-estate assets. We hope this work product will continue to inform community discussions around those issues and allow the District's preferred plan to be implemented.

The School Board should adopt this version of the plan by resolution. That resolution should direct CSA Planning and staff to begin the process to incorporate the plan into the local Comprehensive Plans for Medford, Phoenix, Talent and Jackson County.

Thank you again for this opportunity.

Sincerely,

CSA Planning, Ltd.

A handwritten signature in blue ink, appearing to read 'Jay Harland', is written over a horizontal line.

Jay Harland
President

ACKNOWLEDGMENTS

CSA would like to thank all those who supported this planning process to develop a new Long-Range Facilities Master Plan. Specifically we would like to thank the following individuals:

PHOENIX-TALENT SCHOOL BOARD:

Craig Prewitt, Chairman
Marina Piantentini, Vice Chair
Sara Crawford
Dawn Watson
Richard Nagel
Nate Shinn
Shana Vos

PROJECT ADVISORY TEAM:

Sara Crawford
Dawn Watson
Sara Adams
Mike Davis
Stephanie Holtey
Roland Kretschmann
Alan Vos
Shana Vos
Jeanette Woods

DISTRICT STAFF:

Teresa Sayre, Past Superintendent
Brent Barry, Superintendent
David Marshall, Past Business Manager
Jon McCalip, Director of Facility Maintenance

CONSULTANT TEAM:

Jay Harland, CSA Planning Ltd.
Beverly Thruston, CSA Planning Ltd.
Dave Straus, Straus and Seibert Architecture
Gary Corn, Straus and Seibert Architecture
Bill Watson, Straus and Seibert Architecture
Stan Pszczolkowski, Architectural Cost Consultants
Jason Prins, Structural Solutions, Inc.



TABLE OF CONTENTS

Acknowledgments	ii
Table of Contents	iii
1 Executive Summary.....	5
1.1 Review and Analysis of District Facility Needs:.....	5
1.2 Facility Capacity and Enrollment Summary	6
1.3 Elementary and Middle School Issues.....	6
1.3.1 Building Design and Function.....	7
1.3.2 Value in Existing Improvements	7
1.3.3 Geography and Site Conditions.....	7
1.3.4 Existing School Conditions	7
1.4 Addressing High School Facility Challenges.....	8
1.4.1 Existing Building Design and Function.....	8
1.4.2 Value in Existing Improvements	9
1.4.3 Geography and Site Conditions.....	9
1.4.4 Options Considered for High School.....	9
1.5 Other Real Estate Assets Evaluation	9
1.6 Plan to Improve District Facilities.....	10
2 Introduction	14
2.1 Project Purpose and Scope	14
2.2 Planning Process Summary	14
2.3 Pedagogy and Curriculum Guidance.....	15
3 Student Enrollment Forecasts and Facility Capacity Analysis.....	16
3.1 Existing Student Population Base Analysis.....	16
3.1.1 Enrollment and Trends by School	16
3.1.2 Enrollment and Trends by Grade.....	18
3.1.3 Enrollment Geographic Distribution	19
3.1.4 Existing Conditions School Capacity Analysis	21
3.1.5 Existing Enrollment Summary	22
3.2 Regional Growth	22
3.2.1 Regional Population Growth Projections	22
3.2.2 Population Growth in Phoenix-Talent School District.....	23
3.3 Base Enrollment Forecast & Capacity Analysis.....	25
3.4 Enrollment Projection and Capacity Analysis Conclusions	27
4 Inventory and Assessment of Existing Facilities.....	28
4.1 Orchard Hill Elementary School	29
4.2 Phoenix Elementary School	31
4.3 Talent Elementary School	33
4.4 Talent Middle School	36
4.5 Phoenix High School.....	38
4.6 Other Real Property Assets	40
5 Build Scenarios Identified for Each School and Other Real Estate Assets	42
5.1 Build Scenario Priorities.....	42
5.2 Elementary Schools and Middle School Improvements.....	43
5.3 High School Improvements.....	44
5.4 Non-School Improvements.....	45
6 Analysis of Plan Context and District’s Facility Position	46
6.1 Policy and Regulatory Context.....	46

6.1.1	Special Capital Funding and Improvement Programs	46
6.1.2	Building Code Compliance Thresholds.....	46
6.1.3	Security and Safety Issues	47
6.1.4	Land Use Regulations.....	48
6.2	Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis	48
6.2.1	Strengths.....	49
6.2.2	Weaknesses.....	50
6.2.3	Opportunities	52
6.2.4	Threats (Risks).....	55
6.2.5	SWOT Conclusions (Synthesis).....	56
7	Cost Estimates for Build Scenarios	57
7.1	Cost Estimate Process.....	57
7.2	Direct Construction Cost Summary.....	57
7.3	Soft Costs	57
7.4	Cost Estimate Summary	58
8	Preferred Improvement Plan and Financing Considerations	61
8.1	Planning Process Outcome	61
8.2	Bond Measure Implementation	65
9	Facility Policies and Asset Strategies.....	67
10	Appendices (on CD-ROM).....	CD
10.1	Existing Conditions Reports (Facilities Assessment Documents).....	CD
10.1.1	Existing Conditions List.....	CD
10.1.2	Facility Condition Assessment Checklists	CD
10.1.3	Structural Evaluations Summary	CD
10.1.4	HVAC Assessment Reports	CD
10.2	Cost Estimating and Financing Items.....	CD
10.2.1	Proposed Bond-Budget Improvements.....	CD
10.2.2	Conceptual Cost Estimate.....	CD
10.2.3	Bond Levy Analysis	CD
10.3	Project Advisory Team Materials.....	CD
10.3.1	Tech Memo #1.....	CD
10.3.2	Powerpoint Tech Memo 1	CD
10.3.3	PAT Meeting #1 Minutes	CD
10.3.4	Tech Memo #2.....	CD
10.3.5	Tech Memo #3.....	CD
10.3.6	Powerpoint Tech Memos 2 & 3.....	CD
10.3.7	PAT Meeting #2 Minutes	CD
10.3.8	Tech Memo #4.....	CD
10.3.9	Design Solution Concepts	CD
10.3.10	PAT Meeting #3 Minutes	CD
10.3.11	Tech Memo #5.....	CD
10.3.12	Powerpoint Tech Memos 5 & 6.....	CD
10.3.13	PAT Meeting #4 Minutes	CD
10.3.14	PAT Meeting #5 Minutes	CD
10.3.15	Tech Memo #6.....	CD
10.3.16	Powerpoint School Board Meeting.....	CD
10.4	School Board Resolutions	CD
10.4.1	Resolution 17-8	CD
10.4.2	Resolution Adopting Long-Range Facilities Master Plan.....	CD

1 EXECUTIVE SUMMARY

CSA Planning Ltd. was engaged to prepare a Long-Range Facilities Master Plan for the Phoenix-Talent School District in 2016-2017. CSA worked with the architectural firm Straus and Seibert Architects to identify facility issues and develop solutions to identified issues. Architectural Cost Consultants to prepare cost estimates for identified school facility projects. Straus and Seibert Architects engaged sub-consultants with professional specialties to identify and address key issues – such as structural integrity- as needed.

The planning process utilized a Project Advisory Team (PAT) that included District staff, District Board Members, and interested citizens. The Project Advisory Team provided valuable input throughout the planning process to refine concepts, add policy context and develop strategic solutions to facilities challenges. The Project Advisory Team Provided key input at the beginning of the process on optimum and maximum classroom sizes as well as perspective on the educational vision and approach of the District, see Section 2.3.

The Long-Range Facilities Master Plan was developed in 2016-2017 and described the real property needs and building needs of the District for the next 10 to 20 years. While considerable detail is necessary in the process to inventory existing conditions, the scope of the project is planning-level. The project seeks to solve identified, but solvable, facilities problems with specifically identified projects. The identified projects are planning level solutions that will require additional refinement work to realize the final result. Some problems may not be readily solvable with specific identified improvements. For these issues, the plan provides policy guidance so that future directed planning processes can work toward solutions to these more long-term challenges.

The plan also includes updates through May of 2018. These updates reflect the approval of the bond measure. They also reflect real estate policy decisions made by the Phoenix-Talent School District since the 2017 version of the plan was prepared.

1.1 Review and Analysis of District Facility Needs:

A thorough analysis was performed to identify facilities needs and deficiencies. The analysis sought to identify all the major facilities issues through the master planning process. A brief summary of the technical aspects included in the planning process is as follows:

- 1. Analyzed Student Populations and Projected Future Enrollment**
- 2. Assessed Facility Conditions from a Variety of Perspectives:**
 - a. Safety and Security
 - b. Functionality and Capacity
 - c. Building Integrity Assurance
 - d. Energy Efficiency
 - e. Site Conditions
 - f. Policy and Regulatory Context.

3. **Developed Improvement Concepts to Address Deficiencies**
4. **Cost Estimating**
5. **Prioritization and Selection of Preferred Improvement Plan**
 - a. Preliminary Consultant Developed Concepts
 - b. The Project Advisory Team, District Staff and the School Board refined the improvement options to select a preferred improvement plan that balances funding considerations with the needs of the District.

1.2 Facility Capacity and Enrollment Summary

The optimum and maximum numbers of students per classroom were developed by the District. CSA Planning analyzed existing and future enrollment in relation to the District's facility capacity numbers. CSA then projected future enrollment to identify expected facility capacity issues during the Long-Range Facilities Master Plan period. The analysis identified the following capacity issues:

- The High School has excess capacity. This is an inefficient condition that requires energy and maintenance of significantly more gross-square footage than is necessary to serve the current high school population.
- The District has exhibited a pronounced loss of enrollment after Elementary School for many years. The loss of these students represents approximately a \$1 million dollars in lost instructional revenue from the State every year.
- Orchard Hill Elementary School is projected to approach capacity in the 2031-2036 timeframe. This is even with the assumption that capacity at Orchard Hill will be preserved by a series of elementary school boundary amendments to expand the Phoenix Elementary School boundary and reduce the Orchard Hill Elementary School boundary. Orchard Hill also currently has acute capacity issues with the Cafeteria.
- Phoenix Elementary is projected to have adequate capacity.
- Talent Elementary has adequate capacity currently. However, future capacity issues may arise as the modular classrooms reach the end of their useful life and if a more permanent and appropriate home for the Outdoor Discovery Program is not determined.
- There is also a degree of excess capacity at Talent Middle School. This excess capacity is less of an issue with respect to the absolute building efficiency than it is in relation to future student population growth proximity to Talent Middle School.

1.3 Elementary and Middle School Issues

While the overall challenges and needs associated with Elementary and Middle School are extensive, the overall strategy for each of these campuses is the same. The overall strategy is to make reinvestments in the existing campuses and structures to assure they are available to serve existing and future student populations for the planning period. The bond measure funds are directed at major structural, safety, capacity and and mechanical issues while leaving certain maintenance issues to be addressed with other funding sources.

1.3.1 Building Design and Function

Notwithstanding the excess capacity at Talent Middle School, all three elementary schools and Talent Middle School are appropriate from a design and function standpoint to serve the District's needs. There are no building designs or functional issues that cannot be solved in a reasonable and cost effective manner for these four campuses.

1.3.2 Value in Existing Improvements

Overall, the value in the existing improvements far outweighs the replacement costs to build new. Each school is due for some major improvements and upgrades to enhance safety, security, assure future building integrity, and improve energy efficiency. However, these objectives can all be accomplished through refitting existing structures more cost-effectively than could be accomplished by building new. Reinvestments in these structures do not represent a sunk cost and appropriate reinvestments should benefit the District for many years to come.

1.3.3 Geography and Site Conditions

The site conditions and geography of each of the elementary schools is well suited to meet the needs of the projected student bodies over the next ten years. Orchard Hill Elementary School may begin to experience some mild crowding by the end of the planning period depending on the rate of growth in Southeast Medford. All the Elementary School campuses are well situated to serve current and future enrollment distributions. The sites are all adequate in size and configuration to handle current student populations; some additional land at Orchard Hill Elementary may be beneficial toward the end of the planning period.

Talent Middle School has both site configuration and geographic challenges. Geographically, many students are located a long distance from the campus and this is expected to impact enrollment negatively over the planning period. The site itself is adequately sized but its configuration is somewhat long and narrow and much of it is tucked behind a row of single-family houses. The Talent Middle School site conditions are not ideal but they are not sufficiently problematic to justify a new school site at this time.

1.3.4 Existing School Conditions

All four school campuses have significant condition issues that include safety and security issues, functional issues, energy efficiency, and building integrity issues. Safety issues are primarily due to seismic deficiencies. Seismic retrofitting is required at all four campuses; the seismic retrofitting will not necessarily ensure the structure will remain useable following a major earthquake but it is intended to assure safe exit of the structure following a major earthquake. Security issues primarily concern the ability to secure entry and exit points; all of the schools have uncontrolled access points that are not well integrated with circulation and do not have modern hardware or security technology. Lighting and electrical systems are deficient to some extent at all the five main campuses. HVAC systems in all the schools are at the end of their useful life and are not energy efficient from a current best practices perspective. Roofing systems are failing at all the schools except Talent Middle School. Floor coverings throughout the five main campuses are failing and require replacement.

In addition to these Districtwide deficiencies, each school has a particular set of challenges. The most significant additional deficiencies are each main school campus is the following:

ORCHARD HILL ELEMENTARY SCHOOL: The cafeteria is significantly undersized and circulation to get to and from the cafeteria is very problematic. Additionally, the external circulation for bus pick-up and parent/student drop-offs is less than ideal. Capacity may become an issue toward the end of the 20 year planning period.

PHOENIX ELEMENTARY SCHOOL: The actual configuration of the school is appropriate for its use and function but the internal circulation and external circulation is not well coordinated. Some of the classrooms are built-in-place modular classrooms that are nearing the end of their useful life.

TALENT ELEMENTARY SCHOOL: The actual configuration of the school is appropriate for its use and function but the internal circulation and external circulation is not well coordinated. Some of the classrooms are built-in-place modular classrooms that are nearing the end of their useful life. Also, a portion of the student body is enrolled in Outdoor Discovery School which is housed in a nearby facility that is not purpose-built classroom space that is well past its useful life.

TALENT MIDDLE SCHOOL: The cafeteria is undersized significantly for the student body. Bus pick-up and drop-offs is a significant congestion and safety issue. The geographic and excess capacity issues at Talent Middle School are not being addressed with specific actions in the long-range facilities master plan, because there are no straightforward and cost-effective solutions. These conditions are not readily solvable and will need to be handled through management processes in the short-term with development of a long-term solution over the next ten years.

1.4 Addressing High School Facility Challenges

The existing high school has numerous functional issues in addition to all the worn-out systems common at the other campuses. Cost-effective reinvestment in a school with numerous functional issues is problematic. The District must compete for enrollment with nearby high schools that are in good to excellent condition – St. Mary’s, South Medford High School and Ashland High School. These conditions present the primary challenge that must be addressed in this Long-Range Facilities Master Plan District because of the short-term operations and long-term enrollment risks presented by the existing condition of the High School.

1.4.1 Existing Building Design and Function

The existing building design is problematic. The Theater and Gymnasium complex is reasonably well designed and could be made to function properly with appropriate refitting efforts. While the Commons is a nice space, it is surrounded by a maze of poorly circulating hallways that connect to low-ceilinged classrooms and some that do not have windows or natural light. The classrooms are somewhat organized by subject but the flow between them is limited. Also, the classroom space exists at multiple finished floor elevations which is not a desirable condition. The materials and design of the classroom space makes it difficult to renovate in anything resembling a cost-effective manner. The poor circulation results in very inefficient layout on a per built-foot per student basis which increases maintenance and energy costs per student. Achieving appropriate campus security with all entrances and exits is another major issue.

1.4.2 Value in Existing Improvements

The District has considerable value in the Gymnasium and Theater complex portion of the High School. This portion of the High School could warrant cost-effective reinvestment.

The net-present value of the classroom space is minimal if viewed from the standpoint of bringing the existing spaces up to a modern standard appropriate for high school level education that is comparable to competing facilities in the area.

1.4.3 Geography and Site Conditions

The best aspect of the High School is the geography and site conditions. The geography is well located to serve the student body. The site is at least as walkable and bikeable as any other potential location in the District. The site itself is sufficiently large to serve the high school population. It is not adjacent to high speed roadways that might create a potential safety issue but it is still close to the region's arterial road network to allow good access for students and staff. Replacing the site with a new green-field site in a cost effective manner would be a challenge.

1.4.4 Options Considered for High School

Four generalized solutions to the High School were considered during the original long-range planning process as follows:

- “Minimal Build”- This option would have made minimum investment to squeeze the remaining useful life out of the classrooms while making progress on the Gym and Theater so that it would still be viable for the third option listed here.
- “Renovate Existing Structure” – This option planned the requirements to reconstruct the existing classroom facilities to address the multitude of functional issues.
- “Reconfigured High School” – This option planned new classrooms south of the existing Theater and Gymnasium core so that those components could be refitted and used going forward with new construction limited to the classroom space.
- “New High School on Greenfield Site” – This option would construct a completely new High School at a new location.

1.5 Other Real Estate Assets Evaluation

In addition to the five main school campuses, the Long Range Facilities Master Plan evaluated the other real estate assets of the District from the standpoint of strategic value to the District. The issues identified for those other real estate holdings are as follows:

- District Admin Office Building: This building is in good shape and requires minimal reinvestment.
- Maintenance Support Buildings in Phoenix: These buildings are in poor shape and need to be refit or replaced.
- Main Maintenance Building on Colver Road: This building is not salvageable and should be replaced in a different location (see below on Colver Road Property).

- Coal Mine Road Property: This site is not expected to be needed in the next twenty years for a new school. However, it may represent a potential solution to address the middle school location issues in the next round of master planning in fifteen to twenty years. The hold cost is minimal at this point, so the opportunity cost to hold onto it appears low.
- Colver Road Property: This site is still useful for extra athletics fields, the bus logistics facility and a new relocated primary maintenance building. However, the site has approximately 10-12 acres of surplus land that is not expected to be necessary for School operations anytime in the reasonably foreseeable future (even well beyond 20 years) and has been declared surplus property by the School Board, see Resolution No. 17-8. As part of this resolution, the District directed staff to take appropriate steps to achieve highest and best value for this surplus land.
- The District also owns property across from Talent Elementary School that is currently being used for the Outdoor Discovery School. This property not especially valuable but it could be sold as surplus if the District found a better option for the Outdoor Discovery School.

1.6 Plan to Improve District Facilities

The major improvement policy choice that was confronted by the District in the Master Planning Process concerned the High School. Consensus formed around the Reconfigured Phoenix High School improvement concept that would retain the existing Gymnasiums/Theater core area and construct new classrooms, this design solution is shown in Atlas Figure 9. This concept has a number of advantages, as follows:

- This design solution has the potential to stem the enrollment loss risk by having a High School facility that is on par with competing facilities.
- Total cost is much less than a completely new school at a new greenfield site. Net savings are estimated to be in the \$7 million to \$15 million dollar range but the result would still be an essentially new high school facility.
- The project can be phased so that the initial build has adequate capacity for the next 15-20 years but will be configured in a way that additional capacity can be added very cost effectively in the future if that future planning process were to determine additional capacity is appropriate.

As the planning process progressed, the importance of the Reconfigured High School for the entire future of the District became more apparent. This led to a prioritization process that balanced improvement priorities at the four other schools without jeopardizing the Reconfigured High School project.

The consultant team presented an initial set of potential build packages to the Project Advisory Team that included total cost estimates for each package. If all the recommended improvements were completed in a single-set of projects, the total project budget was just approximately \$98 million. The estimates for identified improvements were prepared by Architectural Cost Consultants in Tigard, Oregon and are located in Appendix 10.2.2. The Plan assumes an additional 25% of the direct costs will be needed for these purposes.

Of the full build estimate of around \$98 million for all potentially needed improvements, the District determined that about \$13 million worth of those improvements, while needed, are not absolutely necessary within the planning period. This prioritization process resulted in a plan with a total budget of approximately \$83 million. Out of that total project budget, the District identified approximately \$11.5 million in improvements that are needed but can be implemented through smaller incremental improvement projects over time in a cost-effective manner and financed using non-bond revenues – such as operational revenues, excise tax revenues, surplus property sales, etc. These projects are generally deferred maintenance items like painting, floor coverings and new energy efficient lighting lamp replacements.

The remaining \$72 million dollars was proposed to be funded with \$68 million through a General Obligation Bond that was approved by the electorate in the District on November 7, 2017 with the additional \$4 million coming from State matching grants. The design schematics for the preferred improvement plans are provided on Atlas Figures 5-11. The following table summarizes the major identified improvements for each school and the approximate total budget for improvements at each school associated with the bond component of the improvement package:

Orchard Hill Elementary School Bond-Funded Planned Improvements:	
Bond Budget includes:	\$5,212,328
1	Remodel administration for security
2	New cafeteria addition
3	Remodel old cafeteria
4	Seismic upgrade throughout structure
5	Replace existing HVAC equipment
6	New roof where not already replaced
7	New security entrance hardware & electronics
8	Replace all handles throughout with ADA compliant
9	Reconfigure playground as required for new cafeteria

Phoenix Elementary School Bond-Funded Planned Improvements:

Bond Budget includes:	\$5,405,564
1 Remodel administration for security	
2 Seismic upgrade throughout structure	
3 Replace existing HVAC equipment	
4 Remove & Replace roof	
5 New security entrance hardware & electronics	
6 Replace all handles throughout with ADA compliant	
7 New divider wall at classrooms in round building	
8 New windows in Primary Wing	
9 Renovate Art Room	
10 Upgrade fire alarm system	
11 New gated entry court and decorative security fencing at classrooms	
12 Replace parking lot	

Talent Elementary School Bond-Funded Planned Improvements:

Bond Budget includes:	\$5,465,837
1 Remodel administration for security	
2 Seismic upgrade throughout structure	
3 Replace existing HVAC equipment	
4 Remove & Replace roof	
5 New security entrance hardware & electronics	
6 Replace all handles throughout with ADA compliant	
7 New divider wall at classrooms in round building	
8 New windows in Primary Wing	
9 Upgrade plumbing in Primary Wing	
10 Remodel Restrooms	
11 Renovate Art Room	
12 New gated entry court and decorative security fencing at classrooms	

Talent Middle School Bond-Funded Planned Improvements:

Bond Budget includes:	\$6,792,604
1	Remodel administration and entries for security
2	Expand existing cafeteria
3	Repair Roof as needed
4	Seismic upgrade throughout structure
5	Replace existing HVAC equipment
6	Replace Fire alarm & Intercom systems
7	Replace all handles throughout with ADA compliant
7	Add accessible ramp at main entry & improve accessibility at northern entries
8	Extend sidewalk along eastern bus loop

Reconfigured Phoenix High School Bond-Funded Planned Improvements

Gym Core includes- athletic facilities, theater, culinary room and band room

Bond Budget includes:	\$48,332,647
1	Replace existing HVAC equipment for Gym Core
2	Seismic upgrade Gym Core
3	Remove & Replace roof of Gym Core
4	Remodel Existing Band Room to Choir Room
5	Remodel existing theater
6	Remodel all athletic facilities
7	Upgrade locker rooms
8	Relamp or replace existing lighting
9	Construct new academic wing with dining & commons
10	Construct new Fine and Industrial Arts wing
11	New communications/fire alarm connecting new & existing buildings
12	New security system
13	Expand existing parking lot
14	New track facility
15	Upgrade existing bleachers
16	New softball and soccer fields

2 INTRODUCTION

CSA Planning Ltd. was engaged to prepare a Long-Range Facilities Master Plan for the Phoenix-Talent School District. CSA worked with the architectural firm Straus and Seibert Architects to prepare planning-level design solutions for identified school facility projects and Architectural Cost Consultants were engaged to prepare planning-level cost estimates. Straus and Seibert Architects engaged sub-consultants with professional specialties to identify and address key issues – such as structural integrity- as needed.

The planning process engaged a Project Advisory Team (PAT) that included District staff, District Board Members, and interested citizens. The PAT provided valuable input throughout the planning process to refine concepts, add policy context and develop strategic solutions to facilities challenges.

2.1 Project Purpose and Scope

The Long-Range Facilities Master Plan generally uses a twenty-year planning period, but this plan takes a 2016-2026 ten-year look and a 2016-2036 twenty-year look. The ten-year look tends to be more specific because it is somewhat easier to envision likely future conditions over the next ten years and the 10-20 period is treated in a more general way.

The Long-Range Facilities Master Plan describes the real property needs and building needs of the District for the next 20 years. While considerable detail is necessary in the process to inventory existing conditions, the scope of the project is planning-level. The project seeks to solve identified, but solvable, facilities problems with specifically identified project. The identified projects are planning level solutions that will require additional refinement work such as construction plan set development, etc. Some problems may not be readily solvable with specific identified improvements. For these issues, the plan provides policy guidance so that future directed planning processes can work toward solutions to these more long-term challenges.

2.2 Planning Process Summary

A brief summary of the main technical aspects of the planning process is provided as follows:

- 1. Existing Conditions Analysis**
 - a. CSA evaluated existing enrollment and student distributions
 - b. The project team evaluated existing facility conditions with respect to safety and security issues, functional and capacity issues, building integrity assurance, and energy efficiency. The analysis identified those facility conditions that were deficient or could benefit from future improvements
- 2. Future Student Projections and Facility Improvement Concepts**
 - a. CSA projected future student distributions and enrollment and performed capacity analysis of the existing schools to handle future student enrollments
 - b. SSA developed facility improvement concepts for each of the District's schools
 - c. The consultant team developed recommendations regarding other District real estate holdings and facilities

3. Concept Refinement and Cost Estimating

- a. The consultant team worked with the Project Advisory Team through a series of meetings to refine the improvement concepts consistent with District objectives and needs.
- b. The refined improvement concepts were transmitted to Architectural Cost Consultants to cost estimating of the identified improvement concepts.

4. Prioritization and Selection of Preferred Improvement Plan

- a. The consultant team developed a set of improvement options for consideration by the District.
- b. The Project Advisory Team, District Staff and the School Board refined the improvement options to select a preferred improvement plan that balances funding considerations with the needs of the District.

The working documents for the development of the plan are provided in the appendices to the plan. The Project Advisory Team materials and minutes from the Project Advisory Team meetings are available in Appendix 10.3.

2.3 Pedagogy and Curriculum Guidance

Early in the planning process, the Project Advisory Team discussed issues and provided input on the educational vision and approach to pedagogy for the District. A summary of this input to the plan is provided in Section 5 of Tech Memo #1 as follows:

Based on the dialogue and research thus far, we understand the District's pedagogy to have a foundation of traditional K-12 teaching methods focused on a "common core" curriculum augmented with unique education opportunities based upon student/parent demand. Phoenix-Talent has a number of these demand based programs, such as:

- Two-way Language Immersion at Phoenix and Talent Elementary Schools
- Outdoor Discovery School at Talent Elementary
- SDI and STEM Technology Programs at Talent Middle School
- Ag-FFA and Vet-Tech at Phoenix High School
- Talented and Gifted programs

In follow-up discussion on these issues, the Project Advisory Team agreed that this general educational approach has worked for the District in the past and the District intends to continue this successful pedagogy/curriculum approach into the future. This guidance was then incorporated into the balance of the analysis in the plan and especially helped identify functional issues with the buildings that would affect educational endeavors.

3 STUDENT ENROLLMENT FORECASTS AND FACILITY CAPACITY ANALYSIS

Section 3 of the plan sets forth the District analysis of student population. The analysis utilized student enrollment data and trends from the District’s database. Future growth analysis utilized CSA’s proprietary regional growth model to estimate future enrollment conditions at the schools. The spatial distribution of CSA’s regional growth model projections are primarily based upon Oregon’s land use planning system that applies to jurisdictions with the District. Growth rate estimates for the analysis are based upon a number of economic factors and were compared for reasonableness of the District’s growth share estimates to the total growth projected in the County from other accepted projections. All base data in the model is a direct apportionment of the most recent population data available at the block-group level from the U.S. Bureau of the Census.

3.1 Existing Student Population Base Analysis

This data informs the projections for future years in the next step of the Long-Range Facility Master Plan process that will help the district identify future needs.

3.1.1 Enrollment and Trends by School

To determine what direction the levels of enrollment in the Phoenix-Talent School District have been taking over the past 10 years we first looked at enrollment by school.

Table 3.1.1.1 – Enrollment by School 2006 to 2015

School / Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Orchard Hill	367	400	398	421	352	364	367	406	438	440
Phoenix Elementary	489	502	436	369	431	424	413	373	387	404
Talent Elementary	508	541	491	491	493	392	438	469	522	495
Talent Middle School	653	664	629	637	596	602	600	601	582	575
Phoenix High School	867	889	852	824	739	777	804	802	826	746
Total Enrollment ¹	2,884	2,996	2,806	2,742	2,611	2,559	2,622	2,651	2,755	2,660

¹ Enrollment numbers do not include the Armadillo Charter School.

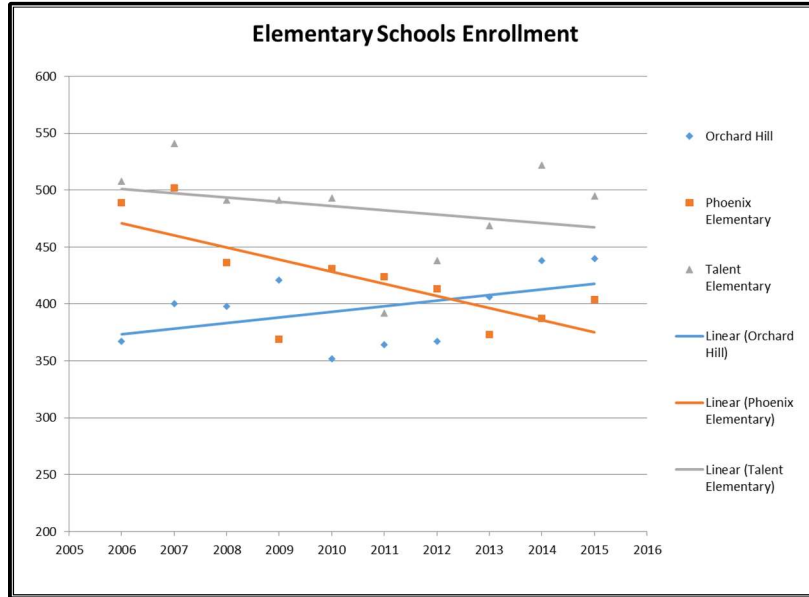
Using linear regression, the analysis looked to see what trend those numbers show. The table below depicts statistical trends based on the past 10 years of enrollment:

Table 3.1.1.2 – Enrollment Statistics by School

2006 to 2015	Mean	Standard Deviation	Linear Regression (OLS)	
			Equation	R-Square
Orchard Hill	395.3	30.14	$y = 4.9273x - 9511$	0.2205
Phoenix Elementary	422.8	42.43	$y = -10.667x + 21868$	0.5214
Talent Elementary	484.0	40.46	$y = -3.7576x + 8039$	0.0711
Talent Middle School	613.9	28.55	$y = -9.2182x + 19147$	0.8599
Phoenix High School	812.6	46.87	$y = -10.921x + 22770$	0.4480
Districtwide Enrollment	2,728.6	129.31	$y = -32.527x + 68119$	0.4931

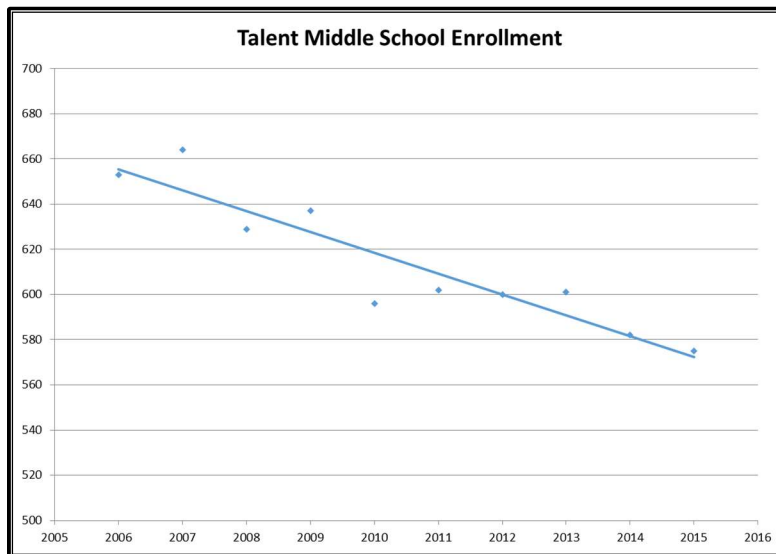
The statistics above provided the basis for the graphs below depicting the trend lines for each school’s enrollment and the District as a whole. Where the R-Square is greater than around 0.75, it indicates a discernable trend in the enrollment numbers. Where the R-Square is less than 0.75, it means that the variation in the enrollment numbers over the years fluctuate irregularly and as such do not indicate a trend up or down in enrollment.

Figure 3.1.1.1- Elementary School Enrollment by Year



The enrollment statistics indicate essentially flat enrollment for K-5 elementary schools with slightly positive enrollment growth for Orchard Hill Elementary and slightly negative enrollment decline for the other two elementary schools. However, the R-square is less than 0.53 in all cases. Thus, the regression does not indicate a discernable trend in the data.

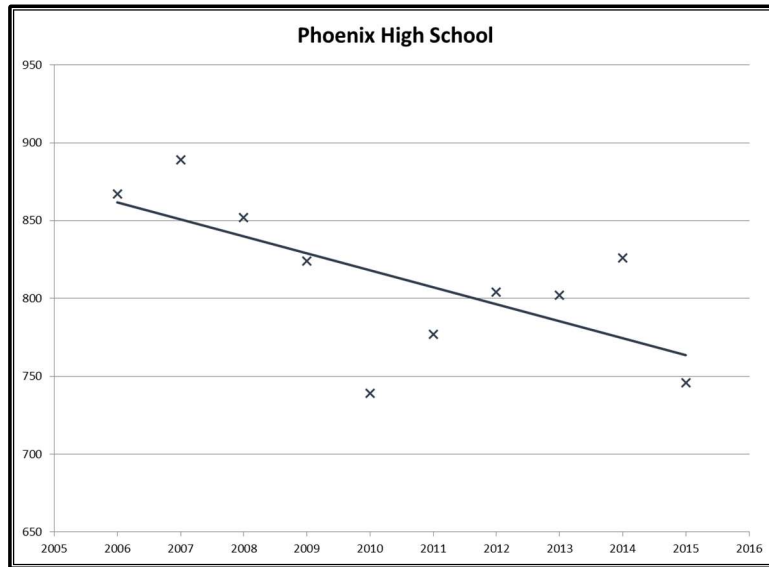
Figure 3.1.1.2 - Middle School Enrollment by Year



Enrollment is negative for Talent Middle School. The school has lost an average of about 9 students per year for the last ten years; this is independent but affected by the attrition between the elementary and middle school transition period. An R-square of 0.86 indicates a trend that has been stable over the last 10 years. Flat enrollment in Elementary should lead to flat enrollment in Middle School but that is not the case. The District is losing students in this age cohort.

High School enrollment is also negative but there is not as established a trend. Fluctuations have occurred as a result of several factors such as charter schools and open enrollment.

Figure 3.1.1.3 - High School Enrollment by Year



3.1.2 Enrollment and Trends by Grade

Table 3.1.2.1 looks at the enrollment numbers by grade over the past ten years at all schools.

Table 3.1.2.1- Enrollment by Grade

Grade	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Mean	Std. Dev.
K	209	236	207	159	203	207	215	237	235	232	214.0	21.4
1	210	221	229	209	196	209	192	200	240	213	211.9	13.4
2	221	229	209	223	225	189	212	205	213	234	216.0	12.0
3	240	256	219	216	218	189	198	215	211	223	218.5	17.2
4	229	252	229	230	217	193	193	206	242	211	220.2	17.9
5	255	249	232	244	217	193	208	185	206	226	221.5	21.5
6	190	236	211	220	210	195	195	202	187	193	203.9	13.9
7	233	190	222	195	200	212	193	203	197	188	203.3	13.3
8	230	237	196	222	186	195	212	196	198	194	206.6	15.8
9	207	246	207	210	206	198	191	214	194	187	206.0	15.0
10	257	216	226	214	171	217	211	192	224	179	210.7	22.5
11	217	234	195	207	187	177	214	197	200	197	202.5	14.7
12	186	193	224	193	175	185	188	199	208	183	193.4	12.7

Below, based on the number of students in each grade, we project how many students are expected to enroll in the grade above the following year. Table 1.2.2 shows the difference between the expected number of students and the actual enrollment.

Table 3.1.2.2- Enrollment Change by Grade

Grade	2007	2008	2009	2010	2011	2012	2013	2014	2015	Mean
1	12	-7	2	37	6	-15	-15	3	-22	0.1
2	19	-12	-6	16	-7	3	13	13	-6	3.7
3	35	-10	7	-5	-36	9	3	6	10	2.1
4	12	-27	11	1	-25	4	8	27	0	1.2
5	20	-20	15	-13	-24	15	-8	0	-16	-3.4
6	-19	-38	-12	-34	-22	2	-6	2	-13	-15.6
7	0	-14	-16	-20	2	-2	8	-5	1	-5.1
8	4	6	0	-9	-5	0	3	-5	-3	-1.0
9	16	-30	14	-16	12	-4	2	-2	-11	-2.1
10	9	-20	7	-39	11	13	1	10	-15	-2.6
11	-23	-21	-19	-27	6	-3	-14	8	-27	-13.3
12	-24	-10	-2	-32	-2	11	-15	11	-17	-8.9
District Total	61	-203	1	-141	-84	33	-20	68	-119	-44.9

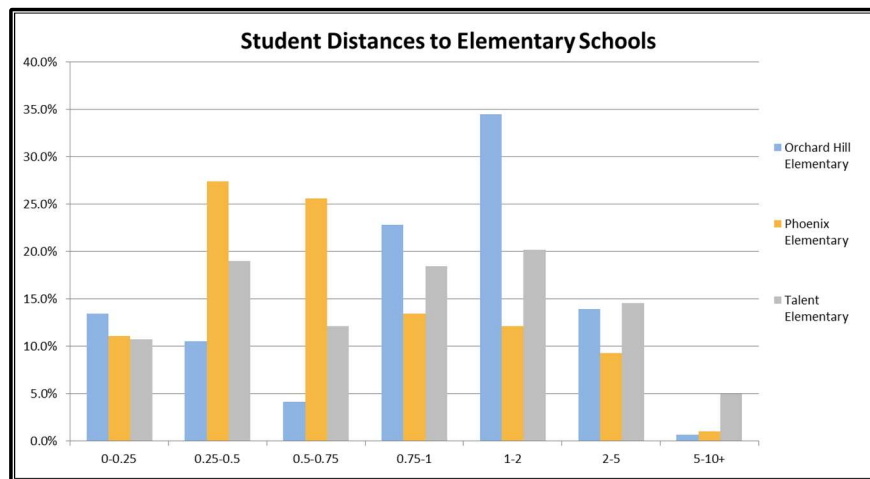
A consistent pattern of enrollment loss can be seen from Elementary School to Middle School at Grade 6 in the District that averages 15.6 students per year over the last 10 years. This pattern has been somewhat less pronounced over the last four years, however. Except for the losses from Elementary School to Middle School, the mean differential from one year to the next is relatively negligible on average from grades K-10. Losses again appear in grades 11 and 12 which tends to be the point at which some students drop out of High School.

From a facility space planning standpoint, the standard deviation in enrollment by grade is tight relative to the mean and ranges from 12 to 22.5 students per year per grade. This is less than an entire class District-wide making it possible for the District to absorb historic student volatility within the classrooms that are available for each grade level; however this does not mean challenges have not arisen due to unequal geographic distribution within the Elementary School District areas.

3.1.3 Enrollment Geographic Distribution

Atlas Figures 2-4 is a series of Maps that depict the distribution of students in the District. The Maps depict enrollment by School and show boundaries between Elementary School Districts. Below are associated graphs that depict the Euclidean (straight line) distance of students to their respective schools in the 2014-2015 school year.

Figure 3.1.3.1- Percentage of students by walking distance to Elementary School

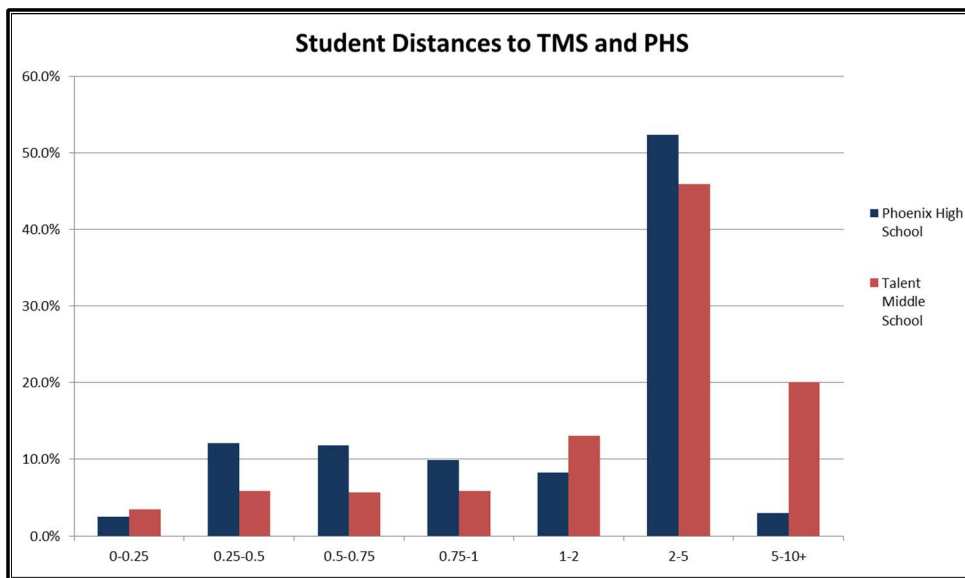


The Elementary School graph indicates that Phoenix Elementary is the most walkable of the three elementary schools from a distance standpoint with over 35% of the students located less than ½ a mile from the school and another 25% less than ¾ of a mile. Completion of the ODOT construction work on Highway 99 will further enhance the walkability of this school. From a facility standpoint though, additional sidewalk improvements on Highway 99 are still needed.

Talent Elementary students are more evenly distributed across their district, but still a large number of students live within a reasonable walking distance to the school.

Orchard Hill is the least walkable and has less than 25% of its student body within a ½ mile of the school. The school is located on the southeast border of the City of Medford which limits its walkability, as there is no housing to the south at this time. The school boundary also extends across I-5 which makes the road miles distance that much further when compared to the Euclidean distance in the above analysis, especially for the large group of students that are 1-2 Euclidean miles from the school, but can be as much as 5-7 road miles away.

Figure 3.1.3.2- Percentage of students by walking distance to Middle and High Schools



In addition to walking, biking also becomes a more viable alternative mode of travel for Middle School and High School students. Less than one mile is generally a reasonable walking distance for Middle School and High School students and less than two miles is a reasonable biking distance. Nevertheless, except in very dense large urban areas, High Schools and Middle Schools tend to serve a broad area and significant portions of the student body is often bussed, transported by parents or high school students may drive themselves.

For the type of school district Phoenix High serves, it is relatively proximate to its student body. Almost 45 percent are within a reasonable biking and walking distance.

Typically, middle schools would be more closely located to their student body than high schools, but that is not the case for Phoenix-Talent. There are 15% more high school

students within a comfortable walking distance to Phoenix High school than there are to Talent Middle School. The location of Talent Middle School requires 20% of the student body to travel more than 5 miles each way by Euclidean distance and somewhat further by road miles. This is significantly more distance for a significant portion of the student body than most other middle schools in the region. Ashland, Medford, Central Point, and Eagle Point all have more centrally located middle schools in relation to their student body.

3.1.4 Existing Conditions School Capacity Analysis

Table 1.4.1, below, compares the capacity of each school in relation to the enrollment in each school over the last three years. Capacity is based upon the number of students in each instructional classroom (music rooms and gyms are not counted as instructional rooms at the elementary schools). An optimum number is given for the desired number of students in a classroom and the maximum number reflects the greatest number of students in a classroom at that school level that would be considered acceptable to the District.

Table 3.1.4.1 – Percent of Capacity Used by Enrollment

	2013		2014		2015		Student/Classroom		Number of Class Rooms	Capacity Numbers	
	Optimum	Maximum	Optimum	Maximum	Optimum	Maximum	Optimum	Maximum		Optimum	Maximum
Orchard Hill	67.7%	56.4%	73.0%	60.8%	73.3%	61.1%	25	30	24	600	720
Phoenix Elementary	62.2%	51.8%	64.5%	53.8%	67.3%	56.1%	25	30	24	600	720
Talent Elementary	72.2%	60.1%	80.3%	66.9%	76.2%	63.5%	25	30	26	650	780
Talent Middle School	58.9%	50.5%	57.1%	48.9%	56.4%	48.3%	30	35	34	1,020	1,190
Phoenix High School	66.8%	57.3%	68.8%	59.0%	62.2%	53.3%	30	35	40	1,200	1,400
District Enrollment ^{/1}	65.1%	55.1%	67.7%	57.3%	65.4%	55.3%				4,070	4,810

^{/1} The Talent Elementary School capacity data includes the two classrooms at the Outdoor Discovery School.

Overall, the District has considerable available capacity in its system. Operating with some available capacity margin can be beneficial because it affords the District capacity to handle modest short-term surges in enrollment without the need to construct new facilities. Being somewhat under capacity also allows for smaller class sizes, provided there is adequate revenue in the instructional budget to support those teacher ratios. The existing District facilities could support Elementary Schools and the Middle School with class sizes of 20 and the High School with a class size of just 23, but these are smaller class sizes than revenues have historically supported from an instructional standpoint.

The Phoenix-Talent School District, overall, appears to be on the threshold of being over-built from the standpoint of ideal capacity, especially as it relates to Middle School and High School. There is a point of ideal efficiency, beyond which extra facilities simply represent additional fixed costs, such as maintenance, and are not necessary to serve the typical student enrollment base.

The above Capacity Analysis does take credit for all of the existing classrooms, including the four modular classrooms at Phoenix Elementary and the four modular classrooms at Talent Elementary, as well as the two classrooms at the Outdoor Discovery School at Talent Elementary. However, it is important to be aware that the Existing Conditions Capacity Analysis is “just the math” regarding space available and is silent on the qualitative aspects of the space. The next phase of the project will look at future conditions and that process will evaluate the appropriateness of modulars and other less than standard classrooms, as a means to satisfy long-term enrollment needs.

3.1.5 Existing Enrollment Summary

Overall, enrollment at the elementary level has been relatively constant over the last ten years. Existing elementary school facilities have adequate capacity, from a supply of instructional classrooms standpoint, to handle additional enrollment. Enrollment at the middle school and high school is in decline.

In comparing current data to the last Facilities Master Plan from the 1999, the total elementary school enrollment now is in the same range as the total elementary school enrollment in the late 1990's. Middle school enrollment has dropped to levels not seen since the early 1990's. High school enrollment was growing rapidly in the late 1990's, but enrollment has levelled off to a current figure that is near the enrollment figures in the late 1990's.

Table 3.1.5.1 – 1996 to 1999 Enrollment **Table 3.1.5.2 – 2012 to 2015 Enrollment**

School / Year	1996	1997	1998	1999	Mean	School / Year	2012	2013	2014	2015	Mean
Elementary Schools	1375	1385	1348	1377	1371	Elementary Schools	1218	1248	1347	1339	1288
Middle School	647	655	660	649	653	Middle School	600	601	582	575	590
High School	758	798	808	802	792	High School	804	802	826	746	795
Total Enrollment ¹	2780	2838	2816	2828	2816	Total Enrollment ¹	2622	2651	2755	2660	2672

In planning for facilities now, it is useful to evaluate enrollment in the context of the 1999 Master Planning effort, because this was the last time that facility capacity and adequacy was assessed on a District-wide basis. If the prior Master Plan included facilities that were planned to have adequate capacity, and enrollment has remained constant, then the existing facilities should be expected to be substantially adequate (in size but not necessarily condition) to meet current needs. If in the future the entire enrollment at the elementary schools level was retained through high school, then enrollment at Phoenix High School would be approximately 150 students per year higher than current levels. From a supply of instructional classrooms standpoint, the Talent Middle School and Phoenix High School are capable of handling all the through-put from the three elementary schools without overcrowding in the event all these “lost students” were somehow retained.

3.2 Regional Growth

The first step in the enrollment projection process is to look at regional growth projections. Future enrollment in the Phoenix-Talent School District is localized in response to region-wide population change. Thus, the methodology we employ in the enrollment projections is to examine regional growth projects and then estimate the amount of regional growth that might reasonably be captured in the Phoenix-Talent School District area.

3.2.1 Regional Population Growth Projections

The table below depicts three county-wide population projections from three distinct but appropriate foundational sources, as follows:

Table 3.2.1.1 – Regional Population Growth

	2020		2025		2030		2035		2015 Census Estimate
	pop.	growth	pop.	growth	pop.	growth	pop.	growth	
Office of Economic Analysis	223,458	10,891	238,955	26,388	253,274	40,707	265,624	53,057	212,567
PSU Population Reserch Center	222,583	10,016	234,561	21,994	245,963	33,396	255,840	43,273	212,567
Jackson County Comprehensive Plan	246,031	33,464	261,497	48,930	276,437	63,870	291,150	78,583	212,567
Average	230,691	18,124	245,004	32,437	258,558	45,991	270,871	58,304	212,567

These sources have a fair degree of variance within the projections. By 2035, there is a difference of over 35,000 people countywide. However, all the analysis sources project significant regional growth that is projected to be not less than 43,273 people; an amount of growth that is more than any single City other than Medford in Jackson County.

From an enrollment standpoint, this means the chances of flat or enrollment declines in the medium and long-term are relatively low; barring some sort of unanticipated moratorium on development or a significant and unexpected change in the overall economic/demographic picture. However, the amount of enrollment captured by the District will depend on the share of the regional growth that is located in the District and the District’s ability to attract and retain students in an ever more competitive education service environment.

3.2.2 Population Growth in Phoenix-Talent School District

To estimate the population growth within the District, CSA adapted a proprietary model CSA developed for the Rogue Valley Transportation District for their boundary location analysis. Parameters were developed for that model to estimate the expected development capacity yield, in terms of population and employment, of individual tax lots based upon the applicable land use plan regulations. All base population data comes from data the U.S. Bureau of the Census.

Essentially, the model estimates future population, by location, based upon the applicable land use regulatory framework at full build-out. This is done for all Urban Growth Boundary (UGB) areas which are lands designated to meet urban needs in the next 20 years, and for all Urban Reserve (UR) areas, which are additional lands designated to meet urban needs over the next 50 years.

All three cities are in the process of amending their UGB’s to accommodate additional lands, so it is expected that some portion of the existing Urban Reserves will be consumed as urban land over the next 20 years. The City of Medford has selected a draft UGB boundary and that draft boundary was utilized in the projections. Phoenix and Talent have both identified the amount of residential lands needed, but have not specified a location. However, because Phoenix and Talent are entirely located within the School District Boundary the residential need projection for the next 20 years is adequate; regardless of the location selected for expansion to meet that need it will be located within the School District boundary.

Thus, the remaining projection analysis requires assumptions about the pace of development. These assumptions are described in the below table:

Table 3.2.2.1 – Development Pace Assumptions within District

Development Pace Estimates			Medford	Phoenix	Talent
0-10 Year Build-Out	UGB	Modest Pace	40%	5%	10%
		Moderate Pace	60%	10%	50%
		Rapid Pace	85%	15%	70%
	URA	Modest Pace	5%	8%	15%
		Moderate Pace	10%	21%	25%
		Rapid Pace	15%	42%	35%
0-20 Year Build-Out	UGB	Modest Pace	95%	10%	10%
		Moderate Pace	95%	20%	70%
		Rapid Pace	95%	30%	90%
	URA	Modest Pace	40%	32%	35%
		Moderate Pace	55%	56%	55%
		Rapid Pace	80%	75%	80%

The development pace assumptions are based upon CSA’s experience with development in the Bear Creek Valley and our knowledge of the area. The Medford pace assumptions are based upon pretty steady development of the areas and the rapid pace of development assumption is estimating that most all of the land being included in Medford’s UGB in the pending UGB amendment will be built out 20 years from now. It is also important to note, that the analysis for Medford assumes that land being added as part of the Medford’s UGB process that is owned by the Rogue Valley Manor will be restricted to an Active Adult Retirement Community which is not relevant for purposes estimated student population in the future; this restriction was offered by the property owner as part of the UGB review process and has been imposed by the Council. If this restriction is modified in the future to allow standard residential development, that policy change will be expected to increase Phoenix-Talent School District enrollment projections.

Phoenix is more complicated because much of the land within the UGB is in-fill which tends to go at a much slower pace than greenfield development. Certain residential areas are severely constrained by slopes. The Urban Reserve areas of Phoenix are expected to develop at a slightly slower pace than in other cities because most all of the growth in Phoenix is planned east of the freeway and the City has relatively little urban development and existing infrastructure in this area.

The assumptions for Talent assume strong demand for housing in Talent. The UGB lands are heavily dependent on installation of a railroad crossing. If the railroad crossing is constructed in the short to medium term then much of the land will build out in the next 20 years. If the crossing is not constructed then relatively little of the capacity in Talent’s UGB will be built out over the next 20 years. Development of lands added to the UGB are assumed to be consumed at a reasonable pace and the rapid development pace assumptions would assume most all of the land added to the UGB will be consumed within the next 20 years.

This methodology yields the following projected population growth district-wide:

Table 3.2.2.2 – District Population Growth

District-wide Forecast Population Growth			Medford	Phoenix	Talent	Total
0-10 Year Growth	UGB & URA	Modest Pace	1570	132	303	2005
		Moderate Pace	2377	349	1147	3872
		Rapid Pace	3375	673	1605	5652
0-20 Year Growth	UGB & URA	Modest Pace	3976	508	451	4935
		Moderate Pace	4108	894	1753	6754
		Rapid Pace	4328	1209	2322	7859

As a matter of scale, the projections represent the growth in population equivalent to an additional City of Talent in the District by the end of 2035.

When applying a rational-location methodology to these types of projections, it is useful to keep the end goal in mind. As long as the upper and lower bounds of the assumptions are likely to capture actual future conditions and the upper and lower bounds are not so wide as to be completely unreasonable on either end, then the assumptions are adequate for planning purposes. It is also useful to compare results from this type of rational-location approach to the empirical population projections for the entire county to check for reasonableness. The below table provides this comparison:

Table 3.2.2.3 – Growth Percentage Comparisons

	Percent of County Growth through 2025			Percent of County Growth through 2035		
	Modest	Moderate	Rapid	Modest	Moderate	Rapid
Office of Economic Analysis	8%	15%	21%	9%	13%	15%
PSU Population Research Center	9%	18%	26%	11%	16%	18%
Jackson County Comprehensive Plan	4%	8%	12%	6%	9%	10%
Average	6%	12%	17%	8%	12%	13%

Over the next 20 years, the table indicates that the population growth in the District would represent a range of 6 percent to 18 percent of the region’s growth during the period. Phoenix-Talent School District is near the geographic center of the Bear Creek Valley and so one would expect demand in this geography to keep pace with the region provided there is adequate land supply. The land use planning documents for the area are intended to supply adequate land for urban uses in these areas over time. Moreover, half of the forecast growth is located within the UGB of Southeast Medford where development has been occurring at a reasonable pace over the years and most all of this land is planned and zoned for urban development and the infrastructure planning for this area is either in place or is planned with financial mechanisms to support delivery.

3.3 Base Enrollment Forecast & Capacity Analysis

With the future population forecast for the District reasonably estimated, it is necessary to convert the area-wide population into student populations. These calculations are based upon census data.

This data reduction requires several steps. First, the census ratios of student population age groups from the population as a whole in the County were estimated. These estimates were based upon an average of the 2010 census and ACS estimates from 2011, 2012, and 2013. Application of these ratios to the forecast future population in the District yielded the student age population in the future years. The student age population growth by age cohort was then divided by the number of years in that cohort to arrive at growth per individual age. The census also provides an estimate of the number of student aged people in each cohort that attend public school. This ratio varies by the age of the students- 91.7% for Kindergarten, 94.3% for 1st through 4th grades, 91.1% for grades 5 through 8, and 87.4% for grades 9 through 12. These ratios were applied to the estimated student population for each age associated with the grade for that ratio. This series of ratio calculations from the District-wide population estimates yields the following district enrollment projections over the next 10 years:

Table 3.3.1.1 – 0 to 10 Years Enrollment Forecasts

	Existing Enrollment (mean last 10 yrs)	Modest Development Pace			Moderate Development Pace			Rapid Development Pace		
		Enrollment	Optimum Capacity	Maximum Capacity	Enrollment	Optimum Capacity	Maximum Capacity	Enrollment	Optimum Capacity	Maximum Capacity
0-10 years										
Elementary	1302	1444	78%	65%	1588	86%	72%	1690	91%	76%
TMS	614	651	64%	55%	769	75%	65%	778	76%	65%
PHS	812	880	73%	63%	963	80%	69%	1043	87%	74%
Total	2728	2976			3320			3510		

Over the next ten years, the District can expect to grow back to historic levels from the last 10 years and perhaps grow as much as 500 additional students. On a Districtwide basis, the District is projected to have adequate facility space capacity for these students. Projecting over the 20 year period, the enrollment growth is projected to continue:

Table 3.3.1.2 – 0 to 20 Years Enrollment Forecasts

	Existing Enrollment (mean last 10 yrs)	Modest Development Pace			Moderate Development Pace			Rapid Development Pace		
		Enrollment	Optimum Capacity	Maximum Capacity	Enrollment	Optimum Capacity	Maximum Capacity	Enrollment	Optimum Capacity	Maximum Capacity
0-20 years										
Elementary	1302	1639	89%	74%	1772	96%	80%	1837	99%	83%
TMS	614	746	73%	63%	841	82%	71%	853	84%	72%
PHS	812	1011	84%	72%	1092	91%	78%	1141	95%	81%
Total	2728	3396			3704			3831		

Total elementary capacity is expected to be approached by the end of the planning period. This indicates that more detailed investigation into the elementary school boundaries is appropriate. The following table depicts the results of this analysis:

Table 3.3.1.3 – Elementary School Enrollment Forecasts

		Modest Development Pace			Moderate Development Pace			Rapid Development Pace		
		Enrollment	Optimum Capacity	Maximum Capacity	Enrollment	Optimum Capacity	Maximum Capacity	Enrollment	Optimum Capacity	Maximum Capacity
0-10 years										
	Orchard Hill	532	89%	74%	598	100%	83%	654	109%	91%
	Phoenix Elementary	397	66%	55%	413	69%	57%	433	72%	60%
	Talent Elementary	515	79%	66%	577	89%	74%	603	93%	77%
0-20 years										
	Orchard Hill	692	115%	96%	708	118%	98%	718	120%	100%
	Phoenix Elementary	422	70%	59%	449	75%	62%	469	78%	65%
	Talent Elementary	525	81%	67%	615	95%	79%	651	100%	83%

The above 10-year table shows potential capacity problems at Orchard Hill Elementary. Some of the capacity issues could be addressed through boundary changes with Phoenix Elementary that would eventually move all City of Phoenix students to Phoenix Elementary and limit Orchard Hill to Medford students. These boundary changes could be made as the need arises. The twenty-year forecast essentially assumes that this boundary change has been done and Orchard Hill is still at or near capacity even with these large elementary sub-district boundary changes.

It is also important to note that the capacity analysis for Talent Elementary includes all four modular classrooms and the two classrooms at the Outdoor Discover Program. Given the high utilization of Talent Elementary School over the ten year period, this raises the question of when a permanent six classroom addition to Talent Elementary school to appropriately handle expected enrollments or an alternative location of the Outdoor Discovery Program is determined.

3.4 Enrollment Projection and Capacity Analysis Conclusions

Regional growth is expected to stem the slightly downward trend in enrollment that the District has experienced over the last ten years. It is expected to turn slightly positive but not abruptly so. Regional growth is not expected to outstrip school capacities in the 10 year period, but the District should be thinking about real estate acquisition or retention of the existing asset at Coal Mine Road to address capacity issues at Orchard Hill Elementary in the 15-20 year timeframe.

Investments in the District's facilities are likely to affect enrollment and revenues going forward. However, it is not expected that such investments will induce demand to such an extent that, in the medium term, the need for expensive new facilities will materialize that would not otherwise have been necessary. Future enrollment is expected to be correlated to an uncertain degree to the facility decisions surrounding the high school.

4 INVENTORY AND ASSESSMENT OF EXISTING FACILITIES

The first step in planning to address the facilities themselves is to identify any deficiencies with the existing infrastructure. This was accomplished through a series of walk-throughs by CSA Planning and Straus and Siebert Architects as well as sub-consultant professionals, such as structural engineers with the Principals from each school and also key maintenance staff. The District contracted independently with mechanical firms to assess the condition of HVAC systems in the buildings and provided these reports to CSA and SSA. Detailed assessment information is provided in the Appendix 10.1.

The facilities assessment information in Section 4 for each school focuses on identified deficiencies. However, the inventory and assessment process evaluated schools from a number of different perspectives to assure a comprehensive understanding of the schools and the physical plants that exist to support the educational objectives of the District. The assessment evaluated components such as:

- Education equity considerations such as any physical components that might affect compliance with regulatory requirements like Title IV issues or ADA issues as well as more subjective considerations like pace planning for key special learning programs at the schools.
- Environmental Hazards considerations some of which were considered by consultant team and some of which were developed in-house by the facilities maintenance programs at the District.
- A structural engineer evaluated schools for seismic integrity.
- CSA reviewed National and State historic registers to determine if any of the schools are identified as protected resources. One portion of Talent Elementary School, the “Original Wing” is identified with an Oregon Historic Site Record. As such, future improvements planned for Talent Elementary School should be coordinated with the State Historic Preservation Office (SHPO). CSA examined local comprehensive plans and no other schools were identified as Goal 5 protected historic resources within those local Comprehensive Plans.
- The school sites were evaluated from the perspective of local land use regulations like Comprehensive Plans and zoning regulations.
- A wide variety of security and functional issues were evaluated for each school.
- Site Design
- Aesthetics
- Energy Efficiency
- Facility Maintenance and Life-Cycle Costs

4.1 Orchard Hill Elementary School

Orchard Hill Elementary School is the newest school in the District. The site is challenging because it is somewhat narrow and one of the two accesses is between two single family residences. The facilities are generally in good to fair condition, however there are critical roof and seismic issues that require immediate attention or the school is at risk of rapid deterioration. A modest retrofit is now appropriate to replace worn out systems, address the critical issues and resolve the more minor functional issues at the school. The below list summarizes existing issues at the school identified thus far in the process:

Orchard Hill Elementary - Key Statistics			
<i>1011 La Loma Drive, Medford</i>			
Original Bldg.- Additions-	1983 2002	Teaching Classrooms	24
Grades Housed	K-5	Music Room	1
Optimum Capacity	600	Portable Classrooms	0
Maximum Capacity	720	Covered Play Area	1
Total SF	53,614	Improvement Value	\$3.2M
Gym (sf)	7,140	Land Value	\$1.6M
Cafeteria (sf)	1,203	ImpV/LV	2.0
Site Acres	10.15	Coverage Factor	12.1%

ORCHARD HILL ELEMENTARY SCHOOL	
Systems	
1	Roof members failing in some areas. Many leaks due to flashing failure.
2	The HVAC systems throughout are inadequate and need retro-commissioning.
3	Seismic Retrofitting required, install masonry anchors and strap to roof diaphragm & add nailing and strapping to connect shear walls to roof diaphragm and shearwall connections & add drag struts and chords to existing shearwall elements. Install in conjunction with roof replacements where appropriate.
4	The roof supporting the kitchen hood support has failed and is being held up by temporary bracing. The roof structure needs to be replaced.
5	Inadequate electrical receptacles & service to support current needs.
6	Lighting systems need updating for energy efficiency. Old fixtures in many areas provide inadequate light for task work.
7	Communication system needs to be upgraded. Unable to communicate directly between school buildings and outside grounds. Consider new bell and intercom system.
8	Security system is needed to allow for lock-downs & after hour surveillance. Need windows & entries secured.
9	Gym floor failing.
10	Much of the carpeting throughout school needs replacement.
11	Art room is in poor condition.
Functional Issues	
1	Main Office cannot see the main entrance (security issue)
2	Staff asked for new restrooms in office area (currently single stall restroom)
3	Open classroom concept creates noise issues, except 4 th & 5 th grades

ORCHARD HILL ELEMENTARY SCHOOL	
4	Cafeteria-extremely small cafeteria. Fire restrictions allows 124 students in cafeteria, logistics issue with students waiting for table (OHE has 415 students). Cafeteria kitchen so small, staff cannot store all the food
5	Gym-has built in cafeteria tables that are seldom, if ever, used.
6	Theater stage can be accessed from gym and music room, but is not ADA accessible
7	Would like to add a health clinic, like the one offered at PES operated by La Clinica; OES does not have a school nurse on staff
8	Inadequate storage throughout
Exterior Issues	
1	Cement tile roof is in good condition, however flashing leaks at wall intersections, gutters and downspouts are causing water damage. Major roof leaks during rainy season, buckets used to catch water
2	Playground entrance to bathrooms is an issue. Have approx. 200 kids at recess and these are the only bathrooms available, which has approx. 3 stalls (for boys and girls). Bathrooms do not meet ADA standards.
3	Good bus turnaround; however not enough space is available for parent pick-up. Cars end up parked as far as Juanipero. Worst congestion lasts about 10-15 minutes during pick up time.
4	Would like to have cover over the basketball courts and playground
5	Would like to have covered walkway to and along bus loading area
6	Northeast corner need additional security fencing and gate.

4.2 Phoenix Elementary School

Phoenix Elementary is functionally serviceable, but is in need of an extensive retrofit. Investments in the existing building are expected to be appropriate in proportion to the existing assets and investment. The cost to find a new site and replace the existing school would be expected to far exceed the cost to improve the existing buildings. The school has four modular classrooms. Future projections should determine whether these modulares will be needed, and if so, consideration should be given to replacing them with permanent classrooms. Despite, the basic adequacy of the school there is an extensive list of improvements that are warranted at this school. Below is a summary of the issues identified thus far in the process:

Phoenix Elementary - Key Statistics			
<i>215 N Rose Street, Phoenix</i>			
Original Bldg.-	1954	Teaching Classrooms	20
Additions-	1998	Music Room	1
Grades Housed	K-5	Portable Classrooms	4
Optimum Capacity	600	Covered Play Area	1
Maximum Capacity	720	Improvement Value	\$1.7M
Total SF	54,933	Land Value	\$781K
Gym (sf)	3,836	ImpV/LV	6.1
Cafeteria (sf)	3,836	Coverage Factor	16.1%
Site Acres	7.81		

PHOENIX ELEMENTARY SCHOOL	
Systems	
1	Open classroom concept causes issues with comfort levels and HVAC control. The HVAC systems throughout are inadequate and need retro-commissioning.
2	Hot water supply is inadequate in some areas.
3	A large portion of roofing is failing and needs replacement.
4	Seismic Retrofitting required, install masonry anchors and strap to roof diaphragm & add nailing and strapping to connect shear walls to roof diaphragm and shearwall connections & add drag struts and chords to existing shearwall elements. Install in conjunction with roof replacements where appropriate.
5	Security system is needed to allow for lock-downs & after hour surveillance. Need windows & entries secured.
6	Inadequate electrical receptacles & service to support current needs.
7	Bell/Intercom system needs replacing
8	Sewage backflows 2 to 3 times per year
9	Many plumbing fixtures do not meet ADA standards. Flush is extremely loud for students in Kinder rooms.
10	Carpeting throughout school needs replacement.
11	Door hardware does not meet ADA standards throughout most of building.
12	Kitchen and roll-up doors need to be upgraded.
13	Primary Wing windows need replacement
Functional Issues	

PHOENIX ELEMENTARY SCHOOL	
1	Front office needs to be more "user friendly"
2	Not enough meeting areas.
3	Need more storage for cafeteria and athletic gear
4	Open classroom concept with Library/Media center in middle. Noise runs across the open area. Would like to get rid of "divider" walls due to noise. Consider closing off classrooms.
5	Security issues because class doors open to outside from the back of each room.
6	Computer lab gets very noisy & interferes with quiet library time. Would like to relocate computers.
7	Art room needs to be bigger. Sprayed on popcorn ceiling finish needs to be removed.
8	Bathroom doors-kept open all the time, due to ventilation issues. Can see into the bathroom area from the mirrors on wall.
9	Music Room/Multi-Purpose-needs projector/screen.
10	Open area at front of school to gym is a security issue-not fenced off.
11	Gym/Lunch room tables need to be replaced
12	Main gym needs projector/technology-sound system upgrade. Holds assemblies/parents night activities. No seating available for a basketball games (though only used for practice). Need backboards.
Exterior Issues	
1	ADA standards not met in many areas- door hardware, ramp slopes.
2	Parent drop-off traffic control is a challenge
3	Gutters & siding issues-run down the side
4	Understructure/roof has a lot of bare wood
5	Need something to deter skateboarders riding on edge of small retaining walls.
6	Track needs to be renovated
7	Parking lot needs repair
8	Open area at front of school to gym is a security issue-not fenced off.

4.3 Talent Elementary School

Talent Elementary is functionally serviceable, but is in need of an extensive retrofit. Investments in the existing building are expected to be appropriate in proportion to the existing assets and investment. The cost to find a new site and replace the existing school would be expected to far exceed the cost to improve the existing building.

In addition to the standard classrooms, the school has four modular classrooms. A separate building across the street houses the Outdoor Discovery School which is in very rough shape. If the demand for these classrooms continues long term, consideration should be given to constructing permanent classrooms to meet these future needs.

There is an extensive list of improvements that are warranted at the school. The issue of rehousing the Outdoor Discovery School combined, the a desire to redirect the bus circulation, along with issues related to the unusual circular portion of the school will present design challenges for a retrofit of this school and the budget should include adequate design funds to assure an optimum site design solution can be achieved.

Below is a summary of the issues identified thus far in the process:

Talent Elementary - Key Statistics			
<i>307 W. Wagner Creek Road, Talent</i>			
Original Bldg.-	1949	Teaching Classrooms	20
Additions-	1973	Music Room	1
Grades Housed	K-5	Portable Classrooms	4
Optimum Capacity	600	Covered Play Area	1
Maximum Capacity	720	Improvement Value	\$1.7M
Total SF	53,302	Land Value	\$998K
Gym (sf)	3,836	ImpV/LV	1.1
Cafeteria (sf)	3,802	Coverage Factor	12.3%
Site Acres	9.98		
Outdoor Discovery School			
<i>215 W. Wagner Creek Road, Talent</i>			
Original Bldg.-	1968	Teaching Classrooms	2
Additions-	-	Music Room	shared
Grades Housed	K-5	Portable Classrooms	0
Optimum Capacity	50	Covered Play Area	0
Maximum Capacity	56	Improvement Value	\$63.9K
Total SF	2,000	Land Value	\$90.2K
Gym (sf)	shared	ImpV/LV	1.4
Cafeteria (sf)	shared	Coverage Factor	9.0%
Site Acres	0.51		

TALENT ELEMENTARY SCHOOL	
Systems	
1	The HVAC systems throughout the main building inadequate and need retro-commissioning. Old boiler has been abandoned. Needs to be removed and room secured.
2	Hot water pressure is inadequate and is unavailable in some areas where needed. No hot water in old wing.
3	Seismic Retrofitting required, install masonry anchors and strap to roof diaphragm & add nailing and strapping to to connect shear walls to roof diaphragm and shearwall connections & add drag struts and chords to existing shearwall elements. Install in conjunction with roof replacements where appropriate.
4	Security system is needed to allow for lock-downs & after hour surveillance. Need windows & entries secured.
5	Inadequate electrical receptacles & service to support current needs.
6	Plumbing fixtures need to be replaced. Toilets & fixtures corroded and no longer cleanable.
7	Carpet and tile floor covering failures at most areas of the school.
8	Exit devices are old crash bars and some are beginning to fail.

TALENT ELEMENTARY SCHOOL	
9	Door hardware old and failing. Some doors are padlocked because the door hardware is worn out or removed.
10	Gym floor failing at Cafeteria area.
11	Exposed monocote ceilings at gym, art, and music room.
12	Hallway floorcovering failing from moisture wicking
13	Ceiling in Primary wing is failing and needs replacement
14	Window units need to be closed if not used and walls insulated.
15	Counters and cabinetry failing throughout
16	Some rooms, including the Cafeteria and Art Room, have sprayed on acoustic popcorn finish. Needs to be removed and ceilings refinished.
Functional Issues	
1	Main Entry is a safety concern- no way to easily monitor who enters; needs more open area, possibly a foyer
2	Front office needs to be more "user friendly", desk areas need redesign
3	Windows in Kindergarten too high for students to see out.
4	Gym is especially noisy and has no sound control.
5	Need long-term solution for location for the Boys and Girls Club program
Exterior Issues	
1	Roofing at old gym and round building useful life ending or ended.
2	Walkway roofing and rain drains and column downspouts rusting through the masonry.
3	Want to look at alternate bus loop location from Second Street
4	Track needs to be renovated
5	Need additional breezeway covers connecting buildings.

In addition to the main elementary school buildings, the Outdoor Discovery School is housed in a building across W. Wagner Street from the main school campus. The issues identified to-date with this building include the following:

OUTDOOR DISCOVERY SCHOOL	
Systems	
1	Building is in overall poor condition. Most systems past useful life cycle.
2	Electrical and plumbing systems need upgrading.
3	Roof is in poor condition and is leaking. Needs replacement.
4	Windows and interior doors need replacement.
Functional Issues	
1	Building interior configuration is awkward. Students must walk through a classroom to access restrooms.
2	Need sink in second classroom.
Exterior Issues	
1	Exterior envelope in poor condition despite newer paint.
2	Landscaping needs maintenance.



4.4 Talent Middle School

The structure and design of the middle school is well suited to its purpose. The building itself is in fair to good condition. However, a number of systems require repairs and the school is in need of extensive retrofitting or replacement of systems such as HVAC and floor coverings. Notwithstanding that the overall functional design of the building works reasonably well, the school does have several specific functional issues that need to be addressed. Many of these functional issues arise from the nature of the site itself. The site is long and narrow and tucked behind a row of single-family dwellings which makes access challenging. This also has corollary effects on the building design and options to address building functional issues. The below list summarizes the issues identified thus far in the process:

Talent Middle School - Key Statistics			
<i>102 Christian Avenue, Talent</i>			
Original Bldg.-	1990	Teaching Classrooms	34
Additions-	'99,'03	Music Room	1
Grades Housed	6-8	Portable Classrooms	0
Optimum Capacity	990	Gyms	2
Maximum Capacity	1155	Improvement Value	\$14.1M
Total SF	97,006	Land Value	\$565K
Sports Facil. (sf)	18,135	ImpV/LV	25.0
Cafeteria (sf)	3,360	Coverage Factor	16.5%
Site Acres	13.49		

TALENT MIDDLE SCHOOL	
Systems	
1	The HVAC systems throughout are inadequate and need retro-commissioning.
2	Inadequate electrical receptacles & service to support current needs. Hallway light switches an issue. Need replacement with either keyed covers or changed to motion sensors.
3	Seismic Retrofitting required, install masonry anchors and strap to roof diaphragm & add nailing and strapping to connect shear walls to roof diaphragm and shearwall connections & add drag struts and chords to existing shearwall elements. Install in conjunction with roof replacements where appropriate.
4	Plumbing systems at shower areas and other high water use areas need updating.
5	Much of the carpeting throughout school needs replacement.
6	Security system is needed to allow for lock-downs & after hour surveillance. Need windows & entries secured.
7	Kitchen rollup doors are beginning to fail.
8	Door hardware is worn and non-compliant with ADA or safety measures.
9	Intercom/Bell system needs updating
10	Multi-media systems are out-of-date.
Functional Issues	
1	Main entrance is not accessible. Need vestibule inside of entrance for control. Access to office needs to be reconfigured.
2	Exterior security an issue at breezeway area that opens to parking lot.

TALENT MIDDLE SCHOOL	
3	Cafeteria- currently operate with 2 lunch periods; can only fit 150/200 kids per cycle; try to get students thru as quickly as possible. Potential for enclosing adjacent breezeway to increase cafeteria size. Could eliminate the need to secure area with fence.
4	Gyms needs storage area to hold athletic equipment separate from custodial storage.
5	Sprinkler system is exposed throughout building. Detract from look of the hallways and are open to vandalism.
6	No onsite health clinic.
7	No kiln available for ceramics program.
Exterior Issues	
1	Field and track in poor condition and need updating. Not a regulation track (not quite ¼ mile track).
2	ADA issues include lack of ramps to main entry, entries off of bus loop, and sports field
3	Bus Loop: 14/15 buses running and only 10 can fit into loop area with 4 waiting on street. Students are walking on asphalt curve bump (very small area between curve/buses) to access their bus.
4	Courtyard plantings are not maintained. Is there adequate irrigation?
5	Fire Lane behind school is gravel only
6	Ventilation vents are covered in back of school, screen hanging down on one of them.
7	Gravel drive that leads to the entry doors from track & field area an issue. Gravel is tracked into entry and hallway daily, issue - gravel is stuck in doors which is a security issue, because doors are not locking properly.
8	Need a sign at Wagner Creek to help in wayfinding. Crossing between elementary school and middle school needs upgrading
9	No covered outdoor area.

4.5 Phoenix High School

Phoenix High School has numerous functional, system, and exterior issues. Most all of the major systems require extensive repair or complete replacement. Functionally, the school is not well laid out. This is the one school where cost to retrofit and make the school fully functional may not represent a sound investment when compared to replacement because almost every aspect of the school is in need of redesign and replacement, with the exception of the gymnasiums and theater area. The below list summarizes the issues identified thus far in the process:

Phoenix High School - Key Statistics			
<i>745 N. Rose Street, Phoenix</i>			
Original Bldg.-	1954	Teaching Classrooms	38
Additions-	'89,'05	Music Rooms	2
Grades Housed	9-12	Portable Classrooms	0
Optimum Capacity	1110	Gyms	2
Maximum Capacity	1295	Improvement Value	\$8.2M
Total SF	163,209	Land Value	\$1.7M
Sports Facil. (sf)	37,693	ImpV/LV	4.8
Cafeteria (sf)	5,927	Coverage Factor	17.9%
Site Acres	20.99		

PHOENIX HIGH SCHOOL	
Systems	
1	The HVAC systems throughout the main building and gymnasiums are failing or have failed and need replacement and retro-commissioning.
2	Hot water is not available in all areas where needed.
3	Seismic Retrofitting required, install masonry anchors and strap to roof diaphragm & add nailing and strapping to connect shear walls to roof diaphragm and shearwall connections & add drag struts and chords to existing shearwall elements. Install in conjunction with roof replacements where appropriate.
4	A large portion of roofing is failing and needs replacement.
5	Lighting systems need updating for energy efficiency. Old fixtures in many areas provide inadequate light for task work.
6	Security system is needed to allow for lock-downs & after hour surveillance. Need windows & entries secured.
7	Food Service freezer has issues.
8	Inadequate electrical receptacles & service to support current needs. Many rooms are jury-rigged with extension cords to spread out usage to avoid blowing circuits.
9	Much of the carpeting throughout school needs replacement.
10	Door hardware does not meet ADA standards throughout most of building.
11	Many plumbing fixtures do not meet ADA standards.
12	Inadequate number of gas shutoffs at science areas
Functional Issues	
1	Need new front entry foyer abutting office with registrar and office entry opening directly onto it.
2	Office areas need reconfiguring. Many areas do not have adequate space or layout for use.

PHOENIX HIGH SCHOOL	
3	- Need a system that provides easy access to counselor, etc without having to walk all over school
4	- First Aid room-has curtains only. School does not have a health clinic.
5	- Crisis Area-is an open desk area. Teens feel uncomfortable in open area rather than in closed room
6	- Staff Locker/Admin office-backs up to one of the restrooms-not noise proof
7	Wayfinding throughout the school is very difficult. Circulation is constricted and confusing. Many dead-ends. Canopies were installed to identify the office door, etc-to direct traffic. Hallways have been numbered, but floor plan is irregular.
8	Ramps within the hallways occur in odd locations and isolate rooms at different levels.
9	School has 32 exterior doors. Makes it difficult to control access/egress during "lock-down" procedures. Non-students can enter without being seen.
10	Lack of natural daylighting impacts both staff and students. Many interior classrooms without windows.
11	Awkward Food Service/Cafeteria area circulation for students. Cafeteria room too small. Crowded connection to Commons.
12	Portion of library used for TRIO and other programs is too small and isolated from the counselors
13	Library is the "heart" of the school, used for many meetings. However is unusually small for a high school library.
14	Room for computers/media center is needed for students & parents, but oversized for actual demand.
15	Theater: Alcove/public entrance from Rose Street, to entry to Theater is odd, seems like you are entering from the back of the theater. Student body cannot fit into theater, not large enough to even hold staff meetings. Stage is inaccessible-needs wheelchair lift.
16	Band Room completely isolated from the rest of the school by loading ramp. Storage room HVAC is non-functional.
17	FFA/Ag Building does not meet access standards. Classroom needs renovation.
Exterior Issues	
1	ADA standards not met in many areas- door hardware, ramp slopes, Rose Street and other exterior thresholds.
2	Track is past useful lifespan and needs replacing
3	Football Bleachers in poor repair. Need replacing.
4	"No man's" asphalt drive area between Weight Room and Commons. Unpleasant space, impacts views from Commons.

4.6 Other Real Property Assets

District Offices: The District has office buildings next to Phoenix Elementary School. The exterior of this office building is in relatively good shape. It has a metal roof which appears to be in decent condition. A more detailed functional evaluation might be warranted to assure district administrative functions are being optimized.

District Office / Maintenance Bldgs			
409 Fourth Street, Phoenix			
Offices	2003		
Maint Bldgs.	1975		
Total SF	8,890	Improvement Value	\$490K
District Office	4,610	Land Value	\$202K
2 Maintenance Bldgs	4,280	ImpV/LV	2.0
Site Acres	0.50	Coverage Factor	40.7%

DISTRICT OFFICE	
Systems	
1	HVAC system functions poorly and needs retro-commissioning
2	Voice/data system needs replacement
Functional Issues	
1	Building is functioning well at current time
Exterior Issues	
1	Parking lot and landscaping need continuing maintenance

Adjacent to the District offices are the IT Building and the Maintenance Warehouse. The IT building was upgraded in 2003. The Warehouse is in pretty tough shape and functions poorly. The identified issues are described below:

DISTRICT IT BUILDING	
Exterior Issues	
1	Parking lot to north needs to be retopped.

DISTRICT OFFICE MAINTENANCE WAREHOUSE	
Systems	
1	Building is in overall poor condition. Roof is in poor condition. Regularly leaking.
2	Building is not sprinkled. Could be a hazard to surrounding buildings.
3	Doors and locks need replacement.

DISTRICT OFFICE MAINTENANCE WAREHOUSE	
Functional Issues	
1	Poor condition makes buildings hard to use. Materials are stored haphazardly.
2	Heating and Cooling are essentially non-existent. No insulation. Makes buildings difficult for maintenance workers to work in.
Exterior Issues	
1	Parking for building is awkwardly laid out.

Colver Road Property: Aside from the existing schools, the District’s Colver Road property is its largest real estate holding by land area. The property is being used for athletic fields including soccer and softball as well as bus parking and maintenance facilities. The property is located adjacent to the northwest corner of the City of Talent. While the property is outside the Talent Urban Growth Boundary, it is located within the City’s Urban Reserve which means it may be brought into the City’s UGB at a future time. The Regional Problem Solving Plan currently restricts use of this property to school uses in the event it is brought into the UGB.

Colver Road Fields/ Maintenance Facility			
6450 Colver Road, Talent			
Original Bldgs.-	1975,	Playing Fields/	3
Bus Barn -	1992 1997	Buildings	3
Total SF	10,756	Improvement Value	\$246K
Maint Bldgs	5,080	Land Value	\$519K
Bus Barn	3,876	ImpV/LV	2.0
Site Acres	43.09	Coverage Factor	0.6%

COLVER ROAD MAINTENANCE BUILDINGS	
Systems	
1	Roof and exterior wall materials deteriorating and may need replacement in within 5 years.
2	Plumbing fixtures and piping not upgraded in 2003 remodel is in poor condition and should be replaced.
3	Interior wall finishes in poor condition
4	Exterior doors and locks need replacement.
Functional Issues	
1	Poor condition makes buildings hard to use.
2	Heating and Cooling are essentially non-existent. No insulation. Makes buildings difficult for maintenance workers to work in.
Exterior Issues	
1	Dirt/gravel drive and parking areas have issues during periods of rain
2	No organization to outdoor material storage.

Coal Mine Road property: The District owns 11.73 acres at the northeast corner of Coal Mine Road and North Phoenix Road. The property is located within the City of Medford city limits and is zoned SFR-4, which is a low density, single family zone. The property is currently vacant. A portion of the property appears to be impacted by wetlands.

5 BUILD SCENARIOS IDENTIFIED FOR EACH SCHOOL AND OTHER REAL ESTATE ASSETS

Build scenarios were developed for each school. For each facility, the build scenarios only considered costs from a best investment value standpoint. Each scenario considered the expected future capacity needs for the school within the planning period. From a value standpoint, certain improvements were considered with mutual cost-effectiveness. For example, coordination of needed roof repairs with seismic improvements can reduce costs because access to roof substructure will be required for much of the seismic retrofitting.

5.1 Build Scenario Priorities

The build scenarios were based upon the priorities developed through the planning process. The priorities are for safety and security, future building integrity assurance, functional and capacity issues, and energy efficiency.

- Safety issues primarily concern seismic upgrades. The seismic upgrades do not necessarily assure a school will remain safe to use following a major earthquake but is intended to assure safe exit of the structure for people within the school.
- Security issues primarily concern exits and entries to the school facilities. Many of the schools have numerous entries and exits with little or no controls in place. Security improvements will address these entry and exit point issues. These access issue points also concern building functional issues in many cases. Lesser security issues will concern improved fire alarm systems, PA systems upgrades and door locking systems.
- Building integrity issues concern improvements necessary to cost-effectively maintain existing school facilities. Examples include roof system upgrades necessary to maintain water integrity of the structure. If such improvements are not made in the near term, the structure is at risk of deteriorating at an accelerated rate.
- Functional issues concern school improvements that will configure the school with an appropriate learning environment.
- Energy efficiency involves changes to the building to make it more energy efficient.

With the priorities set for the build scenarios, the approaches for each school were developed through the planning process.

5.2 Elementary Schools and Middle School Improvements

For the elementary schools and the middle school, relatively minor functional issues were identified. As such, for these schools, the general approach was to develop build scenarios that represented cost-effective solutions to improve the schools in a manner that would serve the needs of the district from the standpoint of energy efficiency, assuring future building integrity and resolving safety and security issues. These build scenarios are all needed improvements. However, they are agnostic with respect to financing and the preferred improvement plan may determine certain improvements are not absolutely necessary within the planning period when funding constraint are considered. Tech Memo #4 and the associated design concepts for the school improvement concepts are provided in Appendices 10.3.8 and 10.3.9. For all the elementary schools and the middle school, the following general improvements were identified:

General Improvements at all Schools:

1. All school facilities require upgrade for seismic compliance. The basic identified problem is structural connection of roof and walls at perimeter and interior shearwalls.
2. All of the schools require replacement and upgrades of the HVAC equipment.
3. Exterior security upgrades will be required at all schools to control exterior access.
4. ADA upgrades are needed at restrooms, entrances and walkways. Door hardware upgrades are needed throughout.
5. Paint and refurbish all interior spaces not being remodeled.
6. Refurbish and paint exterior of all facilities.
7. Extensive roof repairs or roof replacements

In addition to the general improvements for all schools above, the below improvements were identified to address specific issues at each school:

A. Orchard Hill Elementary:

1. Relocate and expand the Cafeteria
2. Remodel Administration & Main Entry
3. Replace carpeting throughout
4. Convert and add lighting to LED lamps or fixtures
5. Remodel existing Cafeteria for storage and meeting space

B. Phoenix Elementary:

1. Enclose exterior corridors connecting the four separate buildings
2. Replace existing modular classrooms with new construction
3. Replace carpeting throughout
4. Replace windows in Primary Wing
5. Convert lighting to LED lamps or fixtures

C. Talent Elementary:

1. Enclose exterior corridors connecting the four separate buildings
2. Replace existing modular classrooms with new construction
3. Replace carpeting throughout, new HVAC throughout
4. Convert lighting to LED lamps or fixtures
5. Add new class rooms and support spaces for the Outdoor Discovery Program (ODP) on the elementary school site

D. Talent Middle School:

1. Enclose exterior corridor adjoining the Cafeteria
2. Add cover over existing entry walk and add ramp access to main entry
3. Add new sidewalks at bus loading and from main entry to street.

Detailed list of improvement concept development can be found in Appendix 10.3.8 and 10.3.9. The plans depicting the identified improvement locations are shown on Atlas Figures 5-9.

5.3 High School Improvements

With respect to identifying the needed High School improvements, the High School has a multitude of issues. This makes determining the needed improvements less straightforward for the High School. Security issues exist throughout the building with numerous unsecured entry points. Seismic safety issues exist throughout the building. Building Integrity issues exist throughout the site due to failing roofing and other sources of water infiltration. Energy consumption of the High School is high.

In addition to all the problems with the structure itself, the High School has numerous functional issues. The circulation of the building is poor which makes it difficult to navigate and creates excessive circulation space. The building has multiple finished floor elevations which is both unconventional and undesirable. Many of the classrooms have no windows for natural light and fewer options for fire egress. The total square-footage of the building is substantially oversized relative to the minimum square-footage needed to serve the student enrollment which leads to significant maintenance and energy expenses to maintain and heat and cool a building that is much bigger than required. Many of the classrooms have very low ceilings which results in somewhat oppressive classroom space.

In spite of all the building issues, the High School does have some redeeming qualities. Spatially, the High School site is well positioned to serve current and future student population. The site is relatively easy to access from all parts of the District and is easily walkable and bikeable for much of the student body that lives in Phoenix. Parts of the building are in relatively good condition – specifically the gymnasium and theater area.

Two approaches for the High School build were developed based upon two very different funding conditions. The first approach was High School Reconfiguration which reuses the positive aspects of the site and the building by keeping the gym and theater core area and constructing a new classroom facility on the south side of the site. This approach would construct a new high school for about 2/3rds of the school. The second “minimal” approach assumed a funding solution that would address all the needs at the other schools and delay the full improvements to the High School to a future funding measure.

The reconstruction of the High School is the most complicated of the District projects and elements of the Reconfigured High School project are described below:

1. A significant portion of the existing facility will be demolished (entire north classroom wing) retaining the existing Gyms and Theater core.
2. A new one or two-story classroom wing will be added to the south of the gyms
3. A new one-story Arts/Industrial Arts wing will be added to the north of the gyms in the area of the demolished classrooms.
4. The existing Gyms, Locker-rooms and Theater will be refurbished.
5. The stadium bleachers will be refurbished,
6. Existing track to be reconstructed
7. Relocate Parking lot and two playing fields

Detailed list of improvements is provided in Appendix 10.3.8 and 10.3.9. The plans depicting the identified improvement locations are shown on Atlas Figures 5-9.

The “minimal” approach to the High School involves the needed improvements to the athletic and gymnasium facilities to advance the ultimate objectives for the full build project and then makes the minimum investments in the remaining structure to keep it minimally functional until the new classroom construction is funded.

5.4 Non-School Improvements

In addition to the improvements to the schools themselves, the build scenarios have identified needed improvements to the accessory facilities of the District, as follows:

1. New roofing, siding, windows and doors at the District Distribution Warehouse
2. New 4,800 SF Maintenance Facility to be constructed at Colver Road site. Existing deteriorated Colver Road facilities will be demolished



6 ANALYSIS OF PLAN CONTEXT AND DISTRICT'S FACILITY POSITION

This section of the plan evaluates Plan Context and Financial Considerations associated with financing the cost estimates from Section 6.

6.1 Policy and Regulatory Context

It is important to have a basic understanding of the policy and regulatory context under which Oregon K-12 schools operate. This section provides a primer on the relevant policy and regulatory context that relate to and inform the Long-Range Facility Master Plan process.

6.1.1 Special Capital Funding and Improvement Programs

Schools in Oregon have a number of funding programs which can be used to fund capital improvements or defray the costs of certain capital improvements, some of these programs include the following:

Senate Bill 1149 - Senate Bill 1149 provides funds through a program administered by the Oregon Department of Energy to pay for energy systems upgrades. The District has undertaken required audits to qualify for reimbursement for energy systems upgrades and these audits are reflected in the facilities analysis.

Energy Trust of Oregon Incentives – Unfortunately Senate Bill 1149 dollars are only available as reimbursements for investments in existing buildings and they do not give full credit for decisions to construct new more energy efficient buildings. There are other opportunities for incentives for new construction through the Energy Trust of Oregon.

Senate Bill 1036 Construction Excise Tax - The District has established a construction excise tax. Revenues from this tax are generated by real property improvements in the District. Most all improvements identified in the Long-Range Facilities Master Plan will be eligible for expenditure of these funds.

Senate Bill 447 – Senate Bill 447 in the 2015 legislature authorized up to \$123M in matching funds for capital construction for school improvements. The State funds match local funds that are authorized by voters through approval of a levy to retire the debt on the issuance of General Obligation Bonds for school construction. Sixty percent of the funds are to be released based upon a prioritization scheme of students below the poverty level and assessed value in the district. The next round is to be distributed on a first-in-time basis. The District may qualify for this match but the planned projects selection did not assume a grant dollar award. The maximum match for the District is \$4M which was awarded to the District

6.1.2 Building Code Compliance Thresholds

Another important regulatory issue that needs to be considered in the long-range facility master planning process is the interplay between improvements and building code requirements. Building codes are complex, but their application is relatively straightforward for new buildings – the current codes apply. These issues become much more complicated for remodels. In general, the more extensive the remodel the more new

code update thresholds are reached. There are somewhat fuzzy lines between where routine maintenance ends and where new construction begins as part of a major building retrofit such as is needed for all the District's schools.

Several types of new code issues can escalate costs dramatically, such as the following:

- Seismic or Structural improvements
- ADA Compliance
- Safety- Such as Electrical, Sprinklers, Smoke Alarms, Food Service

The interplay between various code component issues can cause chain reactions that can dramatically increase prices. For instance, when a seismic retrofit requires a new shearwall: Installing the new shearwall then affects a hallway, which now requires the entire hallway to be remodeled to meet current ADA requirements. This requires moving an interior wall. The new wall requires new electrical. The new electrical requires a whole new circuit panel which requires that entire service to be upgraded, and so on. It is important to keep in mind that these are generally all good things. Most of the code requirements exist for a reason and these requirements improve safety and accessibility for the occupants. But the costs can add up quickly.

It is often the case in these planning processes that the accountant in all of us wants to have high levels of precision and accuracy for each item to "make sure there are no surprises and not to waste any money." Among other reasons, the interplay between various code requirements makes this an ideal rather than a practical reality. From a Long-Range Facility Master Planning process standpoint, it is beyond the scope of the planning process to identify how each code interplay issue will arise for each specific project let alone all the identified projects as a collective.

At the Long-Range Facility Master Planning process level, these issues are handled with contingency funds in the planning budgets and the way in which the direct costs are estimated. The detailed code interplay issues are worked out as the individual projects are programmed and designed (or bundles of related projects on the same building). There is a silver lining to the contingency budgeting approach. The District's facilities have a wide range of needs that are unlikely to be fully funded by most any reasonably expected funding scenario. If less contingency is consumed by the highest priority projects than was originally projected in the Long-Range Facilities Master Plan, then additional funds become available for lower priority (but still important) projects.

6.1.3 Security and Safety Issues

From a Long-Range Facility Master Planning standpoint, there is an important distinction between the concepts of "safety" and "security". Safety in the context of facility planning does not necessarily mean "personal safety". Safety in the context of facility master planning refers to things like seismic integrity of the buildings and electrical system engineering. Safety is accomplished through systems that are adequate designed, engineered, constructed and maintained.

"Security" issues may have personal safety implications, but it is a more day-to-day management issue than "safety issues". Security is addressed at the Long-Range Facility Master Planning level at a more functional design level. Ultimately, some specific security systems may be installed to meet identified security needs, but the security system should be selected and designed to work with the functional approach taken for security at the

school. Some of the existing conditions functional issues with major security concerns are the poor circulation combined with numerous exterior doors at the High School. As the Master Plan was developed, security was revisited many times to consider how the overall layout and functional solutions will be expected to work from a security standpoint. This iterative process considered security from a number of perspectives, including the following:

- Local Law Enforcement Perspectives
- Security Technology
- Policy Approach to Security
- Common Sense

6.1.4 Land Use Regulations

ORS 195.110 requires all school districts with enrollment of greater than 2,500 students to adopt a School Facility Plan. This statute requires local governments to adopt the School Facility Plan into the local Comprehensive Plan if the same is requested by the School District. Adoption of the School Facility Plan into the Comprehensive Plan provides the District a policy basis to require local land use plans be coordinated with the school facility plans and provides a framework for the School District to request land use policy changes necessary or appropriate to implement the District’s facilities plan.

Land use regulations can also come into play in a manner similar to building code thresholds. Entitlement costs can be a significant expense associated with real estate development in Oregon. Schools are frequently located in residential areas and are permitted by cities through “Conditional Use Permits”. For new school construction or a substantial remodel (especially that add square footage), cities have wide latitude to require changes to site designs, exterior elevations, and to ask for public works improvements. If the Long-Range Facility Master Plan, for example, called for a significant addition to Orchard Hill Elementary School the City of Medford Public Works might request Juanipero to be widened to meet their current street standards. This frontage is almost 360 feet long and a street improvement of this type could easily cost \$150k-\$250k. Unanticipated improvements to satisfy land use permitting requirements are another reason that the major project budgets in the Long-Range Facility Master Plan include contingency funds, although no insurmountable land use barriers were identified through the plan development process.

6.2 Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis

Now that the plan has framed up the enrollment trends, examined school conditions and developed improvement scenarios for each school, it is useful to step back and consider the bigger picture issues confronted by the District to work towards a preferred plan. SWOT analyses are a traditional analytic framework for this type of planning process that tends to be effective even if it is a little pedestrian.

This SWOT is focused on the physical infrastructure of the Phoenix-Talent School District. While the analysis includes some curriculum/pedagogy considerations in the analysis, it is not an analysis of the strengths, weaknesses, opportunities and threats associated with the District’s instructional activity per se.

6.2.1 Strengths

The strengths section of the SWOT identifies the areas of strength the District has with respect to its school facilities and real estate holdings.

6.2.1.1 School Geography and Transportation

The elementary schools are generally well located to serve the existing and future student population base. The High School site is near the geographic center of the district and is well located to serve the District. It is easy biking and walking distance to most all the students who live in Phoenix, but would benefit from improved sidewalks on Highway 99 north of the Fern Valley Intersection.

6.2.1.2 School Campus Characteristics

- The schools have adequate total square footage to meet current and projected future enrollment needs.
- The basic design of the Middle School and the elementary schools is appropriate for their intended use and function.
- The Middle School and elementary schools condition is sufficient to warrant future capital investments to refit those facilities to serve existing and future enrollment.

6.2.1.3 Other Real Estate Holdings

- District Office is in good condition.
- The Colver Road property is a very large property that is reasonably flat and reasonably well located for the District maintenance activities, bus storage and logistics, and for athletic fields that supplement the on-campus athletic fields at the individual schools.
- The Coal Mine Road property is within Medford's Urban Growth Boundary and is planned and zoned for residential use. The site is in a prominent location at the corner of Coal Mine Road and North Phoenix Road. The site is currently vacant.

6.2.1.4 Capital Investment Funding

The District is nearing the end of the existing school bond which will sunset in 2019. The District also has resources available through the construction excise tax and many HVAC improvements may be fundable through Senate Bill 1149 that provides funding for energy efficiency upgrades.

6.2.1.5 Pedagogy

The District has an excellent approach to pedagogy with a foundation of common core instruction that is supplemented with a variety of exceptional programs based upon the needs and desires of the student body over time. Flexibility and adapting to new opportunities is a hallmark of the District's educational approach.

6.2.1.6 Enrollment

Enrollment has been steady at the Elementary schools over the last ten years. The cities of Medford and Phoenix and Talent are all planning for growth. There is market demand for growth in these areas if the regulatory and infrastructure demand can be addressed. Even a modest pace of the planned growth in these cities should be sufficient to assure some degree of enrollment growth over the next ten years with additional growth in the ten to twenty year timeframe.

6.2.2 Weaknesses

The weaknesses section of the SWOT identifies the areas of weakness the District has with respect to its school facilities and real estate holdings.

6.2.2.1 School Geography and Transportation

Maintaining balance with the enrollment between Orchard Hill Elementary sub-district and the Phoenix Elementary sub-district has been a challenge. It is expected that this challenge will increase with student population growth in Southeast Medford. Enrollment projections indicate that balancing capacity over the next 10 years will require sub-district boundary adjustments so that all City of Phoenix students attend Phoenix Elementary in order to keep Phoenix Elementary appropriately utilized and not overcrowd Orchard Hill Elementary.

The location of the Talent Middle School near the southern district boundary is problematic. Typically, middle schools are relatively close to their student body. The location of Talent Middle School requires 20% of the student body to travel more than 5 miles each way by Euclidean distance and somewhat further by road miles. This is significantly more distance for a significant portion of the student body than most other middle schools in the region. Ashland, Medford, Central Point, and Eagle Point all have more centrally located middle schools in relation to their student body. This geographic challenge is likely a contributing factor in enrollment declines that appear between 5th and 6th grade in the District. This challenge is made more complicated by the size and condition of the Middle School which is more than adequate for the use.

From a size standpoint, the school has excess capacity beyond what is needed for the existing enrollment. It is sufficiently sized to support significant projected enrollment growth. From a condition standpoint, the school is in reasonably good condition and with appropriate reinvestment can serve the District's needs for many years. Thus, because it is a quality school with sufficient capacity, the "simple" solution to build a second Middle School nearer to the Medford students is problematic from a financial standpoint as needed space and investment is already available for Middle School students at Talent Middle School.

6.2.2.2 School Campus Characteristics

- For the Talent Middle School and the elementary schools, the weakness is the risk presented if somewhat sizeable capital reinvestment does not occur or is substantially delayed. All these schools are functional, reasonably designed and have adequate capacity. However, all the schools are due for a substantial refit – well beyond basic maintenance – to deal with issues like HVAC systems that are worn out, safety features like fire alarm systems, seismic integrity and roof system failures. Failure to make these reinvestments in a timely manner could result in rapid deterioration of all four of these schools and/or risk to students due to failure of structural systems in a seismic event. If inadequate measures are taken at this time, complete remodels or replacement would likely be required by the end of the 20-year Long-Range Facility Master Plan period. Given the current condition of these four schools, delay of major capital reinvestment could make this risk a reality and instead of reinvesting on the order of \$44M total in these schools now, the District would be faced with a replacement or remodel price tag that would be 2/3rds this amount or more for each of the four schools.

- With respect to the High School, the classroom component of the school has major design/functional issues as well as the need for substantial reinvestment in all the major systems. The indoor athletics facilities and the theater are in better shape, but are still due for a significant refit that is on par with investments appropriate at the other schools. Unlike the other schools, however, the condition of the High School classroom portion of the school is problematic on a number of levels and likely contributes to the reduced enrollment in the High School when compared to elementary enrollment of the District. A very extensive remodel would be necessary to make the classroom space desirable and functional.
- A current district weakness is found in the poor condition of the maintenance facilities and resources. Sufficient reinvestment is needed to modernize and repair or replace the District's maintenance facilities so that they are adequate for providing an appropriate level of maintenance for the refurbished district schools and facilities.

6.2.2.3 Other Real Estate Holdings

- Colver Road - The main weakness in the Colver Road property is just how large it is. It may have, at one time, been considered as a future high school site. However, even if the District considered a new high school on a green field site, CSA would recommend against this location because it is too far removed from the center of the District and the future population growth in south Medford. Locating a new high school further from the District center would mean a continued enrollment exodus from the District would be likely over the long term. The savings in land cost versus finding a more centrally located green field site would not be expected to be worth the loss in enrollment and associated revenue.
- Coal Mine Road- This site may be too small for a full middle school.
- District Maintenance Facilities – facilities are in severely deteriorated condition. Upgrading these facilities is needed to support maintaining the school improvements.

6.2.2.4 Capital Investment Funding

Overall, Phoenix-Talent School District has a somewhat limited tax base to support bonding for school improvements. The District boundaries contain relatively little in the way of industrial and commercial development. Industrial and Commercial development pays significant property taxes without creating new demand for schools. When compared to other districts in Jackson County, Phoenix-Talent School District has much less employment land in its taxing boundary- Central Point has the western White City Industrial Area and downtown Central Point and the Tolo area, Eagle Point has the eastern portion of the White City Industrial area, Medford has a number of large and valuable employment areas. Ashland has relatively few employment areas, but has very high assessed land values for its residential lands and the employment land areas it does have are very valuable.

6.2.2.5 Pedagogy

It appears the main pedagogy weakness the District has related to facilities results from the loss of students beyond elementary school. The single middle school location in Talent, combined with the poor condition of the high school results in reduced enrollment. The reduced enrollment translates to less money available for instructional

revenue and this limits the spectrum of programs and activities that can be offered at the middle and high school level.

The other challenge to pedagogy associated with facilities is the attraction and retention of high quality teachers for the high school. The current high school classroom environment is sufficiently low that attracting and retaining high quality teachers to teach in that high school facility is challenging and a problem that has the potential to get much worse.

6.2.2.6 Enrollment Policies

Enrollment has become more liberal and dynamic over the last several years. It is no longer a simple matter of geography and policies controlled directly by the school board. Between private school options, charter school options, traditional district transfers, and open enrollment the competition landscape for students has changed dramatically. From a facility standpoint, efficient facilities require minimum utilization rates, and the High School and Middle School have relatively low utilization rates which translates to low levels of efficiency.

6.2.3 Opportunities

This section identifies and describes the opportunities for Phoenix-Talent School District based upon the strengths the District has and education landscape going forward.

6.2.3.1 Capture Larger Share of Elementary Enrollment at Middle School

Stemming the losses in enrollment from elementary school to middle school is a huge opportunity. The geographic dislocation issues for certain Orchard Hill Elementary students are a major contributing factor to these issues. Because the District needs to also deal with the facility quality issues at the high school and the existing middle school is in fair condition and has adequate capacity for growth, the “simple solution” of building a new relocated middle school does not appear prudent at the short term although it will likely need to be addressed in the longer term – in say 15 to 25 years. If the District substantially solves the facility quality issues at the high school, then that will help but not likely resolve this issue. Thus, short and medium term creative solutions appear required. Potential strategies might include the following:

Short/Medium Term (0-10 years):

1. Establish policies to consider (or even go so far as to promote) co-located charter school on the middle school site or development of a magnet school. A charter school would result in a lease-back arrangement from the charter school that would increase utilization at the school while generating revenue. This could also be done with a magnet school model in Talent Middle School rather than a Charter School model that would not create lease-back revenue but would generate instructional revenue and increase utilization rates.
2. Identifying some niche or programmatic instructional curriculum that could be provided to middle school students in south Medford on a small (possibly even leased) site. It could be that students are at this niche campus two days a week and at the main campus three days per week but this would limit the number of days that parents need to get their middle school age kids to Talent.

Longer Term (10-20 years):

3. Consider a second middle school that would be 5th-6th grade in Southeast Medford. Moving 5th graders to a middle school would take pressure off of Orchard Hill Elementary which will begin to reach or exceed capacity in the 10-20 year period – even with sub-district boundary adjustments with Phoenix Elementary. Having 6th grade in that school reduces the number of years that Medford students need to go all the way to Talent down to just two years. Also, 6th graders do not need as complete of athletic facilities as 7th and 8th graders which would thereby reduce the cost of the new school.

6.2.3.2 Capture Larger Share of Elementary Enrollment at High School

In addition to actively working on creative solutions to the middle school geography problem in the short and medium term, holding on to more elementary school enrollment through the high school level will likely require the incentive of the reconfigured high school concept. This represents more than just a straight-line benefit. It has the potential to support iterative improvement, where better facilities can be expected to attract more students. In addition, having buildings that run more efficiently with less energy and maintenance expense leaves more revenue for instruction, allowing the District to offer a wider range of programs which can be expected to attract even more students.

6.2.3.3 Potential Surplus Property

The District has established policies to identify and acquire lands for future school needs well in advance of the need for school construction. This is excellent public policy that should be continued. However, the District should also evaluate its real estate holdings from time-to-time to determine if the property it is holding for future schools is still considered to be well located to meet future school needs, or whether such land should become surplus. The District has two large parcels that may be surplus property from the standpoint of sites appropriate for new schools, as follows:

- ***Colver Road Property-*** Originally the Colver Road property was envisioned as a site for a future high school. Its location and size are not ideal however. The property is larger than is needed for the current athletics and maintenance uses. It is also not well located in relationship to the district population. In reviewing the potential of the property, a portion of the Colver Road property would likely still be needed to provide athletic fields if the High School remains at its current site. In addition the site continues to be appropriate for district maintenance facilities. However, not all of this property is needed for athletic and maintenance facilities and the bus storage and operations. A portion of the site could likely be made available as surplus property. For example, if it is determined that 12.5 acres are surplus property, and if such land were to be included in Talent’s UGB and be available for urban development, the value of this property would be expected to be in the \$1.5m-\$2.5m range. Preliminary review of the deed history indicates the property was transferred from Jackson County and no reversionary clauses appeared in the deed; if the District were to select a strategy to sell any of this property, a title report and legal opinion on the title regarding full market sale is recommended.
- ***Coal Mine Road Property-*** This property is approximately 11 acres and was acquired in 2010 for \$1.3m. The property is large enough to accommodate an elementary school or possibly a 5th-6th grade middle school, but may be too small for a full new middle school and appropriate athletic fields to serve 6th-8th grades. There appears to be adequate capacity in Talent Middle School for the next 10-15 years with no

problems. Solving the geographic issues with the middle school in the long-term is important, but the time value of money to hold a \$1.3m property for 10-15 years before the District would even start looking at doing something with it should be revisited on an occasional basis.

6.2.3.4 Long-Term Middle School Site Selection

This opportunity relates to a potential decision to liquidate the Coal Mine Road property if it is determined to be surplus property. There are several potential future school site locations that might make sense in growth areas planned on the east side of Phoenix. As part of the UGB amendment process for Phoenix, the District should consider reaching out to property owners in the area. As part of Medford's UGB process, many property owners offered to donate land for a future school as part of their UGB proposal because they viewed the value of future school site planning to be a net benefit to the rest of their proposed development land. This potential may exist for the Phoenix-Talent district as well.

6.2.3.5 Policies for Flexible Space Design for Flexible Pedagogy

The District has a history of timely and creative responses to new and changing instructional demand from the students and their parents in the District. This is commendable instructional policy, but can create facility challenges because curriculums can be more flexible than buildings.

If the District constructs new buildings or substantially reconstructs existing buildings, the District should consider policy guidance to include flexible and adaptable spaces in the design that can be reconfigured to meet future needs without major structural, mechanical, or electrical costs.

6.2.3.6 Efficiency Improvements

Investments in the Districts facilities have the opportunity to create significant efficiency improvements, such as:

- The District buildings have some large energy bills that are due in significant part to low efficiency buildings being heated and cooled with worn out and low efficiency HVAC. Upgrades to these facilities, will reduce operating costs for the District by tens of thousands of dollars.
- The life-cycle cost of the materials in many of the schools is high. For example, most of the district has roll carpeting which is slightly cheaper at installation but requires the entire room to be replaced when sections of the carpet begin to fail. Changing over to carpet tile allows only the failed sections to be replaced which can keep the schools feeling and looking new over time.
- Maintenance of the schools has been variable ranging from fair to poor overall. The District's recent hire of Jon McCalip introduces dramatic increase of expertise in both facility maintenance knowledge and construction management knowledge. If this newly deployed human resource is combined with a significant reinvestment in the schools, modest increases in annual maintenance expenses have the potential to yield a much higher quality learning experience from a facility standpoint.

6.2.3.7 UGB Amendments

In addition to specific involvement in the Phoenix UGB amendment to identify a site to meet the long-term needs for a future second middle school, the District may wish to

consider weighing in at a policy level for the UGB processes for Medford, Phoenix and Talent. The enrollment projections assume successful UGB amendments in all the cities served by the District. Failed UGB amendments could introduce some risk of declining enrollment over time. Successful UGB amendment will create supply to increase the likelihood that enrollment will move in the direction of higher school utilization rates which makes the facilities more efficient. Also, especially in the case of Medford's UGB, there is a plan for a new "employment campus" area that would significantly increase the District's tax base by bringing in new tax-paying businesses within the district boundaries without adding more residences in that area that would increase school demand. This has the potential to significantly improve the financial position of the District over time.

In the interest of disclosure and transparency regarding this policy question; the land for the proposed employment campus in Medford is owned by clients of CSA Planning Ltd.

6.2.4 Threats (Risks)

This section seeks to identify and describe the threats for Phoenix-Talent School District based upon the strengths the District has and education landscape going forward.

6.2.4.1 Middle School Location vs. Existing Facility Investment

The existing investment and capacity in the middle school versus its location relative to the student base is a threat. If state policies continue to allow more and more enrollment flexibility this threat risk will continue and may be made worse if Medford 549C were to build a new middle school in a location that is near the southeast Medford Area or creates a new middle school sub-district that creates significant new capacity at Hedrick. The level of investment in the existing facility and its capacity is such that the Phoenix-Talent School District has limited options in the short and medium term to address these issues.

6.2.4.2 Elementary School Building Conditions Trend-line

Failure to invest in the elementary schools in the near term is likely to put these facilities on a rapid deterioration trend-line that routine maintenance could not stem. This would create a massive liability for the District in the future while jeopardizing the grade levels with the best enrollment rates.

6.2.4.3 Land Use Policies on Colver Road Property

If it is determined that at least a portion of the Colver Road property is surplus property, then there is a major land use policy barrier to achieving the maximum achievable price for the property. While the property was designated Urban Reserve and so can be brought into the UGB it has a policy restriction on the use of the property for educational purposes only. Full value of any surplus land can only be achieved if the property is available for development.

Also, the regional plan and the Talent TSP contemplate a road through the eastern boundary of the property and then extending south along the eastern orchard boundary to Wagner. As part of a development project, this road is probably fundable in significant part but represents a potential cost liability to the School District or a future acquirer.

6.2.4.4 High School Design and Function

As has been discussed elsewhere, the design and function of the High School is an ongoing threat to enrollment and the more liberal the state enrollment policies become the greater the threat posed by the design and function of the high school.

6.2.4.5 Residential Development Pace in Phoenix and Talent

The enrollment projections have a wide range of potential student populations by 2036. Most all of that variation is based upon assumed residential development pace in Talent and Phoenix. There are regulatory and physical challenges to development in these cities. The District has adequate school capacity to serve the growth in these areas, but if the growth does not materialize, then some of the schools will continue to be somewhat under-utilized.

6.2.4.6 Position to Capture State Capital Investment Funding

Overall, the District is in a difficult situation to capture state investments in capital infrastructure. The District has been characterized as being too “rich” for much state assistance in capital infrastructure (like the prioritization in the bond matching program) but the reality is that the District still has very low local assessed value tax base when compared to neighboring districts like Medford, Ashland and Central Point.

6.2.5 SWOT Conclusions (Synthesis)

The SWOT analysis points the District in the direction of a Long Range Facilities Master Plan that focuses on addressing the acute High School deficiencies in the immediate term while seeking to address the following additional issues:

- Consider creative short/medium term solutions to address the geographic challenge associated with Medford students attending Talent Middle School.
- Develop a strategy to address longer term capacity issues at Orchard Hill Elementary and create a more permanent solution for the middle school location problem for Medford kids.
- Recognize that the capacity analysis of Talent Elementary School includes the Outdoor Discovery School classrooms. The Outdoor Discovery School building is in poor condition and real classrooms are needed for these students. Talent Elementary school also has four modular classrooms that are nearing the end of their useful life. There appears to be both a medium and long-term need for all six of these classrooms to be housed in permanent high quality classroom space.
- Decisions and policies related to the potential surplus properties should be weighed carefully by the District as the master plan is implemented over the next five years.

The SWOT analysis contained herein was developed during the planning process in advance of the bond proposal. It is retained in its “pre-bond approval form” to provide insight and guidance to future facility planning efforts on how and why the choices were made to identify needs and develop a preferred plan. As the District moves forward with the new and improved facilities made possible by the bond measure passage, the District’s circumstances will change. This change will cause the District’s strengths, weaknesses, opportunities and threats to evolve from those described in this “pre-bond approval” SWOT.

7 COST ESTIMATES FOR BUILD SCENARIOS

This section of the plan describes the cost estimating process for the build scenarios developed through the planning process. These estimates were used to select a preferred plan. Detailed direct construction cost estimate information is available in Appendix 10.2.2.

7.1 Cost Estimate Process

During the planning process, conceptual design packages were prepared which identified key information about the elements needed for constructing proposed improvements at each school and district site. These were submitted to ACC Cost Consultants, LLC who then set-up their estimating spreadsheets to assign costs to each element based on current market pricing. ACC continually updates their database of construction costs to assure they have the most up-to-date cost information. These conceptual cost estimates are intended to be conservative with the goal of assuring that there will be adequate funds identified to cover the costs of the planned improvements.

7.2 Direct Construction Cost Summary

The base cost estimate from ACC Cost Consultants, LLC provides an estimate of what the total “Direct Construction Costs” will be for each project. Also described as “hard” costs, these include the cost of all materials and labor to construct a project, plus the contractor’s costs including general conditions, insurance, bonding, plus overhead and profit. It does not include furniture or other “soft” costs.

To that number, two additional multipliers are applied to assure that there is room in the budget for changes as the detailed designs are developed, as well as respond to inflation that pushes costs up every year. The “estimating/design contingency” is important as we are at a planning level development of the design of each project. Our team has provided the Estimator with the plans showing the amount of square footage we anticipate will be added or remodeled at each site, plus a description of what the types of construction and equipment we anticipate will be used. It is not possible to anticipate everything that will be needed to complete the project at this stage. Therefore, a contingency of 10% has been added to every project estimate to anticipate the difference in costs between the conceptual design and the final design.

In addition, an escalation factor is applied. This factor converts the estimate, which is calculated in today’s 2017 costs, to what the likely cost for the same project will be the year it is most likely to begin construction. In this case we are using 2020 as the start date for the projects. The escalation cost applied here is 15.85% which equals roughly 5.3% per year for inflation.

7.3 Soft Costs

When developing a budget for construction it is important to account for all the many “soft” costs that are also part of construction projects. These costs include but are not limited to the following:

- Project Management/Construction Management fees
- Design and Engineering fees
- Special Consultants fees
- Land use and Building permits
- Testing and Inspection Fees

- Legal fees
- Financing/bond costs
- Furniture and equipment
- Moving costs

The list varies with each project. Typically we add 25 to 30% to cover these added costs to complete the budget. For the planning level of this project, we are using 25%.

7.4 Cost Estimate Summary

Attached is a Cost Estimate Summary for each of the projects by school that the team has selected. It includes both the “hard” and “soft” costs as well as the contingencies discussed earlier. Below is an overview of the estimates for each school. We have divided the costs into two major categories: Base Work and Facility Upgrades. Base work is work that does one of three things – solves security issues, addresses fire/life/safety of the buildings, or performs maintenance and replacement necessary to prevent rapid deterioration of buildings and infrastructure that are expected to be needed for the District going forward. Facility Upgrades are improvements that represent functional enhancements to the District’s facilities.

Base Work includes:

- Seismic Upgrades
- Key repairs to the facilities to avoid further deterioration
- Replacements of roofs and HVAC as required
- Efficiency upgrades to facility lighting
- Safety improvements such as fencing and entry security
- ADA upgrades at the restrooms, hardware replacement, etc.
- Replace flooring and other finishes as needed
- Repainting inside and out

Facility Upgrades include:

- Enclosing elementary school corridors
- Replacing portables with permanent classrooms
- Adding or expanding cafeterias where needed.
- Reconfiguring high school with new classroom wings



2020 CONSTRUCTION COST ESTIMATES OVERVIEW			
<i>Includes hard & soft costs, contingency and escalation</i>			
Orchard Hill Elementary School			
	<u>Base Work</u>	<u>Facility Upgrades</u>	<u>Total</u>
	\$4,477,906	\$3,588,624	\$8,066,530
Phoenix Elementary School			
	<u>Base Work</u>	<u>Facility Upgrades</u>	<u>Total</u>
	\$7,395,328	\$5,487,991	\$12,883,319
Talent Elementary School			
	<u>Base Work</u>	<u>Facility Upgrades</u>	<u>Total</u>
	\$7,080,149	\$6,663,799	\$13,743,948
Talent Middle School			
	<u>Base Work</u>	<u>Facility Upgrades</u>	<u>Total</u>
	\$9,455,918	\$711,064	\$10,166,982
Total Construction Costs	<u>Base Work</u>	<u>Facility Upgrades</u>	<u>Total</u>
Elementary & Middle Schools	\$28,409,301	\$16,451,478	\$44,860,779
High School Options			
Phoenix High School			A. Reconfigured High School
	<u>Demolition & Site</u>	<u>Remodel</u>	<u>New Construction</u>
	\$5,255,225	\$7,464,109	\$35,613,313
			<u>Total</u>
			\$48,332,647
Phoenix High School			B. Minimum Improvements
	<u>Track/Stadium</u>	<u>Min Remodel</u>	<u>Gym/Theater Core</u>
	\$1,235,895	\$2,840,295	\$4,088,940
			<u>Total</u>
			\$8,165,129

The above table includes both High School options that were given serious consideration during the planning process. The first High School project is the Reconfiguration that rebuilds approximately 2/3rds of the High School. The second option makes the minimum improvements to the High School necessary to keep the facility minimally usable over the next ten years while making key improvements in the Gym/Theater Core to assure it remains viable for a future High School Reconfiguration.

In addition, there are several proposed district facility projects that need to be considered. These include looking at what is the most cost effective option for housing the Outdoor Discovery Program and replacement of the deteriorated maintenance facilities.

District Facilities		
ODP & Magnet School Alternates:		
<i>Select Alternate 1-</i>	New classroom wing for ODP	\$2,507,754
<i>OR Alternate 2-</i>	ODP at TMS	\$53,949
<i>OR Alternate 3-</i>	ODP plus Magnet School at TMS	\$270,067
<hr/>		
District Office:	Upgrade HVAC & telephone system	\$256,442
<hr/>		
Maintenance Buildings:	New siding/roof at Maintenance Warehouse	\$409,206
	New Maintenance Building at Colver Rd.	\$2,074,656
		\$2,483,862

Estimates are reflective of the analysis and information developed in the planning process. These estimates are based upon the discussions and selections of the Project Advisory Team as they reviewed the design options provided by our team for each school. Conservative design and escalation contingencies have been included to make room for the inevitable increases that occur as a project goes through the design and construction process. This is intended to assure that the funding amounts for the key projects selected by the District are adequate to move forward when they are ready. It is preferable to find that you have some funds left over, rather than coming up short for a critical project. Remaining funds, if there are any, can then be put toward other projects that did not make the final bonded improvement project list.

8 PREFERRED IMPROVEMENT PLAN AND FINANCING CONSIDERATIONS

8.1 Planning Process Outcome

The cost estimates for all of the District’s facility needs was around \$98 million. Given the condition of the District’s facilities, the identified needs are almost universally “needs” not “wants”. Nevertheless, the needs were developed irrespective of the financial means of the District to implement the plan.

The plan could not have been implemented to any meaningful extent with the financial resources of the District without passage of a new capital facilities bond. Following the technical consulting work, the Project Advisory Team and the School Board evaluated the needs identified in the Master Planning process to prioritize the needed improvements and to select a preferred improvement plan. The objective of the preferred improvement plan was to attain the optimum balance between value to the tax payer, utility for the District’s education objectives, and political reality that significant implementation of the plan required voter approval of a general obligation bond.

The first major prioritization decision concerned the options for the High School. While consensus developed around the Reconfigured High School solution as the optimum solution from physical and cost-effectiveness standpoints. A question with respect to timing required prioritization by the District. The District was confronted with two basic options: delay the High School improvements to a future funding measure to reduce that project budget item in this round by approximately \$40 million and make available more resources for the rest of the District’s needs or include the High School Reconfiguration in this bond request and make some tough decisions on the rest of the District’s priorities to develop a bond request with a reasonable likelihood of success.

The District selected the latter option after careful consideration for a number of reasons including the following:

- The High School Reconfiguration is the “big ticket item” and interest rates are still near historical lows. Failure to act now may make implementation very difficult in the future when a high interest rate environment could dramatically escalate the total cost of this major expense.
- The enrollment risk of losing students due to poor high school facilities is real, especially in today’s “open enrollment” and “charter school” environments. The lost revenue is a significant potential problem for the District. Falling further behind neighboring facilities is too great a risk to the District’s future.
- The bond request was a major political effort. The Reconfigured High School represented a major tangible benefit that would accrue to the District’s tax payers from its passage versus the many other improvements that have benefits that are less tangible to the average tax payer – like seismic retrofitting.

In addition to the High School Reconfiguration, the planning process identified additional projects with combined costs estimated to be near \$50 million. The District received preliminary Levy Rate Analysis from their bond counsel at PiperJaffray. This preliminary analysis indicated that the full-build of all the project components would result in substantial levy increases on the property taxes of the typical homeowner. The District's objective was to give the bond measure the best chance for success by making it a more modest increase and building the most critical components at the other school campuses.

To this end, the District first looked at which project components could be removed from the preferred plan without damaging the core integrity of the planned projects. The District identified approximately \$13.5 million of beneficial projects but ones that were not absolutely necessary within the planning period. The potential projects removed from this facility improvement planning round were those that would enclose corridors at the elementary schools (instead using fencing for security), not replace the modular classrooms with new construction, and not build a new maintenance building at Colver Road. All these projects are needed, but it was determined that the District could function without them over the next 15 to 20 years. None of the investments that will occur under the preferred plan will escalate the costs of these projects in the future and very little of the alternative investments under the preferred plan will be stranded by the elimination of these components.

The remaining prioritization process focused on a more broad policy distinction and some practical realities. The District decided to make a policy distinction that asked the tax payers to bond for new capital construction and improvements that can be most efficiently coordinated with new capital construction. The idea was to parse the planned improvements according to this distinction and use the bond funding for the portion of the improvement plan to address the security, safety, functional issues, and critical building integrity issues like failing roofs. Planned improvements are depicted in Atlas Figures 5-11.

The planned improvements that were not scheduled to be bond funded are essentially deferred maintenance issues. There is a lot of this type of work but it can be completed through incremental improvements and funded from multiple sources. The work can be done by in-house maintenance staff or completed through relatively small and easy to manage contracts as time and resources allow. The planned improvements to address deferred maintenance issues total almost \$11.5 million at the non-High School campuses. This planned work essentially includes interior and exterior painting and surface refurbishing, new floor coverings, and high efficiency relamping of existing lighting fixtures. Funding for this component of the plan will come from a variety of sources such as the Construction Excise Tax, operations savings from more efficient buildings, surplus property liquidation and special targeted state grant opportunities.

The planned improvements that are scheduled to be bond funded total a little under \$72 million with \$68 million of that coming from the approved bond and the remaining \$4 million coming from a State matching grant. The planned improvements are identified below by school:

Orchard Hill Elementary School Bond-Funded Planned Improvements:

Bond Budget includes:	\$5,212,328
1 Remodel administration for security	
2 New cafeteria addition	
3 Remodel old cafeteria	
4 Seismic upgrade throughout structure	
5 Replace existing HVAC equipment	
6 New roof where not already replaced	
7 New security entrance hardware & electronics	
8 Replace all handles throughout with ADA compliant	
9 Reconfigure playground as required for new cafeteria	

Phoenix Elementary School Bond-Funded Planned Improvements:

Bond Budget includes:	\$5,405,564
1 Remodel administration for security	
2 Seismic upgrade throughout structure	
3 Replace existing HVAC equipment	
4 Remove & Replace roof	
5 New security entrance hardware & electronics	
6 Replace all handles throughout with ADA compliant	
7 New divider wall at classrooms in round building	
8 New windows in Primary Wing	
9 Renovate Art Room	
10 Upgrade fire alarm system	
11 New gated entry court and decorative security fencing at classrooms	
12 Replace parking lot	

Talent Elementary School Bond-Funded Planned Improvements:

Bond Budget includes:	\$5,465,837
1	Remodel administration for security
2	Seismic upgrade throughout structure
3	Replace existing HVAC equipment
4	Remove & Replace roof
5	New security entrance hardware & electronics
6	Replace all handles throughout with ADA compliant
7	New divider wall at classrooms in round building
8	New windows in Primary Wing
9	Upgrade plumbing in Primary Wing
10	Remodel Restrooms
11	Renovate Art Room
12	New gated entry court and decorative security fencing at classrooms

Talent Middle School Bond-Funded Planned Improvements:

Bond Budget includes:	\$6,792,604
1	Remodel administration and entrys for security
2	Expand existing cafeteria
3	Repair Roof as needed
4	Seismic upgrade throughout structure
5	Replace existing HVAC equipment
6	Replace Fire alarm & Intercom systems
7	Replace all handles throughout with ADA compliant
7	Add accessible ramp at main entry & improve accessibility at northern entries
8	Extend sidewalk along eastern bus loop

Reconfigured Phoenix High School Bond-Funded Planned Improvements

Gym Core includes- athletic facilities, theater, culinary room and band room

Bond Budget includes:	\$48,332,647
1	Replace existing HVAC equipment for Gym Core
2	Seismic upgrade Gym Core
3	Remove & Replace roof of Gym Core
4	Remodel Existing Band Room to Choir Room
5	Remodel existing theater
6	Remodel all athletic facilities
7	Upgrade locker rooms
8	Relamp or replace existing lighting
9	Construct new academic wing with dining & commons
10	Construct new Fine and Industrial Arts wing
11	New communications/fire alarm connecting new & existing buildings
12	New security system
13	Expand existing parking lot
14	New track facility
15	Upgrade existing bleachers
16	New softball and soccer fields

A Bond Levy Rate Analysis was prepared by PiperJaffray for a \$72 million bond to pay for the above identified improvements to each school, see Appendix 10.2.3. That analysis indicated a 30-year bond for that amount would require a combined millage of \$1.76 per \$1,000 of assessed value. This rate is comparable to rates in other Districts in Jackson County and will result in an increase in property tax payments of around \$140 to \$260 annually for typical homeowners with homes with assessor’s real market values from \$175,000 to \$325,000.

8.2 Bond Measure Implementation

On November 7th, 2017, the electorate in the Phoenix-Talent School District approved a 30-year bond measure for \$68 million to fund improvements consistent with the preferred plan described in Section 7 and Section 8.1 above. Fifty-four percent of voters approved the bond measure. The ultimate bond rate that was approved by the voters was to \$1.49 per thousand dollars of assessed value to fund the \$68 million in bonded improvements.

As of Spring 2018, the construction projects at Orchard Hill Elementary School and Phoenix High School are in the design process. ORW Architecture was the selected firm for design of these projects, as well as the minor remodel at Talent Middle School. ORW expects to be finished with the Design Development process for the High School by the fall of 2018.

ORW is going through the public involvement process for the High School design in the spring of 2018. They are taking the following steps to obtain community guidance on the design process:

1. Develop vision statements and key goals to guide the design. Facilitate discussions with Design Committee composed of Key decision-makers (teachers, administrators, Board member, student)
2. Convene Task forces around focused program areas with key staff and stakeholders (STEM, CTE, SpEd, Performing & Fine Arts, Career Services & Library, Athletics, Educational Models) and provide relevant examples and exercises to build a list of recommendations that will inform the area program and master plan.
3. Take Design Committee on physical tours of comparable school projects elsewhere in Oregon. Supplemented by virtual tours.
4. Staff Presentation, Student Workshop, Staff & Parent Meeting
5. Community Workshop to discuss community goals, and Open House to share planning progress
6. Two area program meetings to share options, modified through in-person discussions with Design Committee
7. Facilitate meeting with Design committee to create Adjacency Diagrams for building & site components
8. Site Master Planning explorations
9. Professional Cost Estimate for two site master plan options
10. EcoCharette with Energy Trust of Oregon (owner, architect, engineers)
11. Provide site plans and attend 1 neighborhood meeting (CSA to submit application, and perform City coordination)
12. Zoning ordinance analysis collaboration with CSA.



9 FACILITY POLICIES AND ASSET STRATEGIES

The section sets for the Long-Range Facilities Master Plan policies and Asset Strategies.

POLICY 9.1: STRIVE TO ACHIEVE THE OPTIMUM BALANCE BETWEEN COST-EFFECTIVE FACILITIES AND FACILITIES THAT ADVANCE THE EDUCATIONAL OBJECTIVES OF THE DISTRICT OVER TIME.

Strategy 9.1.1 – Develop a financial plan that dedicates operational and maintenance savings from the new construction back into facility maintenance programming.

Strategy 9.1.2 – Continue to apply the District’s policy to identify needed vacant land for future schools well in advance of any need for potential future construction.

Strategy 9.1.3 –Direct the architectural design teams to identify flexible space opportunities. Flexible space designs will allow some of the new areas to be reconfigured to meet future needs in a cost-effective manner. This will allow the District to continue providing unique educational opportunities based upon new demand expressed by students and parents.

POLICY 9.2: CONTINUE TO ADDRESS FACILITY ISSUES THAT ARE NOT RESOLVED WITH SPECIFIC IMPROVEMENT ACTIONS IN THE LONG-RANGE FACILITIES MASTER PLAN.

Strategy 9.2.1 – Continue to work on a permanent solution for the Outdoor Discovery Program School in Talent. The Talent Elementary School capacity analysis assumes the ODP classroom space is available but the current location is less than optimal. Continue to work to find an appropriate long-term location for the Outdoor Discovery Program as part of the bond implementation.

Strategy 9.2.2 – The Talent Middle School locational issue is going to continue to create enrollment risk for the District and inconvenience for many Medford families going forward. This locational issue should be revisited shortly after the improvement projects in the bond are constructed and every three to four years thereafter. Develop a strategy to address this issue as a minor update to this plan by 2025.

Strategy 9.2.3 – Capacity at Orchard Hill is projected to be an issue at some point in the future. Consider acquiring additional land from Rogue Valley Manor before final development plans are approved for that land by the City. Develop a strategy to address this issue as a minor update to this plan by 2025.

Strategy 9.2.4 – The future use of the Coal Mine Road property should be coordinated with the strategies to deal with the Talent Middle School geography issue and the future capacity issues at Orchard Hill. This property could be surplus property to be used to help fund solutions to one or both of those issues or it could be a development opportunity site to address one or both of those issues.

Strategy 9.2.5 – The District’s Colver Road property is larger than is anticipated to be needed into the distantly foreseeable future for any contemplated use. The School Board has declared up to 12 acres on the easternmost portion of the property as surplus property

at the Colver Road site, see Resolution 17-8. In order to achieve the highest and best price for this surplus property the land must be brought into the Urban Growth Boundary and be made available for residential development. This would require an amendment to the Regional Problem Solving Plan (a regionally adopted land use policy plan to allow residential use of that portion of the property following UGB inclusion). Resolution 17-8 directs staff to take appropriate actions for the benefit of the property to make the property suitable to support the highest and best future uses so that a future liquidation action of the surplus property will achieve the highest and best real property market returns to the District.

Strategy 9.2.6 – Look for ways to fund needed projects that were not included in the preferred plan in the future. The new maintenance building, enclosing corridors at the elementary schools and replacing the modular classrooms with permanent classrooms are all needed and important projects but were determined to too expensive and not worth the risk to plan implementation for the other identified projects. Nevertheless, these are needed projects and the District should look for opportunities to fund these needed improvements.

Strategy 9.2.7 – In performing site analysis at Phoenix Elementary School, it appears there is an existing right-of-way that actually projects into the main campus. This is potentially a major safety problem because stopping public access from an existing public right of way is difficult and is outside the District’s sole control. The District has requested the City of Phoenix and Jackson County vacate this right-of-way.

POLICY 9.3: COORDINATE THE LONG-RANGE FACILITIES MASTER PLAN WITH STATE AND LOCAL PLANNING EFFORTS TO ASSURE PLANS ARE WELL COORDINATED.

Strategy 9.3.1 – Coordinate with ODOT, the City of Phoenix and the Area Commission on Transportation to support the completion of the sidewalk network on Highway 99 in Phoenix north of Fern Valley Road.

Strategy 9.3.2 – Request the City of Medford, the City of Phoenix, the City of Talent and Jackson County adopt the Long-Range Facilities Master Plan into their respective comprehensive plan land use plans pursuant to the authority established in ORS 195.110.

Strategy 9.3.3 – Participate in local jurisdictions’ UGB amendment proceedings as necessary to ensure the District’s positions with respect to growth are understood by local government and State agencies.

Strategy 9.3.4 – Strategies 9.2.3 through 9.2.5 are interrelated and direct future District master planning actions to address expected future capacity issues at Orchard Hill and the geographic dislocation issues associated with Talent Middle School. These District actions should be well coordinated with local land use plans for this area. When the District undertakes facility planning to implement these strategies, it will contact Medford and Phoenix and provide coordination opportunities early in the site analysis and selection process. When either city is doing land use planning for these areas, especially UGB planning or neighborhood planning, the District will participate and provide comments to coordinate local land use plans with the Districts expected facility needs on these issues.

Strategy 9.3.5 – The Cities and the County are required by ORS 195.115 to work with the District to identify barriers and hazards to children walking or bicycling to and from school. The District will support the Cities and County in this regard with cooperative data collection for local government TSP preparation efforts to satisfy the transportation planning requirements of OAR 660 Division 12 and implementation of ORS 195.115; such support would typically begin with a request from the applicable City or the County. Examples of such cooperation may include providing bicycle counts on bike racks at applicable schools, student and staff travel surveys, and soliciting comments from students, staff and parents to identify physical transportation barriers for bicyclists and pedestrians. The District will cooperate in funding opportunities by providing readily producible data and/or policy support for local government state or federal funding requests for improvements designed to reduce identified the barriers and hazards for pedestrian and bicycle access to District schools.



10 APPENDICES (ON CD-ROM)

The appendices are not attached to the document in hard copy form. Full hard copies of the plan have a CD-ROM with the back cover with a jacket that includes the CD-ROM with all appendices. The file names and folders are organized according to the outline below.

10.1 Existing Conditions Reports (Facilities Assessment Documents)

- 10.1.1 Existing Conditions List**
- 10.1.2 Facility Condition Assessment Checklists**
- 10.1.3 Structural Evaluations Summary**
- 10.1.4 HVAC Assessment Reports**

10.2 Cost Estimating and Financing Items

- 10.2.1 Proposed Bond-Budget Improvements**
- 10.2.2 Conceptual Cost Estimate**
- 10.2.3 Bond Levy Analysis**



10.3 Project Advisory Team Materials

- 10.3.1 Tech Memo #1**
- 10.3.2 Powerpoint Tech Memo 1**
- 10.3.3 PAT Meeting #1 Minutes**
- 10.3.4 Tech Memo #2**
- 10.3.5 Tech Memo #3**
- 10.3.6 Powerpoint Tech Memos 2 & 3**
- 10.3.7 PAT Meeting #2 Minutes**
- 10.3.8 Tech Memo #4**
- 10.3.9 Design Solution Concepts**
- 10.3.10 PAT Meeting #3 Minutes**
- 10.3.11 Tech Memo #5**
- 10.3.12 Powerpoint Tech Memos 5 & 6**
- 10.3.13 PAT Meeting #4 Minutes**
- 10.3.14 PAT Meeting #5 Minutes**
- 10.3.15 Tech Memo #6**
- 10.3.16 Powerpoint School Board Meeting**

10.4 School Board Resolutions

- 10.4.1 Resolution 17-8**
- 10.4.2 Resolution Adopting Long-Range Facilities Master Plan**

Appendix 7.2.1

Assessor's Account Information

Account Sequence	Map TL Sequence	Assessment Year 2020 ▾	Print Window Close Window																														
Assessment Info for Account 1-003252-6 Map 381W22D Taxlot 1000 Report For Assessment Purposes Only Created December 29, 2020																																	
Account Info		Tax Year 2020 Info																															
Account	1-003252-6	Pay Taxes Online																															
Map	381W22D 1000	Tax Code 4-08																															
Taxlot		Acreage 43.09																															
Owner	SCHOOL DISTRICT 4	Zoning																															
Situs Address		EFU																															
6100 COLVER RD PHOENIX-TALENT/COUNTY R		Land Class																															
6184 COLVER RD PHOENIX-TALENT/COUNTY R		UNK 43.09 Ac																															
Mailing Address	SCHOOL DISTRICT 4 PO BOX 698	Property Class 204																															
Appraiser	PHOENIX OR, 975350698	Stat Class 685																															
		Unit ID 186071-1																															
		Maintenance Area 4																															
		Neighborhood 000																															
		Study Area 00																															
		Account Status ACTIVE																															
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<input checked="" type="checkbox"/> Value Summary Detail (For Assessment Year 2020)																																	
<input checked="" type="checkbox"/> Market Value Summary (For Assessment Year 2020)																																	
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Value History Details		Total:	\$ 858,930	\$ 858,930	\$ 306,970	\$ 306,970																											
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Building #	Code Area	Year Built	Eff Year Built	Stat Class	Description	Type	SqFt	% Complete	Details																								
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Appendix 7.2.2

**Lot Creation Document Warranty
Deed found at
Volume 234 Page 214**

Vol 234

214

R. H. McCALL ET UX
TO
234-214
JACKSON COUNTY, OREGON

Kind of Instrument
WARRANTY DEED
167326
Consideration
\$ 10.00

STATE OF OREGON }
County of Jackson } ss.
I hereby certify that the annexed instrument
of writing was received and filed for record at
4:30 o'clock P. M on the 7th day
of January 1942
G. R. Carter Clerk
By _____ Deputy

KNOW ALL MEN BY THESE PRESENTS, That R. H. McCALL and BESSIE M. McCALL, husband and wife, in consideration of Ten and no/100 Dollars, and other good and valuable considerations, to them paid by JACKSON COUNTY, OREGON; do hereby grant, bargain, sell and convey unto said JACKSON COUNTY, OREGON its heirs and assigns, all the following real property, with the tenements, hereditaments and appurtenances situated in the County of Jackson and State of Oregon, bounded and described as follows, to-wit:

Commencing at a point on the North line of Donation Land Claim number 60 in Township 38 South of Range One West of the Willamette Meridian, which point is 8.08 chains East of the Northwest corner of said claim and running thence East 31.42 chains to David Brower's Northwest corner; thence South 14.86 chains to the South boundary of said claim; thence West along said South boundary 31.42 chains; thence North 14.86 chains to the place of beginning, containing 45.38 acres, more or less.

The parties of the first part herein are to pay the taxes due and payable for the year 1941.

To Have and to Hold, the above described and granted premises unto the said JACKSON COUNTY, OREGON its heirs and assigns forever.

And we, R. H. McCall and Bessie M. McCall, husband and wife, the grantors above named do covenant to and with the above named grantees, its heirs and assigns that we are lawfully seized in fee simple of the above granted premises, that the above granted premises are free from all incumbrances, and that we will and our heirs, executors and administrators, shall warrant and forever defend the above granted premises, and every part and parcel thereof, against the lawful claims and demands of all persons whomsoever.

Witness our hands and seals this 7th day of January, 1942.

Executed in the Presence of

R. H. McCall (SEAL)
Bessie M. McCall (SEAL)

STATE OF OREGON, }
County of Jackson } ss.

BE IT REMEMBERED, That on this 7th day of January A. D. 1942, before me, the undersigned, a Notary Public in and for said County and State, personally appeared the within named R. H. McCall and Bessie M. McCall, husband and wife, who are known to me to be the identical individuals described in and who executed the within instrument and acknowledged to me that they executed the same freely and voluntarily.

IN TESTIMONY WHEREOF, I have hereunto set my hand and official seal the day and year last above written.

Notarial Seal of
Mabel Showers

Mabel Showers
Notary Public for Oregon.
My Commission expires June 7, 1942.

Appendix 7.2.3

Summary of Historic County Permits

COLVER FIELD DEVELOPMENT HISTORY

Summary

- March 19, 1975 Zoning Clearance for School Dist #4 for School Bus Repair, Parking, and Shop. Zoned Farm Residential 5. Permitted use in this zone. Requires Conditional Use Permit, Comments: "Received June 26, 1975".
- June 26, 1975 Septic Permit 15-321-75N issued.
- June 30, 1975 Building permit 594-E-675. Application made to Jackson County Building Division for construction of a 50x75 foot pre-engineered 3,750 sq. ft. metal building including 25x25 foot conference room 25x25 foot shop space and 3 bay bus repair area.
- July 22, 1975 Building permit 594-E-675 issued for Bus Repair Shop. Pre-engineered metal building to include a 25x25 foot conference room, 25x25 foot shop space and 3-bay bus repair area. Note on permit states "CUP Appv'd".
- September 3, 1975 Final Inspection from Sanitation Division Jackson County Dept of Planning and Development for Bus Repair Shop.
- March 30, 1976 Building permit 594-E-675 for Bus Repair Shop final inspection.
- April 2, 1976 Septic Permit 15-321-75N Certificate of Satisfactory Completion signed.
- February 4, 1977 Letter and map from School Dist. 4 representative to Mr. Weaver. Letter is an application for a conditional use permit for a baseball field on the high school Colver Road site. Copy of the Jackson County map of the proposed site shows the site is zoned F-5. Note on map states it is an amendment to Conditional Use Permit File No. 75-16-SP for site 38-1W-22 TL 4600, previous map and tax lot prior to further re-mapping as 38-1W-22D TL 1000.
- May 13, 1988 87-4-UGBA. Sent direct to Planning Commission on July 14, 1987. Planning Commission recommended denial to the Board on January 4, 1988. Board denied on May 13, 1988.
- March 11, 2004 CPA File LRP2004-00004. Failing septic on property outside Talent UGB. Goal 11 Exception. See County Staff Findings File ZON2005-00966.
- March 11, 2004 Non Conforming Use Application ZON2004-00330. Application for maintenance building to be constructed on existing school owned playing fields property School Dist #4 Phoenix-Talent. Expansion of a Non Conforming Use. Determination that the playing fields are a pre-existing and lawfully established.

COLVER FIELD DEVELOPMENT HISTORY

Summary

September 13, 2005 ZON2005-00966. Request for sewer hookup and continued and expanded use of existing uses on site which include a bus barn, maintenance shop, office and athletic fields. Final Approval September 13, 2005. This Staff Report determined in part that:

1. The Parcel was legally created prior to countywide zoning
2. At the time of development, the property was zoned F-5 and school related uses were conditionally allowed. *See File 75-16-SP*
3. The existing maintenance building , office, bus barn and ball fields have been in existence on the parcel since the 1970's and were properly permitted by Jackson Count at the time of development.
4. The ball fields were added in 1977 as an amendment to the original Planning approval for the bus barn and accessory maintenance building.
5. The ball fields are an approved accessory use.
6. It was determined that a health hazard exists on the property.
7. The existing onsite sanitation system cannot be repaired nor a new system installed.
8. The proposed connection to RVSS is an alteration of an existing nonconforming use that will not alter the use in a manner that will have any adverse impact on surrounding neighborhoods.
9. Board of Commissioners adopted Board Order No. 402-05 supporting the sewer connection and further supports expansion of the city of Talent Urban Growth boundary to include the Phoenix-Talent School District #4 site in its entirety.
10. The RVSS connection will be limited to existing uses on the site (maintenance shop, office, bus barn and ball fields.

Appendix 7.3.1

Jackson County Board of Commissioners Order 402.05

BEFORE THE BOARD OF COUNTY COMMISSIONERS

STATE OF OREGON, COUNTY OF JACKSON

IN THE MATTER OF EXTENSION OF)
ROGUE VALLEY SEWER SERVICE (RVSS))
TO PROPERTY OWNED BY THE PHOENIX-)
TALENT SCHOOL DISTRICT #4 AND)
SUPPORTING EXPANSION OF THE)
CITY OF TALENT URBAN GROWTH)
BOUNDARY TO INCLUDE SAID PROPERTY)

ORDER No. 402-05

WHEREAS, enactment of Senate Bill 100 in 1973 established a Statewide land use regulation system that initially included 14 Goals and Guidelines implemented through ORS Chapters 92, 197, 215; OAR Chapter 660, and local comprehensive plans and land development ordinances; and

WHEREAS, Goal 11 (Public Facilities and Services) directs State agencies and local governments to *“Plan and develop a timely, orderly and efficient arrangement of public facilities and services to serve as a framework fo urban and rural development;”* and

WHEREAS, Statewide Planning Goal 11 as it pertains to wastewater disposal has historically been implemented through OAR 660, Division 011 (Public Facilities Planning), OAR 340, Division 018 (State Agency Coordination Program); and OAR 340, Division 071 (Onsite Wastewater Treatment Systems); and

WHEREAS, Statewide Planning Goal 11 was amended in July 1998 to include a definition of the term *“Extension of a sewer or water system,”* which included express language that any connection to an existing system, including individual taps to existing uses, constitutes an “extension” of sewer service; and

WHEREAS, Statewide Planning Goal 11 states that *“Local governments shall not rely upon the presence, establishment, or extension of a water or sewer system to allow residential development of land outside urban growth boundaries or unincorporated community boundaries at a density higher than authorized without service from such a system,”* thereby mitigating any growth inducing impacts of such extensions; and

WHEREAS, restricting connections to existing sewer lines with adequate capacity to support both urban and rural uses does not contribute to the preservation of agricultural or forest land but rather removes potentially productive land from farm and forest use when on site sanitation systems are employed; and

WHEREAS, OAR 660-011-0060(2) prohibits extension of sewer service outside urban growth and unincorporated community boundaries except in limited circumstances; and

WHEREAS, documented health hazards are one of the few reasons sewer service may be extended beyond an urban growth or unincorporated community boundary; and

WHEREAS, the Board of Commissioners of Jackson County has determined the existing septic system has failed and cannot be repaired based upon analysis by a qualified sanitarian; and

WHEREAS, there is no growth inducing impact associated with extension of sanitary sewer service to the existing Phoenix-Talent School District #4 property located at 6100 Colver Road, which is developed with a bus barn and ballfields for District use; and

WHEREAS, the District may wish to use the site in the future for a school, which is prohibited within three miles of an urban growth boundary.

NOW THEREFORE, the Board of County Commissioners of Jackson County hereby ENDORSES and SUPPORTS the following actions:

1. Issuance of a land use decision permitting connection of the existing restroom facility on site to RVSS in order to cure a health hazard resulting from a failed septic system.
2. Expansion of the city of Talent Urban Growth Boundary to include the Phoenix-Talent School District #4 site in its entirety.

DATED this 18th day of August, 2005 at Medford, Oregon.

Absent

Jack Walker, Chair

Dave Gilmour

Dave Gilmour, Commissioner

Dennis "C.W." Smith

Dennis "C.W." Smith, Commissioner

Appendix 7.3.2

Phoenix-Talent Little League Letter of Intent



November 3, 2021

Dear Members of the Phoenix-Talent School Board,

On behalf of Phoenix-Talent Little League (PTLL), please accept this Letter of Intent to relocate the current PTLL fields and facility to the expanded Colver Road Educational Facilities and Sports Complex. The PTLL desires to enter into negotiations for property to ultimately be the future home of a new PTLL fields and associated facilities. A conceptual plan has been developed for future facilities of approximately 9.7 acres. At present, that proposed location is approximately as shown in the document attached. PTLL understands the site planning is conceptual and actual locations may evolve as the design work progresses, but the overall acreage and fields are expected to meet the community's needs.

We welcome the relocation of our existing facilities, which are now based at MO Grove at the Jim Walker Complex on Rogue River Parkway, a property PTLL leases from the City of Talent. That lease expires in 2025, so not only do we need to find a new home for the program – we are delighted for the opportunity to partner with the Phoenix-Talent School District in order to provide our community with a unique and contemporary facility to support the district families we serve.

PTLL is the only independent organized youth sports program serving Phoenix-Talent families exclusively. The mental, social, and emotional benefits for students who participate in youth sports are immeasurable, and the enhancement of local little league fields would make a considerable difference in our ability to meet and exceed the growing needs of our community. This endeavor would allow for us to potentially expand the number of students and families who enjoy little league, as well as explore partnerships with other district minded organizations and promote synergy amongst them. The development of a state-of-the-art complex, representing the spirit of community that makes the Phoenix-Talent family so incredible, is something we absolutely wish to be a part of.

To that end, PTLL wholeheartedly supports the expansion of the Urban Growth Boundary to include the Colver Road district owned property, and looks forward to collaborating with the district to relocate PTLL facilities. There is no question that the demand for a multi-use educational and sports complex exists in our community.

The parties agree that their goal and interest herein is to bring about a use and capital investment agreement and the parties agree to negotiate/cooperate in good faith for the period set forth below.



1. **Closing or Termination.** The transaction will be completed or settled on or before 06/30/2023. This letter will automatically terminate on such date if the transaction is not completed.
2. **Governing law.** This letter and all matters thereto shall be governed by and construed in accordance with the law of the State of Oregon, without giving effect to the conflict of laws principles.
3. **Non-binding.** This letter is intended only as a reflection of the intention of the parties, and neither this Letter nor its acceptance shall constitute or create any legally binding or enforceable obligation on any party, except with regards to Closing or Termination and Governing Law.
4. **Miscellaneous.** This Letter contains the entire understanding between the parties considering the same or substantially the same matter. This letter may be amended, supplemented, or otherwise modified only in writing signed by duly authorized representatives of each party. The section headings are for reference purposes only and shall not otherwise affect the meaning, construction, or interpretation of any provision in this letter.

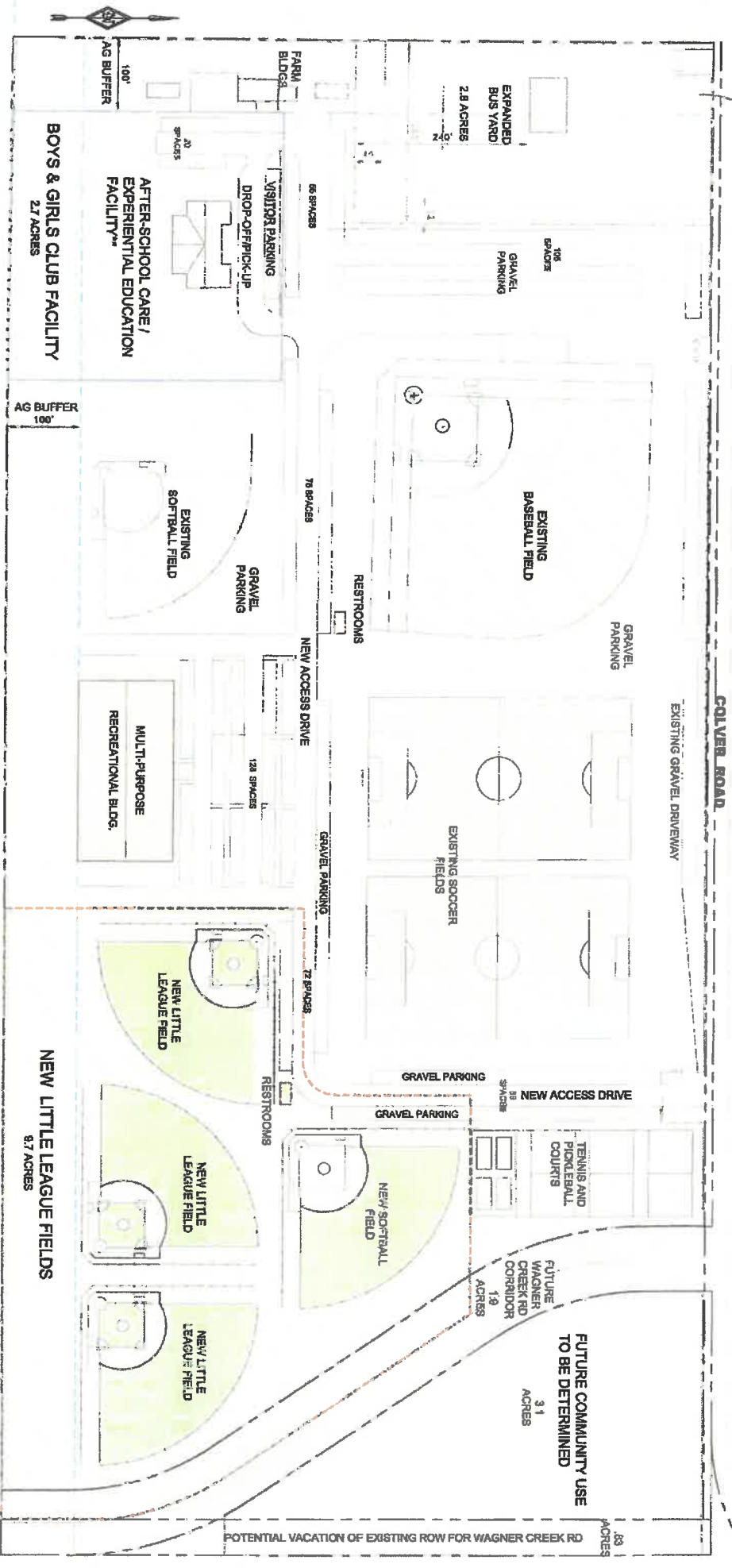
Thank you for this remarkable opportunity. Please don't hesitate to contact us if you have any questions at all.

Sincerely,

Members of the Phoenix-Talent Little League Board of Directors

Kourtney Selee, Ashley George, Amanda Guthmiller, Brittany McDonald, Cody Rombach, Nick McDaniel, Zepp Charlton, Heather Wulf, Nathan Bursk, Andrew George, Brittany Dizick, Shonda Bursk, Matt Guthmiller

FUTURE AG BUFFER, TO BE INSTALLED UPON REDEVELOPMENT WITHIN 400 FEET OF THE WEST PROPERTY LINE*



*REDEVELOPMENT EXCLUDES REHABILITATION OF EXISTING FIELDS
 **CURRENTLY PLANNED TO BE SHARED WITH OUTDOOR DISCOVERY PROGRAM

PHOENIX-TALENT SCHOOLS

DATE: 11/8/2021 SCALE: NTS

COLVER ROAD EDUCATIONAL FACILITIES CONCEPT PLAN

NOTE: THIS MAP WAS DEVELOPED FOR ILLUSTRATION ONLY AND IS NOT A SURVEY. ACTUAL CONDITIONS MAY VARY.



Phoenix-Talent Little League Board Meeting Minutes

November 15th, 2021 at 6:00 pm
Angelo's Pizza, Phoenix, OR

Roll Call 6:10 pm

President	Kourtney Selee	X
Vice President	Ashley George	X
Secretary	Brittany McDonald	X
Treasurer	Amanda Guthmiller	X
Safety Coordinator	Cody Rombach	X
Equipment	Nick McDaniel	
Umpire Manger	Zepp Charlton	X
Player Agents (Boys)	Shonda Bursk	X
Player Agents (Girls)	Heather Wulf	X
Concession	Ashley George and Shonda Bursk	
Field Maintenance	Nathan Bursk and Andrew George	
Fundraising/sponsorship	Matt Guthermiller	X
Information Officer	Amanda Guthmiller	
Uniforms	Brittany Dizick	X

Announcements:

Colver Road Facility: Need to decide if the board wants to sign a letter of intent to move forward with renting the Colver Rd. Facility from school district.

New Business:

- Amanda went over budget for 2022 with anticipated budget of \$26,000. Bored will vote on budget next meeting after Umpires are added to budgeted.
- Board decided to use Rogue Valley Umpires for all boys and girls, Major and Minor games at \$40 a game will budget for \$2,000.
- Plumbing in bathrooms was discussed as a concern, Matt was going to look at receipt from Plummer to see what was done to fix bathroom. Renting a porter potty was suggested by Shonda, \$85 bi-weekly and we clean and provided toiletries or \$90 weekly and they clean and provided toiletries.
- Registration will open January 1st – Close March 14th, 2022- bored discussed raising registration by \$5 for 2022 season, will finalize at next bored meeting.
- Practice will start March 1st/ Games start April 1st
- Need to get flyers for little league out to schools PTA for distribution?
- Kourtney is going to research Title One Scholarship through little league.

- Kourtney is going to see if we can get T-Mobile to donate hot spot or cost to get one for season in the concession stand.
- How do we get a 501C3 form, Kourtney will talk to Damn
- Field Maintenance, Waiting on Milestone greenery for official date for cleanup, City parks offices stated fields are in fine standing till spring. Need to figure out how to turn sprinklers off on fields.
- Need to see if Rogue Valley Roofing is still willing to fix Concession stand roof, as a Donation.
- Field clean up day set for March 12
- Picture Day set for 3/28 and 3/29
- JPal- January 8th 10am-1pm at PHS, Ronda Scoggins is the coordinator. The bored will need to get tablets or chrome books together to sign players up at end of camp. Will use PHS guest Wi-Fi.

Next meeting dates to finalize:

- Tryouts- Should we use turf field at PHS if available?
- Opening Ceremonies Vs. Hat night

Motions:

- Amanda Guthmiller puts in a Motion to sign letter of intent to go forth with Cover Rd. Facility, 2nd Ashley George. No oppositions.

Next Meeting Date set for December 13th at 6:00pm Phoenix-Talent Little league Concession stand

Meeting adjured at 7:15pm



Kourtney Selee- President



Brittany McDonald- Secretary

Appendix 7.3.3

Boys and Girls Club of the Rogue Valley Letter of Intent



Phoenix-Talent School Board/District

Subject: Letter of Intent for new facility

Ref: Colver Road Educational Facilities Plan 3 .pdf. dated 11/09/21

Dear Chair,

This letter of Intent sets forth the mutual interest of the Boys and Girls Clubs of the Rogue Valley (BGCRV) and the Phoenix-Talent School District regarding its desire to enter into negotiations for property to ultimately be the future home of a new BGCRV club/community center for use in the Phoenix-Talent area. At present that proposed location is approximately as shown in the .pdf referenced above.

The BGCRV has clearly demonstrated its support over the years to the community through facilities provided at the Talent Elementary School by the Phoenix-Talent School Board. However, the facility in existence is limited in size, availability, and scope. BGCRV desires to expand its educational services, recreational opportunities, and events to even more children and the community in the years ahead. A facility at the location indicated would be a huge step forward.

The BGCRV understands the plan is in concept stage only but wants to indicate our definite interest in 2.5 to 3.5 acres of the subject property even if the location shifts during the course of negotiations and site plan refinements. The parties agree that their goal and interest herein is to bring about the transaction and thus promises to negotiate/cooperate in good faith for the period set forth below.

1. **Closing or Termination.** The transaction will be completed or settled on or before 12/31/2023. This letter will automatically terminate on such date if the transaction is not completed.
2. **Governing law.** This letter and all matters thereto shall be governed by and construed in accordance with the law of the State of Oregon, without giving effect to the conflict of laws principles.

GREAT FUTURES START HERE.

Grants Pass • Illinois Valley • Talent

Administrative Office: 203 SE 9th Street • Grants Pass, OR 97526 • (541) 479-5258 • www.begreat4kids.com

Boys & Girls Clubs of the Rogue Valley is a 501(c)(3) Charitable Organization. Federal Tax ID: 93-0588108



**BOYS & GIRLS CLUBS
OF THE ROGUE VALLEY**

Celebrating 50 Years
1970 - 2020

3. **Non-binding.** This letter is intended only as a reflection of the intention of the parties, and neither this Letter nor its acceptance shall constitute or create any legally binding or enforceable obligation on any party, except with regards to Closing or Termination and Governing Law.

4. **Miscellaneous.** This Letter contains the entire understanding between the parties considering the same or substantially the same matter. This letter may be amended, supplemented, or otherwise modified only in writing signed by duly authorized representatives of each party. The section headings are for reference purposes only and shall not otherwise affect the meaning, construction, or interpretation of any provision in this letter.

If the forgoing terms and conditions are acceptable, please sign and return this Letter to the undersigned.

Very truly yours,

Rene Cardiff

Board President

GREAT FUTURES START HERE.

Grants Pass • Illinois Valley • Talent

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