

**Facilities and Capacity Workshop  
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**Executive Summary**  
Portland Board of Public Education  
Business Meeting Agenda Item

**TOPIC:** Workshop on District Capacity and Enrollment Study

**DATE:** August 21, 2018

**PREPARED BY:** Xavier Botana, Superintendent

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**Recommended Action:**

- Action Item – Consent
- Action Item – First Read
- Action Item – Vote
- Discussion Item
- Information Item

**Agenda Reference:**

1. A.

**School Year Item:**

W-19-17/18

**Recommendation(s):**

Discuss possible options for a district capacity and facility assessment

**Purpose:**

**Connection to Comprehensive Plan:**

The work of the Portland Board of Public Education (“Board”), as facilitated by the Chair, supports all goals and objectives of the Comprehensive Plan:

**Goal 1 – ACHIEVEMENT:** All Portland Public School students will be prepared for college and career and empowered to pursue a productive postsecondary path.

**Goal 2 – WHOLE STUDENT:** All Portland Public School students will develop the skills, habits and mindsets they need to engage in and contribute to our diverse city and ever-changing world.

**Goal 3 – EQUITY:** Portland Public Schools is vigilant in supporting each and every student’s particular path to achieving high standards, rooting out systemic or ongoing inequities.

**Goal 4 – PEOPLE:** Portland Public Schools attracts, supports and retains talented and diverse people who use their strengths to achieve our shared goals.

**Background:**

During the 2019 budget process, it became apparent that changes in the state funding formula and the increased valuation for Portland would likely lead to ongoing reductions in state funding for Portland Public Schools for the foreseeable future.

As part of the Board’s commitment to the council and community as part of that budget process, the Board committed the district to review all aspects of the district’s current enrollment and capacity to determine if there are efficiencies that can be implemented to reduce



the overall cost of education.

To that end, the Board adopted a resolution to that effect on May 15<sup>th</sup>, 2018 (attached). The resolution calls for the superintendent to present a plan for executing a comprehensive facilities and capacity analysis over the course of the 2018-19 school year.

Staff have been working with Davis Demographics, a company with history working with the Portland Public Schools on similar projects (most recently in connection with the elementary facilities work in Buildings for Our Future).

The workshop will be an opportunity for the Board to learn about the proposed work plan including the data work needed and process steps envisioned.

**Fiscal Impact:**

Not to exceed \$260,000

**Attachment(s):**

May 15<sup>th</sup> Board Resolution  
Davis Demographics/Thomas & Williamson Proposal #1  
Davis Demographics/Thomas & Williamson Proposal #2  
High Level Timeline  
Proposed oversight commission composition



**RESOLUTION SCHOOL BOUNDARY AND SCHOOL CAPACITY REVIEW**

Whereas, A strong sense of community is essential to a successful school district and successful students;

Whereas, The Portland Board of Public Education believes that all children deserve the same educational opportunities;

Whereas, The Board believes that a common district wide Portland Public School experience would bond our expansive district and foster a strong sense of community;

Whereas, The Board is committed to maintaining neighborhood cohesion and the need to ensure that siblings attend the same schools; and the desire to maintain balance across schools that reflects the diversity of the City;

Whereas, The Board believes that the district is more than political, governmental or geographical boundaries and directional lines on a map;

Whereas, The Board recognizes that the Portland district faces reduced funding from local, state and federal sources;

Whereas, The Board acknowledges the budget concerns created by declining revenues and increasing expenses;

Whereas, The Board acknowledges rising property values will continue to reduce the amount of state funding the district receives;

Whereas, The Board acknowledges that adequate funding includes the general operational costs, including, but not limited to, staff salaries and benefits;

Whereas, The Board acknowledges the need to inquire about how much people are willing and able to pay for education; the community's expectations for its schools; and the effective use of resources;

Whereas, The Board tackles the most urgent needs of our facilities while postponing other maintenance work to another year and acknowledges the district's maintenance needs based upon consultant Sebago Technics report that the district has maintenance needs that exceeds \$320 Million and that reports recommend the district allocate approximately \$12-15 million annually to keep up on general maintenance;

Whereas, The Board realizes accurate enrollment projections are vital to effective long-term planning and enrollment management;

**NOW THEREFORE BE IT RESOLVED**, that no later than two months after authorization to proceed from the Board, the Superintendent shall present a work plan to the Board at a workshop meeting. The work plan shall identify resources and staffing, a schedule of key activities and milestones, including consultations with the Board and the cost of funding sources to complete the work as outlined herein



BE IT FURTHER RESOLVED, that in order to complete the work noted below the Portland Board of Public Education directs the superintendent to hire an independent consultant to research, guide, and facilitate the completion of said work and one who shall have skills in computer mapping, demographic analysis, five year planning, and experience involving the public in multiple and meaningful ways no later than one month after approval of the workplan by the Board of Education

BE IT FURTHER RESOLVED, that upon the approval of the Board at one of its regular business meetings the Superintendent shall appropriate such funds from the Board Contingency Line in order to retain the services of such consultants as may be deemed necessary to complete the work as outlined herein;

BE IT FURTHER RESOLVED, that the Superintendent shall deliver a report of findings and recommendations to the Board by six months after the approval of the workplan by the Board of Education;

BE IT FURTHER RESOLVED the study include:

- Five year projections and planning integrated with data from multiple sources. Review five year historical trends to better understand local demographic cycles;
- Five year local plans for housing development or other initiatives that may affect demographics; and
- Five year rolling strategy to bring together programs, demographics and facilities;

The five year plan shall include the following:

1. Demographics data that includes:
  - A demographics map showing land uses and planned developments; and
  - A demographics map plotting students for the three school levels (all maps should be digital maps) in a manner that is useful for analysis but maintains student privacy consistent with applicable federal and state laws and local policies;
2. Facilities data that includes:
  - Data on number of standard and portable classrooms at each school site;
  - Data on number of standard classrooms used at each building. List each standard classroom with its actual use and how many periods per day that use goes on;
  - Data on standard classroom uses accepted by the district for all schools and what uses found are not standard;
  - Known needs for renovations-not additions-at each school, and estimated costs;



- Building and site needs as to life safety code, building code, building integrity, health security, site preservation, support programs, core programs, special programs, and desirable options;
  - Site acreage at each school that is buildable along with playground area. Identify site problems with drainage, security, faculty and visitor and student parking, and bus parking and circulation; and
  - Area of each core facility: media center, food service, and physical education with a comparison to applicable standards and best practices;
3. Enrollment data that includes:
- Enrollment projections by grade for five years at each school
  - A school zones map with overlays of elementary, middle and high school zones on a street map;
  - District student transfer policies by using computer mapping of students overlaid on attendance zones and the district enrollment database to determine how many students attend a school other than their zoned school at each facility along with their home school by the map plotting of all students;
  - Data on how students are assigned to schools and what existing alternatives are;
  - Alignment of elementary, middle and high school attendance areas should be a factor in establishing attendance areas as much as possible;
  - Enrollment trends, capacity trends and facility costs which includes current and anticipated populations in the district, birth rates, cohort survival projections, local transportation and land use plans, zoning policies, new housing developments, a history of school attendance data and school locations is also a part of the assessment; and
  - Mapped data per school for Free and Reduced Lunch versus non-Free and Reduced Lunch student enrollment;
4. Cost data that includes:
- Cost to operate each school per year, not including teachers who will be needed whether the school is closed or not. It should include payroll costs for Principal, Secretaries, media personnel, food service personnel and janitors and utility expenditures;
5. Program data that includes:
- Separate building and site needs including special program needs and wants;
  - Special needs of special programs (self-contained special education etc.);
  - Types of programs that are offered in buildings be identified including the distribution and use of space for any special programs. ;
  - Create boundaries that reflect equitable access to services and programs; and



- Maximize walkability;

6. Transportation data that includes:

- Current configuration of transportation programming including the number of students transported daily by grade and school, the overall transportation costs by student, school and program;
- Safety, convenience and efficiency of transportation, as well as student travel times and current population patterns considered in assigning students to buildings;
- Transportation sustainability; and
- Costs of busing students to school;

7. Plan for Community engagement:

- Engage community for a better understanding of what the community's priorities are via focus groups, telephone or email/mail surveys, community meetings, workshops and internet panels to develop priorities;
- Gather community input and convey information; and
- Develop a process flowchart and timeline to communicate information about the process to the public. Steps in the process include data gathering, forums, public workshops, scenario development, analysis of community input, and public hearings.

BE IT FURTHER RESOLVED, that as part of the study it shall evaluate the distribution of students throughout the city such that at the completion of the elementary school capital improvements, each student has access to an equitable physical environment in which to learn no matter where they live within the city;

BE IT FURTHER RESOLVED, annually, the Superintendent shall study and evaluate the alignment of enrollment with capacity in the schools and method(s) by which enrollments can be made to more closely align with capacity. To include computer mapping of school zones and enrollment every year, integrated with proven 5 year enrollment projections by grade and school.

BE IT FURTHER RESOLVED, that this effort shall be legally established and authorized to act when this resolution is approved.

Adopted on this 15<sup>th</sup> day of May, 2018.

The Portland Board of Public Education

**Work Plan and Fee Schedule**  
Portland Public Schools | District-wide Facility Study



The information contained in this document is the property of Thomas & Williamson, LLC and Davis Demographics & Planning. The Portland Public Schools board of directors and administration ("the district") is granted limited access to view this information solely for the purpose of reviewing the author's recommended work plan and associated fee to conduct a study of the district's facilities, operations, operating budget and other factors subject to a potential reconfiguration of the district's facilities. The district shall not forward, copy, transcribe or in any way duplicate this document without our prior written approval. The district shall not discuss the information contained herein with any potential competitor, advisor or consultant.

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WBS	Task/Sub-task	Task Lead	Grand Totals (DDP + T&W)	T&W Totals	DDP Totals
<b>1</b>	<b>Community Survey</b>	<b>T&amp;W</b>			
1.1	Develop list of survey questions in collaboration with PPS		\$2,360	\$2,360	
1.2	Prepare & deploy online survey for community feedback		\$1,040	\$1,040	
1.2	Analyze data & prepare charts/graphs		\$1,460	\$1,460	
1.3	Prepare report of community feedback survey		\$1,940	\$1,940	
	<b>Total Costs for 1 - Community Survey</b>		<b>\$6,800</b>	<b>\$6,800</b>	
<b>2</b>	<b>Commission Engagement Sessions</b>	<b>T&amp;W</b>			
2.1	Commission Session 1 - Review Survey Results & District-wide Capacity Analysis				
2.1.1	Assist PPS in Organization of Commission		\$775	\$775	
2.1.2	Prepare presentation & handouts		\$2,500	\$2,500	
2.2	Commission Session 2 - Review Prelim. Enrollment Projections & Develop Conceptual Scenarios				
2.2.1	Prepare presentation & handouts		\$2,500	\$2,500	
2.3	Commission Session 3 - Review Preliminary Scenarios & Baseline Cost Analysis				
2.3.1	Prepare presentation & handouts		\$2,500	\$2,500	
2.4	Commission Session 4 - Finalize Scenarios & Presentation Info to Community & Board				
2.4.1	Prepare presentation & handouts		\$2,500	\$2,500	
	<b>Total Costs for 2 - Commission Engagement Sessions</b>		<b>\$10,775</b>	<b>\$10,775</b>	
	<i>Note: These costs do not include travel expenses which are provided at the bottom of this document.</i>				
<b>3</b>	<b>Community Engagement Sessions</b>	<b>T&amp;W</b>			
3.1	Community Session 1 - Present Survey Results, Enrollment Projections, Baseline Data				
3.1.1	Assist PPS in Organization of Community Sessions		\$775	\$775	
3.1.2	Prepare presentation (& handouts)		\$2,500	\$2,500	
3.2	Community Session 2 - Present Redistricting/Reconfiguration Scenarios				
3.2.1	Prepare presentation (& handouts)		\$2,500	\$2,500	
	<b>Total Costs for 3 - Community Engagement Sessions</b>		<b>\$5,775</b>	<b>\$5,775</b>	
	<i>Note: These costs do not include travel expenses which are provided at the bottom of this document.</i>				
<b>4</b>	<b>Demographics History &amp; Overview</b>	<b>T&amp;W</b>			
4.1	Review Previous Independent Demographer Projections <i>Refer to Appendix A - Davis Demographics Proposal</i>		\$450	\$450	
4.2	Prepare Demographics History, Trends and Dependences Including Review of Census Data Regarding Population & Housing		\$2,560	\$2,560	
	<b>Total Costs for 4 - Demographics History &amp; Overview</b>		<b>\$3,010</b>	<b>\$3,010</b>	
<b>5</b>	<b>Demographics &amp; Enrollment Study</b>	<b>DDP</b>			
5.1	Davis Demographics - Demographics & Enrollment Study		\$17,500		\$17,500
5.2	T&W Coordination & Review with DDP		\$2,360	\$2,360	
	<b>Total Costs for 5 - Demographics &amp; Enrollment Study</b>		<b>\$19,860</b>	<b>\$2,360</b>	<b>\$17,500</b>
<b>6</b>	<b>Educational Facility Capacity Analysis</b>	<b>T&amp;W</b>			
6.1	Programming survey set-up and administration		\$0	\$0	
6.2	Review district-furnished program information		\$1,010	\$1,010	
6.3	Develop elementary school keyplans   confirm current usages		\$5,600	\$5,600	
6.4	Develop secondary school keyplans   confirm current usages		\$3,360	\$3,360	
6.5	Develop baseline elementary capacity vs loading tables		\$3,925	\$3,925	
6.6	Calculate baseline secondary master schedule loading efficiency		\$13,260	\$13,260	
6.7	Develop elementary school specials loading patterns		\$1,010	\$1,010	
6.8	Develop optimized elementary school capacity tables		\$3,925	\$3,925	
6.9	Prepare optimized elementary school keyplans		\$840	\$840	
6.10	Develop optimized secondary school department models (subj centered)		\$900	\$900	
6.11	Prepare optimized secondary school keyplans		\$1,680	\$1,680	
6.12	Online Conference Calls to Capacity vs Loading		\$730	\$730	
6.13	Draft, review and finalize analysis		\$1,930	\$1,930	
	<b>Total Costs for 6 - Educational Facility Capacity Analysis</b>		<b>\$38,170</b>	<b>\$38,170</b>	



WBS	Task/Sub-task	Task Lead	Grand Totals (DDP + T&W)	T&W Totals	DDP Totals
<b>7</b>	<b>Special &amp; District-wide Programming</b>				
7.1	Online Conference Calls with Administration to Review Programming		\$1,460	\$1,460	
7.2	Develop elementary grades special education loading and space requirements		\$2,220	\$2,220	
7.3	Develop secondary grades special education loading and space requirements		\$1,660	\$1,660	
7.4	Compile elementary school site-specific program requirements		\$1,210	\$1,210	
7.5	Compile secondary school site-specific program requirements		\$1,660	\$1,660	
	<b>Total Costs for 7 - Special &amp; District-wide Programming</b>		<b>\$8,210</b>	<b>\$8,210</b>	
<b>8</b>	<b>Operating Cost Study (baseline)</b>				
8.1	Districtwide Historic Costs by Major Cost Category		\$2,360	\$2,360	
8.2	Districtwide Per-pupil Analytics		\$1,180	\$1,180	
8.3	Detailed utilities costs by building		\$280	\$280	
8.4	Detailed supplies costs by building		\$280	\$280	
8.5	Detailed transportation costs by building		\$1,120	\$1,120	
8.6	Import & escalate facility capital improvement costs from previous study(ies)		\$1,220	\$1,220	
8.7	Detailed staffing costs by building (from model)		\$280	\$280	
	<b>Total Costs for 8 - Operating Cost Study (baseline)</b>		<b>\$6,720</b>	<b>\$6,720</b>	
<b>9</b>	<b>Staffing Cost Study</b>				
9.1	Develop staffing cost input and sorting template		\$450	\$450	
9.2	Input staffing costs		\$1,600	\$1,600	
9.3	Calculate average costs per staffing category		\$900	\$900	
9.4	Prepare staffing cost model with per-pupil metrics		\$1,800	\$1,800	
9.5	Staffing cost analysis and narrative		\$2,700	\$2,700	
	<b>Total Costs for 9 - Staffing Cost Study</b>		<b>\$7,450</b>	<b>\$7,450</b>	
<b>10</b>	<b>Redistricting / Reconfiguration Options (3 final options)</b>				
10.1	Prepare baseline configuration summary table (Option 0)		\$505	\$505	
10.2.1	Develop preliminary reconfiguration options - keyplans		\$3,660	\$3,660	
10.2.2	Develop preliminary reconfiguration options - design capacity and loading tables		\$2,490	\$2,490	
10.2.3	Develop preliminary reconfiguration options - configuration summary tables		\$2,490	\$2,490	
10.3	Review preliminary reconfiguration options - select best options		\$1,180	\$1,180	
10.4.1	Finalize reconfiguration options - keyplans		\$3,660	\$3,660	
10.4.2	Finalize reconfiguration options - design capacity and loading tables		\$2,490	\$2,490	
10.4.3	Finalize reconfiguration options - configuration summary tables		\$2,490	\$2,490	
	<b>Total Costs for 10 - Redistricting / Reconfiguration Options (3 final options)</b>		<b>\$18,965</b>	<b>\$18,965</b>	
<b>11</b>	<b>Redistricting Planning</b>				
11.1	Davis Demographics Prepares Boundary Scenarios Using Enrollment Forecasts <i>Refer to Appendix A - Davis Demographics Proposal</i>		\$20,000		\$20,000
11.2	T&W prepares detailed maps of the Current Enrollment Zones & Proposed Zones		\$7,800	\$7,800	
11.3	T&W Coordination with DDP on Proposed Redistricting vs. Capacity		\$2,920	\$2,920	
11.4	Grade-level stratigraphy diagrams (Feeder Patterns)- (1 baseline, 3 options)		\$3,360	\$3,360	
	<b>Total Costs for 11 - Redistricting Planning</b>		<b>\$34,080</b>	<b>\$14,080</b>	<b>\$20,000</b>
<b>12</b>	<b>Transportation Options</b>				
12.1	District-supplied Data Exporting Assistance		\$280	\$280	
12.2	Transportation Data Sorting and Reporting		\$1,680	\$1,680	
12.3	Reconfiguration Patterns - 3 Options		\$3,360	\$3,360	
	<b>Total Costs for 12 - Transportation Options</b>		<b>\$5,320</b>	<b>\$5,320</b>	
<b>13</b>	<b>Cost Savings Available through Redistricting / Reconfiguration Options</b>				
13.1	Apply staffing cost model to final options		\$2,190	\$2,190	
13.2	Estimate transportation costs for final options		\$2,190	\$2,190	
13.3	Estimate utility savings for final options		\$1,770	\$1,770	
13.4	Estimate supplies cost for final options		\$1,770	\$1,770	
13.5	Incorporate future facility repair cost avoidance for closed facilities		\$3,030	\$3,030	
	<b>Total Costs for 13 - Cost Savings Analysis</b>		<b>\$10,950</b>	<b>\$10,950</b>	
<b>14</b>	<b>Property Disposition/ Reuse Options</b>				
14.1	Develop List of Alternative Facility Uses and Marketability		\$900	\$900	
14.2	Estimate of Continued Ownership Liabilities		\$1,350	\$1,350	
14.3	Estimate of Sale or Lease Revenue		\$1,350	\$1,350	
	<b>Total Costs for 14 - Property Disposition/ Reuse Options</b>		<b>\$3,600</b>	<b>\$3,600</b>	

WBS	Task/Sub-task	Task Lead	Grand Totals (DDP + T&W)	T&W Totals	DDP Totals
<b>15</b>	<b>Reimbursement Impact Study</b>				
		<b>T&amp;W</b>			
15.1	Maine Department of Education State Subsidization Impacts		\$1,460	\$1,460	
15.2	Transportation Reimbursement Impacts		\$1,010	\$1,010	
<b>Total Costs for 15 - Reimbursement Impact Study</b>			<b>\$2,470</b>	<b>\$2,470</b>	
<b>16</b>	<b>Recommendations to the Board (January 2019)</b>				
		<b>T&amp;W/DDP</b>			
16.1	Prepare Final Draft		\$5,200	\$5,200	
16.2	Review Final Draft with Administration (Online Conference Call)		\$1,180	\$1,180	
16.3	Outline Presentation		\$900	\$900	
16.4	Prepare Presentation		\$3,400	\$3,400	
<b>Total Costs for 16 - Recommendations to the Board (January 2019)</b>			<b>\$10,680</b>	<b>\$10,680</b>	
<i>Note: These costs do not include travel expenses which are provided at the bottom of this document.</i>					
<b>Total - Not Including Expenses (if all services selected):</b>			<b>\$192,835</b>	<b>\$155,335</b>	<b>\$37,500</b>
<b>T&amp;W Reimbursable Expenses</b>					
SurveyMonkey Subscription				\$411	
Join.Me (Online Meeting Service) for 6 months				\$128	
Reproductions of All Finalized Study Volumes (To be determined based on quantity.)				TBD	
<b>Total T&amp;W Reimbursable Expenses</b>				<b>\$539</b>	
<i>*DDP anticipated expenses included in fees provided in the DDP Costs column.</i>					
<b>T&amp;W Travel Expenses Per Visit - Jon Thomas &amp; Blake Leibert of T&amp;W</b>					
Total Unit Cost Per Visit				\$5,258	
<b>Total Cost for 12 Visits Throughout Duration of Study</b>				<b>\$63,092</b>	
<i>*DDP anticipated expenses included in fees provided in the DDP Costs column.</i>					
<b>Grand Total - Including Expenses Listed Above (if all services selected):</b>			<b>\$256,467</b>	<b>\$218,967</b>	<b>\$37,500</b>

Note: T&W proposes that PPS contract with DDP independently of T&W's contract. T&W will coordinate their efforts on the study with DDP's efforts. If the District desires to have one single contract, DDP shall become a subcontractor of T&W and T&W will apply a 10% mark-up of their fee and any reimbursable expenses.

#2

**Work Plan and Fee Schedule - Modified**  
 Portland Public Schools | District-wide Facility Study



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WBS	Task/Sub-task	Task Lead	Grand Totals (DDP + T&W)	T&W Totals	DDP Totals	PPS To Do	Comments	Risks
<b>1. Community Survey</b>								
1.1	Develop list of survey questions in collaboration with PPS		\$0	\$0	\$0	✓		
1.2	Prepare & deploy online survey for community feedback		\$0	\$0	\$0	✓		
1.2	Analyze data & prepare charts/graphics		\$0	\$0	\$0	✓		
1.3	Prepare report of community feedback survey		\$0	\$0	\$0	✓		
<b>Total Costs for 1 - Community Survey</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>			
<b>2. Commission Engagement Sessions</b>								
<b>PPS</b>								
2.1	Commission Session 1 - Review Survey Results & District-wide Capacity Analysis		\$0	\$0	\$0	✓		
2.1.1	Assign specific responsibilities of Commission		\$1,670	\$1,670			T&W prepares presentations using info provided by PPS and work developed by T&W/DDP.	The risk is the information presented in the Powerpoint work developed by T&W/DDP.
2.2	Commission Session 2 - Review Prelim. Enrollment Projections & Develop Conceptual Scenarios		\$1,670	\$1,670		✓	PPS to present without involvement from T&W/DDP.	to assume the information provided to us by PPS is accurate and supports the presentation.
2.2.1	Prepare Presentation		\$1,670	\$1,670		✓	Generally when we prepare a presentation, it is based on T&W's analysis to date and includes demonstrative examples of our latest analytics. T&W does not see the value of PPS having T&W past their analysis in a Powerpoint presentation.	furtherance of the audiences understanding of the facility options as they develop.
2.3	Commission Session 3 - Review Preliminary Scenarios & Baseline Cost Analysis		\$1,670	\$1,670		✓		
2.3.1	Prepare Presentation		\$1,670	\$1,670		✓		
2.4	Commission Session 4 - Finalize Scenarios & Presentation Info to Community & Board		\$1,670	\$1,670		✓		
2.4.1	Prepare Presentation		\$1,670	\$1,670		✓		
<b>Total Costs for 2 - Commission Engagement Sessions</b>			<b>\$6,680</b>	<b>\$6,680</b>				
<b>3. Community Engagement Sessions</b>								
<b>PPS</b>								
3.1	Community Session 1 - Present Survey Results, Enrollment Projections, Baseline Data		\$0	\$0	\$0	✓		
3.1.1	Assign PPS to Organize/Attend Community Sessions		\$0	\$0	\$0	✓	See above.	See above.
3.1.2	Prepare Presentation		\$0	\$0	\$0	✓		
3.2	Community Session 2 - Present Redistricting/Reconfiguration Scenarios		\$0	\$0	\$0	✓		
3.2.1	Prepare Presentation		\$0	\$0	\$0	✓		
<b>Total Costs for 3 - Community Engagement Sessions</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>			
<b>4. Demographics History &amp; Overview</b>								
<b>T&amp;W</b>								
4.1	Review Previous Independent Demographic Projections		\$0	\$0	\$0			
4.2	Prepare Demographics History, Trends and Dependencies Including Review of Census Data Regarding Population & Housing		\$0	\$0	\$0			
<b>Total Costs for 4 - Demographics History &amp; Overview</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>			

WBS	Task/Sub-task	Task Lead	Grand Totals (DDP + T&W)	T&W Totals	DDP Totals	PPS To Do	Comments	Risks
5	<b>Demographics &amp; Enrollment Study</b>							
5.1	Davis Demographics - Demographics & Enrollment Study <i>Refer to Appendix A - Davis Demographics Proposal</i>	DDP	\$17,500		\$17,500			
5.2	T&W Coordination & Review with DDP <i>Total Costs for 5 - Demographics &amp; Enrollment Study</i> <i>Note: DDP's fee includes two (2) on-site visits.</i>		\$2,360	\$2,360				
			\$19,860	\$2,360	\$17,500			
6	<b>Educational Facility Capacity Analysis</b>							
6.1	Programming survey set-up and administration	PPS	\$0	\$0				
6.2	Review district-furnished program information		\$0	\$0				
6.3	Develop elementary school keyplans   confirm current usages		\$0	\$0				
6.4	Develop secondary school keyplans   confirm current usages		\$0	\$0				
6.5	Develop baseline elementary capacity vs loading tables		\$0	\$0				
6.6	Calculate baseline secondary master schedule loading efficiency		\$0	\$0				
6.7	Develop elementary school specials loading patterns		\$0	\$0				
6.8	Develop optimized elementary school capacity tables		\$0	\$0				
6.9	Prepare optimized elementary school keyplans		\$0	\$0				
6.10	Develop optimized secondary school department models (sub) centered)		\$0	\$0				
6.11	Prepare optimized secondary school keyplans		\$0	\$0				
6.12	Online Conference Calls to Capacity vs Loading		\$0	\$0				
6.13	Draft, review and finalize analysis		\$0	\$0				
	<b>Total Costs for 6 - Educational Facility Capacity Analysis</b>		\$0	\$0				
7	<b>Special &amp; District-wide Programming</b>							
7.1	Online Conference Calls with Administration to Review Programming	PPS	\$0	\$0				
7.2	Develop elementary grades special education loading and space requirements		\$0	\$0				
7.3	Develop secondary grades special education loading and space requirements		\$0	\$0				
7.4	Compile elementary school site-specific program requirements		\$0	\$0				
7.5	Compile secondary school site-specific program requirements		\$0	\$0				
	<b>Total Costs for 7 - Special &amp; District-wide Programming</b>		\$0	\$0				
8	<b>Operating Cost Study (baseline)</b>							
8.1	Districtwide Historic Costs by Major Cost Category	PPS	\$0	\$0				
8.2	Districtwide Per-Pupil Analytics		\$0	\$0				
8.3	Detailed utilities costs by building		\$0	\$0				
8.4	Detailed supplies costs by building		\$0	\$0				
8.5	Detailed transportation costs by building		\$0	\$0				
8.6	Import & escalate facility capital improvement costs from previous study(ies)		\$0	\$0				
8.7	Detailed staffing costs by building (from model)		\$0	\$0				
	<b>Total Costs for 8 - Operating Cost Study (baseline)</b>		\$0	\$0				

PPS to perform in-house.

The risk is whether PPS is able to provide the requirements and guidelines for each special education or district-wide program that can be affected in redistricting / restructuring - by a mutual deadline. This information will be used by T&W to develop redistricting / restructuring options.

PPS to perform in-house.

The risk is whether PPS has the staff availability to complete a baseline operating cost analysis. If redistricting / restructuring options are presented, PPS must be prepared to answer anticipated questions regarding costs.

WBS	Task/SDP/Task Lead	Grand Totals (DDP + T&W)	T&W Totals	DDP Totals	PPS To Do	Comments	Risks
9	<b>Staffing Cost Study</b>						
9.1	Develop staffing cost input and sorting template	\$0	\$0			PPS to perform in-house.	
9.2	Input staffing costs	\$0	\$0				
9.3	Calculate average costs per staffing category	\$0	\$0				
9.4	Prepare staffing cost model with per-pupil metrics	\$0	\$0				
9.5	Staffing cost analysis and narrative	\$0	\$0				
	<b>Total Costs for 9 - Staffing Cost Study</b>	\$0	\$0				

WBS	Task/SDP/Task Lead	Grand Totals (DDP + T&W)	T&W Totals	DDP Totals	PPS To Do	Comments	Risks
10	<b>Redistricting / Restructuring Options (3 final options)</b>						
10.1	Prepare baseline configuration summary table (Option 0)	\$505	\$505				
10.2.1	Develop preliminary reconfiguration options - Keyplans	\$3,660	\$3,660				
10.2.2	Develop preliminary reconfiguration options - design capacity and loading tables	\$2,490	\$2,490				
10.2.3	Develop preliminary reconfiguration options - configuration summary tables	\$2,490	\$2,490				
10.3	Review preliminary reconfiguration options - select best options (Online Conference Calls)	\$2,360	\$2,360				
10.4.1	Finalize reconfiguration options - Keyplans	\$3,660	\$3,660				
10.4.2	Finalize reconfiguration options - design capacity and loading tables	\$2,490	\$2,490				
10.4.3	Finalize reconfiguration options - configuration summary tables	\$2,490	\$2,490				
10.5	Review finalized reconfiguration options (Online conference call)	\$590	\$590				
	<b>Total Costs for 10 - Redistricting / Restructuring Options (3 final options)</b>	\$20,735	\$20,735				

Note: T&W fee does not include travel expenses for on-site meeting(s). The District may request an on-site meeting using the unit cost provided towards bottom of this document.

WBS	Task/SDP/Task Lead	Grand Totals (DDP + T&W)	T&W Totals	DDP Totals	PPS To Do	Comments	Risks
11	<b>Redistricting Planning</b>						
11.1	David's Demographics Prepares Boundary Scenarios Using Enrollment Forecasts	\$20,000		\$20,000		DDP's fee is provided as a not to exceed fee. Same as above.	
11.2	Refer to Appendix A - Davis's Demographics Proposal	\$0	\$7,800				
11.3	T&W prepares detailed maps of the Current Enrollment Zones & Proposed Zones	\$2,920	\$2,920				
11.4	T&W Coordination with DDP on Proposed Redistricting vs. Capacity	\$3,360	\$3,360				
11.5	Grade-level stratigraphy diagrams (Feeder Patterns) - (1 baseline, 3 options)	\$1,180	\$1,180				
	<b>Total Costs for 11 - Redistricting Planning</b>	\$35,260	\$15,260	\$20,000			

Note: T&W fee does not include travel expenses for on-site meeting(s). The District may request an on-site meeting using the unit cost provided towards bottom of this document. DDP travel expenses are included in not to exceed amount.

WBS	Task/SDP/Task Lead	Grand Totals (DDP + T&W)	T&W Totals	DDP Totals	PPS To Do	Comments	Risks
12	<b>Transportation Options</b>						
12.1	District-supplied Data Exporting Assistance	\$0	\$0			PPS to perform in-house.	
12.2	Transportation Data Sorting and Reporting	\$0	\$0				
12.3	Reconfiguration Patterns - 3 Options	\$0	\$0				
	<b>Total Costs for 12 - Transportation Options</b>	\$0	\$0				
13	<b>Cost Savings Available through Redistricting / Reconfiguration Options</b>						
13.1	Apply staffing cost model to final options	\$0	\$0			PPS to perform in-house.	
13.2	Estimate transportation costs for final options	\$0	\$0				
13.3	Estimate utility savings for final options	\$0	\$0				
13.4	Estimate supplies cost for final options	\$0	\$0				
13.5	Incorporate future facility repair cost avoidance for closed facilities	\$0	\$0				
	<b>Total Costs for 13 - Cost Savings Analysis</b>	\$0	\$0				

The risk is whether PPS has the staff available to allocate time or staff with experience in cost projections to complete this analysis. If redistricting / restructuring options are presented, PPS must be prepared to answer anticipated questions regarding costs.

WBS	Task/Sub-task	Task Lead	Grand Totals (DDP + T&W)	T&W Totals	DDP Totals	PPS To Do	Comments	Risks
14	Property Disposition/ Reuse Options	PPS						
14.1	Develop List of Alternative Facility Uses and Marketability		\$0	\$0		✓	PPS to perform in-house.	PPS must consider the future options and costs associated with closing or re-purposing a building.
14.2	Estimate of Continued Ownership Liabilities		\$0	\$0		✓		
14.3	Estimate of Sale or Lease Revenue		\$0	\$0		✓		
	<b>Total Costs for 14 - Property Disposition/ Reuse Options</b>		\$0	\$0				
15	Reimbursement Impact Study	PPS						
15.1	Maine Department of Education State Subsidization Impacts		\$0	\$0		✓	PPS to perform in-house.	PPS must consider the impacts to any reimbursement in the closing of a building or transportation planning.
15.2	Transportation Reimbursement Impacts		\$0	\$0		✓		
	<b>Total Costs for 15 - Reimbursement Impact Study</b>		\$0	\$0				
16	Recommendations to the Board (January 2019)	T&W/DDP						
16.1	Prepare Final Draft		\$0	\$0			PPS to prepare recommendations to the Board and City Council.	
16.2	Review Final Draft with Administration (Online Conference Call)		\$0	\$0				
16.3	Outline Presentation		\$0	\$0				
16.4	Prepare Presentation		\$0	\$0				
	<b>Total Costs for 16 - Recommendations to the Board (January 2019)</b>		\$0	\$0				
	<b>Total - Not Including Expenses:</b>		\$82,535	\$45,035	\$37,500			
	<b>T&amp;W Reimbursable Expenses</b>			\$128				
	John Me (Online Meeting Service) for 6 months			\$128				
	Reproductions of Study Volumes (as requested by PPS and determined by dtv.)			TBD				
	<b>Total T&amp;W Reimbursable Expenses</b>			\$128				
	<i>*DDP anticipated expenses included in fees provided in the DDP Costs column.</i>							
	<b>T&amp;W Travel Expenses Per Visit - Jon Thomas &amp; Blake Leibert of T&amp;W</b>			\$5,258				
	<b>Total Unit Cost Per Visit</b>			\$5,258				
	<b>Total Cost of Visits Throughout Duration of Study</b>			\$0				
	<i>*DDP anticipated expenses included in fees provided in the DDP Costs column.</i>							
	<b>Grand Total - Including Expenses Listed Above:</b>		\$82,663	\$45,163	\$37,500			

Note: T&W proposes that PPS contract with DDP independently of T&W's contract. T&W will coordinate their efforts on the study with DDP's efforts. If the District desires to have one single contract, DDP shall become a subcontractor of T&W and T&W will apply a 10% mark-up of their fee and any reimbursable expenses.

**Proposed Study Schedule**  
 Portland Public Schools | District-wide Facilities Study

DRAFT



WBS	Responsibility	Task Name	Duration	Start	Finish	2019																															
						August	September	October	November	December	January	February	March	April																							
1	T&W/PPS	Community Survey	35 days	8/8/18	9/26/18	5	12	19	26	2	9	16	23	30	7	14	21	28	4	11	18	25	2	9	16	23	30	6	13	20	27	3	10	17	24	31	
2	T&W/PPS	Commission Engagement Sessions	38 days	9/27/18	11/19/18																																
2.1	T&W/PPS	Session 1 - Review Survey Results & Preliminary Capacity Analysis	1 day	9/27/18	9/27/18																																
2.2	T&W/PPS	Session 2 - Review Prelim. Enrollment Projections & Develop Conceptual Scenarios	1 day	10/18/18	10/18/18																																
2.3	T&W/PPS	Session 3 - Review Preliminary Scenarios & Baseline Cost Analysis	1 day	11/9/18	11/9/18																																
2.4	T&W/PPS	Session 4 - Finalize Scenarios & Presentation Info to Community & Board	1 day	11/29/18	11/29/18																																
3	T&W/PPS	Community Engagement Sessions	27 days	11/12/18	12/19/18																																
3.1	T&W/PPS	Session 1 - Present Survey Results, Enrollment Projections, Baseline Data	1 day	11/12/18	11/12/18																																
3.2	T&W/PPS	Session 2 - Present Redistricting/Reconfiguration Scenarios	1 day	12/19/18	12/19/18																																
4	T&W	Demographics History & Overview	40 days	8/8/18	10/9/18																																
5	DDP	Demographics & Enrollment Study	65 days	8/8/18	11/7/18																																
6	T&W	Educational Facility Capacity Analysis	45 days	8/8/18	10/10/18																																
7	T&W	Special & District-wide Programming	15 days	9/6/18	9/26/18																																
8	T&W	Operating Cost Study (Baseline)	40 days	8/22/18	10/17/18																																
9	T&W	Staffing Cost Study	40 days	8/22/18	10/17/18																																
10	T&W	Redistricting / Reconfiguration Options	30 days	10/19/18	11/30/18																																
11	T&W/DDP	Redistricting Planning	10 days	10/26/18	11/8/18																																
12	T&W	Transportation Options	15 days	11/9/18	11/30/18																																
13	T&W	Cost Savings Available through Redistricting / Reconfiguration Options	15 days	12/10/18	1/8/19																																
14	T&W	Property Disposition/ Reuse Options	5 days	12/3/18	12/7/18																																
15	T&W	Reimbursement Impact Study	5 days	12/3/18	12/7/18																																
16	T&W/DDP	Recommendations to the Board	11 days	1/4/19	1/18/19																																
16.1	T&W/DDP	Prepare Final Draft of Study Volumes & Prepare Presentation	10 days	1/4/19	1/17/19																																
16.2	T&W/DDP	Presentation to Board	1 day	1/18/19	1/18/19																																

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**Commission on School Demographics and Capacity:**

Membership Expectations

- A 5 month commitment to help PPS present options and recommendations re: PreK-Grade 12 facility capacity needs.
- A maximum of 8 meetings, approx. 2 hours per meeting.
- The work will be supported by PPS staff as well as project management consultants who will inform facility capacity, as well as a demographics/enrollment consultant.
- The Commission will be comprised of 12 members in order to be both representative of multiple stakeholder groups, and be nimble enough to work efficiently within an ambitious time frame.

**Draft Meeting Schedule:**

Sept 2019 - 1 Meeting

October - 2 Meetings

November - 2 Meetings

December - 2 Meetings

January - 1 Meeting

**Possible Commission Prospects:**

**2 City Councilors**

2 School Board Members

2 Principals

2 Staff Representatives (PEA president)

2 PTO representatives (i.e., Ben Grant)

2 Business community representatives (with PPS connections)