



# **2017 MASTER PLAN**

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FORNEY INDEPENDENT SCHOOL DISTRICT

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Live Oak Finance, Financial Advisor  
Templeton Demographics, Demographer

## Executive Summary

## District Standards

## Elementary Schools

- Blackburn Elementary School
- Claybon Elementary School
- Criswell Elementary School
- Crosby Elementary School
- Henderson Elementary School
- Johnson Elementary School
- Lewis Elementary School
- Rhea Elementary School
- Smith Elementary School

## Middle Schools

- Brown Middle School
- Warren Middle School

## High Schools

- Forney High School
- North Forney High School
- Forney Academic Center

## Auxiliary Facilities

- Central Administration Building

## Appendix

- Demographics
- Existing Vacant Property Inventory

The intent of this Long-Range Plan is to outline current and future capital investment needs of Forney Independent School District (FISD) over the next ten years. Some needs may be more critical than others, and this document will be used to assist FISD in the prioritization of the comprehensive needs across the District to begin to accomplish the short-term goals and address the long-term needs across the District.

## PROCESS

In order to facilitate a comprehensive planning process, Forney ISD engaged a large stakeholder group representing a good cross section of the district and community. The group was comprised of district and campus staff, board members, parents, community members and students. The group visited Huckabee’s LEx Labs located at the BRIC in Waco. While there, the group went through the “battleship” process which facilitates a discussion about the direct relationship between the built environment and the educational vision of Forney ISD.

The following report represents Huckabee’s findings and recommendations from data collected at a “Battleship” planning exercise on Sept. 20, 2016, at the LEx Laboratories at Baylor Research and Innovation Collaborative (BRIC) in Waco. This report addresses preliminary findings from Huckabee’s long range planning process for the Forney Independent School District.

It is important to note this information was preliminary in nature; it did not include the adjacencies component of our planning exercise or any other contextual analysis Huckabee conducted.

Huckabee’s findings were limited to the FISD community’s input on desired culture, experiential aspects and spatial quality as they relate to the district’s educational goals. The results also include future expectations on furniture, instructional tools, and technology.

Our report is divided as follows:

1. Description of Battleship Planning Exercise
2. Analysis Methodology
3. Findings
4. Recommendations

### Description of Battleship Planning Exercise

Huckabee’s Battleship exercise is a community workshop aimed at correlating subjective aspirations with objective actions believed to promote or further develop the educational goals of a school district. For the educational facilities planner, this exercise is mainly a data gathering and consensus building tool to define the theme of the overall long range plan for the district. It can also help develop the spatial, furniture and technology design expectations for current and future facilities and specific projects of a plan.

Participants are presented a matrix in which columns represent the district’s goals. The columns are bisected with six lines representing Culture, Experience, Space, Furniture, Instructional Tools and Technology. A seventh line is used for additional elements that further the district’s objectives but might not fit within the preceding six categories.



Prior to our Battleship planning session, your district seemed to conduct an internal planning workshop defining its educational philosophy and its 10 Brain/Mind beliefs. This workshop’s final document and its results contributed greatly to the development of our matrix columns used by the Battleship participants. Our exercise is typically conducted with more general goals derived from the district’s mission statement and graduate profiles. FISD also provided a large and diverse stakeholder group of the district’s community, including administration, school principals, teachers, students and parents.

During the session, 24 aspirational statements were analyzed by the stakeholders. These statements were enough to produce two different matrixes, which were then organized by grade alignment: elementary, middle and high school. Discussion around each matrix lasted approximately two hours as participants rotated through two rounds of discussion. Each group developed action statements in the seven specific categories that could further each district goal. Overall, FISD participants provided 41 total matrixes.

Analysis Methodology

The 24 new matrix sheets, developed during the Battleship planning, were then organized. Each of the action statements were analyzed and compared to find similar themes. These similarities were organized in order of repetition, then distilled into overarching themes, desires and expectations for the facilities that shape FISD’s instruction delivery, culture and the experience of both learners and teachers.

Findings

The planning session findings are organized into the following categories:

- Culture and Experiences
- Space and Furniture
- Instructional Tools and Technology

Culture and Experience

Our findings in Culture and Experience reflect a desire to learn in a safe environment where risk-taking and hands-on learning are encouraged and trust between the teacher and students is important. Group collaboration and multi-disciplinary approaches to problems were also critical issues.

Culture	Experience:
<p><b>Choice</b> <i>(Choice is the single common theme that stands in all categories.)</i></p>	<ul style="list-style-type: none"> <li>• Demonstrating knowledge (written, verbal or graphically); “Exit-ticket”</li> <li>• Peer-to-peer learning/teaching</li> <li>• Cross-grade learning; student as owner of benchmark on content mastery</li> <li>• Ability to work seating or standing; individual preference; learning style facilitation</li> <li>• Creativity output - personal, other and group preferences</li> <li>• Group size involvement for collaboration</li> </ul>
<p><b>Real world experiences and relevance</b></p>	<ul style="list-style-type: none"> <li>• Student centered/led inquiry; hands-on learning</li> <li>• Multi-disciplinary approach</li> <li>• Learning styles facilitation to find relevance</li> <li>• Expert lecturers (drawn from community and world at large)</li> </ul>
<p><b>Group collaboration</b></p>	<ul style="list-style-type: none"> <li>• Large group sharing; small group reflection preferences</li> <li>• Flipping classroom by working in school with applied knowledge as opposed teacher content lecture</li> <li>• Peer to peer, student to teacher, teacher to student knowledge sharing</li> <li>• Break-out focus: “Focus is a net, not a prison”</li> <li>• Collaboration – Reflection cycle</li> </ul>
<p><b>Growth mind-set</b> <i>(as opposed to fixed mind-set)</i></p>	<ul style="list-style-type: none"> <li>• Learner encouragement to expand his/her learning abilities to grow them</li> <li>• Knowledge as a shared value</li> <li>• Learning by engagement</li> </ul>
<p><b>Mistake and risk-taking culture</b></p>	<ul style="list-style-type: none"> <li>• Multiple settings: “fail-faster” to acquire solid knowledge</li> <li>• Empower student teaching</li> <li>• Hands-on laboratories</li> <li>• PBL and inquiry-based learning</li> <li>• Flexibility to applied lesson learned</li> </ul>
<p><b>Relationships</b></p>	<ul style="list-style-type: none"> <li>• Trusting environment</li> <li>• Building relationships through collaborations; failure and success cycle.</li> <li>• No judgmental policy on mistake</li> </ul>

Space and Furniture

Flexibility, choice and power-friendly technology are the three main themes that evolved during the session. The ability to change the learning environment and have a choice in how each environment is set up was important.

	Space	Furniture
<b>Choice</b>	<ul style="list-style-type: none"> <li>Group size accommodations (more small group room availability)</li> <li>Learning style preferences</li> <li>Strong desire to use outdoor learning spaces in available choices</li> <li>Social and reflective options</li> </ul>	<ul style="list-style-type: none"> <li>Mobility</li> <li>Hard &amp; soft seating options: "It's all about the chairs"</li> <li>Learning style preferences</li> <li>Ease of use: height, ergonomics clear and easy to operate</li> <li>Social and reflective options</li> <li>Total separation of work surface and seating components</li> </ul>
<b>Technology and Power Friendly</b>	<ul style="list-style-type: none"> <li>Ease of access to network, power in every space</li> <li>Touch screen technology</li> <li>Projection capability in all learning spaces</li> </ul>	<ul style="list-style-type: none"> <li>Ease of access to network and power in every space</li> <li>Touch screen technology projection capability in all learning spaces</li> </ul>
<b>Flexibility</b>	<ul style="list-style-type: none"> <li>Allow for different arrays of furniture and size of room</li> <li>cross learning – visibility and collaboration interconnected spaces</li> <li>Space variability and adaptability</li> </ul>	<ul style="list-style-type: none"> <li>Allows for various arrays of furniture, expanded mobility: weight and size</li> <li>Cross learning – visibility and collaboration interconnected spaces</li> <li>Variability and adaptability</li> </ul>
<b>Openness</b>	<ul style="list-style-type: none"> <li>Maximize space and reduce furniture, space should foster mobility</li> <li>No rows</li> </ul>	N/A

**Instructional Tools and Technology**

The findings on Instructional Tools and Technology yielded solid guidelines for the future. There was an interesting take on technology applied to spatial quality that includes movable walls, garage doors, retractable walls, and glass screen doors and partitions.

Guidelines:

- Video production capable campuses with correspondent output technology availability
- Video is seen as an instructional tool or facilitator of tools.
- Accessibility of instructional tools and technology for afterschool hours
- Integrated platforms
- Interconnected real-time collaboration capable (chats, print, project and share)
- 50 percent technology and 50 percent face to face (old and new technology combination)
- Continuing education and training in technology and instructional tools
- At-home technology class/training availability
- Well-chosen platforms that grow with technology developments



**Recommendations**

This report is a qualitative distillation of a thoughtful process reflecting common themes from the participants who attended the exercise. It was a group effort from a cross section of the school district community. The findings are an applied interpretation of goals to help guide the planning and design process for new and existing facilities.

Because this was a preliminary report from only one planning process component, we recommend the district validate these findings with, at minimum, the district's campus principal group. Their comments, critique and feedback are encouraged. The district should also test the findings of this exercise at each campus to assess the reality of implementing these goals.

Huckabee is pleased to provide you and your district with the findings of this interesting and exciting part of the planning process and look forward to our continuing relationship in developing the Forney Independent School District's long term plans.

Following the LEx Labs visit, Huckabee planning team members met with departmental employees to develop Educational Specifications. The draft copy of each grade alignment has been developed and submitted to Forney ISD in draft form for final review and approval. Forney ISD Administrators collaborated with Huckabee and Gallagher representatives to brainstorm options to address the project student growth. That team evaluated the options and more fully developed the most valuable option for Forney ISD balancing student and district needs, community expectations as well as financial and operational parameters. That option is presented in this 2017 Master Plan.

All identified needs are presented in one of the following categories: Growth, Aging and Evolving.

#### Growth

These needs are based entirely on population and community growth, as specified by current demographic reports. To better understand the effects of growth on individual facilities, this document references information about campus capacities.

*Items in this category will answer the question: What needs to be built, bought or added onto in order to accommodate community growth?*

#### Aging

These needs are based entirely on physical conditions of existing capital investments. To provide some context for these types of needs, this document indicates the year that individual facilities were built (older facilities will typically need more work).

*Items in this category will answer the question: What needs to be fixed or replaced due to deteriorating physical conditions?*

#### Evolving

Needs in this category reflect the changing of: program demands, instructional delivery objectives, security initiatives and general district/community expectations.

*Items in this category will answer the question: What needs to be acquired in order to move (or continue moving) in a new direction?*

## INSTRUCTIONAL VISION

Across the District, Forney ISD is utilizing a variety of educational delivery methods, all aimed at achieving brain compatible instruction—instruction that leads to long-term memory penetration. The term educational delivery method refers to the general structure, pedagogy and classroom management principles utilized for classroom instruction. Forney ISD teachers are using Canvas, an online learning management system, and 1 to 1 Chromebooks (grades 4-12) to support a wide variety of collaborative and active (multi-sensory) learning experiences that are relevant, meaningful and enjoyable for students. Traditional teaching methods are still used throughout the district, when appropriate, but future-readiness\*, blended learning\* and brain-compatible learning\* are becoming commonplace in Forney ISD classrooms. In order to further support the learning needs of students, in and out of the classroom, the District also promotes and facilitates transparency with parents and continues to generate more opportunities for teachers to collaborate. Overall,

Forney ISD's educational model places emphasis on maximizing student engagement, positively impacting the learning experience and supporting a culture of student choice, relevance, collaboration, risk taking, and relationship-building.

\*Future-Readiness Method: Forney ISD recognizes that its teachers are preparing students for an undefined future. While mastery of traditional academic content remains a high priority, teachers also integrate curricula designed to build 21<sup>st</sup> century skills (creativity, collaboration, critical thinking, and communication), social-emotional learning (SEL) and digital/media literacy.

\*Blended Learning Method: This method provides a framework of the teacher as the authority figure as well as a facilitator. The traditional method is employed a portion of the time, and online instruction is used for the other portion of the instructional time. Teachers structure a course to identify the content best delivered in person and the content best learned through online resources. A good example of blended learning is a concept called the Flipped Classroom. This is where students utilize online resources at home for introduction to new concepts and use their time in the classroom to work with the teacher to delve deeper into those concepts, ask questions of the teacher and get answers immediately.

\*Brain-Compatible Learning Method: This method of instruction involves designing learning experiences that maximize long-term memory penetration. Teachers create relevant, meaningful and enjoyable lessons that make learning a pleasurable experience. New concepts are introduced in ways that allow for multiple entry points and multiple solutions paths to accommodate the unique and uniquely organized brains of their diverse learners. Student choice, curiosity, progression towards master, collaboration, real-world connections, and self-reflection are also important elements of a brain-compatible classroom. Finally, lessons are designed to engage student biology, emphasizing movement and multisensory experiences.

Forney ISD currently utilizes a traditional elementary school (K-6), middle school (7-8) and high school (9-12) grade level configuration. In order to better meet the needs of all students and provide collaboration for all teachers, Forney ISD is transitioning to a 4-level educational model. Beginning in the 2019 school year, Fisd will utilize a K-4 Elementary, 5-6 Intermediate, 7-8 Middle school, and 9-12 high school grade level configuration.

## FACILITIES RECOMMENDATION

### Future Facilities

Additional capacity is needed in the district to address the growing student population at the elementary grades. While facility additions at each elementary school are an option, Fisd needs to balance the challenges of a fast-growing student population with limited financial resources and a desire to minimize the impact to students across the district. As a result, Rhea Elementary and Smith Elementary will be converted into intermediate campuses serving students in grades 5 and 6. Along with this conversion, facility additions/renovations will increase the capacity of those two campuses by approximately 400-450 students and move two grade levels off of each elementary campus. These additions should be completed to open for the 2019-20 school year.

The District will continue to grow at all grade levels, but with the types of residential development throughout the community, the elementary population will most likely continue to grow at a slightly higher rate than the secondary levels. This will create the need for one (1) additional elementary school. Based on the demographics projects, this elementary school should have a capacity of approximately 750 students and be constructed in time to open for the 2024-25 school year. Below is the recommended 10 year facilities plan based upon current demographic projections, construction costs, and property values for the school district.



## 10 Year Facilities Plan

Date	Event	Estimated Cost*	Funding Source
July-August 2017	RFQ for AE Services		
Fall 2017	Begin Design Process	\$500,000	Remaining Construction Funds - \$500,000
Spring 2018	Begin Construction Bid Process	\$0	
Fall 2018	Begin Conversion to Smith and Rhea Intermediate to Add Classroom Capacity Only	\$13,000,000	Remaining I&S Funds Available - \$36,000,000
Fall 2019	Open Smith and Rhea Intermediate		
Fall 2024	Open New Elementary on Southside**	\$23,000,000	Remaining I&S Funds Available - 23,000,000
2026-2027	Develop Facility Plan for 2027-2037	\$0	

\*Based upon 2017 construction estimates

\*\*Based upon 2016-17 Fall Demographic Report

While the current demographic projections, campus capacities and utilization studies, and financial projections show adequate capacity and funds to embrace the anticipated growth through the 10 year facilities plan, student enrollment increases or financial projections could differ from the projections. If this occurs and alternate solutions do not meet the needs of students or the district, portable classroom buildings may become necessary to address the rapid student growth.

### Future Land Opportunities

In order to meet the future demand for school sites, the district has purchased property in past years for this purpose. Included in the 2006 bond election approved by voters was authorization to purchase \$6.2 million of land for future use. To date, the district has \$1.1 million of bond authorization remaining for this purpose.

There are several active and future master planned communities within the boundary of the school district. The district has discussed the possibility for locating future elementary school sites in the following developments:

- Devonshire
- Gateway
- Windmill Farms
- Wynne Jackson

All of the developers are interested in locating schools in their development. Some have even indicated the possibility of donating land to the school district.

### TAX RATE INFORMATION

#### Introduction

The district currently utilizes Live Oak Public Finance as its financial advisory in all debt related transactions. Future estimates of student enrollment are derived from research provided by Templeton Demographics.

#### Tax Rate Summary

The current tax rate used for the payment of principal and interest for bonded debt is 50¢ per hundred dollar of property value. This rate cannot be increased above 50¢ in an effort to finance the construction, renovation, or equipment of school buildings. In fiscal year, 2017, excess funds generated above what was necessary to pay the debt service were used for the early retirement of debt. The District believes it is fiscally responsible to pay down debt as quickly as possible. Therefore, the district plans to keep future year debt service tax rates at 50¢. Any excess proceeds generated will be used to early retire existing debt or fund principal and interest payments for new construction need for student growth.

### Tax Rate Assumptions

From 2013 to 2017, the district experienced strong property value growth, averaging 9.0% per year. In future years, district administration will use conservative property value growth in its tax rate projections. Administration feels this approach is prudent since property values can be impacted by recessions in the economy. The tax rate analysis below assumes the following:

- Property value increase of 15% in fiscal year 2018
- Property value increase of 6% in fiscal year 2019
- Average property value increase of 3.6% for fiscal years 2020-2028
- Property value increase of 1.5% for every year after 2028
- Borrow \$13 million at an interest rate of 4.75% for converting Smith Elementary and Rhea Elementary to 5-6 intermediate schools beginning in the spring of 2018.
- Average annual growth of 370 students over the next 10 years
- State debt service assistance of \$0 after fiscal year 2018

### Projected Tax Rate

31-Aug	Taxable Value Assigned by Comptroller	Projected Growth	Average Daily Attendance	Student Attendance Increase	Total State Aid	Gross Debt Service	Net Debt Service	Projected Tax Rate at (100%) Collection
2018	3,529,273,595	15.0%	9,650	368	1,391,332	16,812,721	15,651,785	0.4435
2019	3,741,030,011	6.0%	9,962	313	-	17,236,759	17,862,968	0.4775
2020	3,877,531,404	3.6%	10,317	355	-	17,798,173	18,431,877	0.4754
2021	4,026,896,775	3.9%	10,661	344	-	18,319,773	18,965,216	0.4710
2022	4,175,798,512	3.7%	11,013	352	-	18,863,138	19,514,337	0.4673
2023	4,328,900,404	3.7%	11,368	355	-	19,411,018	20,004,263	0.4621
2024	4,485,036,310	3.6%	11,669	301	-	21,539,418	22,072,418	0.4921
2025	4,629,747,855	3.2%	12,034	365	-	21,156,105	21,671,931	0.4681
2026	4,793,100,587	3.5%	12,395	360	-	21,229,605	21,849,932	0.4559
2027	4,957,674,467	3.4%	12,826	431	-	21,595,843	22,225,001	0.4483

Using demographer estimates, the district expects to exceed elementary school capacities in the south Forney area in the fall of 2024. At current estimates, a new elementary school will cost \$24 million to construct. In order to service the debt of \$24 million, the district needs 4¢ of taxing capacity.