

Facilities Optimization Committee
Special Meeting Agenda
November 17, 2020 7:00 PM
Via Zoom

<https://us02web.zoom.us/j/83082462786?pwd=S2huODhyak05b0txYlUUVVZczR6Zz09>

To Dial by Phone: 646 558 8656
Meeting ID: 830 8246 2786
Passcode: 151469

1. Approval of minutes
2. Recap of tri-Board meeting
3. Discussion regarding updated school enrollment projections
4. Discussion/Decision regarding issuing an RFP
5. Any new items
6. Adjournment

WESTON BOARD OF EDUCATION

Weston, CT

Meeting Date: November 16, 2020

Information Only

Action Requested

Agenda Item Subject: Annual Enrollment Report

Submitted by: William McKersie

Document Summary/Purpose and/or Recommended Action:

Attached please find the Comprehensive Enrollment Study 2020 from Milone & MacBroom. This is an annual report, which has been conducted by Milone & MacBroom for the past three years. You will find attached an Executive Summary and the PowerPoint presentation, which will be given by Mike Zuba and Liz Esposito on Monday, November 16, 2020.

Separately, the BOE Administration will present detailed information on the enrollment and withdrawal of students for the 2020-21 school year to date. This information will pick up the ebbs and flows of enrollment especially from late August 2020 through late September 2020. We will post this information on Friday, November 13, 2020.

For more Board of Education Meeting and Committee Meeting Information, visit:
<https://meeting.cabe.org/public/Agency.aspx?PublicAgencyID=47&AgencyTypeID=1>

TO: Dr. William S. McKersie, Ph.D.
Superintendent, Weston Public Schools

FROM: Michael Zuba, AICP

RE: Weston Enrollment Projections Update: Key Takeaways

DATE: November 10, 2020

MMI #: 6115-02-05

In fall 2020, Milone & MacBroom, Inc. (MMI) completed its annual enrollment projection update for Weston Public Schools (WPS). We are pleased to present our enrollment projections developed from the best available data and our deep local knowledge of your community. MMI has successfully projected enrollment for Weston and many of its neighboring communities within 1% of actual enrollment for the successive year. The key takeaways from this year's update are summarized below:

- Updated projections through 2030-31 show a similar but slightly elevated trajectory to the previously prepared enrollment projections for Weston.
- Comparison of Weston's actual October 2020 enrollment to MMI's recommended enrollment model shows a close overall correspondence between projected and realized enrollment, with K-12 enrollment running approximately 0.1% (two students) above the projections.
- The Medium Model continues to align best with underlying conditions and projects 2,291 PK-12 students for the 2030-31 school year.
- Projections for the Low Model and High Model range from 2,126 to 2,530 PK-12 students for the 2030-31 school year.
- In last year's projections, our blend of the regression-based K and the variable Birth-K models yielded excellent results for kindergarten, within two students of the actual kindergarten enrollment. Therefore, this year's medium projection model once again follows the same methodology and yields kindergarten classes ranging from 122 to 140 students over the next 10 years.
- Weston has experienced a rapidly improving housing market, with home sales for 2020 approaching pre-recession peak. If current housing market trends continue, the town should continue to see steady levels of in-migration (+3.8% in the last 4 years), particularly in elementary, intermediate, and middle school grades.
- Should the current active housing market conditions continue, the High Projection Model may prove more accurate over the 10-year horizon.
- Weston births have been stable, averaging 63 births over the last 5 years.
- An analysis of student composition identified a 14% increase in diversity for the WPS student body over the last decade.

- As with all enrollment projections, the updated projections presented in this memo are sensitive to changes in underlying conditions, including birth rates, housing sales, and student migration trends.

Projected Enrollments and Percent Change by Grade Groupings, 2020-21 to 2030-31

Medium Projections Model Enrollment by Grade Grouping

School Year	PK-12	K-12	PK-2	3-5	6-8	9-12
2020-21	2,273	2,249	419	493	558	803
2021-22	2,274	2,250	448	486	546	794
2022-23	2,251	2,227	443	482	545	781
2023-24	2,240	2,216	432	505	538	765
2024-25	2,234	2,210	434	518	530	752
2025-26	2,240	2,216	451	511	528	750
2026-27	2,235	2,211	458	498	553	726
2027-28	2,251	2,227	460	500	567	724
2028-29	2,260	2,236	448	522	558	732
2029-30	2,264	2,240	456	530	544	734
2030-31	2,291	2,267	460	532	546	753

5-Year Change

-1.5% -1.5% 7.6% 3.7% -5.4% -6.6%

10-Year Change

0.8% 0.8% 9.8% 7.9% -2.2% -6.2%

Medium Projection Model

School Year	Birth Year	Births	K	1	2	3	4	5	6	7	8	9	10	11	12	PK
2020-21	2015	62	122	142	131	145	176	172	172	190	196	198	194	207	204	24
2021-22	2016	54	127	145	152	150	155	181	178	173	195	197	197	193	207	24
2022-23	2017	60	123	140	156	163	160	159	188	179	178	196	196	196	193	24
2023-24	2018	59	122	136	150	167	174	164	165	189	184	179	195	195	196	24
2024-25	2019	66	129	135	146	161	178	179	170	166	194	185	178	194	195	24
2025-26	2020	78	140	142	145	156	172	183	186	171	171	195	184	177	194	24
2026-27	2021	63	127	155	152	155	166	177	190	187	176	172	194	183	177	24
2027-28	2022	65	130	140	166	163	166	171	184	191	192	177	171	193	183	24
2028-29	2023	66	131	143	150	178	174	170	177	185	196	193	176	170	193	24
2029-30	2024	68	133	145	154	161	190	179	176	178	190	197	192	175	170	24
2030-31	2025	68	134	147	155	165	172	195	186	177	183	191	196	191	175	24

If you should have any questions, please do not hesitate to contact me.

Very truly yours,

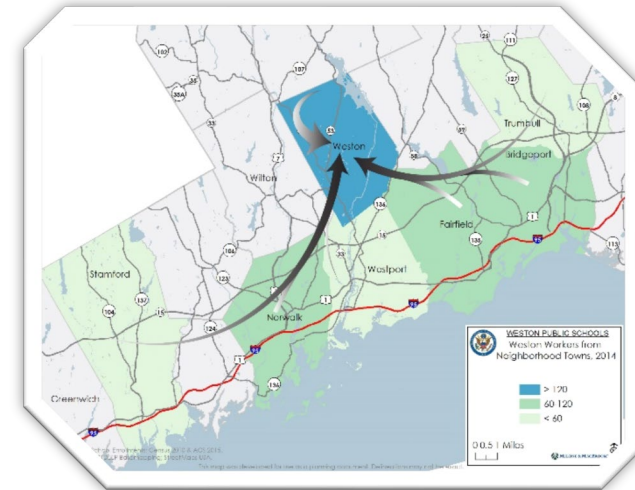
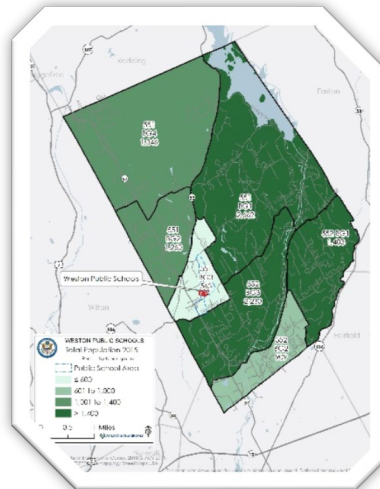
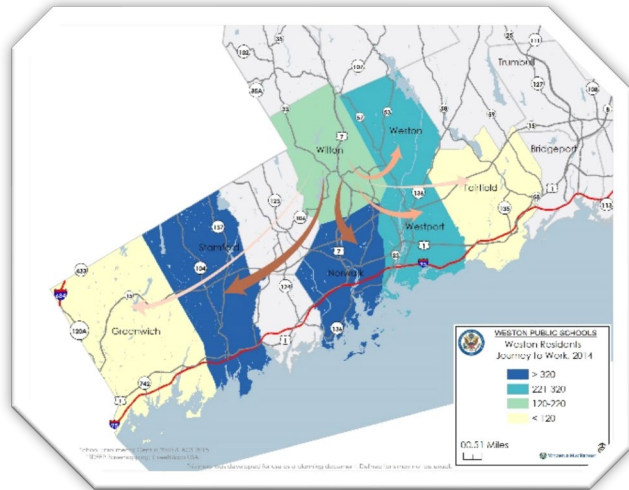
MILONE & MACBROOM, INC.

A handwritten signature in black ink, appearing to read "Michael Zuba".

Michael Zuba, AICP
Director of Planning

6115-02-05-o2820-memo

Weston Public Schools Comprehensive Enrollment Study



November 16, 2020



Introduction

- Projection Comparison
- Summary of Districtwide Projections
- Enrollment Patterns and Trends
- Detailed Enrollment Projections
- Demographic, Housing and Economic Indicators & Trends Update



PROJECTIONS COMPARISON

Type	K	1	2	3	4	5	6	7	8	9	10	11	12
Actual	122	142	131	145	176	172	172	190	196	198	194	207	204
Projected	120	144	124	144	169	174	178	194	189	206	194	206	205
Difference	2	-2	7	1	7	-2	-6	-4	7	-8	0	1	-1
% Difference	1.7%	-1.4%	5.6%	0.7%	4.1%	-1.1%	-3.4%	-2.1%	3.7%	-3.9%	0.0%	0.5%	-0.5%

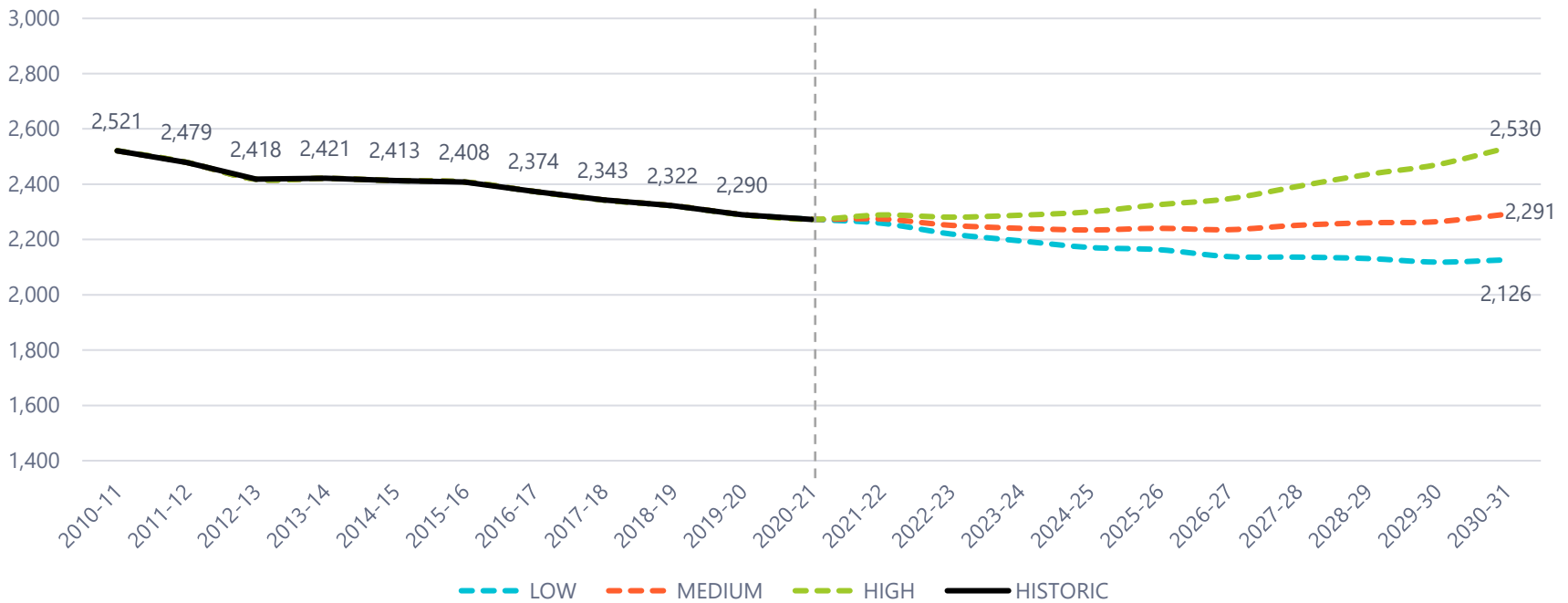
Type	K-2	3-5	6-8	9-12	K-12
Actual	395	493	558	803	2,249
Projected	388	487	561	811	2,247
Difference	7	6	-3	-8	2
% Difference	1.8%	1.2%	-0.5%	-1.0%	0.1%

- Actual district-wide enrollments were 0.1% higher than projected
- Some grade cohorts have varied from this year's projections
- These differences may be attributed to the sharply changing demographics and enrollments associate with the ongoing pandemic



Districtwide Projections

Projection Model Comparison (PK-12)
Weston Public Schools

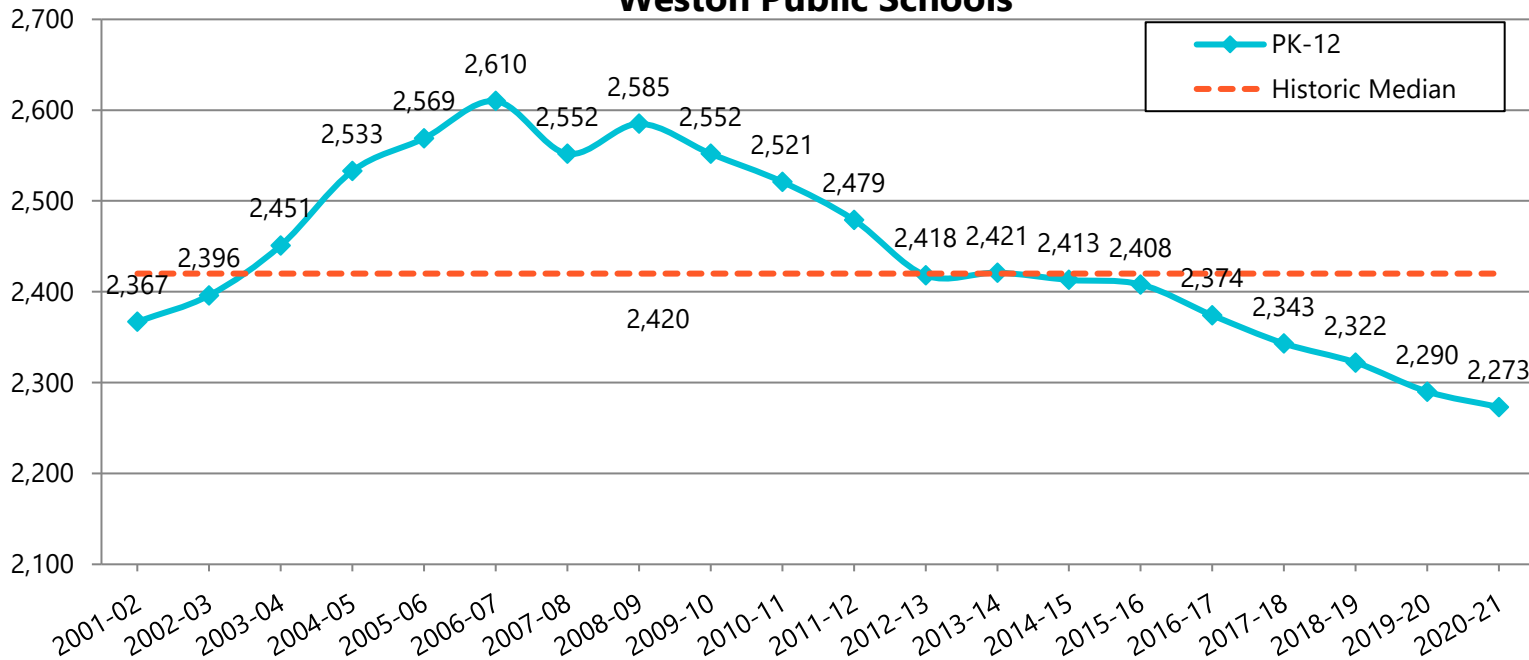


- Developed projections under three scenarios (Low, Med & High)
- **Medium projections model most closely aligns with underlying demographic, housing, and economic trends**
- Medium projection is very close to the high projections for the first 3 years



Historic Enrollment

Total (PK-12) Historic Enrollments Weston Public Schools



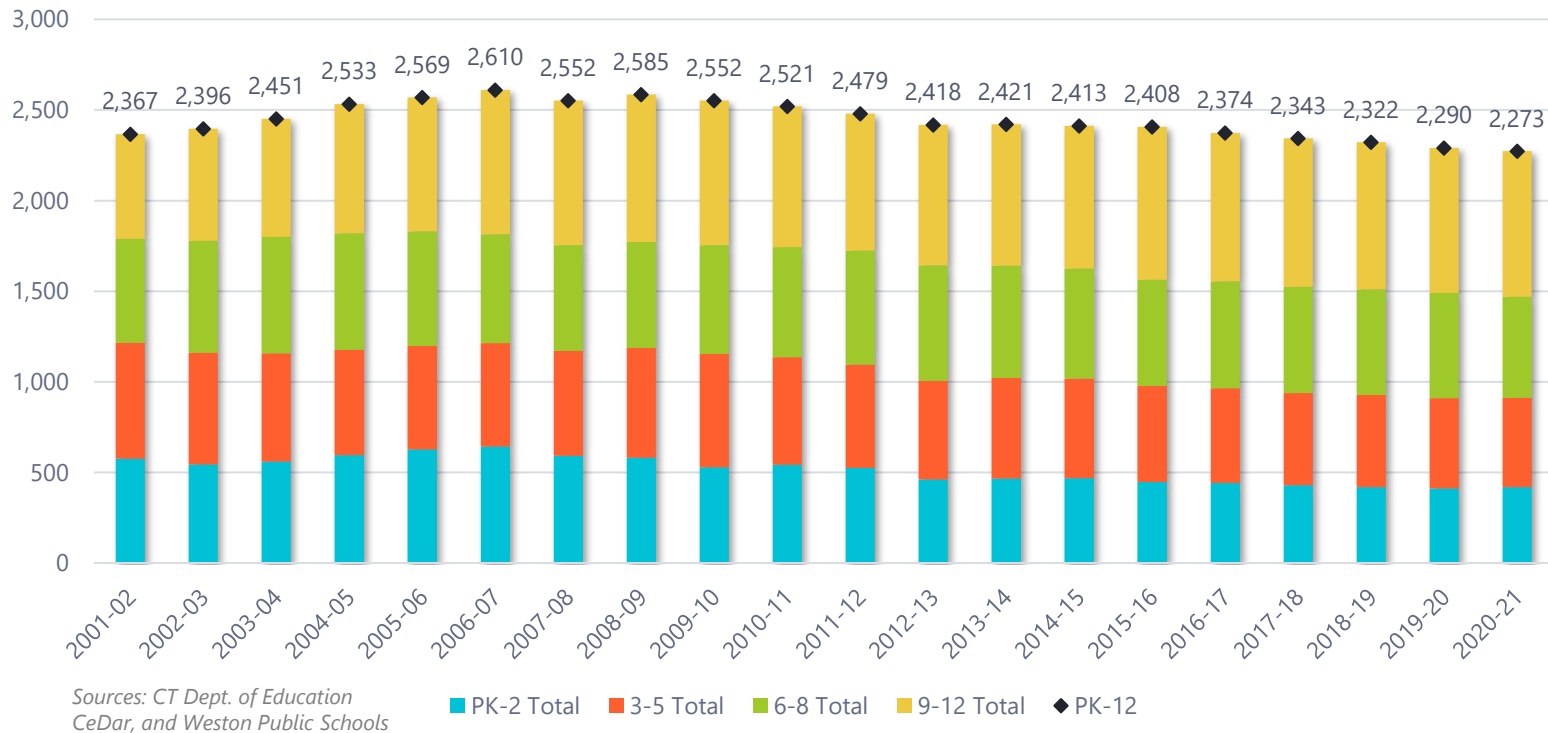
Sources: CT Dept. of Education CeDar, and Weston Public Schools

- Historic enrollment followed an increasing trend through the early 2000s to a peak in 2006-07, followed by a steady decline since 2008-09



Historic Enrollment

Weston Historic Enrollments, 2001-02 to 2020-21



Sources: CT Dept. of Education
CeDar, and Weston Public Schools

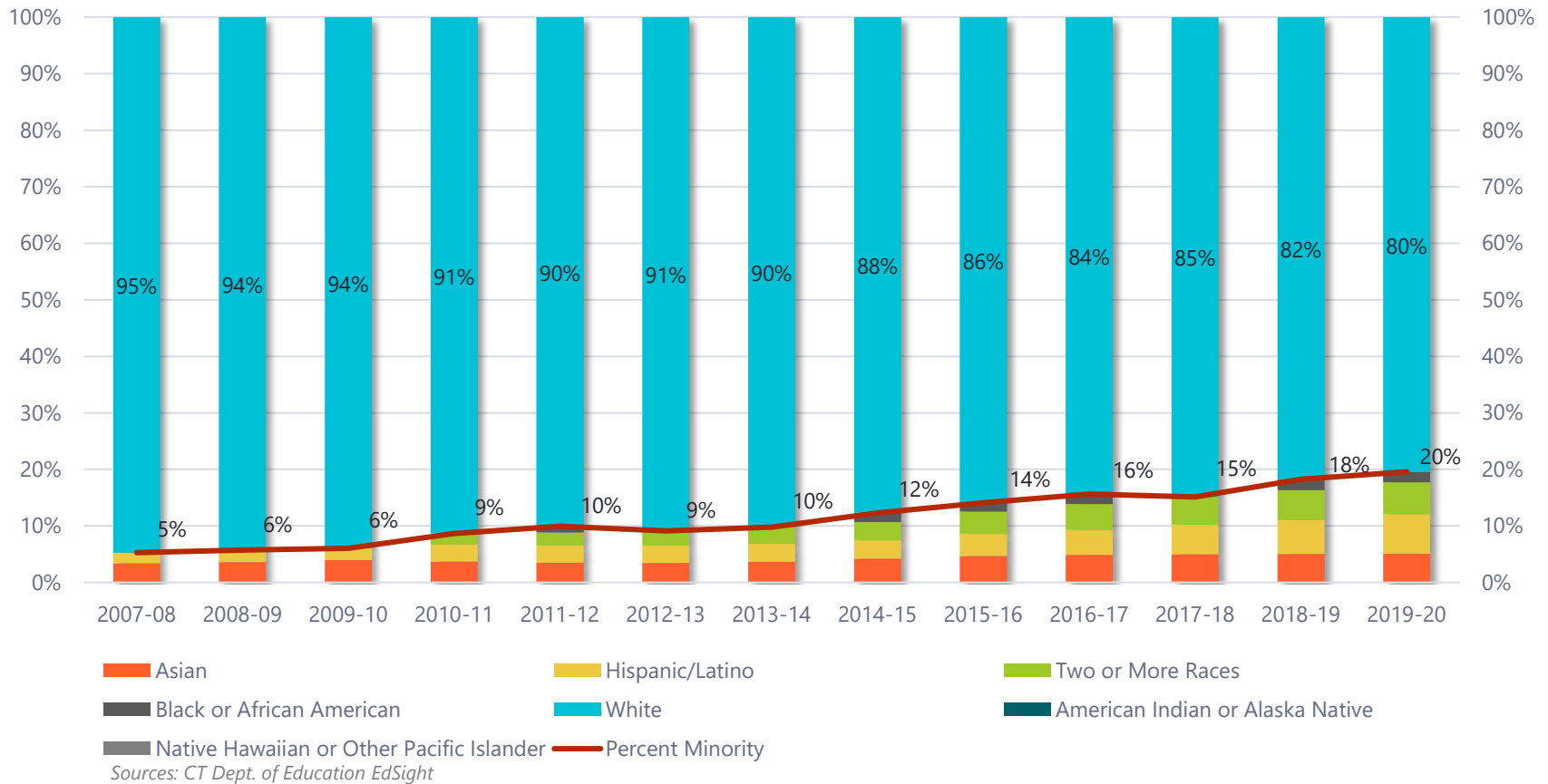
■ PK-2 Total ■ 3-5 Total ■ 6-8 Total ■ 9-12 Total ◆ PK-12

- Examining historic enrollment at the unit of each grade level illustrates changing dynamics that sum to the total system-wide change in enrollment



Historic Enrollment Composition

Race, Ethnicity of Students at Weston Public Schools

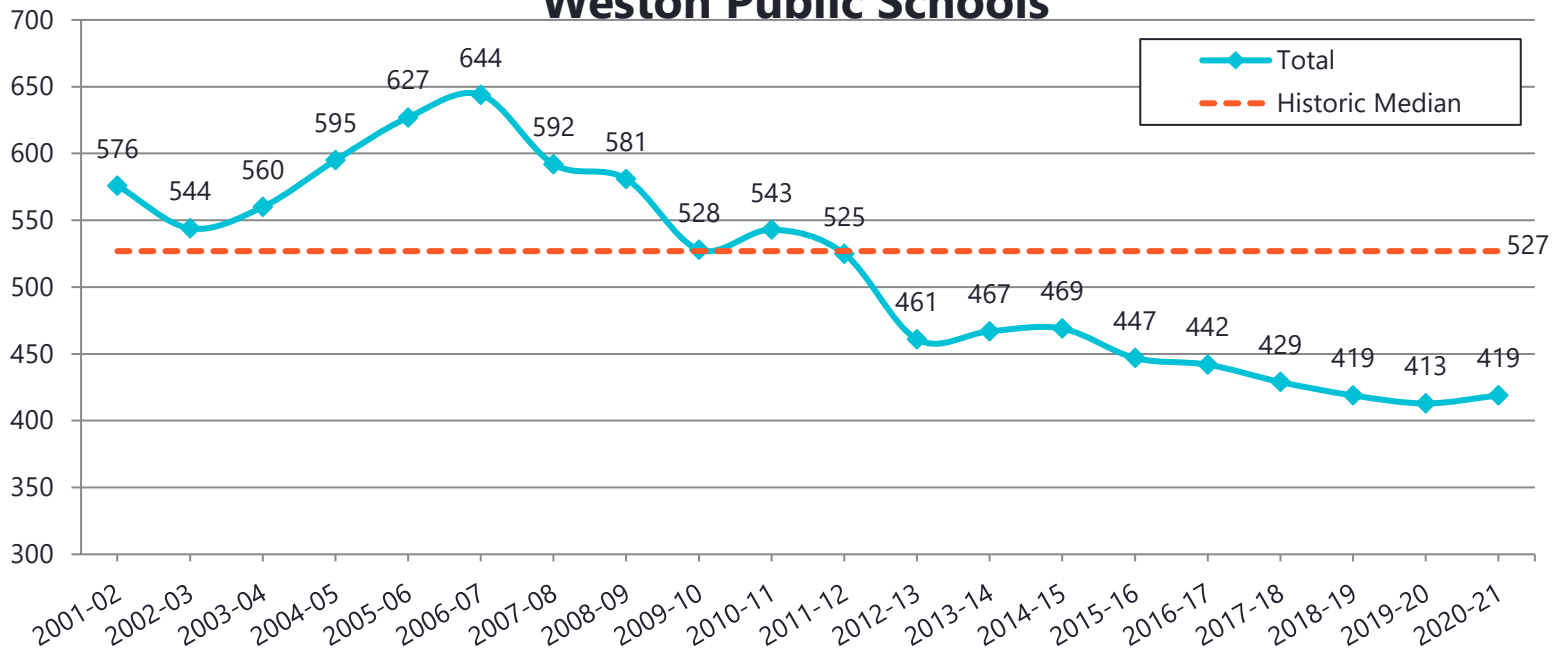


- Weston's student body has become more diverse over the last decade
- Official 2020-21 racial balance data from the State Department of Education is not yet available



Historic Enrollment

Elementary (PK-2nd) Enrollments Weston Public Schools



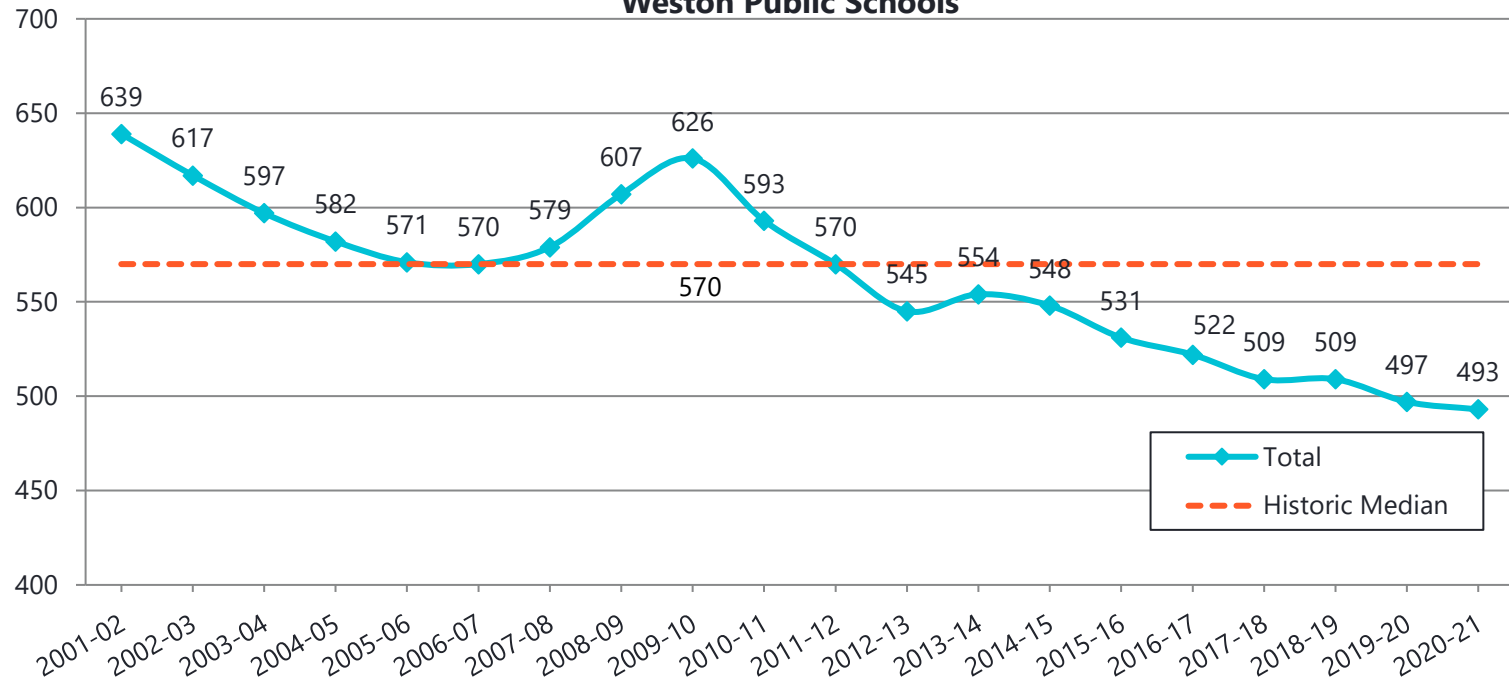
Sources: CT Dept. of Education CeDar, and Weston Public Schools

- Elementary enrollment has been on a downward trend since 2006-07; this grade level is most responsive to changes in births, migration, and housing conditions
- Experienced a modest increase this year for first time since 2014-15.



Historic Enrollment

Intermediate (3rd - 5th) Enrollments Weston Public Schools



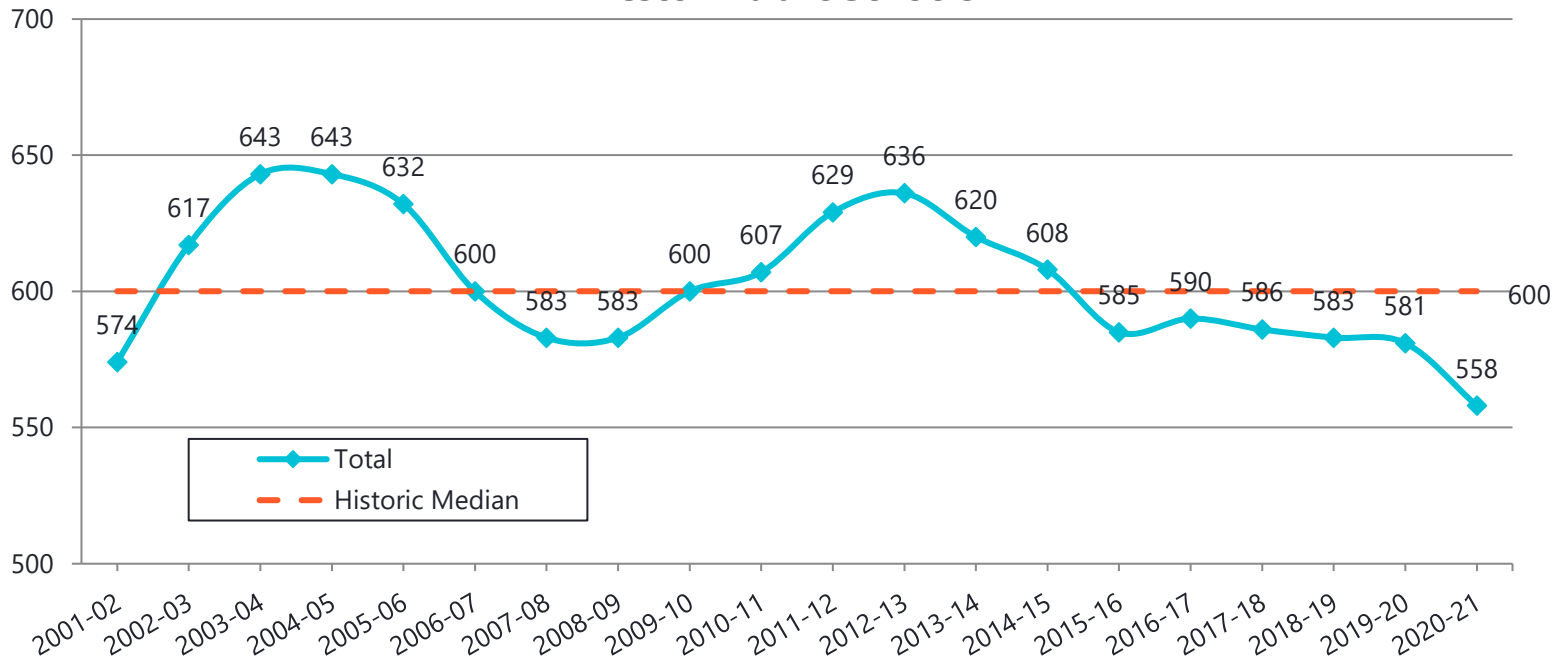
Sources: CT Dept. of Education CeDar, and Weston Public Schools

- Intermediate enrollment begin falling in 2010-11 and continues downward trend through 2020-21 albeit at a much slower rate
- This corresponds with the elementary trend a few years earlier as smaller cohorts age



Historic Enrollment

Middle (6th-8th) Enrollments Weston Public Schools



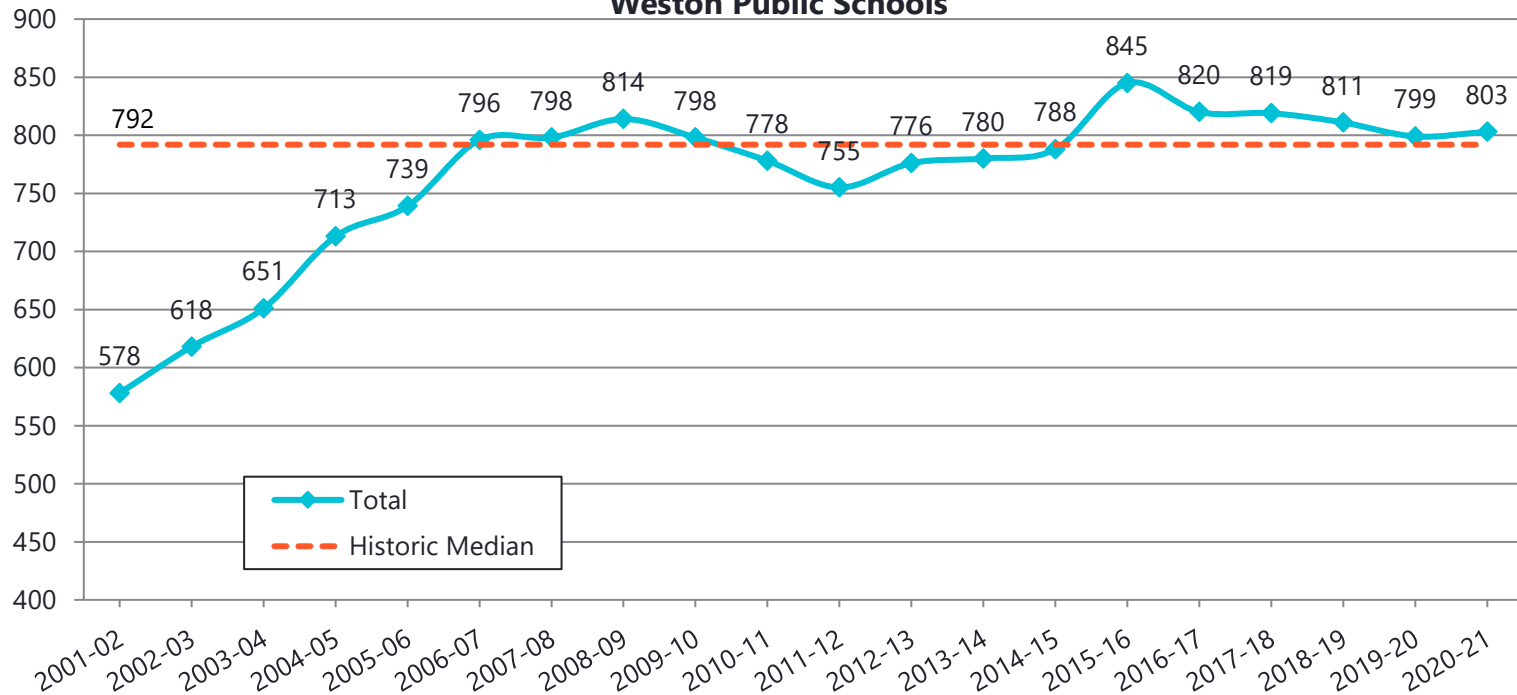
Sources: CT Dept. of Education CeDar, and Weston Public Schools

- Middle school enrollment peaked in early 2000s (on large cohorts that entered in the mid-90s) and again in 2012-13 (on cohorts entering in mid-2000s); enrollment stabilized from 2015-16 to 2019-20 but recently dropped



Historic Enrollment

High (9th-12th) Enrollments Weston Public Schools



Sources: CT Dept. of Education CeDar, and Weston Public Schools

- High school enrollments recently peaked in 2015-16
- Has declined slowly since peak as smaller incoming 9th grade classes replace larger graduating classes
- Enrollment has stabilized at approximately 800 students over last 2-yr



Projections Primer

- The cohort survival methodology relies on observed data from the recent past in order to project the near future
- Persistency Ratios calculated from historic enrollment data to determine growth or loss in a class as it progresses through school system
- Persistency Ratios account for the various external factors affecting enrollments: housing characteristics, residential development, economic conditions, student transfers in and out of system, and student mobility
- Changes in population, housing stock and tenure, and economic conditions help explain persistency ratios
- In scenarios where external factors drive enrollment in a fashion without linear relationships to existing births and/or enrollments, adjustments to the cohort-survival methodology may improve projections
- Based on information regarding student withdrawals from WPS, minor adjustments were made, where necessary, to the enrollment projections



Historic Enrollment

Weston Public School Enrollment History

Kindergarten through 12th Grade

PK-12

School Year	Birth Year	Births	K	1	2	3	4	5	6	7	8	9	10	11	12	PK	Total
2001-02	1996	114	158	210	193	201	226	212	217	181	176	176	135	129	138	15	2,367
2002-03	1997	114	159	170	194	193	201	223	221	209	187	173	175	137	133	21	2,396
2003-04	1998	146	187	163	181	194	195	208	218	215	210	180	167	173	131	29	2,451
2004-05	1999	129	184	204	176	184	201	197	211	226	206	206	169	167	171	31	2,533
2005-06	2000	128	182	194	213	174	191	206	199	201	232	212	201	163	163	38	2,569
2006-07	2001	137	210	194	200	210	174	186	208	191	201	225	207	197	167	40	2,610
2007-08	2002	76	146	220	191	196	213	170	188	203	192	197	219	197	185	35	2,552
2008-09	2003	96	166	159	220	202	194	211	183	190	210	196	206	214	198	36	2,585
2009-10	2004	97	158	171	160	214	203	209	217	181	202	208	191	193	206	39	2,552
2010-11	2005	105	159	166	178	170	216	207	211	215	181	195	205	186	192	40	2,521
2011-12	2006	86	162	156	177	180	173	217	211	207	211	170	193	203	189	30	2,479
2012-13	2007	72	115	157	163	180	186	179	221	208	207	210	173	188	205	26	2,418
2013-14	2008	71	136	135	175	174	183	197	190	215	215	214	209	171	186	21	2,421
2014-15	2009	71	140	150	146	185	177	186	206	188	214	202	208	206	172	33	2,413
2015-16	2010	61	124	141	157	161	186	184	190	209	186	218	208	206	213	25	2,408
2016-17	2011	49	128	143	146	164	173	185	188	194	208	189	216	207	208	25	2,374
2017-18	2012	64	113	142	147	154	175	180	196	192	198	212	185	214	208	27	2,343
2018-19	2013	55	109	128	155	163	165	181	187	201	195	203	209	186	213	27	2,322
2019-20	2014	71	129	117	135	160	168	169	191	186	204	195	207	207	190	32	2,290
2020-21	2015	62	122	142	131	145	176	172	172	190	196	198	194	207	204	24	2,273

State Department of Education - Public School Information System, Summary Report for 2001-02 to 2011-12; CT CeDar 2012-13 to 2015-16; CT EdSight 2016-19

- As existing mid-size cohorts matriculate to high school level, moderate declines are likely at upper grade levels
- Current cohorts at grades K-4 are much smaller than historic levels and will continue to impact the system



Persistency & Net Migration

Kindergarten through 12th Grade Persistency Ratios by School Year
2003-04 to 2020-21

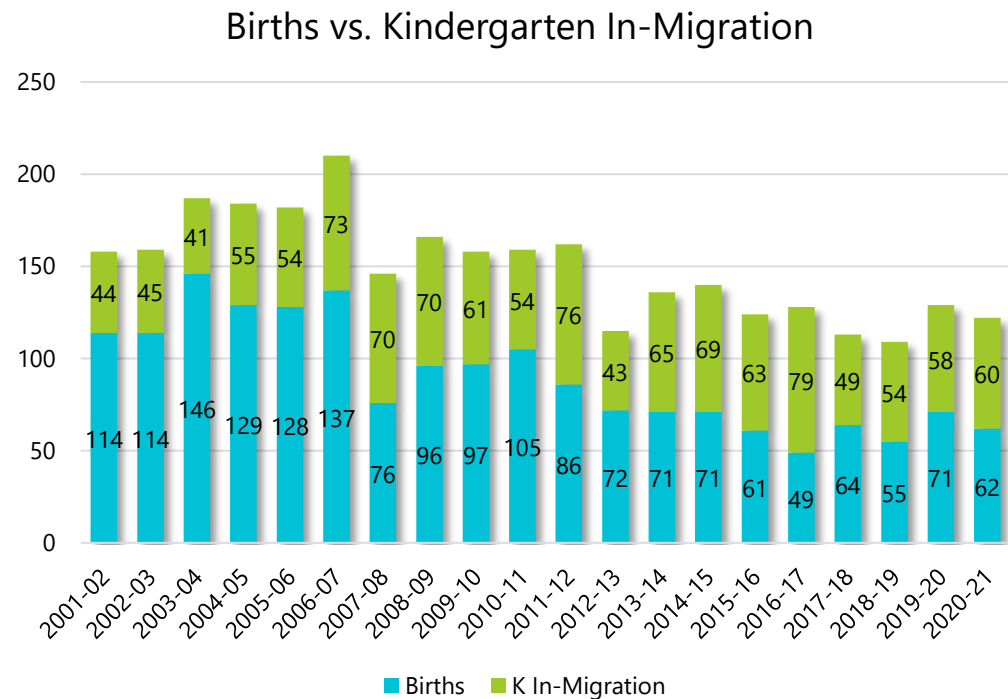
Year	Birth-K	K-1	1-2	2-3	3-4	4-5	5-6	6-7	7-8	8-9	9-10	10-11	11-12	Migration Estimate (2-7 to 3-8)
2003-04	1.2808	1.0252	1.0647	1.0000	1.0104	1.0348	0.9776	0.9729	1.0048	0.9626	0.9653	0.9886	0.9562	-0.08%
2004-05	1.4264	1.0909	1.0798	1.0166	1.0361	1.0103	1.0144	1.0367	0.9581	0.9810	0.9389	1.0000	0.9884	1.16%
2005-06	1.4219	1.0543	1.0441	0.9886	1.0380	1.0249	1.0102	0.9526	1.0265	1.0291	0.9757	0.9645	0.9760	0.67%
2006-07	1.5328	1.0659	1.0309	0.9859	1.0000	0.9738	1.0097	0.9598	1.0000	0.9698	0.9764	0.9801	1.0245	-1.18%
2007-08	1.9211	1.0476	0.9845	0.9800	1.0143	0.9770	1.0108	0.9760	1.0052	0.9801	0.9733	0.9517	0.9391	-0.60%
2008-09	1.7292	1.0890	1.0000	1.0576	0.9898	0.9906	1.0765	1.0106	1.0345	1.0208	1.0457	0.9772	1.0051	2.50%
2009-10	1.6289	1.0301	1.0063	0.9727	1.0050	1.0773	1.0284	0.9891	1.0632	0.9905	0.9745	0.9369	0.9626	2.17%
2010-11	1.5143	1.0506	1.0409	1.0625	1.0093	1.0197	1.0096	0.9908	1.0000	0.9653	0.9856	0.9738	0.9948	1.35%
2011-12	1.8837	0.9811	1.0663	1.0112	1.0176	1.0046	1.0193	0.9810	0.9814	0.9392	0.9897	0.9902	1.0161	0.17%
2012-13	1.5972	0.9691	1.0449	1.0169	1.0333	1.0347	1.0184	0.9858	1.0000	0.9953	1.0176	0.9741	1.0099	1.37%
2013-14	1.9155	1.1739	1.1146	1.0675	1.0167	1.0591	1.0615	0.9729	1.0337	1.0338	0.9952	0.9884	0.9894	3.25%
2014-15	1.9718	1.1029	1.0815	1.0571	1.0172	1.0164	1.0457	0.9895	0.9953	0.9395	0.9720	0.9856	1.0058	1.94%
2015-16	2.0328	1.0071	1.0467	1.1027	1.0054	1.0395	1.0215	1.0146	0.9894	1.0187	1.0297	0.9904	1.0340	2.57%
2016-17	2.6122	1.1532	1.0355	1.0446	1.0745	0.9946	1.0217	1.0211	0.9952	1.0161	0.9908	0.9952	1.0097	2.30%
2017-18	1.7656	1.1094	1.0280	1.0548	1.0671	1.0405	1.0595	1.0213	1.0206	1.0192	0.9788	0.9907	1.0048	4.29%
2018-19	1.9818	1.1327	1.0915	1.1088	1.0714	1.0343	1.0389	1.0255	1.0156	1.0253	0.9858	1.0054	0.9953	4.60%
2019-20	1.8169	1.0734	1.0547	1.0323	1.0307	1.0242	1.0552	0.9947	1.0149	1.0000	1.0197	0.9904	1.0215	2.47%
2020-21	1.9677	1.1008	1.1197	1.0741	1.1000	1.0238	1.0178	0.9948	1.0538	0.9706	0.9949	1.0000	0.9855	4.16%
Long Term Avg.	1.7576	1.0702	1.0452	1.0334	1.0283	1.0193	1.0284	0.9923	1.0119	0.9916	0.9897	0.9841	0.9974	
5-Year Avg.	2.0288	1.1139	1.0659	1.0629	1.0687	1.0235	1.0386	1.0115	1.0200	1.0062	0.9940	0.9963	1.0034	
3-Year Avg.	1.9221	1.1023	1.0886	1.0717	1.0674	1.0274	1.0373	1.0050	1.0281	0.9986	1.0001	0.9986	1.0008	

- Substantial increases in cohort size through elementary and intermediate school years: In-migration has averaged over 3.8% the last four years.



Birth-K Analysis

- Predicting future kindergarten cohorts has been historically challenging in Weston due to low local birthrates and high levels of in-migration of families with children age 0 to 5
- This challenge has been magnified in recent years as Birth-K ratio has risen from ~1.5 (or 50% increase in the size of incoming classes relative to local births) to 2.61 in 2016-17 and 1.97 in 2020-21
- Since peak in 2016-17, Birth to K has returned to recent historic levels





Kindergarten Projections

- K projections blend two methodologically different models
- Traditional cohort-survival method based on historic Birth-K ratios
 - Standard methodology based on recent years' births and K enrollments
 - Assumes stable and linear relationship between future births and total kindergarten enrollment from all sources (e.g. home purchases, rentals, etc.)
 - Potential to over-respond to year-to-year variations in births
 - **Variable Birth-K ratio each year to stabilize total number of kindergarten students generated by in-migration; minimal differences from stable Birth-K method**
- Regression-based approach using historic births, home sales, and K data
 - Adjustment to standard methodology
 - Assumes linear relationships between kindergarten enrollment and two variables (home sales and births) based on multiple regression analysis of all available years of data
 - Places greater weight on housing sale trends projected under each scenario compared to the traditional approach (especially in years 1-5)



Kindergarten Projections

- Regression analysis of kindergarten enrollment vs. home sales and births yields good model fit and significance metrics ($R^2 = 0.99$):

$$K_{Yr} = 0 + (Births_{Yr-5} * 0.805) + (Home\ Sales_{Yr-1} * 0.04258) + (Median\ SF\ Home\ Sale\ Price_{Yr} * 0.00009)$$

- K Projections are based on a blend of the Cohort Survival and Regression based K projection.**

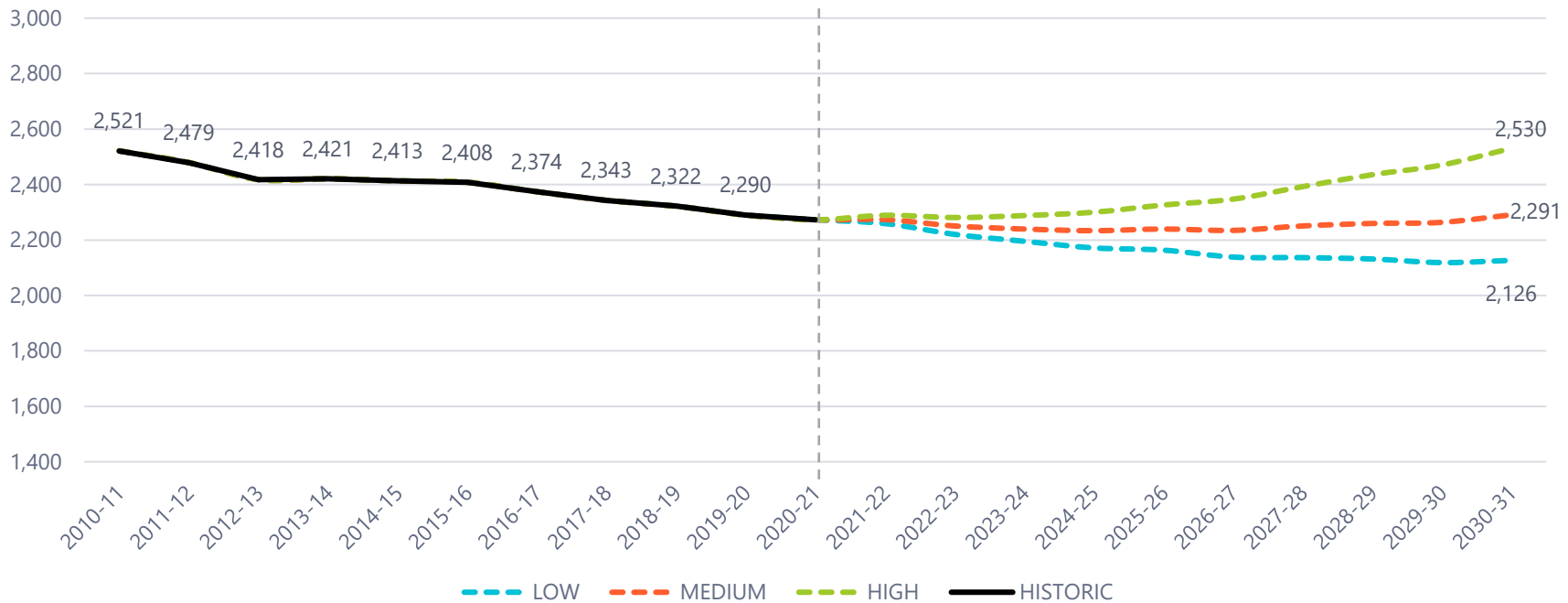
Kindergarten Projection Model Assumptions

	<i>Low</i>	<i>Medium</i>	<i>High</i>
Annual Births	56 - 78	63 - 78	68 - 78
Annual Home Sales	150 - 206	180 - 209	213 - 215
Median Sale Price (2019 \$)	\$743k - \$750k	\$754k - \$850k	\$771k - \$1



Districtwide Projections

Projection Model Comparison (PK-12)
Weston Public Schools



- Developed projections under three scenarios (Low, Med & High)
- **Medium projections model most closely aligns with underlying demographic, housing, and economic trends**
- Medium projection is very close to the high projections for the first 3 years



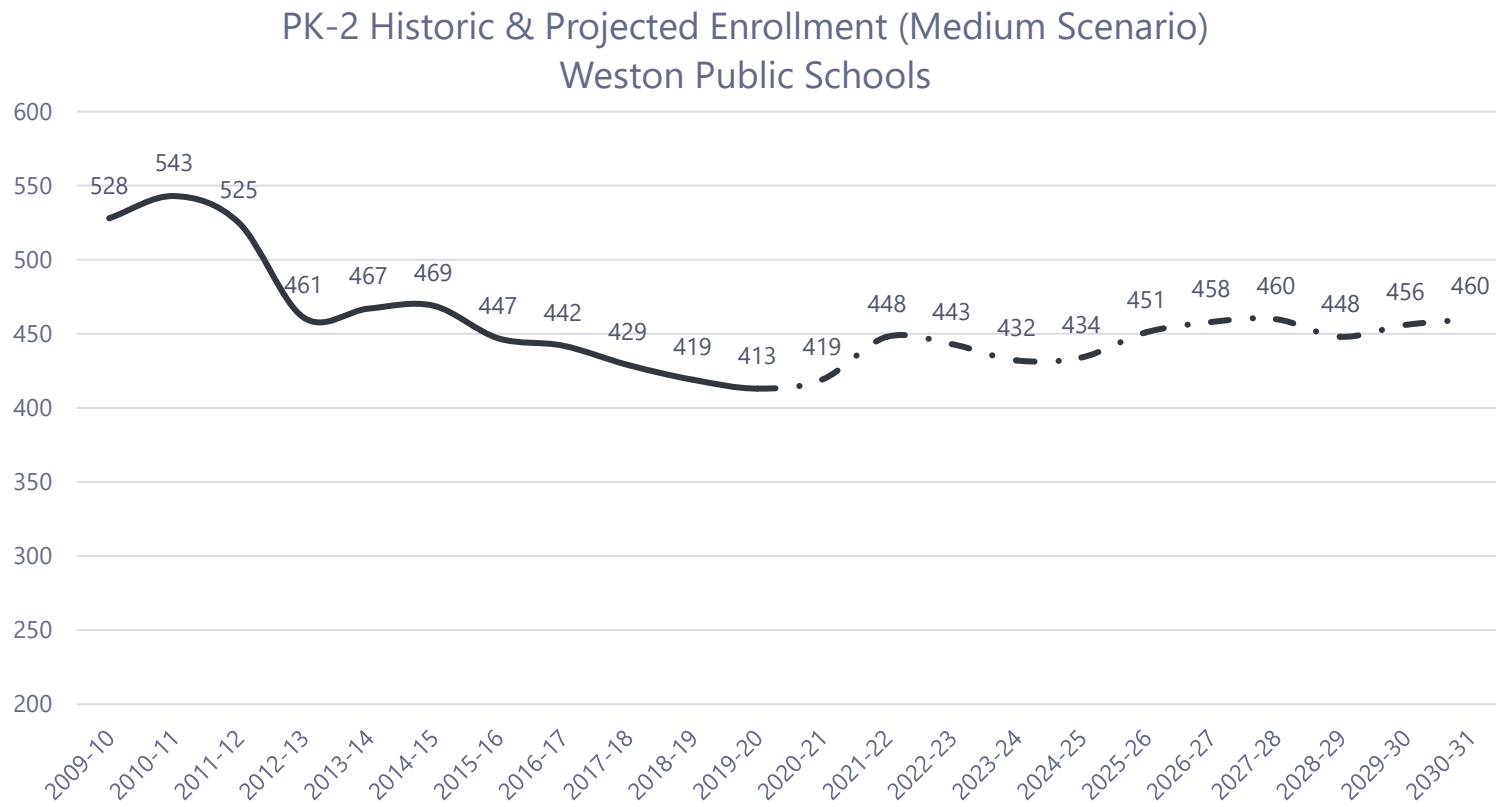
10-Yr Projections (Medium)

School Year	Birth Year	Births	K	1	2	3	4	5	6	7	8	9	10	11	12	PK	PK-12 Total
2020-21	2015	62	122	142	131	145	176	172	172	190	196	198	194	207	204	24	2,273
2021-22	2016	54	127	145	152	150	155	181	178	173	195	197	197	193	207	24	2,274
2022-23	2017	60	123	140	156	163	160	159	188	179	178	196	196	196	193	24	2,251
2023-24	2018	59	122	136	150	167	174	164	165	189	184	179	195	195	196	24	2,240
2024-25	2019	66	129	135	146	161	178	179	170	166	194	185	178	194	195	24	2,234
2025-26	2020	78	140	142	145	156	172	183	186	171	171	195	184	177	194	24	2,240
2026-27	2021	63	127	155	152	155	166	177	190	187	176	172	194	183	177	24	2,235
2027-28	2022	65	130	140	166	163	166	171	184	191	192	177	171	193	183	24	2,251
2028-29	2023	66	131	143	150	178	174	170	177	185	196	193	176	170	193	24	2,260
2029-30	2024	68	133	145	154	161	190	179	176	178	190	197	192	175	170	24	2,264
2030-31	2025	68	134	147	155	165	172	195	186	177	183	191	196	191	175	24	2,291



Individual School Projections

- Hurlbutt projected to dip slightly then increase slowly to 460 students at the end of the projection horizon

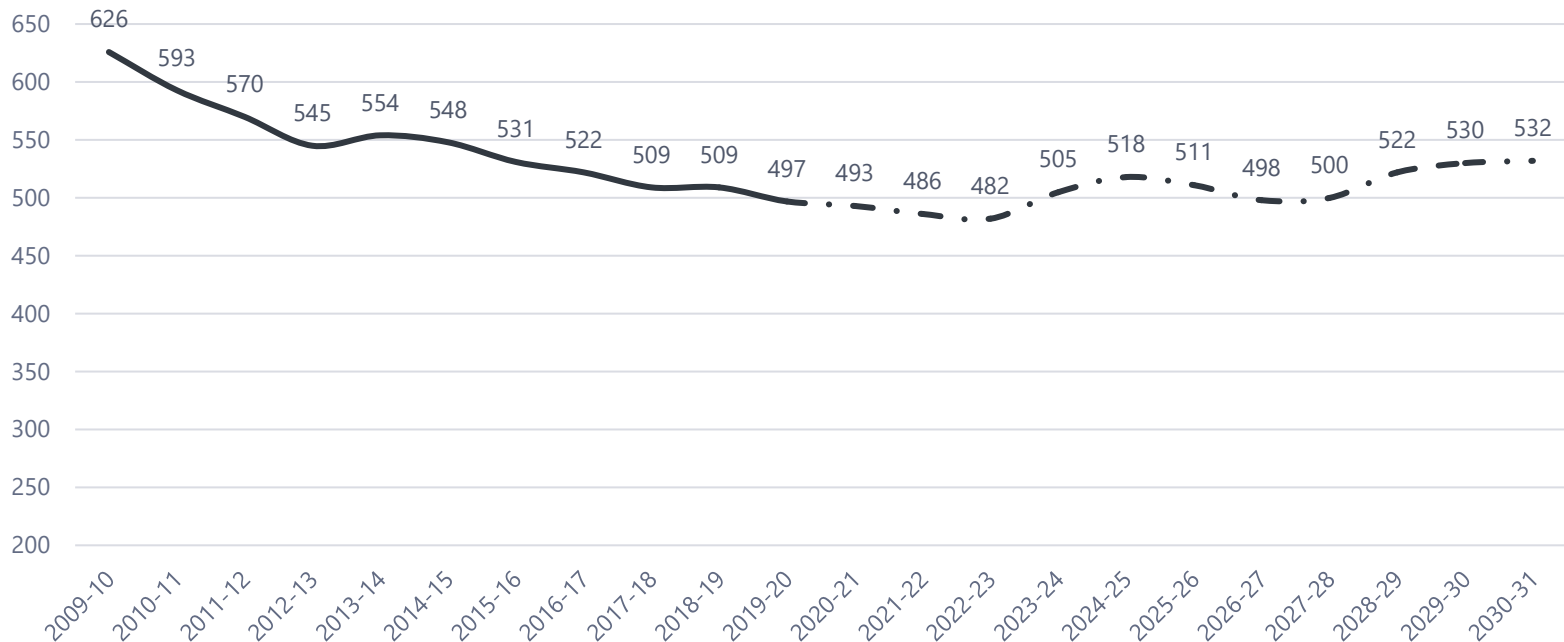




Individual School Projections

- WIS projected to experience drop in 2022-23 to ~480 students
- At the end of the projection horizon, enrollment is expected to increase to around 530 students

3-5 Historic & Projected Enrollment (Medium Scenario)
Weston Public Schools

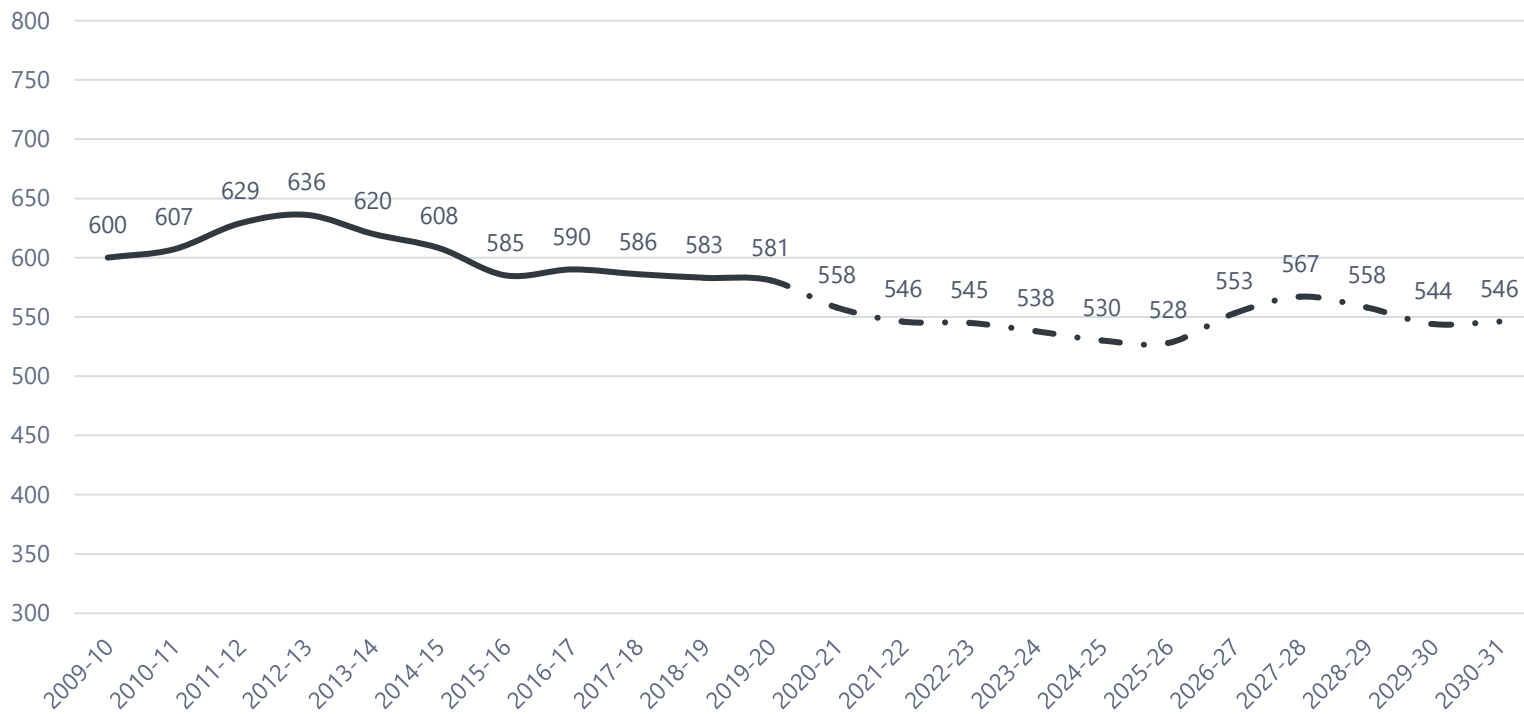




Individual School Projections

- WMS projected to see a steady near-term decline and eventually reaching nadir in 2025-26. A modest increase follows with enrollment stabilizing in the 540's

6-8 Historic & Projected Enrollment (Medium Scenario)
Weston Public Schools

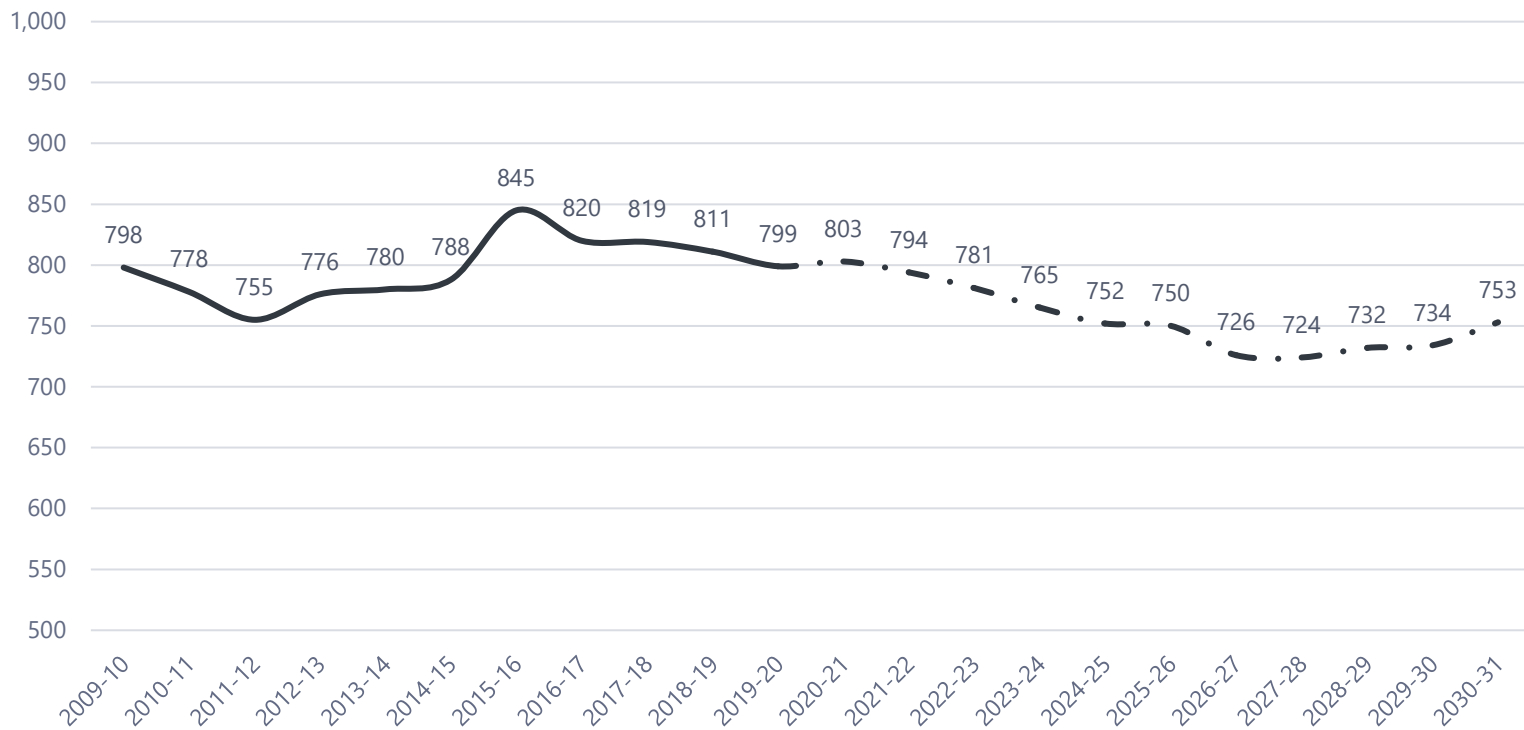




Individual School Projections

- WHS projected to see more gradual decline in next six years before a sharper dip in 2026-27 as successive smaller cohorts currently in the system matriculate

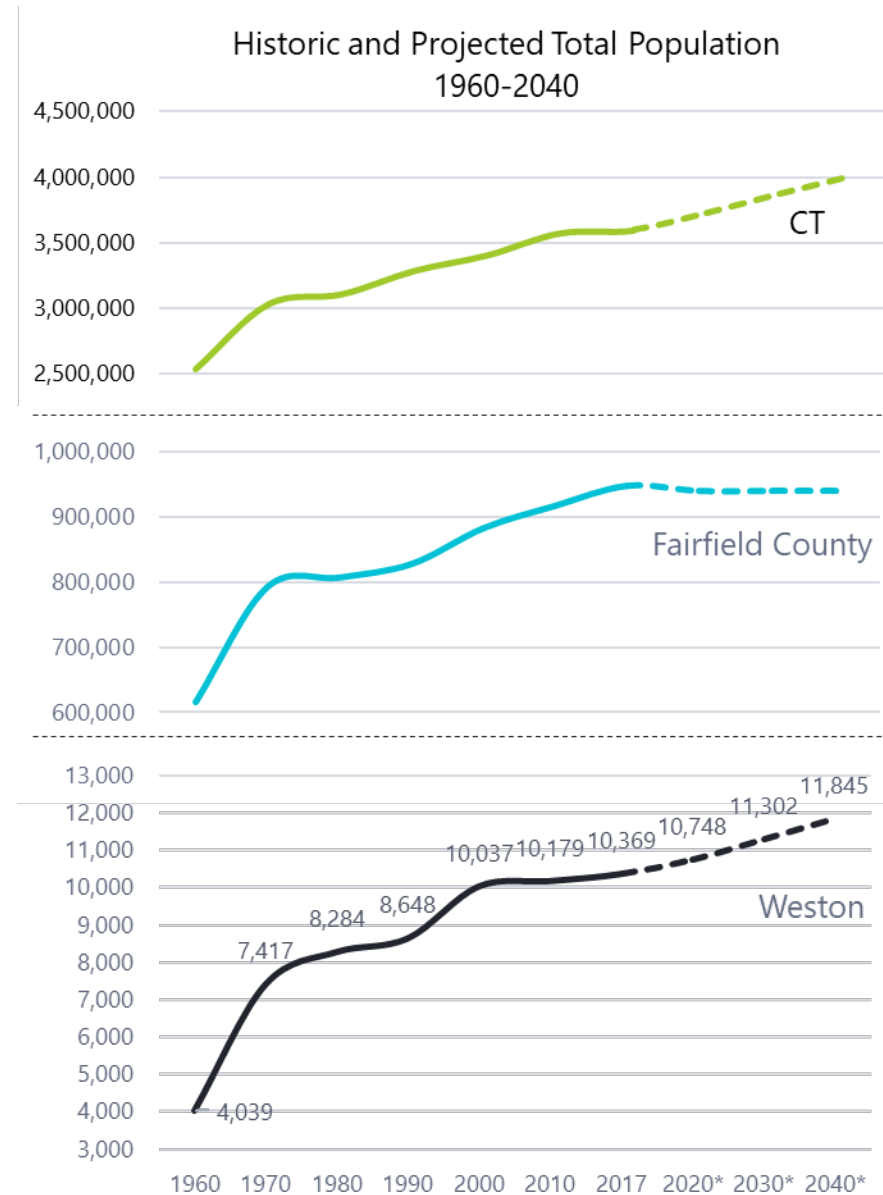
9-12 Historic & Projected Enrollment (Medium Scenario)
Weston Public Schools





Total Population Change

- Total population increased 1.4% from 2000 to 2010, and is estimated to have increased another 1.9% during 2010-2017 according to the ACS
- CT DOT projects steady growth through 2040

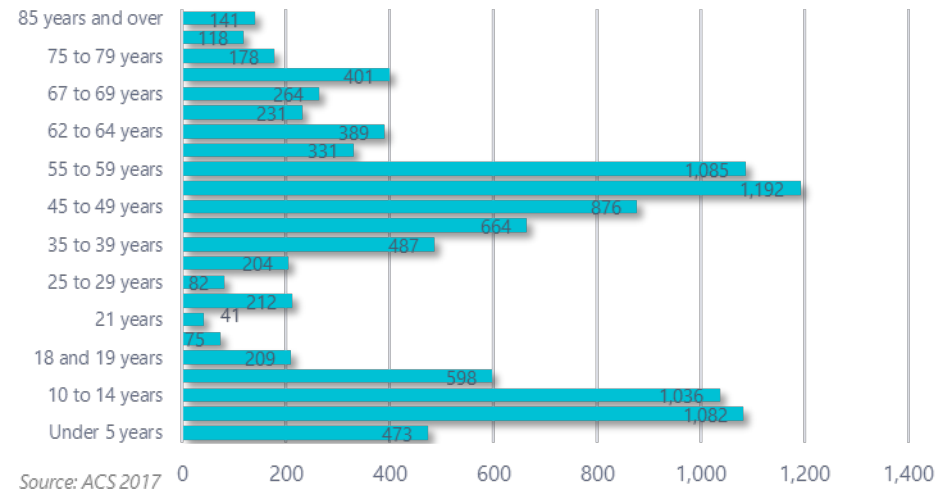




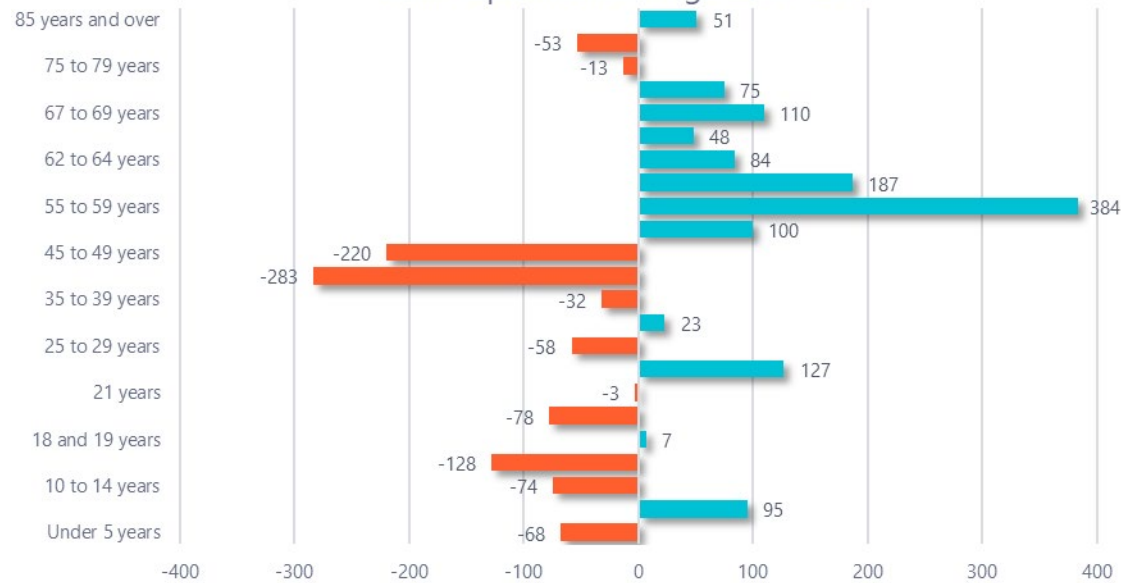
Population by Age

- Growth in the 10 to 24 and 45 to 64 year old cohorts; decline in 0 to 5, and 30 to 44 cohorts through the 2010s
- More recent estimates show growth in younger population (5 to 9, 22 to 24), as well as decreases in the working age (35-54) cohorts (though this data is less precise than Decennial Census counts)

Weston Population Distribution 2017



Total Population Change 2010-2017

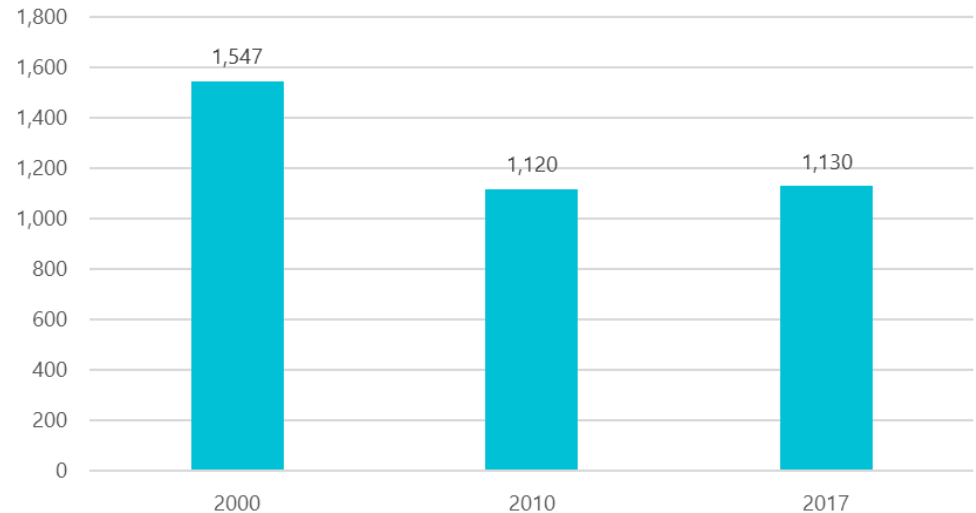




Females of Child-Bearing Age

- Population of potential mothers stabilized from 2010-2017, following a large decrease from 2000-2010
- Highest birth rates for women in their 30s

Females of Child-Bearing Age (18-44)



Source: U.S. Census 2000 and 2010; ACS 2017.

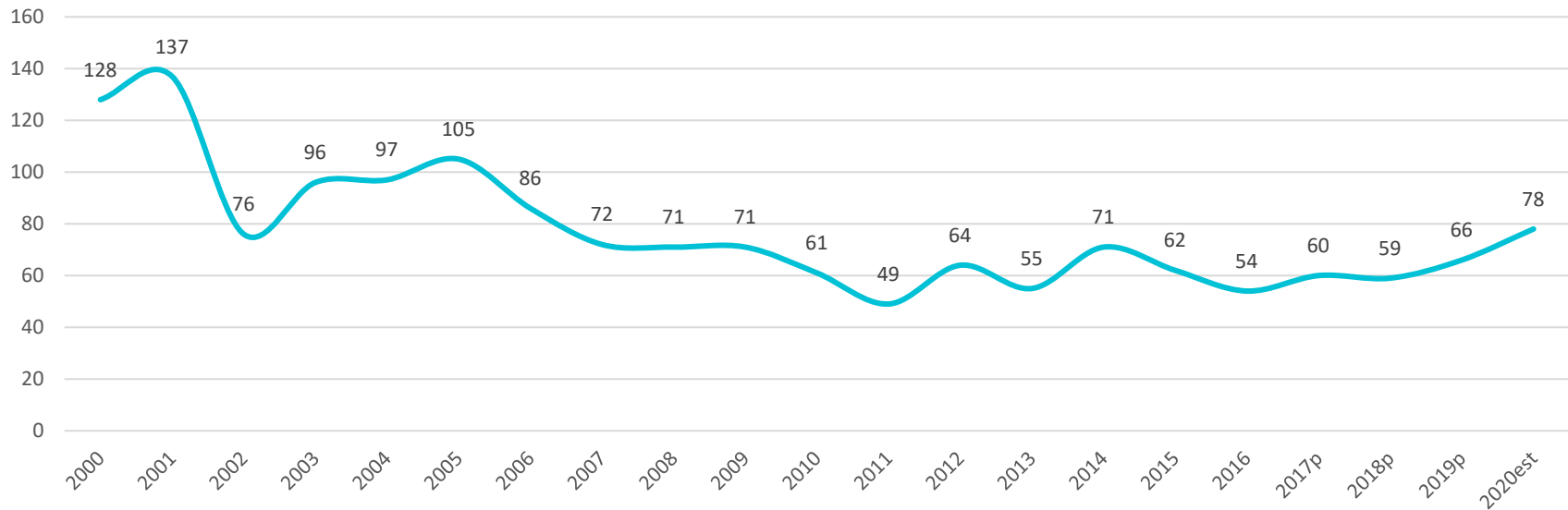
Age Specific Fertility Rates for Weston: 2009-2013
(Births Per Thousand Women in Age Group)

<14	15 to 19	20 to 24	24 to 29	30 to 34	35 to 39	40 to 44	45 to 50	Total
0.0	1.1	6.8	92.6	166.0	129.0	16.3	1.1	22.2



Births

Weston Historic Births 2000 - 2020



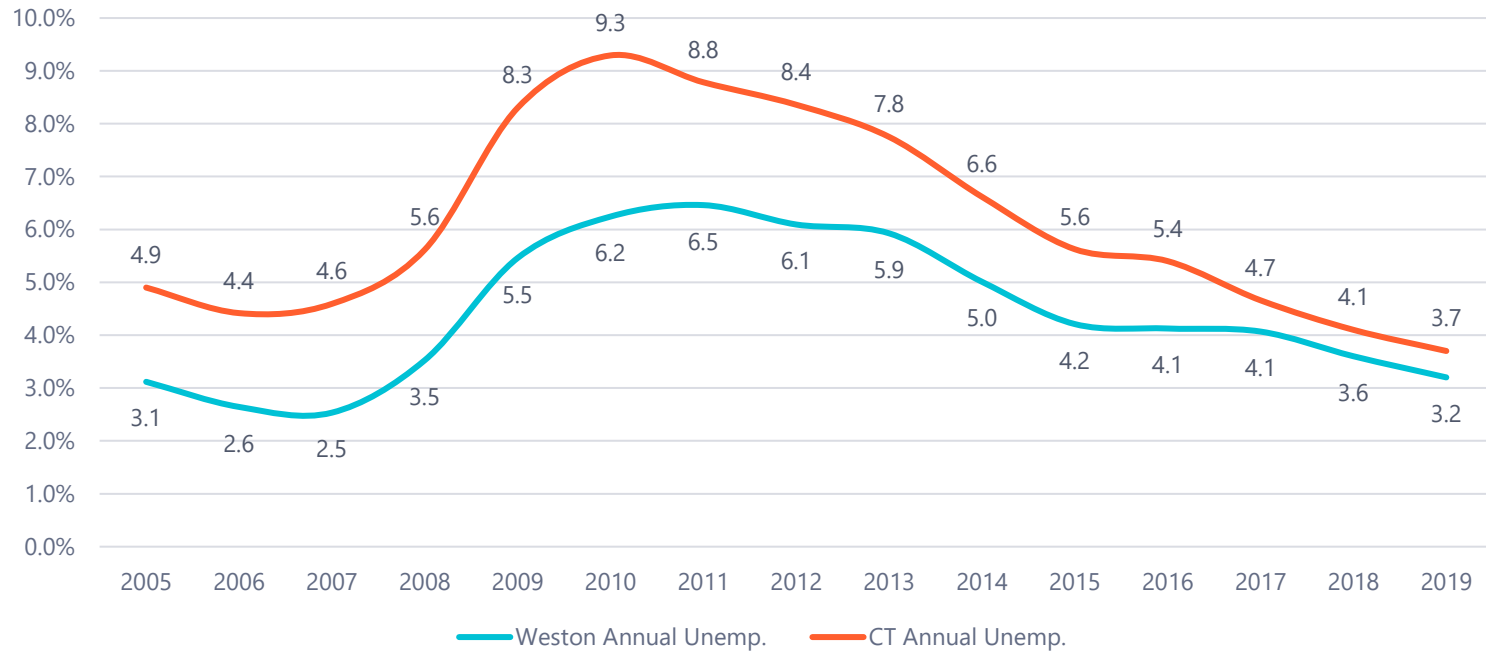
Source: CT Dept. of Public Health with MMI adjustments for estimated out of state births (2019-2020); projections prepared by MMI for 2020 births are preliminary and are estimated for the full year based on Jan. to June reported births.

- The small size of the community and low absolute number of births exaggerates small year-to-year changes
- Annual births increased 30% from 2010 to 2020 (based on most recent estimates).
- 63 births on average for last 5 years
- Moderate increases in births in 2012 and 2014 are tied to 2017-18 and 2019-20 entering kindergarten classes



Unemployment

Weston and CT Unemployment Rates, 2005 - 2019



- Local unemployment rate has consistently trended approximately 0.5-3.0 percentage points below statewide levels
- As of July 2020, the unemployment rate in Weston is 7.2%



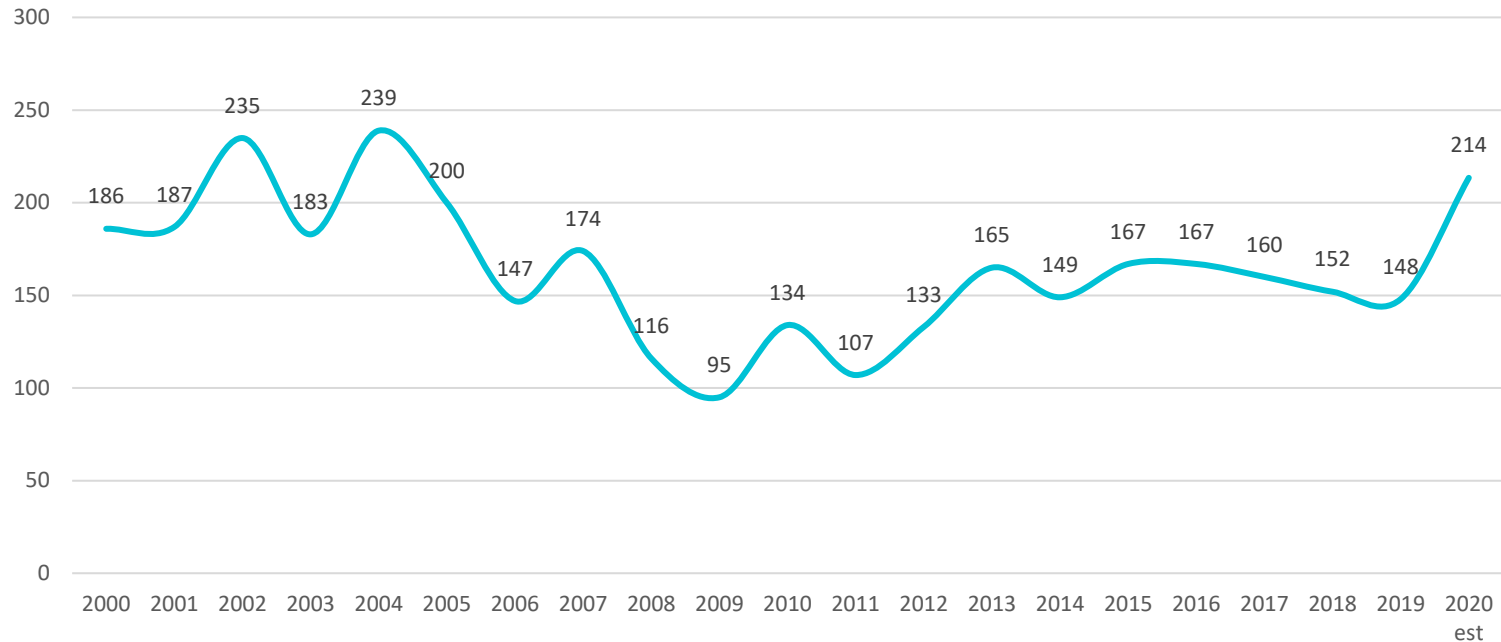
Demographics Summary

- Population growth has been slow through the last 15 years
- Although birth rates decreased through the late 2000s, there has been a recent uptick over the last 3 years.
- 78 births estimated for 2020 are the greatest number experienced since 2005-2006
- Average approximately 63 annually over last 5 years.



Sales

Home Sales in Weston



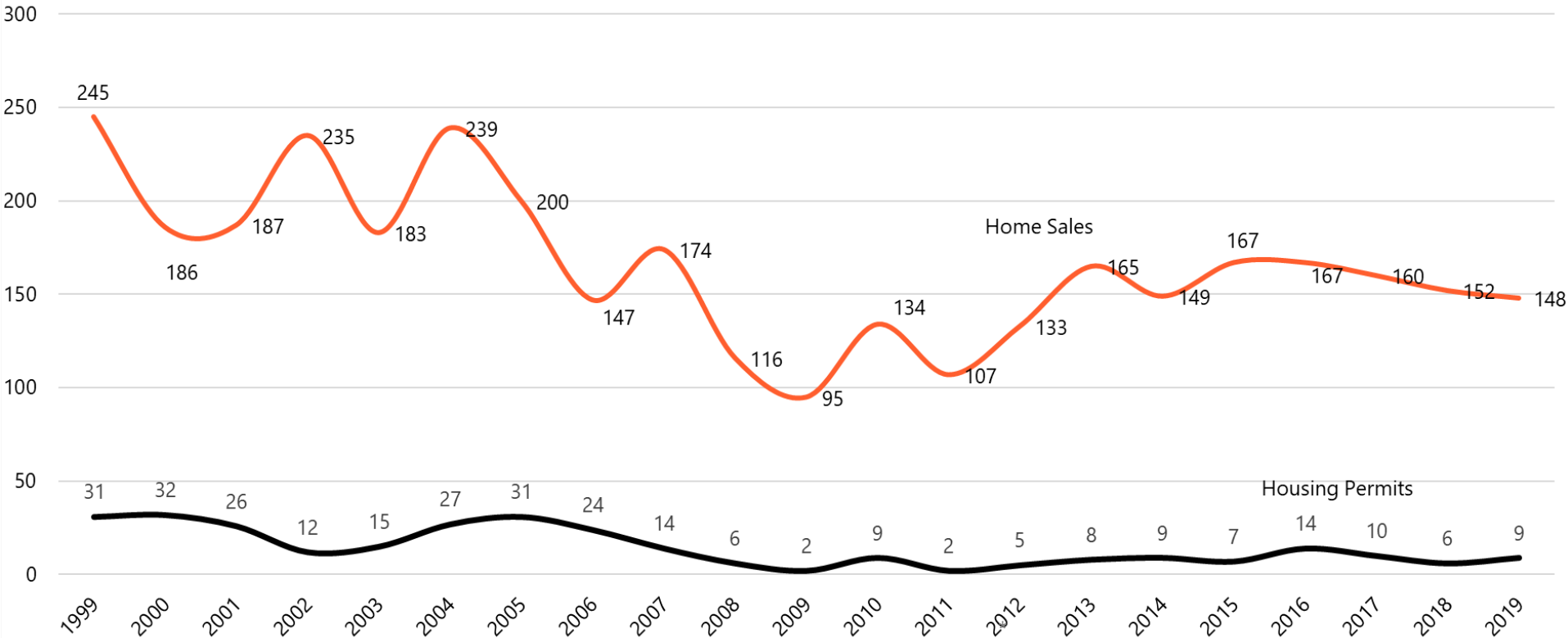
Source: Warren Group. Data for 2020 is Jan. – Aug., extrapolated by MMI using historic data to estimate full year sales.

- After a dip in sales from 2008 to 2011, home sales have stabilized around 159 sales per year from 2015 to 2019.
- **From January to August of 2020, 153 homes have been sold**



Housing Permits (New Construction)

Weston Housing Sales and Permitting Activity, 1999 - 2019



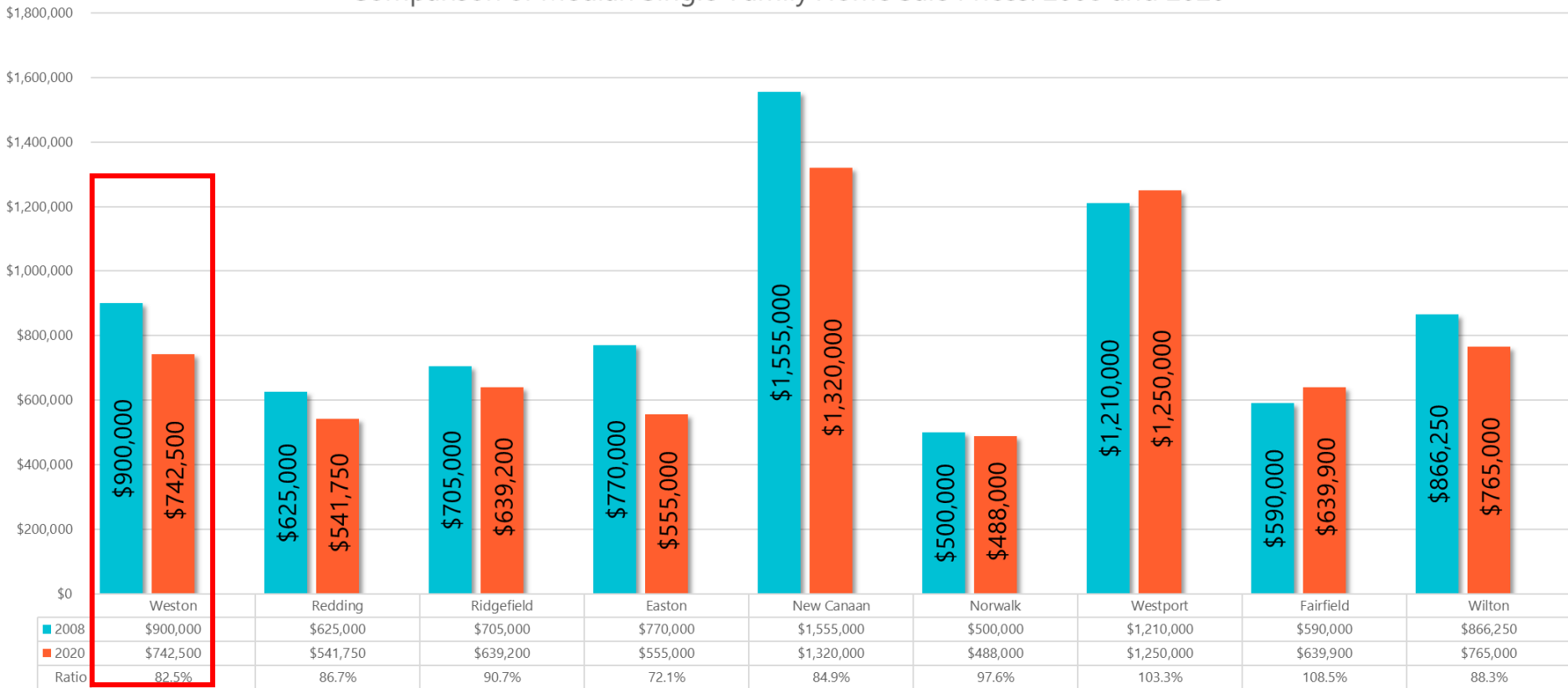
Source: CT DECD, The Warren Group, the Town of Weston. 2020 permit data is not yet available.

- Permits for new housing construction have grown but are constrained by limited availability of land



Median Housing Price

Comparison of Median Single-Family Home Sale Prices: 2008 and 2020



Source: The Warren Group, 2020

- 2020 YTD median single-family sale price: \$742,500
- Median prices in Weston have remained more affordable than Westport, New Canaan, and Wilton, however, well above other Fairfield County towns
- Prices have continued to recover from the Recession but not as well as most of the other towns



Recent Real Estate Trends

The Town Planner and local realtors were interviewed about their recent observations in Weston

- Land that has been fallow for years is getting purchased
 - Especially pre-approved subdivisions
- No new subdivision or lot applications
- New construction boom
 - Lots of additions and adding pools
 - Lots of renovations
 - A few teardowns
- Inventory is limited and moving quickly for sales and rentals
- Younger families are moving in from NYC and cities in Fairfield and Westchester Counties
- Current petition to expand the size of ADUs under consideration by PZC



Housing Summary

- High quality of local schools and development patterns are major drivers for people moving to Weston
- Recent spike in sales and new construction
- Almost exclusively owner-occupied housing stock with low rental vacancy rates, creating a stable long-term residential base
- Largely built-out community with limited opportunities for significant expansion of housing stock under current zoning
- Increasing number of owner-occupants over age 65 a leading indicator of future housing turnover



Takeaways

- The Medium Projection Model still reflects the most likely trajectory for future enrollment. However, recent changes to enrollment drivers from the pandemic bear watching. Should the current active housing market conditions continue, the High Projection Model may prove more accurate
- For the Medium Projection Model
 - Overall PK-12 enrollments are projected to have a very modest decline before reaching their lowest point (~2,200 students) around the projection mid-point. A slow rebound is projected to follow yielding approximately 2,291 students in 2030-31.
 - PK-2 and Intermediate grade enrollments are projected to remain stable for the first five years of the projection before increasing in the last five years
 - Middle school is projected to experience a slow and modest decline
 - High school is projected to slowly decline over the ten-year horizon



Discussion

Any Questions?

DRAFT November 13, 2020

Town of Weston, Connecticut

Request for Proposal

**Facilities Optimization Committee
Project**

1. PURPOSE

The Town of Weston, Connecticut (the “Town”), through its Facilities Optimization Committee (the “FOC”), is accepting proposals from qualified professional consulting firms (the “Consultant”) to provide professional services to the FOC related to the possible consolidation, expansion, closing, and/or renovation of Town educational facilities and certain Town administrative facilities, and the relocation of municipal and school staff offices located in those facilities. Interested Consultants shall possess extensive knowledge and experience in the fields of [municipal planning, facility assessment, engineering and design, educational specifications, cost estimation [other]]. It is anticipated that the project will commence shortly after Consultant selection and contract execution. The estimated completion date will be [prior to the end of September 2021].

2. OVERVIEW

The lead entity for this work will be the FOC. The selected Consultant will work with and under the general direction of the FOC and its Chairman, Rick Bertasi.

The FOC was formed to determine if it is possible to reduce the footprint of the school and Town facilities to optimize lifetime costs (capital, facilities, operating expenses, other Board of Education staffing and expenses), improve the learning environment, create appropriate synergies for Town and school staff, and ensure consistency with the Town’s Plan of Conservation and Development. [The FOC will provide its recommendations to the Town’s Board of Education, Board of Selectmen, and Board of Finance for use in decisions involving possible consolidation, expansion, closing and/or renovation of facilities and relocation of municipal and school staff offices.] The FOC therefore includes the Chairs of the Town’s Board of Finance, Board of Education and Planning & Zoning Commission, other representatives of these bodies, and members of the public at large.

Educational Facilities Goals:

Approximately ___% of the Town’s annual budget is allocated to the Board of Education’s needs. Accordingly, a critical focus of this project is to determine whether Town costs attributable to the Board of Education can be reduced or mitigated by decreasing the current four school buildings to three buildings and reallocating the grades and staff currently assigned to those four buildings accordingly.

The Town currently maintains the following four school buildings on one integrated campus:

- Weston High School (Grades 9-12)
- Weston Middle School (Grades 6-8)
- Weston Intermediate School (Grades 3-5)
- Hurlbutt Elementary School (Grades pre-K-2). (Hurlbutt also contains the Town’s senior center.)

To date, the FOC has concluded that Weston High School and Weston Intermediate School should remain in place. It is considering whether the Town could reallocate students from either Weston Middle School or Hurlbutt Elementary School among the surviving three schools and achieve cost savings versus simply retaining the current four schools, while maintaining the current high educational standards.

The two principal scenarios being considered currently are:

1. Close (and repurpose) Hurlbutt and house students in the remaining three schools in the following manner:
 - High School – Grades 9-12
 - Middle School – Grades 5-8
 - Intermediate School – Grades pre-K-4
2. Close (and, if possible, repurpose) the Middle School and house students in the remaining three schools in the following manner:
 - High School – Grades 9-12
 - Intermediate School – Grades 5-8
 - Hurlbutt – Grades pre-K-4

Based on current enrollment figures and projections, the FOC currently believes that it will not be possible to consolidate the four existing facilities into three facilities going forward without significant expansion of one or more of the surviving facilities.

The FOC is prepared to consider alternative approaches to the above scenarios that might be identified by the Consultant.

Administrative Facilities Goals:

This project will also consider whether the Town's following administrative buildings, at least one of which has technically reached the end of its useful life, can be reorganized with the same efficiencies in mind:

- Board of Education Central Office
- Annex (Containing Land Use and Social Services). (The Annex is at the end of its prescribed useful life).
- [Bus Depot (for school buses)]
- Historic property that housed the Jarvis Military Academy ("Jarvis"). (Jarvis houses the Parks and Recreation Department, and is located in an Historic District)
- [Town Hall (?)] (Also located in an Historic District)]

The FOC has preliminarily determined that the Annex should be demolished, the Bus Depot should, if possible, be repurposed and the buses moved to another location, and Jarvis should be disposed of or rented so as to produce more revenue for the Town.

Relevant background studies and materials:

Background facility assessment documentation, which was completed in 2013 and 2017/18 by Silver Petrucelli Architects, and the most recent school enrollment projections, which were completed by Milone & MacBroom, are available on the Town website at the following links [insert links]. [Baseline information on the physical condition, maintenance and improvement opportunities is outlined within the documents. The documents foresee a need to replace any end of life features of the schools, repair any deferred maintenance capital items and potentially modify the school configuration if supported by future changes in enrollment.]

The 2020 Plan of Conservation and Development (the “POCD”) created by the Town’s Planning & Zoning Commission is available for review on the Town website at the following link:

<http://www.westonct.gov/media/file/TownPlanFinal%2808-20-10%29ssnewpagenumbersize.pdf>

It should be noted that although the Town is exempt from regulation by its Planning & Zoning Commission, the POCD is highly relevant because it contemplates creation of an expanded commercial zone adjacent to the school campus and recommends the repurposing of certain Town properties.

3. SCOPE OF SERVICES

The FOC has structured the following Scope of Services provisions in a manner that contemplates a “basic” study and potential “add-ons” that the Committee is considering, but which will require further cost/benefit analysis before they are approved.

Basic Study

1. Of critical importance to the study is the answer to the following question: Given school population trends and expectations, is it feasible to move from the four-school model currently utilized to a three school model [without incurring prohibitively expensive additional construction costs]?
2. If the answer to the preceding question is “yes,” the Consultant shall assist the FOC in producing a School Facilities Restructuring Plan containing an analysis of alternatives, and preliminary designs and cost estimates for facilities consolidation, expansion, closing, and/or renovation, in order to move to a three-school model, as well as the Consultant’s recommendations regarding the foregoing.
3. Regardless of the answer to Question 1 above, the Consultant shall develop a plan to optimize the Town’s non-school facilities described above under “Administrative Facilities Goals,” including placement of Town personnel within such facilities. If the answer to question 1 is “yes,” then that plan could include placing non-school town employees in Hurlbutt or the Middle School.

Add-Ons

1. In addition to merely consolidating into three schools, are there enhancements, such as energy savings (e.g. daylight modeling), health and safety, sustainability [other?]
2. Are there recommended renovations or alterations that would enhance students' 21st-Century learning environment?
3. [programmatic changes and other upgrades desired by the Board of Education]?

The final scope of the Consultant's services, including deliverables, is anticipated to be clarified once a Consultant is selected. At this point, depending on the answers to the foregoing questions, the FOC contemplates that the services will include at least the following components:

(a) Review existing documentation and studies, and research existing conditions, to create a broad assessment of existing facilities, noting building condition and/or code deficiencies. Detailed building condition assessments are not considered part of the scope of this project, but some buildings may need limited engineering review as an update to prior assessments.

(b) Taking into account the prior studies, as reviewed pursuant to (a) above, assess the function, space needs, and programmatic needs of each school and department or function, including projected enrollment requirements, to determine building net and gross area requirements to meet those programmatic needs.

(c) Study alternative site layouts, building plans, or building locations within the Town center area, including the road on which all four schools are located, to determine if existing or alternative sites have the capacity to accommodate the proposed changes. Analyze parking and access issues as well.

(d) Identify short-term swing space options to accommodate ongoing operations with minimal disruption while buildings are in construction and/or renovation.

(e) Prepare a preliminary assessment of options that lists, for each option, the following: pros and cons of each alternative; feasibility of each alternative; projected cost (including design, construction and operating costs) of each alternative; effectiveness and benefits; relative importance/urgency of each of the identified needs; and comparison to a baseline scenario of the applicable current school and Town buildings, grade configurations and staff locations remaining in place.

(f) Recommend the appropriate disposition of buildings and associated land that would be rendered surplus if your recommendations were followed.

(g) [Achieve an understanding of opportunities that may arise with purchases/swap of Town real estate assets that may provide improved solutions to department/facility relocations to include potential opportunities for public/private collaborations.]

(h) Recommend a preliminary project timeline or schedule from appropriation of funds through design, construction and phasing steps.

(i) Consider possibilities for implementing 'green' building and energy saving strategies.

(j) Account for probable hazardous materials abatement costs in proposed building renovations, based on facility age and any reports/data available from the Town.

(k) Investigate and document potential funding sources available to the Town. These sources include but are not limited to eligibility for State reimbursements under various programs.

(l) Facilitate work/review meetings as necessary with the FOC and relevant Town Boards, the school administration and the Town Administrator, and provide project updates and/or recommendations throughout the project. Please specify minimum meeting expectations.

(m) In coordination with the FOC, create and manage an efficient and effective public participation process, with a goal of achieving consensus among citizens of the Town relative to a long-term vision for the efficient and effective use of school and other municipal facilities, including but not limited to public meetings, digital and social media, mailings and assistance with the development of focused surveys.

(n) Review comparable information and data from DRG A schools, and other municipal or school systems of similar size or facing similar options.

(o) Working with the FOC, integrate the above materials into a master Plan that will provide a framework for capital building projects with estimated project costs for the Town's Capital Plan. Prepare a Final Draft of the Plan and Executive Summary for presentation to the Board of Selectmen and the Board of Education in print and digital form, including a matrix of recommendations over the short, medium, and long term.

All recommendations must comply with the Town Charter, Board of Education policies and all relevant State and Federal requirements.

4. GENERAL

In order to be awarded this assignment, the selected Consultant must meet all State and Federal affirmative action and equal employment opportunity practices.

The Consultant shall obtain and maintain, at its sole expense, Professional Liability Insurance in a minimum amount of \$1,000,000. The Consultant shall also obtain and maintain, at the Consultant's sole expense, such insurance as will protect the Consultant from claims under Workers' Compensation and Comprehensive General Liability Insurance that will protect the Town from all claims of bodily injury, death or property damage which may arise from the performance by the Consultant or its employees in their functions and services to the Town. Limits of insurance shall be \$1,000,000 per occurrence, \$2,000,000 aggregate. Workers' Compensation shall be in accordance with Connecticut Statutes. The Consultant shall, within five (5) days after the Notice of Award date, provide proof of this insurance. The Town shall be listed as an additional insured.

After review of the responses to this Request for Proposal (RFP), the FOC will conduct interviews of those Consultants it identifies as potential candidates. The following factors will be evaluated and weighted appropriately in the selection process:

- Technical competence of the Consultant
- Consultant's experience on similar projects
- Consultant's qualifications and experience of its key personnel
- Reputation of the Consultant based on references
- Consultant's ability to schedule the project within the time constraints
- Evaluation of the fee proposal

This RFP is not a contract offer. The Town reserves the right to (1) reject any and all proposals, and to reject any part of any proposal; (2) waive any informalities in any and all proposals deemed not in the best interest of the Town; and (3) negotiate with any Consultant any amendments to the contract. The Town may choose to award separate contracts for work defined herein to individual Consultants, if deemed in its best interest.

It shall be understood that the award made by the Town shall be final and conclusive and without recourse or appeal by the remaining Consultants. The award of the contract, if made, will be made within [ninety (90) days] after opening of the proposals (the "Notice of Award"). The Town will not award the contract to any Consultant that is in arrears or in default to the Town with regard to any tax, debt, contract or any other obligation.[Does the Town ever ask for any litigation a firm is involved in?]

The selected Consultant will be expected to execute a standard contract for professional services, as proposed by the Town, within fifteen (15) days following the Notice of Award. The Notice of Award does not provide any rights to the Consultant and does not impose on the Town any obligations. The Town may withdraw the award at any time, and for any reason, prior to the signing of the contract by the Town.

5. SUBMITTAL REQUIREMENTS

a) Cover Letter: Interested Consultants shall submit a cover letter addressed to Jonathan Luiz, Town Administrator, Weston Town Hall, 56 Norfield Road, Weston CT 06883, signed by an authorized principal or partner of the Consultant, which provides an overview of the Consultant's proposal (the "Proposal"), as well as the name, title, phone and fax numbers, and email address, of the person to whom questions concerning the Proposal may be directed. **[To the extent that the information requested below is duplicative of information previously provided by you as part of your response to the FOC's RFQ dated _____, 2020, such information need not be repeated in response to this RFP.]**

b) History and Resumes: The Consultant must include a brief history of the Consultant, including:

- Size and organization;
- Full legal name of the Consultant, including registered legal name if different;
- Ownership, including whether the company is a qualified minority owned enterprise;
- Presence in Connecticut and the surrounding States;
- Length of time the Consultant has been in business;
- Products and services offered by the Consultant;
- Resumes for all professionals to be assigned to the project, including resumes of any subcontractors and all professional licenses held by principals and employees of Consultant; and
- Identification of the lead project manager[, who shall be a Certified Planner by The American Institute of Certified Planners].

c) Scope of Work: The Consultant shall provide a detailed Scope of Work that outlines various services it will provide for the project. All services not specifically mentioned in this document, which are necessary to ensure that the purpose and scope are met, shall be included in the Proposal. The Proposal, project schedule and scope of work shall reflect the number of anticipated meetings with the FOC, public meetings, and a list of all deliverables.

d) Experience and Ability to Perform: The Consultant shall provide examples of previous work on similar projects to demonstrate the Consultant's understanding and familiarity with projects of this type, including providing a list of similar projects for comparable Connecticut communities that have been completed in the last five (5) years. Examples shall include adequate details that demonstrate the Consultant's ability to meet the requirements and purpose of the project.

e) Project Approach: The Consultant shall outline a proposed approach to the project, including information on community outreach and methodologies, consensus building and innovative approaches to facility closing, expansion, consolidation and/or renovation, and consolidation of municipal and school offices. The Consultant shall also specify whether it would propose to work with any specialist firms on the project, and provide relevant examples under References below of how those firms would benefit the project.

f) References: The Consultant shall provide a list of [at least three (3) previous contracts] which are similar to the Town's purpose and scope of services, including:

- Dates of contract and duration
- Services performed and fees for services
- Names and contact information of the lead professional and other professionals who performed services for the contract, including the names and contact information of subcontractors
- Name, address, telephone numbers of clients who may be contacted for verification of information submitted
- Statement as to whether projects were completed on time and within budget
- Rough cost parameters of the Consultant's services
- Provide two industry references]

g) Fees: The Consultant is requested to submit an estimated total cost for completion of the project. The fee proposal must include a breakdown of the tasks to be completed, anticipated completion dates of each major task, and a breakdown of the remainder of the tasks to be completed.

6. SUBMISSION

All proposals and the information required for this project must be submitted in sealed envelopes, clearly identified as "RFP for Facilities Optimization Committee Project", labeled with the name and address of the proposing Consultant, must be in a clear, concise and legible manner so as to permit proper evaluation, and must be submitted with five (5) paper copies and one (1) CD or USB copy to Jonathan Luiz, Town Administrator, Weston Town Hall, 56 Norfield Road, Weston CT 06883, no later than 4:00 pm on [, 2020], at which time the proposals will be publicly opened. Proposals received prior to the time established herein for the receipt and opening of the same will be securely kept unopened. The Town officer whose duty it is to receive and open all proposals will decide when the specified time has arrived for the opening of same. No responsibility will be attached to any Town officer for premature opening of a proposal not properly addressed and identified.

Proposals submitted after 4:00 pm on [, 2020], or not in accordance with these instructions will not be considered. Telegraphic or faxed proposals will not be considered. Any proposal may be withdrawn by a written, electronic or fax request received at least one hour prior to the hour fixed for opening the proposals. All costs incurred in the preparation and presentation of the Proposal shall be wholly absorbed by the Consultant. Any material submitted shall become the property of the Town and therefore shall be subject to disclosure and be available for review under the Freedom of Information Act.

[The Town may, before or after the public opening of bids and in its sole discretion, modify, amend or terminate this RFP if the Town determines it is in the Town's best interest. Any modifications or addendums to, or termination of, this RFP shall be

posted on the Town’s website at []. Each respondent is responsible for periodically checking the Town’s website.]

7. POINT OF CONTACT

Any questions regarding this RFP shall be emailed to Rick Bertasi at RBertasi@westonct.gov. [Gayle] Questions will not be accepted via phone.

[other Town requirements for RFPs?]