



Plan to Empower.

PROPOSAL

Southern Lehigh School District

Enrollment Projection Services

December 20, 2012



Southern Lehigh School District

Southern Lehigh School District, PA

OVERVIEW

DeJONG-HEALY will provide 10-year enrollment projections for the Southern Lehigh School District, including an overview of the school district, current and future housing development, population trends, birth counts, migration patterns, and a review of previous projections. Projections will be provided district-wide, by grade and by school.

Submitted to:

Todd Bergey, Support Services Director
Southern Lehigh School District
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Center Valley, PA 18034
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Submitted by:

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STATEMENT OF QUALIFICATIONS

Overview

DeJONG-HEALY, 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

DeJONG-HEALY 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
- ▶ 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 high quality 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 assists districts in the planning, design, renovation, and construction of schools. **DeJONG-HEALY** is the sole provider of enrollment projections for OSFC.

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

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

EDUCATION & EXPERIENCE

Tracy Healy, REFP

Tracy Healy is the current president of **DeJONG-HEALY**. 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 nearly 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. 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 is involved with CEFPI, the Council of Educational Facility Planners, International. She currently serves on the Leadership Team for the Midwest/Great Lakes Region and was the program co-chair of the 2009 regional conference held in Columbus. She has received several awards from CEFPI, including a Distinguished Service Award.

Tracy has also worked as a Senior Planner for the City of Columbus Planning Office.

Education/Certifications

The Ohio State University, Bachelor of Arts, English

The Ohio State University, Master of Arts, English: Rhetoric & Composition

Recognized Educational Facility Planner, Council of Educational Facility Planners, International

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 17,000—an increase of over 240 percent. 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: Austintown Local Schools High School Visioning Process, 21st Century Learning Environments Planning Process, Survey of OSFC Districts regarding Community Use of Facilities, Switzerland of Ohio Local School District Community Engagement Process, and Educational Specifications for Ohio Schools for the Deaf & Blind.

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Complete Project Experience

Enrollment Projections

- ▶ Ohio School Facilities Commission
- ▶ State of Arkansas
- ▶ Northwest Arctic Borough School District, AK
- ▶ School City of Hammond, IN
- ▶ Reading Public Schools, MA
- ▶ Baltimore Public Schools, MD
- ▶ Queen Anne’s County Public Schools, MD
- ▶ Libby School District, MT
- ▶ Northwood Schools, NH
- ▶ Newark City Schools, NJ
- ▶ Buffalo Public Schools, NY
- ▶ Avon Local Schools, OH
- ▶ Avon Lake City Schools, OH
- ▶ Brecksville-Broadview Heights City Schools, OH
- ▶ Chagrin Falls Exempted Village Schools, OH
- ▶ Cleveland Heights-University Heights Schools, OH
- ▶ Crestview Local Schools, OH
- ▶ Edgewood City Schools, OH
- ▶ Franklin City Schools, OH
- ▶ Granville Schools, OH
- ▶ Indian Hill Exempted Village Schools, OH
- ▶ Louisville City Schools, OH
- ▶ Liberty-Union-Thurston Local Schools, OH
- ▶ New Albany-Plain Local Schools, OH
- ▶ Nardon Hills, City Schools, OH
- ▶ North Royalton City Schools, OH
- ▶ Oakwood City Schools, OH
- ▶ Olentangy Local Schools, OH
- ▶ River Valley Local Schools, OH
- ▶ 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
- ▶ School District of Cheltenham Township, PA
- ▶ Coatesville Local Schools, PA
- ▶ Conestoga Valley Local Schools, PA
- ▶ Lower Merion Township Schools, PA
- ▶ Penn Manor Schools, PA
- ▶ Peters Township Local Schools, PA

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Enrollment Projections [continued]

- ▶ School District of Philadelphia, PA
- ▶ Phoenixville Area Schools, PA
- ▶ Pottsgrove Schools, PA
- ▶ Campbell County Public Schools, VA
- ▶ Chesterfield 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, OH
- ▶ Chesterfield County Public Schools, VA

Educational Specifications

- ▶ San Diego City Unified Schools, CA
 - Cesar Chavez Elementary School
 - Hoover/Crawford Elementary School
 - Dr. Jack Kimbrough Elementary School
 - New Elementary School
 - Hoover/Crawford Middle School
 - New Middle School
- ▶ 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 Renovation
 - New Intermediate School
 - Granville Middle School Renovation
 - 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

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

Other Projects

- ▶ Amherst Elementary Schools, MA – Redistricting Review & Recommendations
- ▶ Cascade Township Library, MI – Strategic Plan
- ▶ Austintown Local Schools, OH – High School Visioning
- ▶ Buckeye Association of School Administrators, OH – Consulting Services
- ▶ Granville Schools, OH – Strategic Plan
- ▶ Hilliard City Schools, OH – Strategic Plan
- ▶ Liberty Union-Thurston Local Schools, OH – Capacity Analysis
- ▶ Mechanicsburg City Schools, OH – Strategic Plan
- ▶ Medina City Schools, OH – Technology Plan
- ▶ Olentangy Local Schools, OH – Build-out Analysis & Redistricting
- ▶ Switzerland of Ohio Schools, OH – Community Engagement Process
- ▶ Worthington City Schools, OH – Capacity Analysis
- ▶ Marshall County Schools, WV – Capacity Analysis

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

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REFERENCES

Ohio School Facilities Commission

10 West Broad Street, Suite 1400
Columbus, OH 43215
614-466-6290
Contact: Stephen Roka, Planning Manager
Email: Steve.Roka@osfc.ohio.gov

New Albany-Plain Local Schools

55 North High Street
New Albany, OH 43504
Phone: 614-855-2040
Contact: Mr. Ken Stark, Operations Director
kstark@new-albany.k12.oh.us

Montgomery County Public Schools

200 Junkin Street
Christiansburg, VA 24073
540-382-5141
Contact: Mr. Dan Berenato, Director of Facilities & Planning
Email: dberenato@mcps.org

Williamsburg-James City County Public Schools

P.O. Box 8783
Williamsburg, VA 24073
757-603-6494
Contact: Mr. Scott Burckbuchler, Assistant Superintendent for Finance & Operations
Email: burckbuchlers@wjcc.k12.va.us

SCOPE OF SERVICES

Enrollment Projections

DeJONG-HEALY will collect, review, and analyze demographic data from Southern Lehigh School District, Coopersburg Borough, Lower Milford Township, Upper Saucon Township, Lehigh County, Pennsylvania, the US Census, and other appropriate agencies to provide 10-year projections.

The enrollment projections report shall be categorized by year and grade level and shall include an overview of the district, current and future housing development, population trends, birth counts, migration patterns, and a review of previous projections.

The following information will be collected to develop the enrollment projections:

- ▶ Previous 10 years of enrollment, by grade
- ▶ Non-public school enrollment
- ▶ Birth data for District
- ▶ Migration patterns
- ▶ Population trends
- ▶ Housing development patterns
- ▶ Building permits for single-family units
- ▶ Subdivision activity
- ▶ Previous enrollment studies

DeJONG-HEALY will utilize and assess the information listed above to develop the following:

- ▶ Historical enrollment trend and grade-to-grade survival ratios
- ▶ Demographic profile of the District
- ▶ Housing profile of the District
- ▶ Projected enrollments by grade, by school

Additionally, **DeJONG-HEALY** will establish or confirm enrollment capacities for each school building and prepare a comparison of projected enrollment to building capacity.

A final report will be emailed to the District upon completion.

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SCHEDULE & FEE

Schedule

The projected timeline is approximately 2-3 weeks.

Fee

The cost of services will be \$7,750. This fee assumes no travel to the District.

Should attendance be required in person (as opposed to virtually via Skype, WebEx, etc.), an additional \$1,500 per day for time and an additional \$1,000 per trip to cover expenses will be charged.

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

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AUTHORIZATION

DeJONG-HEALY 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 **DeJONG-HEALY** office. Please retain one copy for your files.

Authorized Person to sign for **DeJONG-HEALY**:

12/20/12
Date



Tracy V. Healy
President
DeJONG-HEALY, LLC

On behalf of **Southern Lehigh School District**, I hereby accept this proposal as outlined herein:

Date

Authorized Agent
Southern Lehigh School District