

KELLEY CAREY PRESENTATION OF ALTERNATIVES ANALYSIS

for the Beaufort County School District
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As to existing organization of facilities and student assignment, this study has been one of the more complex assignments that we have undertaken. The assessment of alternatives in this case has to present several levels of change as a result. The options discussed below describe why making recommendations is a challenge. These alternatives are evaluated in detail in this report. Alternative G is the recommended plan that is developed in this study.

ALTERNATIVE A– DO NOTHING (Maintain Transfers).

Calendar. The district presents an unusual situation of running two calendars for schools without a distinction in the purpose other than an apparent site based choice to have a traditional or year round calendar. Consequently, the elementary schools are split on the issue, and there are hundreds of students transferring to get into or out of the calendar used at their home school. We have seen varying calendars in other districts, but they usually affected selected magnet schools that did not have a residence based zone underpinning their enrollment.

In this context, the first alternative consists of no changes in the present transfers that are ostensibly enrollment capacity based, that is, if there is another space, then a transfer applicant may be accepted. Special education programs housed at a facility have to track its schedule. That results in two sets of in service training for special education teachers. As the district continues to grow, it will have to focus on centers for different categories of special education, introducing a case of home schools and special ed centers having different schedules for siblings, such that parents are forced to adopt a different schedule to use the program at other than their home school.

The long term conflicts with two calendars most directly involve schools in the southern cluster that are in an area of rapid growth. There is pressing and obvious need for additional construction of schools, so that random open seats are not likely to be a norm for equity, as to a space left for the next zone resident student. In short, given an open seat in the building or in portable classrooms, who gets that seat as it stands depends on who walks in the door next, a zone resident or a transfer applicant. As noted in our mini report on school sites for the last bond issue implementation, we are aware of no longitudinal study demonstrating the superiority of one calendar over another, nor have we worked with a district having two calendars split among the schools. The traditional calendar is used at middle and high schools complicating the setup also as to sibling attendance split into two calendars in one family.

The report section on this alternative outlines the enrollment trends that are overwhelming the elementary schools capacity in the southern cluster. There is and will continue to be great need for new classrooms and changing of attendance boundaries will continue for years, until the build out of available land. Continuation of open admissions based upon capacity instead of residency will distort need for classrooms. A school can be filled while a large percentage of enrollment lives outside the zone. Trending of enrollments to organize a plan for new construction becomes too difficult to manage. The costs involved are not seen as adding to the quality of the program and clearly could be applied to more new construction instead. We have to recommend a single schedule.

School Enrollment Capacity. The do nothing alternative has to reflect the present situation, projected for five years. Any schools that are planned but that are not fully funded across the district are not included. The Board may have approved a project, but until the funds are earmarked and until the project is under construction, it does not exist. And, past local experience indicates that prices have increased so rapidly and details of projects have not been worked out for planned projects, in cases, such as site purchase or identification, site costs, local planning review delays, and some schematic plans for cost estimating as a basis of a firm and workable commitment.

Consequently, at least one large project from two bond issues before this is still the subject of speculation at the date of this report preparation as to capacity, costs and perhaps even location. New construction proposed under the most recent bond issue lacked supporting student assignment planning or site locations, as the sites were assumed to be ones owned by the Board. The assumptions of costs and location proved unreliable.

So, the do nothing alternative only considers buildings that exist or that are fully funded for near term construction.

Student assignment. The current transfer scheme has to be projected as part of an alternative plan, as the Board has held to two different school calendars, but this report does not recommend continuing that policy of choice, as noted above. But, if the Board decides to continue that policy, then the present allowed transfers are the extent of our possible knowledge about what that policy would result in, in the context of facilities that are definitely in service or firmly set to be in service.

Because of the transfer program and the natural resistance to of parents to school reassignments, the do nothing alternative has to show the impacts of no change in transfers and no change in zones configurations for the five year projections. Then informed judgments can be made about the validity of the higher level alternatives involving construction and student reassignment planning.

As outlined above, we do not recommend that the calendar preference option for transfers continue. The Board should either set a calendar in each case for the students living within a zone by some reasonable method, which we do not recommend. Or, it should set a district wide calendar for all schools. Varying calendars or not, we have to

recommend that the calendar transfer excuse for changing schools should be terminated. The district should follow the nationally recognized basic standards for allowing student transfers such as for employee children, special education, and specific hardships. Otherwise, all students should attend the school that their home address is assigned to.

In short the first alternative, continuation of the existing situation as to facilities and student assignment and calendar transfers, represents poor and expensive planning or, worse, an impediment to planning that can work in a growing school district. We show the impacts to make this point. We do not recommend this alternative.

ALTERNATIVE B – DO NOTHING AS TO TRANSFERS, BUT PLAN FOR INTERIM STEP OF IMPLEMENTING CERTAIN PROJECTS AUTHORIZED IN 2006.

The Year 200 Bond Referendum authorized certain renovation and modification projects along with a new high school. There was a list of projects but no planning study ahead of this referendum. The new high school, at the time of this report, has yet to be sized for a specific enrollment, designed or funded due to authorized funds not being sufficient and prolonged debate about the cost, capacity and location of the school.

The 2006 Bond Referendum authorized additional projects, including a new elementary and a new middle school in the Bluffton area, along with expansions at McCracken Middle, Bluffton Elementary, Okatie Elementary, and M. C. Riley Elementary. At the time of this report, it appears that M. C. Riley additions will not be funded due to high costs. There was no planning study ahead of the referendum. Our implementation report for that 2006 bond issue was prepared several months after the referendum. It showed that the assumptions for locations for the new schools were in error, so that property owned by the board would not be recommended for their locations, requiring that funds be allocated to site acquisitions. High construction costs along with property acquisition costs have contributed to deletion of the M. C. Riley project as of this report time.

All of this process is summarized to establish that there has to be an interim student assignment plan revised to delete the M. C. Riley addition of 6 classrooms and set up without incorporation of any other projects that have been recommended but not funded.

The report will continue to recommend additional new construction, but students have to be accommodated for the interim plan of 2006 projects coming on line next year, amended for deleting the M. C. Riley project and updated from our prior short study for the 2006 bond issue to reflect 135 day enrollments a year later. The area being served by the 2006 projects is the fastest growing section of one of the fastest growing districts in the State. However good projections might be, it is best to use the latest data when revising a plan for the reasons described above, as developers do shift their projects in scope and timing, with resulting changes in exact locations of development within overall trends.

We do not recommend this alternative because it represents the status quo as to inefficient use of programs and space. It is presented because the Board is entitled to see what flows from doing nothing in these regards and may well decide to not follow efficiency recommendations or may decide to place a hold on them until the adoption of an overall plan for the district, which is the goal of this study. That is certainly within the province of the Board as was continuation of a dual schools calendar.

ALTERNATIVE C– DO NOTHING AS TO TRANSFERS, WITH MORE EFFICIENT USE OF PROGRAMS AND SPACE.

This alternative is identical to alternative “B,” except for programmatic and space concerns. So, the above analysis is not repeated here. The rationale for this alternative variation of “A” is that the Board has continued a policy of allowing two calendars and space available transfers for calendar reasons after our prior study of how they could implement the calls for certain construction projects in the last bond program. In that very limited scope study, we called attention to the implications of two calendars and advised dropping one or the other, which was brought as a recommendation to the Board by the interim superintendent. But, the Board at that time elected to take a wait and see view that it might again wish to employ as to having or dropping the two schedules. So, we continue the transfers in Alternative “B” while dealing with variables involving programs and use of facilities. Implementation of the 2006 bond referendum also did not include space and programs efficiency analysis, as the authorized scope was basically find sites and zones for the projects already adopted.

Equity In Programs. In this study, we undertook a facilities program audit for every school in the district. For this large process, we first gathered known data about each school, being the building floor plan, a site plan if available, and any known issues about the facility. We prepared a standard form that was issued to each principal, referencing the floor plan. It required entry of how each classroom in the school was being used by title of educational program. See the section on programs analysis for a school by school report. After consolidating all the responses on forms, we followed up with questions by telephone to complete the data entries in all respects.

The next step involved a site validation visit. We enlisted the assistance of the Assistant Superintendent for Academics and Accountability who accompanied our team on the site visits. For some of the northern cluster visits, the southern cluster superintendent accompanied our team. It was then seen that curriculum played a large role in implications of findings, such that the Academics specialist joined the team.

First, the district has a prior history of emphasis on site based management. As a result, there evolved differences in program titles and content that continues to some extent as shown by the program audit in this report. It is the duty of the district to decide what programs it wishes to promulgate and where they will be offered. But, that decision first requires knowledge of what is in fact being offered across the district, which was not previously readily available. The audit showed extensive variance in program titles and

program offerings among elementary schools. That non uniformity is not our typical finding in other districts nationally for regular elementary schools.

At site visits, the assistant superintendent took the lead role in discussing the program offerings. In some cases the titles were just different. The titles may be different in some cases because that has to do with their funding sources, not difference in content. In other cases, programs were site based and were simply not offered at all other schools or at any other schools, despite similar demographics. Again, the site visit was to grasp the programs as to name and to content, not to make a decision at that time.

After considerable analysis, as shown on the attached tables, a picture developed as to programs being offered, which ones were simply titled differently, and which ones really were unique to certain schools.

At the site visits for programs discussion, the unique local programs were extensively discussed. Then the administration advised the consultants as to which unique programs were not going to be continued.

Therefore the impacts of programs consolidation are reflected in this alternative plan.

Equity in Classroom Usage. As is typical for any school district, one school will be operated more or less efficiently than others in the district. One school that will house 600 students in one case will house 450 students in another case. The differences go most often to attempts by the principal to set lower student to teacher ratios and to justify more teachers than would be budgeted district wide. Or, pull out programs that could be conducted one on one in a small room or office are instead using a full classroom for part of the day. Or, a classroom is converted to a work room that other schools do not have. Or, a classroom is used for a non conforming program unique to this school, which may range from a special reading program to day care.

Whatever the reasons for using classrooms, the standard of measurement begins with equity in programs across the district so that the facilities will be effectively used and the programs will reflect consistency in staff development, materials, and application to needs that have been recognized and adopted by the administration and the school board.

The accompanying tables show the gamut of programs across the district before recommended changes and after the proposed changes.

It almost goes without saying that uniform evaluation of space needs and programs is not usually well received by schools that have been accustomed to minimal central administration review of the numbers of teachers actually required and the acceptability of all uses of classrooms. But, the consultants recommend that such equity goes far in assuring the public that programs are both appropriate and managed to meet the needs of all students in similar circumstances across the school district.

Once instituted, management of programs and use of classrooms has to be validated each year, or once again the same outcomes of inequity and apparent need for space that really does is not well justified will develop.

This alternative “C” is represented by the following tables showing the resulting current and five year projected needs for classrooms. Again, it is reflective of maintaining the existing numbers of transfers among schools for calendar preference.

Alternate “D” – *ELIMINATE TRANSFERS, WITH MORE EFFICIENT USE OF PROGRAMS AND SPACES.*

This alternative goes to the third level of not only having equity in programs and use of schools but eliminating schedule preference transfers.

See the Alternative “C” discussion for the equity issues. The discussion of our recommendation to have one yearly calendar at all schools was graphically justified in Alternative “A,” the Do Nothing option.

Obviously, the outcome, especially in the southern cluster of schools, even with better use of space and education of students within the school zone where they live, all still results in scattered needs for additional classrooms.

Adding classrooms to old buildings usually has more negatives than positives, if the alternative of new school construction is available. In other cases, a combination of the two types of expansion makes economic and planning sense.

Adding classrooms on to a building that was not designed for more classroom usually costs a lot more per room than for classrooms in a new building. The higher cost comes from extensive redo of the existing building, enlarging media center and food service, for example, as well as costly demolitions, expense of carrying on construction work in a school that is in use, and a list of added contractor expenses. Also, the work is not attractive in a setting where there is a lot of competing demand for subcontractors in clean new construction. So, a penalty for all of these negatives can double the price of additions of classrooms.

Further, poor planning may add here and there all around a school instead of focusing on a new wing or separate building on site, which exacerbates all the difficulties listed.

The board may see names of general contractors from other cities in bids on projects. But, the people who do the work are almost all local subcontractors for whom school construction is only one of many work opportunities here. The different general contractors bidding on a school project are using many of the same local subcontractors. So, competition is really not that clear as to efficiency of prices.

We present this alternative “C”, just as the previous alternatives were presented, so that dollars and complexities are documented, rather than simply discussed. We do not recommend any of these first three alternatives for the planning reasons set out.

E. ALTERNATIVE – ELIMINATE TRANSFERS WITH MORE EFFICIENT USE OF PROGRAMS AND SPACE AND WITH REZONING OF STUDENTS.

This alternative maintains the efficiency proposal in Alternative “D” as to condensing programmatic offerings among the elementary schools to those approved and adopted by the Board and to those equitably offered to all similarly situated students. It also contemplates as in “D” internal reorganization of school buildings to make better use of the actual enrollment capacities.

The option is developed as a progressive tightening step of planning for facilities and student assignment. The report could skip this step and just go on to a combination of rezonings and new construction. But, given the history of the district in incremental planning or no formal planning and public questioning of construction proposals, questions would likely arise as to whether even more construction could have been avoided by some other ideas of using existing buildings.

It may be obvious to some readers that nothing much could be done in some areas of the County as to rezoning, without some new construction. In this situation, obvious is not good enough. This alternative aims to show exactly where rezoning could reduce construction needs and where it would not solve the problem of overtaxing school facilities.

The difference in this Alternative “D” is that it proposes rezoning of students where capacity of schools is either under utilized or there is crowding and opportunities exist to reassign students without new construction. The analysis process necessarily does not extend to new construction at this step for the reasons noted above.

F. ALTERNATIVE – MODIFY “E” TO EXAMINE POSSIBLE REORGANIZATIONS

Alternative “E” envisioned some rezoning to make better use of existing facilities. The remaining test of efficiency in facilities and student assignment involves possible restructuring of grades organizations to use surplus classroom space in some areas.

We examined the surplus classroom space in the northern County, being at Whale Branch Elementary and Middle Schools. But, using more of one school or the other to open up even more space just at one school is not recommended. A K-8 organization would make better use of the middle school, but it is not large enough to bring all of the K-5 school into one facility. Also, opening up the extra space would be an academic exercise, as there is really nothing practicable to use that space via rezoning of students in a sparsely populated sector of the County.

St. Helena Elementary and Early Learning Facilities are substantially under enrolled, as shown by the capacity versus utilization tables in this report. The middle school students in that area have to travel considerable distance to attend Lady's Island Middle School. In such situations, it is sometimes advantageous to convert to a K-8 school. So, we examined that option.

A K-8 school at St. Helena could be feasible, but only given a continuing propensity of a large number of elementary school students now living there to continue attending Ladys Island Elementary, apparently due to it being an "art infused" school having the same calendar. Meanwhile, middle school students who should be attending Ladys Island Middle School are instead transferring to Beaufort Middle School, apparently for the program conducted there.

Were the St. Helena elementary and middle school students to continue transferring outside their zoned schools, the facility could handle a K-8 organization to reduce travel time for students preferring not to transfer out and that would make better use of the schools. However, we cannot recommend the restructuring for further evaluation steps because if the voluntary transfers were to change their minds or be replaced in turn by students who did not want to transfer, then the K-8 facility would be over enrolled

In short the voluntary transfer system and dual calendars make efficient use of facilities challenging. So, concerns expressed about under enrollment of certain schools and overcrowding of others have to be evaluated in the context of who actually lives within a reasonable zone for each school and what impacts collaterally obtain from voluntary transfers and penchant to transfer due to dual calendars.

In sum, we do not recommend any reorganizations of grades in this context of voluntary transfers and dual calendars.

After our planning commenced, some discussions led to request to consider the future of the Academy for Career Excellence. We visited the campus to look at the program and the facility. As a brief history, the ACE program has its own board of governance established under State legislation. It is shared and supported jointly by Beaufort and Jasper Counties under a cost sharing arrangement. The program appears to conduct some traditional vocational technical training, along with some joint programs with the Technical College of the Low Country. The facility is in need of massive infusion of funds for upgrading and even for basic necessities of program spaces. Like many vocational technical schools there are instructional rooms attendant to labs and a wing for business programs. But, the core academics are conducted in portable classrooms. One estimate exceeded a Beaufort County share of \$10 million, and that estimate is out of date by several years and far short of a budget required to make this a free standing and complete school with core subject classrooms for a technical high school.

After reviewing the facility and the unusual arrangement for administration by two counties, along with the very high costs for bringing the facility up to minimal standards,

we do not recommend spending more funds on this school plant. The district is advised to develop a strategy in concert with Jasper County to phase out the program, with the other district buying out the Beaufort County interest or selling the valuable property and dividing the profits for better uses as deemed by both parties.

In the instance of Beaufort County, we have already recommended that the new north high school be “academic and technical” such that the emerging needs for high technology replace the traditional vocational programs that are not so oriented. In the rolling five year planning process, this facility should be phased out in a future five year plan and have a final replacement with a similar technical facility either appended to Bluffton High School or otherwise located to complement the objectives similarly served for the northern cluster at the new high school to be developed there.

We have recommended that the district vigorously pursue research into what has succeeded in other districts national as to academic-technical training, with special note of what is being taught in post secondary technical schools nationally, including partnering with current or prospective business and industry in training programs.

In view of the development of these recommendations and in the context of the northern high school, we began but did not complete a full review of the dollar costs for upgrading the ACE facility. As it stands we suggest that the Beaufort County share of such work would exceed \$15 million, and that travels on the assumption that the neighboring district would consider this a priority spending program at all. Should the district in the future wish to reconsider that evaluation or have some legal means to assume full control of the operation located in another county and with a separate joint board, then we would be glad to do that. Circumstance that might give rise to a later consideration might include possible lack of space at the Bluffton High School for appending a technical facility, whether land is purchased ahead of time for a second high school in Bluffton, later assumption of full control of such a very high investment in a jointly operated school and the legal capacity to operate the facility over the line into another jurisdiction. Or, the study of the technical core curriculum needs for the new north high school might result in a program that is not so heavy on industrial level labs and might make re evaluation of the ACE site more feasible, perhaps even in concert with the adjacent county school board. But, all those considerations would take years to work through and cannot become firm recommendations for commitment of scarce funding in this study.

G. ALTERNATIVE – MODIFY “E” TO INCLUDE NEW FACILITIES REQUIRING FUTURE FUNDING.

In June of 2006, the Board of Education directed Associated Planning and Research, to do a study to site the school authorized under the 2006 school bond referendum earlier in the Spring of that year. The consulting report held surprises in not recommending use of the properties already owned by the district for a new elementary school and a new middle school. The report recommended that the site near Okatie planned for the middle school be surplused, and it recommended that the site called the “Jones Tract” earmarked for the elementary school be held for future use as an elementary site. The District was

also advised to procure land for another elementary school. The District only had funds from the 2006 bond issue for building one elementary and one middle school. It had no funds for another elementary off the future (now existing Bluffton Parkway) nor for the school at the Jones Tract.

The other projects included some enlargements of elementary and middle schools in Bluffton that were considered in locating two new school sites and estimating their zone configurations. None of the work has been completed at this time, and we are uncertain whether all the projects will be built without further funding or will be curtailed in scope. As to the 2006 planned projects that appear to have shortfalls, our best information at this time is the M. C. Riley Elementary addition will not be made now and the middle school capacity will be reduced from 900 to 650 subject to later enlargement. So, those projects are assumed to be work in progress and are included in Alternative B.

When this study commenced, there was no site approved by the County and no concept for attendance for the new North high school. It was authorized under the 2000 bond referendum, but lack of action on the project led to cost increases that the Board has agreed to meet to do the project. After analysis we have recommended to the school board that the new high school be an academic and technical high school serving primarily the northern cluster of the district, but open to the entire district with a target enrollment of 500 to 600 students.

The program for the school has not been developed, but it is envisioned that the first stage will encompass the academic facility that may include non lab technical programs.

In short, this alternative plans for funding a next bond referendum that includes the recommended new elementary school at the Jones Tract, being land owned by the District. We recommend another site be procured as soon as possible near the Bluffton Parkway for another elementary school.

Finally, our enrollment projections for the entire school district show need for another elementary school in the Coosa Elementary zone. While the adjacent Ladys Island Elementary is crowded, that is by choice, as it is an “art infused” school that accepts a large number of transfers, including from St. Helena where considerable excess capacity now exists. On the other hand, there is actual growth around Coosa Elementary that warrants planning now for a school in that area.

The situation as between Coosa Elementary and Ladys Island Elementary may produce similar misconceptions of need as we found between Bluffton and Okatie elementary schools. There, the general impression was that Okatie was growing when in fact our demographic mapping showed that the growth was coming from a zone arrangement that took students living between Bluffton and Riley elementary schools and transported them over to Okatie, producing artificial need for construction in that area.

It does not require imagination to consider all of the present and proposed elementary and middle school construction in the Bluffton area in terms of future need for a second high

school. The current high school has been expanded to its potential. Land is becoming both scarce and exceedingly expensive in the area. It is imperative that if a new high school is to be built in the future, then land must be acquired without more delay from short term planning. The high school is not required in this five year plan at present. But, acquiring the land is a separate issue in this special context, so that the purchase of land is certainly warranted for funding under the next bond program.

Funding for expansion of the M. C. Riley Elementary School was not available under the 2007 building program. We recommend that the expansion be funding in the next bond program, as really no land is available in the area for further school construction. At the same time, we are aware that there is a district owned classroom building adjacent to the school that is being used by the Town of Bluffton and other public programs. We recommend that the alternative uses be assessed compared to the needs of the school district for classrooms and that the building be appraised and offered for sale to the Town of Bluffton first so that the value could be freed up for needed work at the school.

Alternative “G” incorporates the above projects, excepting the new northern high school funded separately by the district, and outlines the additional projects needs to meet growth across the district. See “Section V. Recommended Plan” section of the report for a full discussion of the proposed five year plan developed under Alternative “G.”