



FutureThink

Formerly DeJONG-HEALY

PROPOSAL

Wellesley Public Schools

Enrollment Projection Study

May 31, 2016

Wellesley Public School District, MA

OVERVIEW

FutureThink will provide 10-year, district-wide and by school enrollment projections for Wellesley Public Schools including an overview of the school district, current and future housing development, population trends, and birth counts. High, low, and moderate projections will be provided.

Submitted to:

**Judith M. Belliveau, Assistant Superintendent for Finance & Operations
Wellesley Public Schools**

Attn: Business Office
40 Kingsbury Street
Wellesley, MA 02481
jbelleveau@wellesleyma.gov

Submitted by:

**Tracy Healy, REFP
FutureThink, LLC**
5685 Tynecastle Loop
Dublin, OH 43016
614-264-2638 phone
thealy@futurethinkinc.com

Wellesley Public School District, MA

STATEMENT OF QUALIFICATIONS

Overview

FutureThink, a woman-owned and EDGE-certified business, has been in operation since May 2006. Ms. Tracy Healy is the President and Owner.

Our mission is to empower the people and communities with whom we work—enhancing the educational experience through planning.

Services

FutureThink focuses primarily on enrollment projections and demographic studies while continuing to offer a wide range of planning services, including:

- ▶ Facility Master Planning
- ▶ Capacity Analysis
- ▶ Educational Specifications
- ▶ Redistricting
- ▶ Strategic Planning
- ▶ Use of Geographic Information Systems in Planning

It is our goal to provide high quality service—ensuring that our clients have the tools necessary to make informed decisions to improve the learning environments in their districts.

We have worked with over 1,000 school districts across the United States. We continually strive to balance innovation with cost while providing effective and efficient services. We provide our clients with expertise, guidance, direction, and best practices.

Projections for over 450 districts entering Ohio School Facilities Commission programs have been completed. OSFC was created in 1997 to administer the state’s comprehensive public school construction program and assist districts in the planning, design, renovation, and construction of schools. **FutureThink** is the sole provider of enrollment projections for OSFC.

In working with the State of Arkansas, we projected enrollment regularly for approximately 225 districts as Arkansas continued to develop and refine a statewide educational facility planning process. District enrollments range from approximately 240 to 25,000 students.

In addition, **FutureThink** is an approved Enrollment Projection Provider for the State of Michigan.

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EDUCATION & EXPERIENCE

Tracy Healy, REFP

Tracy Healy is the current president of **FutureThink**. Previously, she served as a vice president at DeJONG and was one of its founding members. Tracy continues to focus on demographics and facility planning projects.

With a master's degree in English, experience in city and regional planning, and time spent teaching in the classroom, Tracy is well-equipped to meet the needs of clients. She combines over 20 years of experience with her desire to enhance learning environments for students around the world.

One major area of focus for Tracy is in projecting student enrollment for school districts involved with the Ohio School Facilities Commission. To date, projections for over 450 districts have been completed, including the six major urban districts: Columbus, Cleveland, Cincinnati, Akron, Toledo, and Dayton. District enrollments in Ohio range from less than 100 to approximately 50,000 students. Tracy has worked with the Ohio School Facilities Commission team to develop ten-year enrollment projections for school districts entering one of its many programs since 1998.

Tracy has served on the jury for the Education Design Showcase presented by *School Planning and Management* magazine since 2006. She has also worked as a Senior Planner for the City of Columbus Planning Office.

Notable Educational Planning Experience

▶ **Olentangy Local Schools, Ohio**

Tracy has worked with Olentangy Local Schools, one of the fastest growing districts in the state of Ohio, since 1998. During that time, enrollment has increased from just under 5,000 students to over 20,000. Each year, ten-year enrollment projections for the District are updated. In addition, Tracy has developed a build-out scenario as well as projections by housing subdivision for the elementary and middle school grades. She has also assisted in ongoing redistricting activities.

▶ **Ohio School Facilities Commission**

In addition to projecting enrollment, Tracy has also provided a variety of educational planning services to OSFC. A sampling of these services includes: Visioning Process for Austintown Local Schools, 21st Century Learning Environments Research & Planning Process, Survey of OSFC Districts regarding Community Use of Facilities, Switzerland of Ohio Local School District Community Engagement Process, and Educational Specifications for the Ohio School for the Deaf and the Ohio State School for the Blind.

Wellesley Public School District, MA

Complete Project Experience

Enrollment Projections

- ▶ Ohio School Facilities Commission
- ▶ State of Arkansas
- ▶ Northwest Arctic Borough School District, AK*
- ▶ Pocahontas County Schools, AR
- ▶ School City of Hammond, IN*
- ▶ Chelmsford Public Schools, MA
- ▶ Reading Public Schools, MA
- ▶ Waltham Public Schools, MA
- ▶ Baltimore County Public Schools, MD
- ▶ Queen Anne’s County Public Schools, MD
- ▶ Libby Schools, MT
- ▶ Northwood Schools, NH
- ▶ Newark Public Schools, NJ
- ▶ Buffalo Public Schools, NY
- ▶ Avon City Schools, OH
- ▶ Avon Lake City Schools, OH
- ▶ Big Walnut Local Schools, OH
- ▶ Brecksville-Broadview Heights City Schools, OH
- ▶ Buckeye Valley Local Schools, OH
- ▶ Chagrin Falls Exempted Village Schools, OH*
- ▶ Cleveland Heights-University Heights City Schools, OH
- ▶ Centerville City Schools, OH
- ▶ Wellesley Public Schools, OH
- ▶ Delaware Area Career Center, OH
- ▶ Dublin City Schools, OH
- ▶ Edgewood City Schools, OH
- ▶ Franklin City Schools, OH
- ▶ Granville Schools, OH
- ▶ Indian Hill Exempted Village Schools, OH*
- ▶ Jackson Local Schools, OH
- ▶ Louisville City Schools, OH*
- ▶ Liberty-Union-Thurston Local Schools, OH*
- ▶ Mathews Local Schools, OH
- ▶ Monroe Local Schools, OH
- ▶ New Albany-Plain Local Schools, OH
- ▶ Nardon Hills, City Schools, OH*
- ▶ North Royalton City Schools, OH
- ▶ Northwest Local Schools, OH
- ▶ Oakwood City Schools, OH
- ▶ Olentangy Local Schools, OH
- ▶ Olmsted Falls City Schools, OH
- ▶ River Valley Local Schools, OH*

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Enrollment Projections [continued]

- ▶ Rocky River City Schools, OH*
- ▶ South-Western City Schools, OH
- ▶ Sylvania City Schools, OH
- ▶ Twinsburg City Schools, OH*
- ▶ Westlake City Schools, OH
- ▶ Wooster City Schools, OH
- ▶ Worthington City Schools, OH
- ▶ Avon Grove Schools, PA
- ▶ School District of Cheltenham Township, PA
- ▶ Coatesville Local Schools, PA
- ▶ Conestoga Valley Local Schools, PA
- ▶ Forest City Regional Schools, PA
- ▶ Lower Merion Schools, PA
- ▶ Penn Manor Schools, PA*
- ▶ Peters Township Local Schools, PA*
- ▶ School District of Philadelphia, PA
- ▶ Phoenixville Area Schools, PA
- ▶ Pottsgrove Schools, PA
- ▶ Southern Lehigh Schools, PA
- ▶ Alexandria Public Schools, VA*
- ▶ Campbell County Public Schools, VA
- ▶ Chesterfield County Public Schools, VA
- ▶ Dinwiddie County Public Schools, VA
- ▶ Manassas City Public Schools, VA
- ▶ Montgomery County Public Schools, VA
- ▶ Williamsburg-James City County Public Schools, VA
- ▶ Marshall County Schools, WV*

Enrollment Projection Training

- ▶ Broward County Public Schools, FL*
- ▶ Duval County Public Schools, FL*
- ▶ New Mexico Public School Facilities Authority, NM
- ▶ South-Western City Schools, MA*
- ▶ Chesterfield County Public Schools, VA

Facility Plans

- ▶ Canal Winchester Local Schools, OH*
- ▶ Granville Schools, OH *
- ▶ Hilliard City Schools, OH*
- ▶ Kent City Schools, OH*
- ▶ Lebanon City Schools, OH *
- ▶ Mason City Schools, OH *
- ▶ Switzerland of Ohio Local Schools, OH

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Facility Plans [continued]

- ▶ Kanawha County Schools, WV*
- ▶ Marshall County Schools, WV*
- ▶ Monroe County Schools, WV*
- ▶ Ohio County Schools, WV*
- ▶ Pocahontas County Schools, WV*
- ▶ Randolph County Schools, WV*

Educational Specifications

- ▶ San Diego City Unified Schools, CA*
 - Four Elementary Schools
 - Two Middle Schools
- ▶ Las Cruces Public Schools, NM - New High School
- ▶ Eastport/South Manor Central Unified H.S. District, NY - New High School*
- ▶ Aurora City Schools, OH - High School Renovation & Addition*
- ▶ Avon Lake Public Schools, OH - High School Renovation & Addition*
- ▶ Catholic Diocese of Columbus, OH - New High School*
- ▶ Granville Schools, OH *
 - Granville Elementary School & Middle School Renovations
 - New Intermediate School
 - New Middle School
 - Granville High School Renovation & Addition
- ▶ Hamilton Local Schools, OH - New Elementary School*
- ▶ Ohio School for the Deaf*
- ▶ Ohio State School for the Blind*
- ▶ Wellington School, OH - K-12 School Renovation & New Construction*

Other Projects

- ▶ Arkansas – Public School Academic Facility Manual Update
- ▶ Connecticut – State Standards and Guidelines for School Facilities
- ▶ Amherst Elementary Schools, MA – Redistricting Review & Recommendations Study
- ▶ Cascade Township Library, MI – Strategic Plan*
- ▶ Ohio School Facilities Commission – 21st Century Workshops & Community Use Survey
- ▶ Austintown Local Schools, OH – High School Visioning
- ▶ Buckeye Association of School Administrators, OH – Consulting Services
- ▶ Eastern Gateway Community College, OH – Demographic & Market Study
- ▶ Forest City Enterprises, OH – Consulting Services
- ▶ Granville Schools, OH – Strategic Plan*
- ▶ Hilliard City Schools, OH – Strategic Plan*
- ▶ Immaculate Conception Elementary School, OH – Visioning Process
- ▶ Liberty Union-Thurston Local Schools, OH – Capacity Analysis*
- ▶ Mechanicsburg City Schools, OH – Strategic Plan*
- ▶ Olentangy Local Schools, OH – Build-out Analysis & Redistricting*

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Other Projects [continued]

- ▶ Our Lady of Peace Elementary School, OH – Visioning Process
- ▶ St. Brigid of Kildare Elementary School, OH – 21st Century Learning Environment Visioning Process
- ▶ Switzerland of Ohio Local Schools, OH – Community Engagement Process
- ▶ Washington State Community College, OH – Demographic & Market Study
- ▶ Worthington City Schools, OH – Capacity Analysis
- ▶ Penn Manor Schools, PA – Build-out Analysis*
- ▶ Marshall County Schools, WV – Capacity Analysis

*project completed while with DeJONG

Publications & Recognitions

- ▶ “The Impact of the Housing Market on School Facility Planning,” *CEFPI Educational Facility Planner*, Volume 41, Issue 4, Summer 2007
- ▶ “Balancing Innovation & Cost in Facility Planning,” *School Planning & Management*, June 2006
- ▶ “The State of School Buildings,” *American School Board Journal*, October 2005
- ▶ “Statewide Facility Assessments: Leaving No School Behind,” *School Business Affairs*, July/August 2005
- ▶ “Building Bridges of Communication: The Columbus Public Schools & the City of Columbus,” *CEFPI Educational Facility Planner*
- ▶ “High Schools: The Next Generation,” *CEFPI Educational Facility Planner*
- ▶ *School Planning & Management*, Education Design Showcase Judge, 2006-present

Wellesley Public School District, MA

SCOPE OF SERVICES

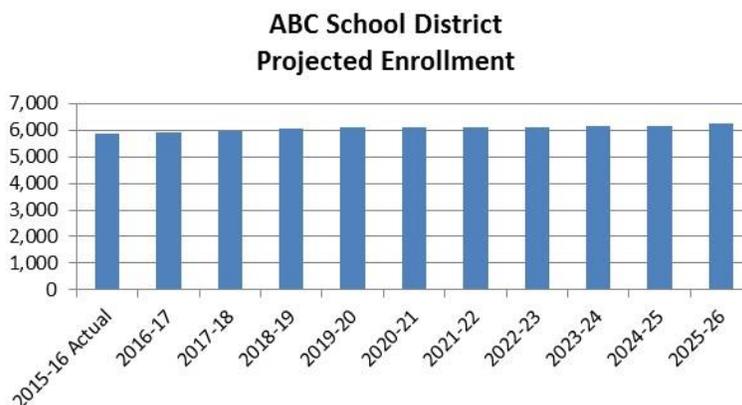
Enrollment Projections

FutureThink will collect, review, and analyze demographic data from Wellesley Public Schools; county and town agencies; the State of Massachusetts; and the US Census. The following information will be collected to develop the enrollment projections:

- ▶ Last 10 years of enrollment for the Wellesley Public Schools, by grade, by school
- ▶ Private school enrollment
- ▶ Birth data
- ▶ Population trends
- ▶ Economic trends
- ▶ Building permits
- ▶ Housing development/turnover
- ▶ In/out migration
- ▶ Previous enrollment studies
- ▶ Any additional pertinent information

FutureThink will utilize and assess the information listed above to develop the following:

- ▶ Historical enrollment trend analysis and grade-to-grade survival ratios
- ▶ Demographic profile of the Town and District
- ▶ Population estimates and projections by census block group to identify changes within the District regarding growth, age, and wealth
- ▶ Housing profile of the District
- ▶ 10-year projected enrollment by grade, by school (high, moderate, and low projections)
- ▶ Results will be made available in electronic format.



Wellesley Public School District, MA

REFERENCES

Ohio School Facilities Commission

30 West Spring Street, 4th Floor

Columbus, OH 43215

614-466-6290

Contact: Stephen Roka, Planning Manager

Email: Steve.Roka@ofcc.ohio.gov

Accuracy Rate: On average within 3% (projections completed for over 450 districts over 17 years)

New Albany-Plain Local Schools (5,000 students)

55 North High Street

New Albany, OH 43504

614-855-2040

Contact: Ms. Rebecca Jenkins, Treasurer

Email: jenkins.5@napls.us

Accuracy Rate: Within 3%

Olentangy Local School District (20,000 students)

814 Shanahan Road

Lewis Center, OH 43035

740-657-4027

Contact: Mr. Jeffrey Gordon, Director of Business Management

Email: jeffrey_gordon@olsd.us

Accuracy Rate: Within less than 1%

Southern Lehigh School District (3,000 students)

3715 Preston Lane

Center Valley, PA 18034

610-282-1030 ext. 5301

Contact: Mr. Todd Bergey, Director of Support Services

Email: bergeyt@sbsd.org

Accuracy Rate: Within 1.8%

Williamsburg-James City County Public Schools (11,000 students)

P.O. Box 8783

Williamsburg, VA 24073

757-603-6494

Contact: Ms. Rene Ewing, Comptroller

Email: Yvonne.Rene.Ewing@wjccschools.org

Accuracy Rate: Within less than 1% - 2% (given a range of projections—high, moderate, low)

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SCHEDULE & FEE

Schedule

The report will take approximately 4-6 weeks once enrollment data is received from the District. The report will be completed on or before August 31, 2016.

Fee

The fee for services is \$8,500, excluding in-person meetings.

An additional \$2,500 will be added to the fee for each in-person meeting. (This amount includes one day of meetings, approximately 10 hours of travel, and an overnight stay.)

There is no additional charge for meetings held via teleconference or video conference.

Expenses per trip will be approximately \$1,200. (This amount includes airfare, hotel for one night, car rental, and meals. Should more than a one-night stay be required, the expense will increase.)

Administrative and ancillary charges will not exceed \$500.

Upon approval of this contract, an invoice will be issued upon completion of the report. Payment is due upon receipt.

Should additional services be requested, the hourly rates are as follows:

- ▶ Principal - \$185
- ▶ Project Director - \$150
- ▶ GIS Manager - \$150
- ▶ Planner/GIS Analyst - \$100
- ▶ Support Staff - \$50

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AUTHORIZATION

FutureThink requires that a signed agreement be retained before engaging in any activities. Upon approval of this contract, please sign and return one copy to the **FutureThink** office. Please retain one copy for your files.

Authorized Person to sign for **FutureThink**: (the signature below certifies that **FutureThink** will meet the completion deadline of August 31, 2016.)

5/31/16
Date



Tracy V. Healy
President
FutureThink, LLC

On behalf of **Wellesley Public Schools**, I hereby accept this proposal as outlined herein:

Date

Authorized Agent
Wellesley Public Schools