



Excellence In ALL We Do

LAGO VISTA ISD

Long-Range
Planning Committee
Meeting 2

October 8, 2019

WELCOME!

AGENDA

- Welcome & Introductions
- Meeting 1 Recap
- School Finance 101
- Tour High School
- Review District Needs + Challenges
- Q&A + Closing



INTRODUCTIONS

If this is your first meeting, please be prepared to share:

- Your name
- Profession / Role in the community
- Number of years in the community
- If you have children / grandchildren in the district
- ONE word to describe Lago Vista ISD



MEETING 1 RECAP

Introductions

**Committee
Purpose +
Charge**

**Process +
Timeline**

**State of the
District**

**Middle
School Tour**

**Q&A +
Closing**



ONE WORD

Supportive Accepting
Compassionate Peaceful
Home
Caring
Growing Heart
Hometown
Family
Diversifying
Special
Growth
Hardworking
Vitality Successful Unique
Distinct Dedicated



COMMITTEE PURPOSE

The purpose of the Long-Range Planning Committee is to involve a broad cross-section of Lago Vista ISD stakeholders in evaluating current and long-term facility needs.

The Committee will study current facilities, enrollment trends, educational programs and other data relevant to providing quality instruction that meet the needs of all students.



COMMITTEE CHARGE

- Consider the educational needs of all students and align with the district's mission, vision and goals.
- Represent the community and its values in the facility planning process.
- Assess and prioritize the district's current and long-term facility needs, including, but not limited to:
 - Building age, safety and condition
 - District growth and capacity
 - Evolving educational delivery and programs
- Potentially bring **recommendations** to the Board of Trustees as to how to proceed with a long-range plan.



COMMITTEE PROCESS

In the upcoming meetings, the committee will discuss the following topics:

- Existing Facility Conditions + Tours
- School Finance
- Facility and Equipment Needs
- Potential Solutions & Cost Analysis
- Community Survey

District staff members and district consultants will aid the committee and serve as information providers.



TIMELINE

Committee meetings will be held from 2pm – 5pm:

- Meeting 3 — October 22 [Viking Hall]
 - Meeting 4 — November 5 [Viking Hall]
 - Meeting 5 — November 19 [Viking Hall]
 - Meeting 6 — December 10 [Viking Hall]
 - Meeting 7 — January 7 (if needed)
-
- Any recommendations will be presented to the Board of Trustees at their regular Board meeting on January 13, 2020



SCHOOL FINANCE 101



HISTORICAL TAX RATE INFO

Year	M&O	I&S	Appraised Values	TOTAL Tax Rate
2012	1.04	.14	\$1,260,537,756	\$1.18
2013*	1.04	.28	\$1,227,950,499	\$1.32
2016**	1.06	.26	\$1,277,778,852	\$1.32
2019	.99	.26	\$1,560,078,967	\$1.25

*\$30 million bond passed for new High School.

**TRE passed. Penny swap to increase M&O funds in light of strong I&S position.

***November 2107 passed a \$2.9 million bond (No Tax Increase Bond) for HVAC, Service Road, Transportation and Safety.



TAX INFORMATION

The district's tax rate is made up of two figures:

Maintenance & Operations (M&O)

Supports major operational and educational programs of the district, such as salaries and benefits, utilities, supplies and materials, and other

Interest & Sinking (I&S)

Supports the repayment of debt authorized by district voters. The district cannot use I&S funds to pay salaries or operational costs.

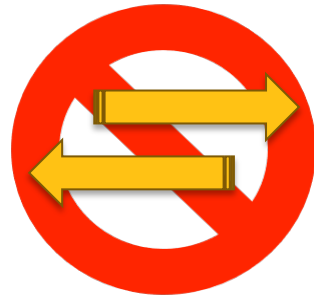


TAX INFORMATION

Maintenance & Operations (M&O)



Daily operations of the district.



Interest & Sinking (I&S)



Bond elections only affect I&S rate.

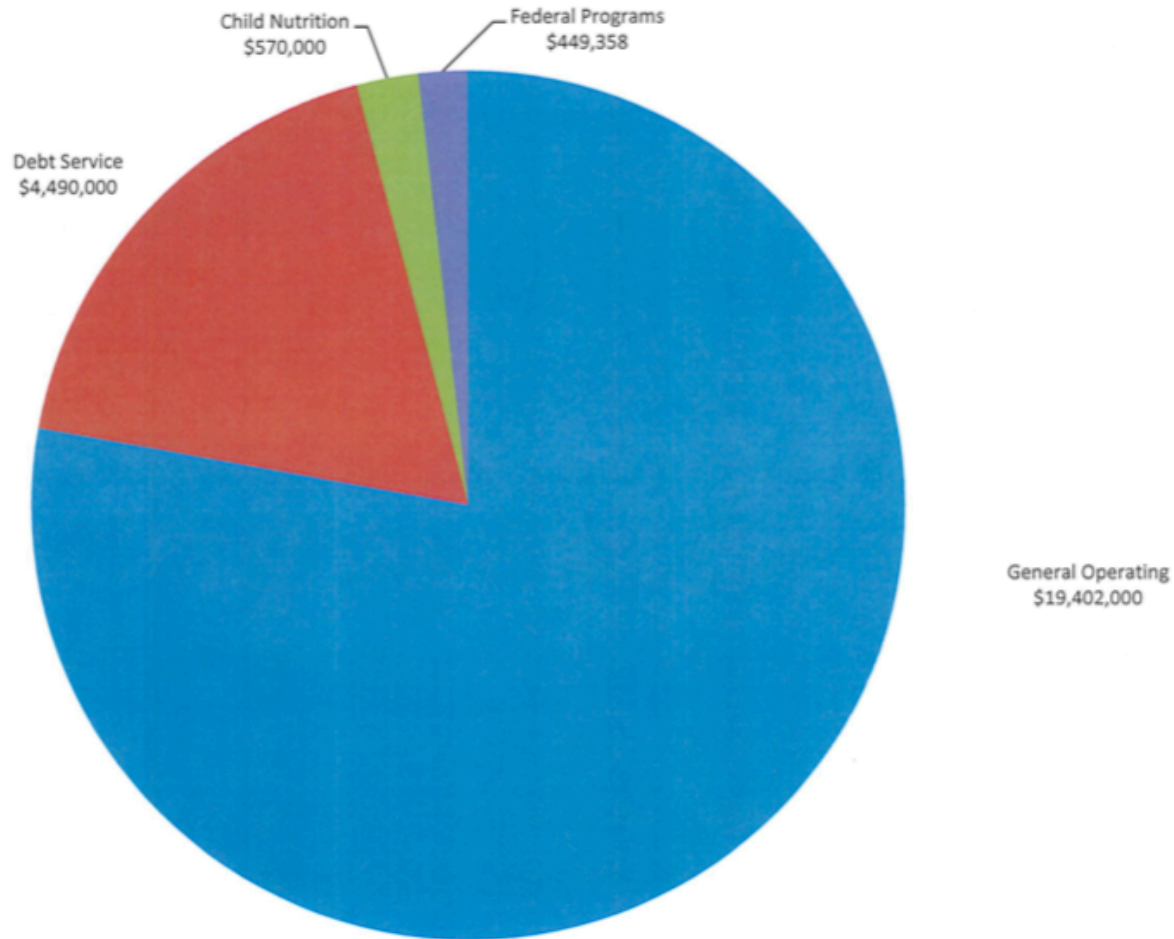
The total tax rate for the district is calculated by adding the M&O rate and the I&S rate together.

$$\text{M\&O } \$0.99 + \text{ I\&S } \$0.26 = \text{ Total Tax Rate } \$1.25$$



CURRENT BUDGET ILLUSTRATIONS

LAGO VISTA INDEPENDENT SCHOOL DISTRICT TOTAL APPROPRIATIONS BY FUND 2019-2020

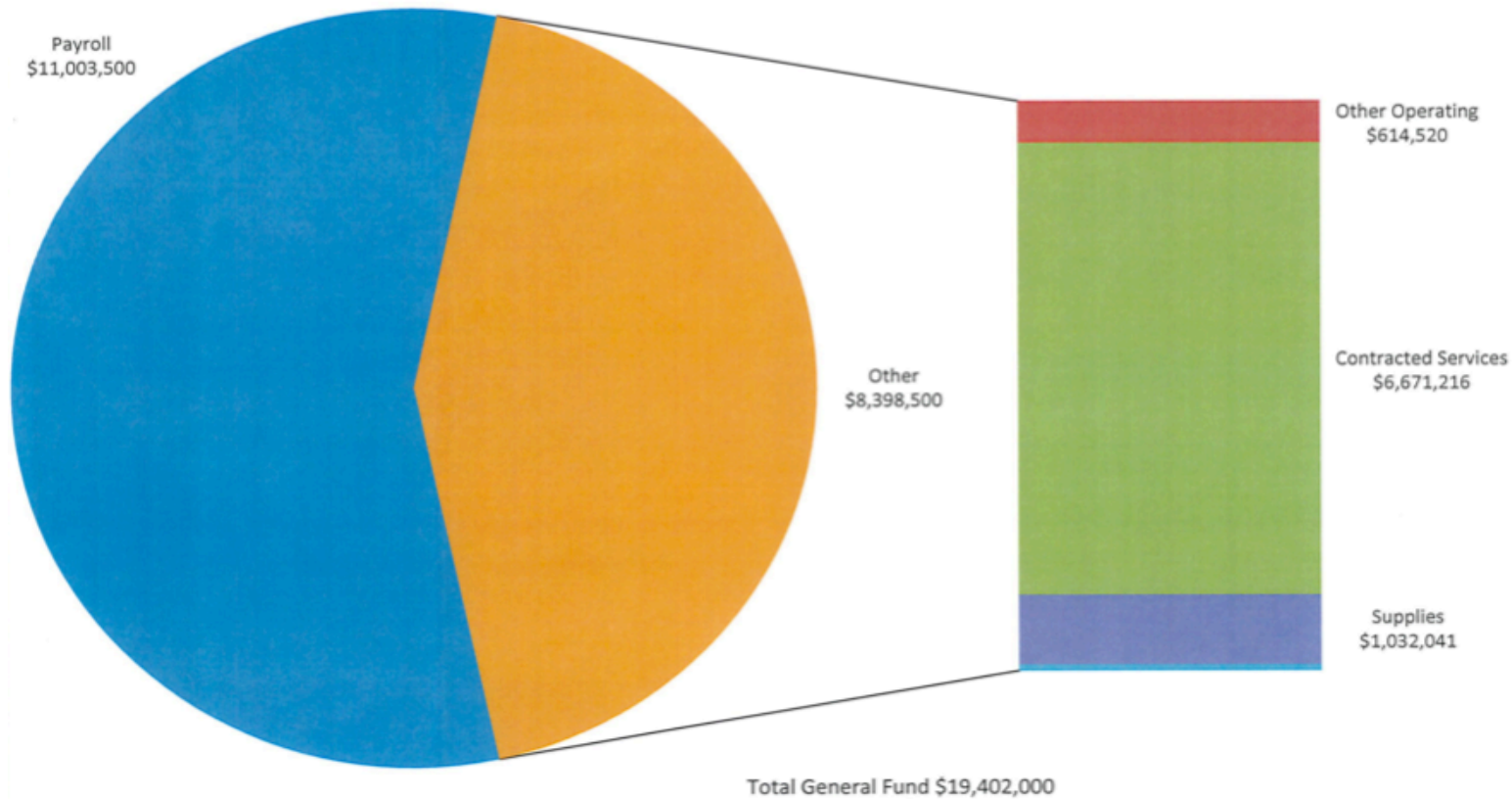


Total All Funds \$24,911,358



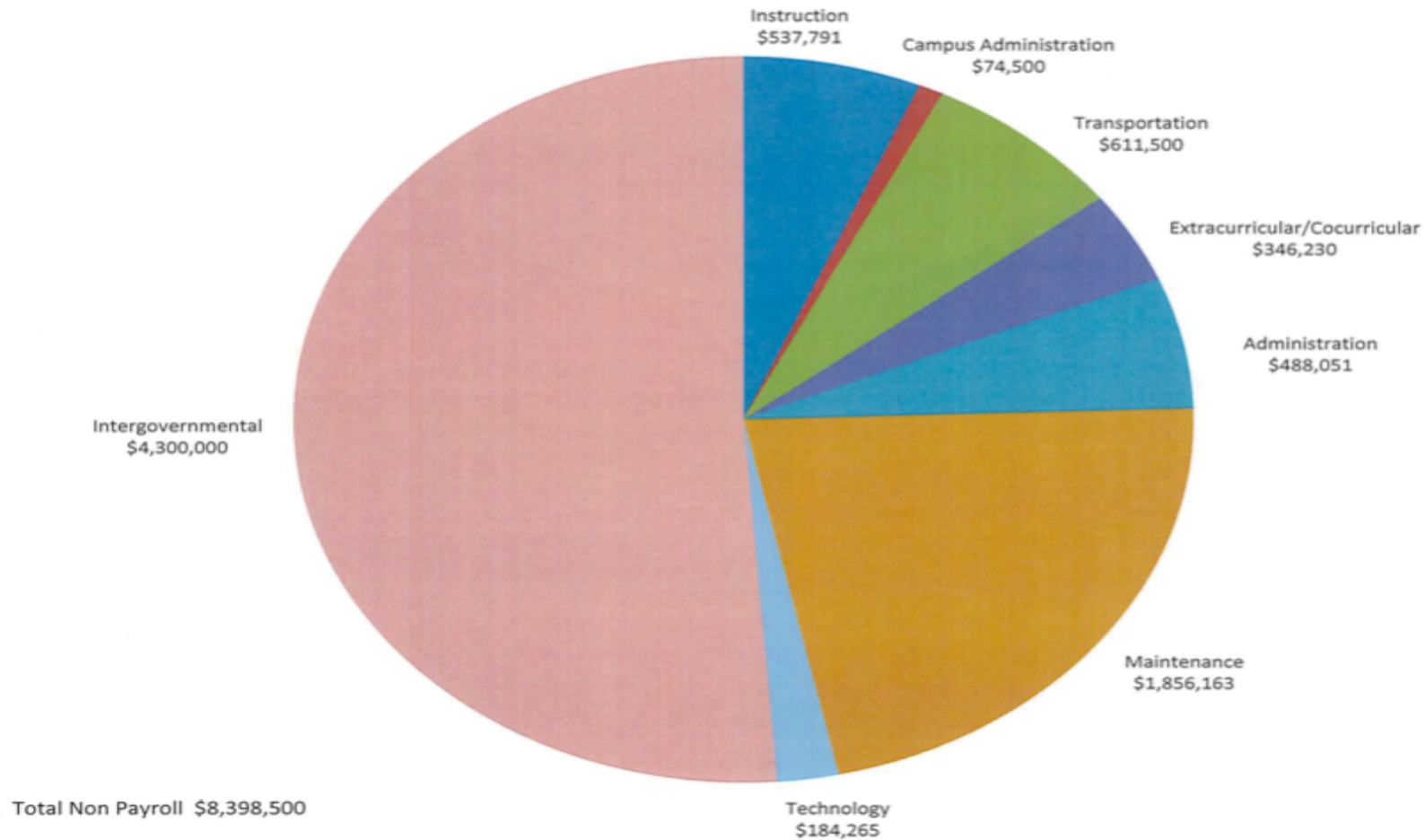
BUDGET DRILL DOWN

LAGO VISTA INDEPENDENT SCHOOL DISTRICT GENERAL FUND BUDGET BY MAJOR OBJECT 2019-2020



BUDGET DRILL DOWN cont'd

**LAGO VISTA INDEPENDENT SCHOOL DISTRICT
GENERAL FUND NON PAYROLL BUDGET BY FUNCTION
2019-2020**



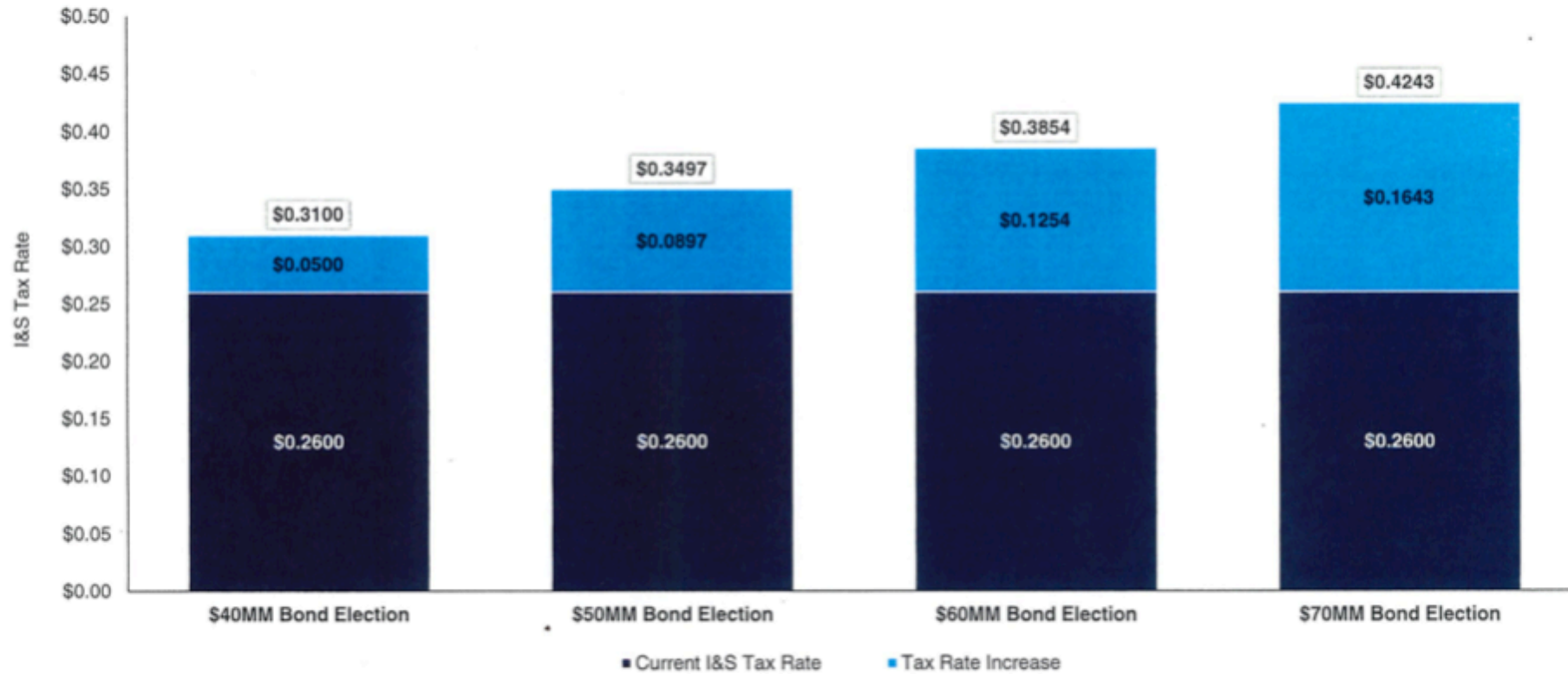
TWO JARS TRIAL...

- Each of you have and M&O “dollar” and an I&S “quarter.”
 - The dollar = maintenance and ops expenses
 - The quarter = debt expenses (fixed principal & interest cost of previous bonds)
- Yr 1: Taxes separate your dollar and your quarter...each into its own jar
 - Yr 1 ENDS: M&O pays out, and I&S pays out
 - COMMUNITY GROWTH, PROPERTY VALUE INCREASE, OR BOTH
- Yr 2: Taxes separate
 - Yr 2 ENDS: M&O pays out, and I&S pays out
 - Illustrate capacity increase of I&S, while M&O is expensed equal to budget



BONDING INFORMATION

Preliminary I&S Tax Rate Impact



STRATEGIES IN I&S MANAGEMENT

2016: Tax Ratification Election: Voter Approved Penny Swap

- Changed tax rate so that 2 pennies moved from I&S to M&O
- Approximately \$125K of new M&O monies annually

2017: \$2.9 Million bond without I&S tax increase

- HVAC, security, technology, road, and transportation needs met
- No effect on M&O
- No tax rate increase

2018 & 2019: Defeasance

- \$1.25 million over the last 2 years-pay principals of callable bonds off early
- Strategy saves district in paying interest
- Strategy increases bonding capacity with imminent construction projects



WHAT ARE THE NEIGHBORS UP TO?

<u>District</u>	<u>M&O</u>	<u>I&S</u>
Leander	1.04	.47
Liberty Hill	1.04	.50*
Lake Travis	1.06	.35
Marble Falls	1.05	.21

*Only 31 ISD's in the state have I&S amount of 50 cents or greater. Either certain a large population growth is imminent or in trouble...



HIGH SCHOOL TOUR



HIGH SCHOOL TOUR

Areas to note:

- Hallways
- HS Cafeteria
- MAC/Admin offices
- Ag/Floral design areas
- Band Hall
- Girls Athletic Facilities
- Field House



REVIEW DISTRICT CHALLENGES + NEEDS



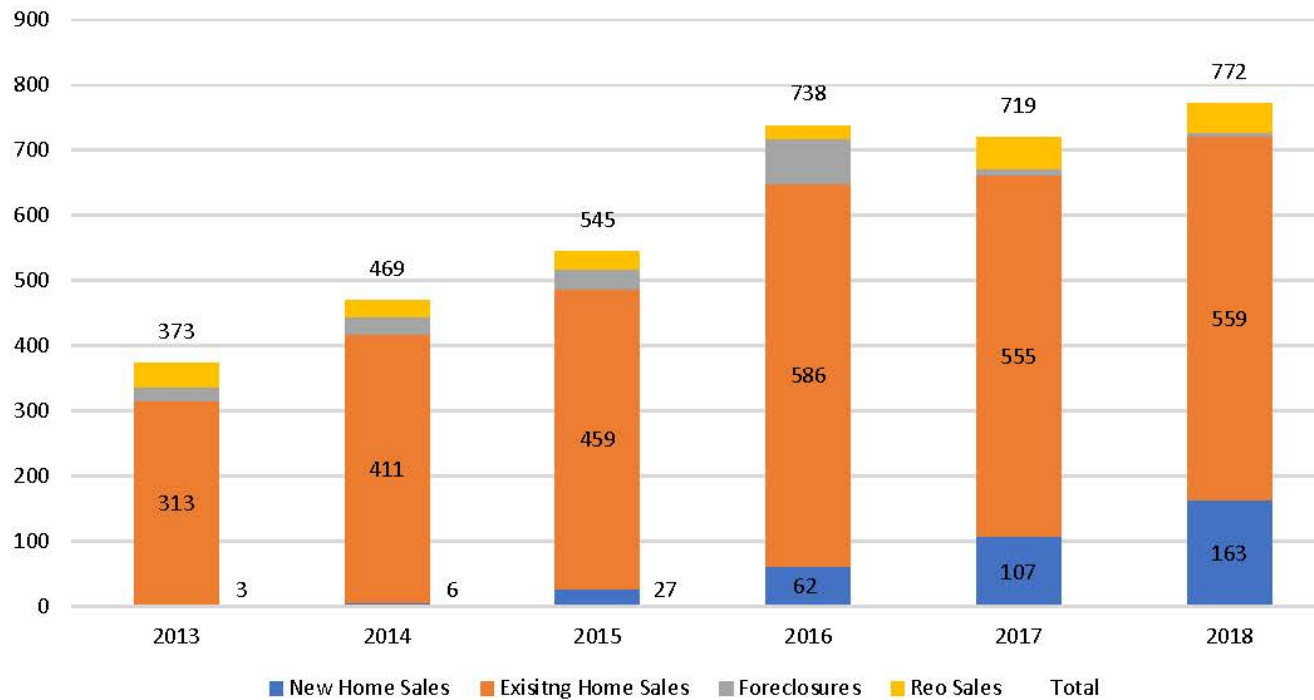
DISTRICT GROWTH



New vs. Existing Housing Activity

Lago Vista ISD Closings 2013 - 2018

Annual District Home Sales by Type



- Lago Vista ISD has sold more than 700 homes each year for the last 3 years
- The district closed 163 new homes in 2018 compared to just 3 in 2013
- The district has had 565 existing home sales on average per year in the last 3 years

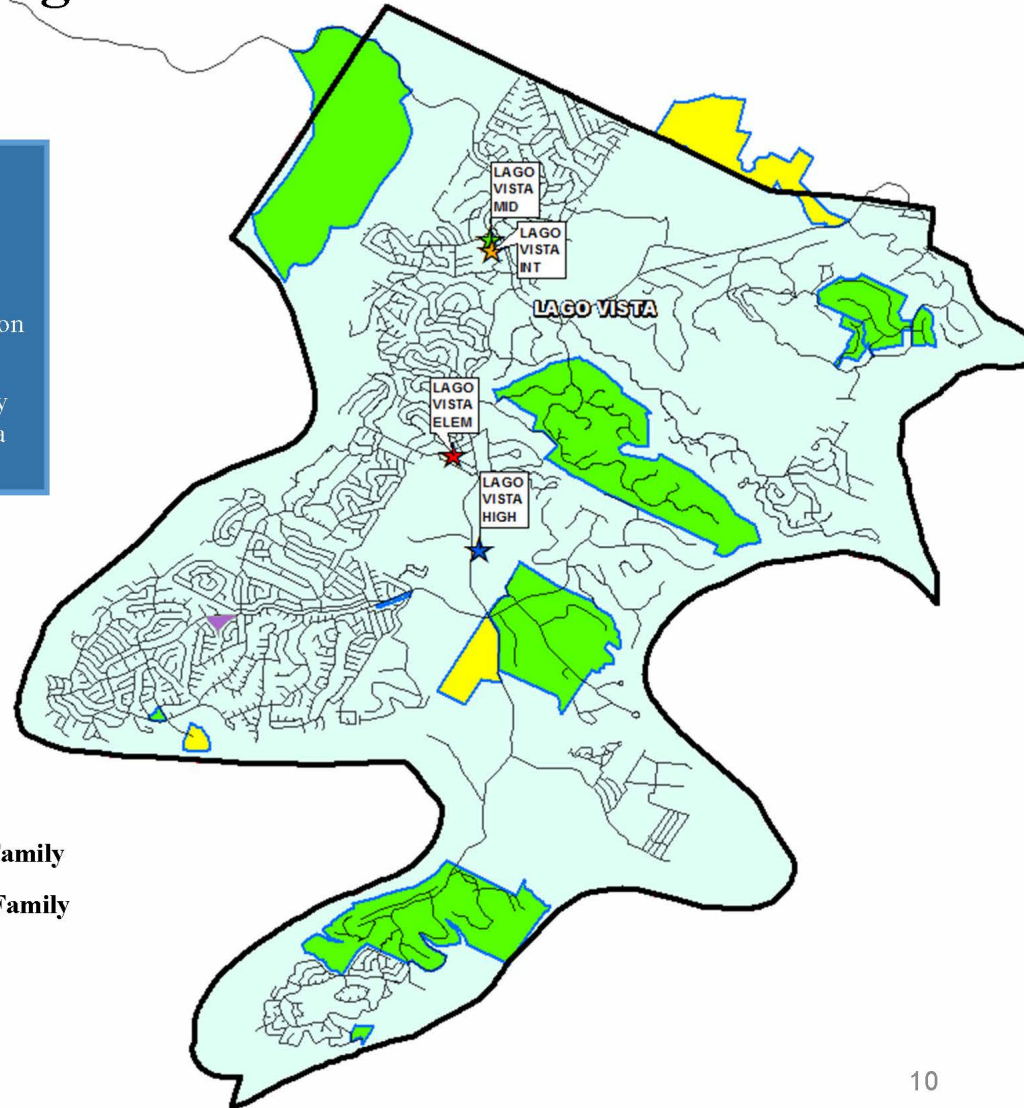


DEMOGRAPHIC REPORT





District Housing Overview

- Lago Vista ISD has more than 640 lots available to build on
- The district has more than 4,100 future lots planned
- Of those, groundwork is underway on roughly 92 lots within the district
- The district also has 72 multi-family units under construction in the Vista Bella complex



 Active Single Family
 Future Single Family

 Active Multi Family
 Future Multi Family



DEMOGRAPHIC REPORT



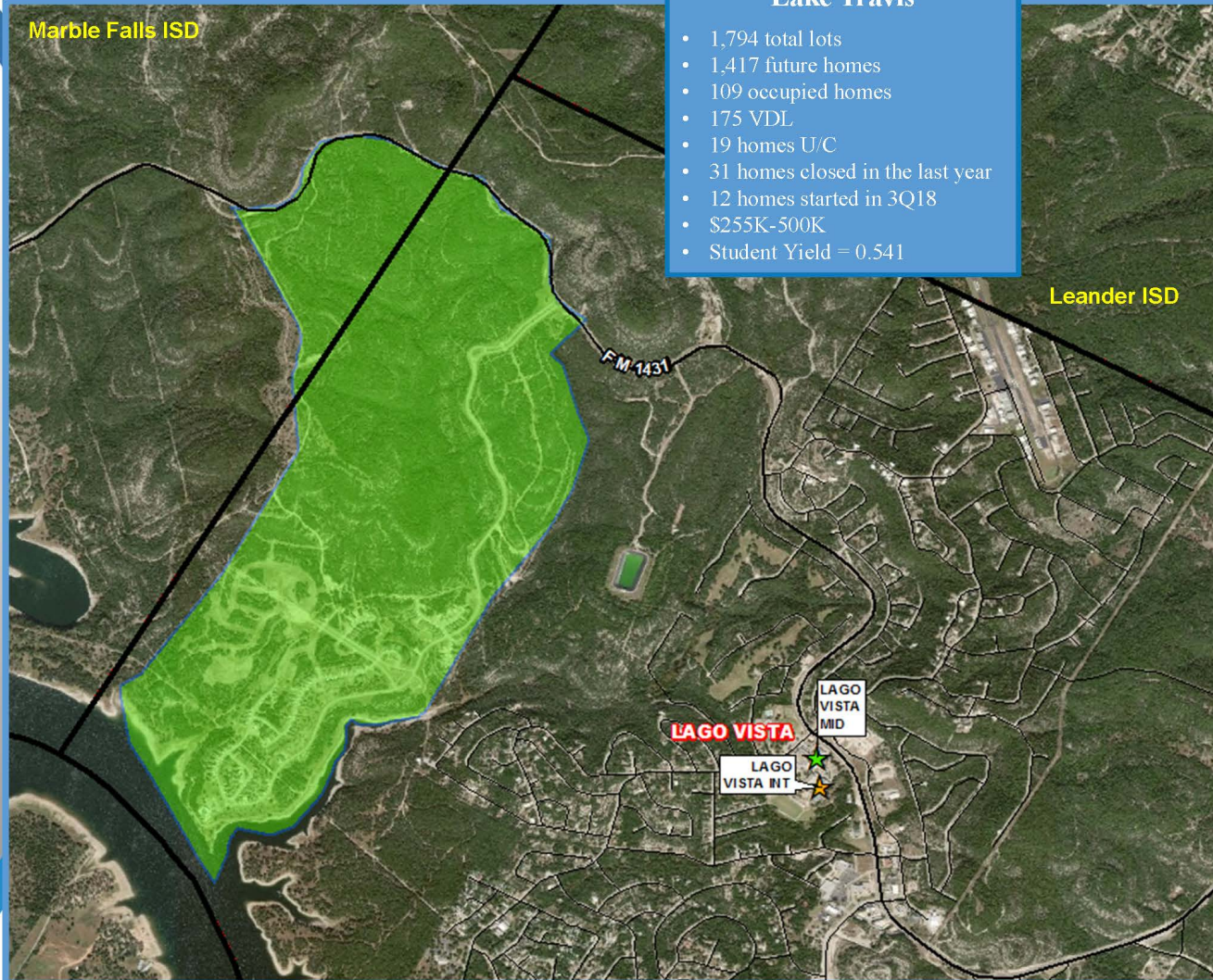
Residential Activity

Marble Falls ISD

Lakeside at Tessera on Lake Travis

- 1,794 total lots
- 1,417 future homes
- 109 occupied homes
- 175 VDL
- 19 homes U/C
- 31 homes closed in the last year
- 12 homes started in 3Q18
- \$255K-500K
- Student Yield = 0.541

Leander ISD



DEMOGRAPHIC REPORT



Residential Activity

Jonestown Tract Site

- 208 total single family lots
- Approx. 30 homes will be within Lago Vista ISD
- Split with Leander ISD

The Hollows

- 600 total single family lots
- The Bluffs—
 - 104 total lots
 - 39 occupied homes
 - 64 VDL
 - 1 home U/C
 - 1 annual start
- The Canyons—
 - 496 total lots
 - 15 occupied homes
 - 170 VDL
 - 1 home U/C
 - 1 annual closing
- \$300K-\$1.1M
- Subdivision Student Yield = 0.093

Ranchland Hills Estates

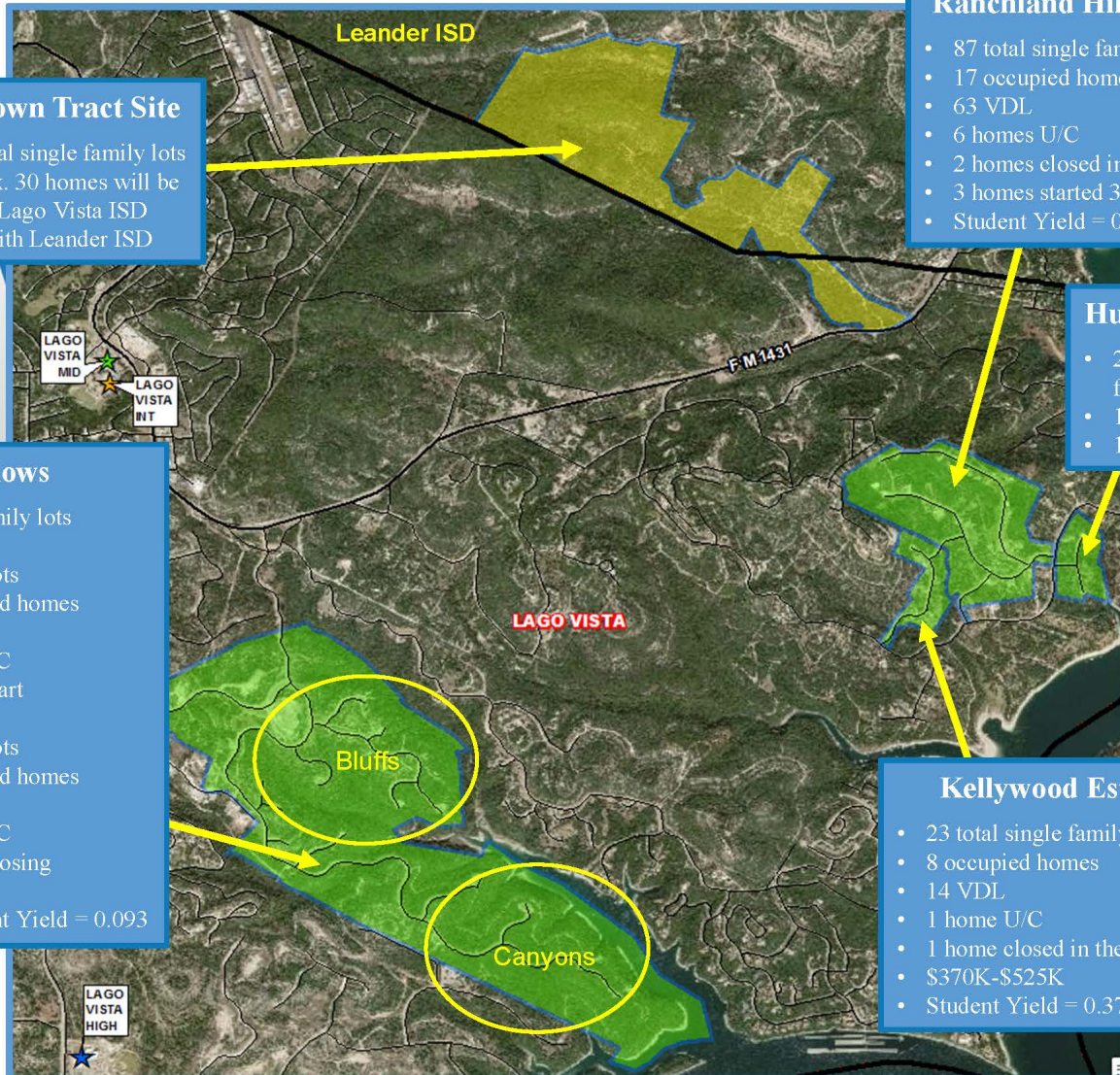
- 87 total single family lots
- 17 occupied homes
- 63 VDL
- 6 homes U/C
- 2 homes closed in last year
- 3 homes started 3Q18
- Student Yield = 0.235

Hunters Creek

- 20 total single family lots
- 1 occupied home
- 19 VDL

Kellywood Estates

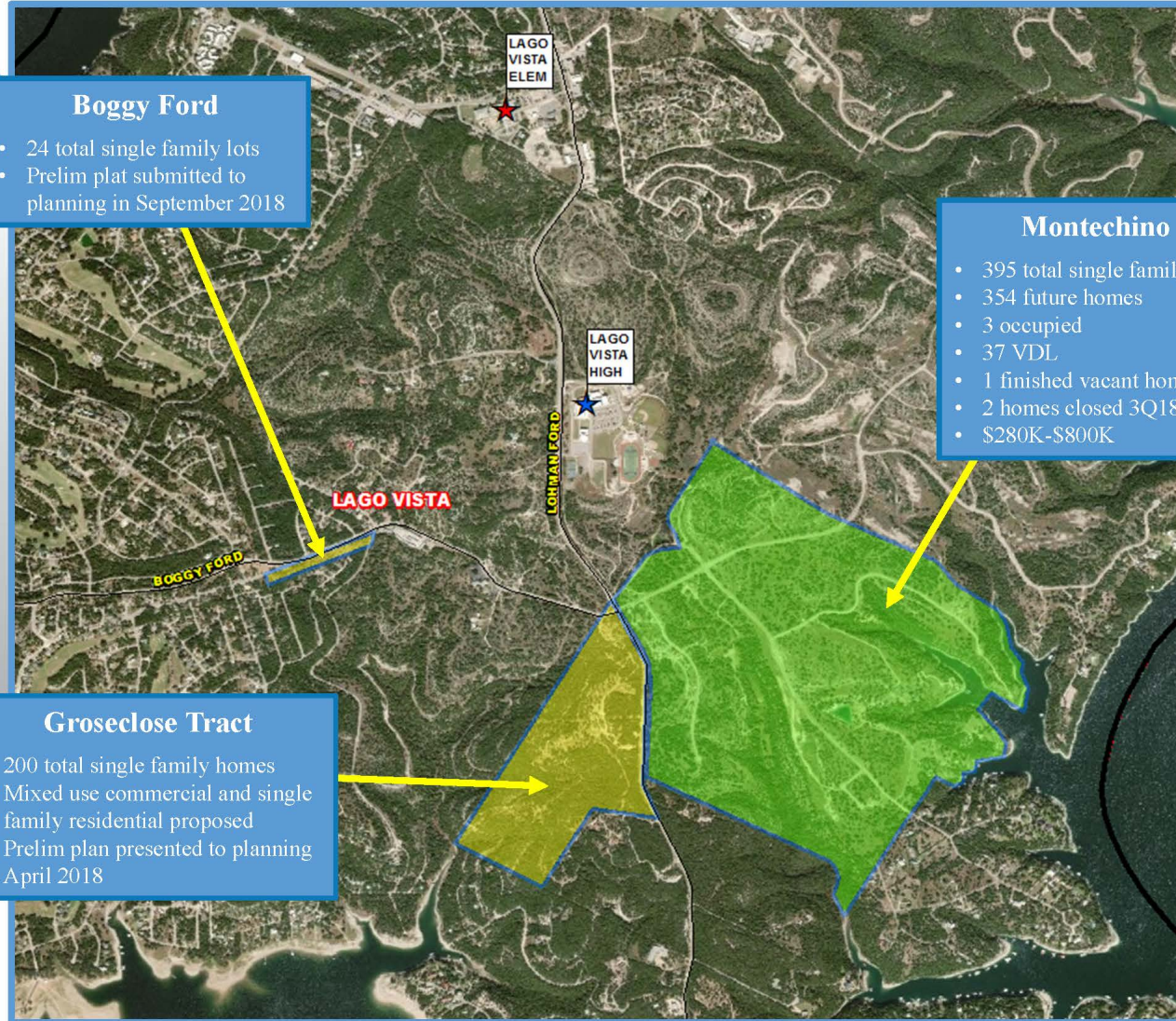
- 23 total single family lots
- 8 occupied homes
- 14 VDL
- 1 home U/C
- 1 home closed in the last year
- \$370K-\$525K
- Student Yield = 0.375



DEMOGRAPHIC REPORT



Residential Activity



DEMOGRAPHIC REPORT



Residential Activity



DEMOGRAPHIC REPORT



Future Multi-Family Activity



Vista Bella

- 72 unit property
- Mixed-income multifamily development
- 40 tax credit units
- 32 market rate units
- Construction began Summer 2018
- Estimated completion date Fall 2019



ENROLLMENT PROJECTIONS



Ten Year Forecast By Grade Level

Year (OCT)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	Total %
2014/15	5	25	89	107	110	99	91	117	103	86	92	116	97	124	105	1,366		
2015/16	12	24	90	98	113	114	100	96	124	113	92	111	131	103	116	1,437	71	5.2%
2016/17	12	13	85	96	104	115	123	109	101	139	119	109	105	115	104	1,449	12	0.8%
2017/18	9	21	80	91	96	110	116	131	123	107	144	136	104	99	108	1,475	26	1.8%
2018/19	4	25	87	79	99	101	118	130	138	133	130	166	144	112	86	1,552	77	5.2%
2019/20	4	25	96	94	87	108	107	132	140	150	149	150	168	151	102	1,663	111	7.2%
2020/21	4	25	101	100	100	93	113	119	144	151	162	171	151	172	137	1,743	80	4.8%
2021/22	4	25	102	105	106	103	99	122	126	156	166	188	168	159	157	1,786	43	2.5%
2022/23	4	25	100	108	109	108	109	107	131	134	170	191	188	166	148	1,798	12	0.7%
2023/24	4	25	106	105	114	113	111	119	112	141	141	196	190	192	152	1,821	23	1.3%
2024/25	4	25	111	111	111	120	115	118	126	120	152	163	194	192	181	1,843	22	1.2%
2025/26	4	25	114	117	117	117	124	124	125	135	129	175	162	195	179	1,842	-1	-0.1%
2026/27	4	25	112	121	124	122	120	133	131	134	144	149	174	164	182	1,839	-3	-0.2%
2027/28	4	25	115	118	128	130	125	128	141	141	144	166	148	176	154	1,843	4	0.2%
2028/29	4	25	117	121	125	134	134	134	136	151	151	166	165	149	164	1,876	33	1.8%

*Yellow box = largest grade per year

*Green box = second largest grade per year



DISTRICT GROWTH



Ten Year Forecast By Campus

CAMPUS	HISTORY	Current	ENROLLMENT PROJECTIONS									
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
LAGO VISTA ELEMENTARY SCHOOL	407	395	414	423	445	454	467	482	494	508	520	526
ELEMENTARY TOTALS	407	395	414	423	445	454	467	482	494	508	520	526
Elementary Absolute Change	-18	-12	19	9	22	9	13	15	12	14	12	6
Elementary Percent Change	-4.24%	-2.95%	4.81%	2.17%	5.20%	2.02%	2.86%	3.21%	2.49%	2.83%	2.36%	1.15%
LAGO VISTA INTERMEDIATE SCHOOL	247	248	239	232	221	216	230	233	248	253	253	268
INTERMEDIATE TOTALS	247	248	239	232	221	216	230	233	248	253	253	268
Intermediate Absolute Change	15	1	-9	-7	-11	-5	14	3	15	5	0	15
Intermediate Percent Change	6.47%	0.40%	-3.63%	-2.93%	-4.74%	-2.26%	6.48%	1.30%	6.44%	2.02%	0.00%	5.93%
LAGO VISTA MIDDLE SCHOOL	374	401	439	457	448	435	394	398	389	409	426	438
MIDDLE SCHOOL TOTALS	374	401	439	457	448	435	394	398	389	409	426	438
Middle School Absolute Change	15	27	38	18	-9	-13	-41	4	-9	20	17	12
Middle School Percent Change	4.18%	7.22%	9.48%	4.10%	-1.97%	-2.90%	-9.43%	1.02%	-2.26%	5.14%	4.16%	2.82%
LAGO VISTA HIGH SCHOOL	447	508	571	631	672	693	730	730	711	669	644	644
HIGH SCHOOL TOTALS	447	508	571	631	672	693	730	730	711	669	644	644
High School Absolute Change	14	61	63	60	41	21	37	0	-19	-42	-25	0
High School Percent Change	3.23%	13.65%	12.40%	10.51%	6.50%	3.13%	5.34%	0.00%	-2.60%	-5.91%	-3.74%	0.00%
DISTRICT TOTALS	1,475	1,552	1,663	1,743	1,786	1,798	1,821	1,843	1,842	1,839	1,843	1,876
District Absolute Change	26	77	111	80	43	12	23	22	-1	-3	4	33
District Percent Change	1.79%	5.22%	7.15%	4.81%	2.47%	0.67%	1.28%	1.21%	-0.05%	-0.16%	0.22%	1.79%



BUILDING CAPACITY ANALYSIS

LAGO VISTA ISD CAMPUS CAPACITY vs. FUTURE ENROLLMENT												
Fall 2019	Functional Capacity	ENROLLMENT PROJECTIONS										
CAMPUS		Current	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
LAGO VISTA ES	641	395	414	423	445	454	467	482	494	508	520	526
LAGO VISTA IS	198	248	239	232	221	216	230	233	248	253	253	268
LAGO VISTA MS	404	401	439	457	448	435	394	398	389	409	426	438
LAGO VISTA HS	817	508	571	631	672	693	730	730	711	669	644	644

Fall 2019		Projected Enrollment as % Increase from Previous Year										
LAGO VISTA ES	641	x	x	2%	5%	2%	3%	3%	2%	3%	2%	1%
LAGO VISTA IS	198	x	x	-3%	-5%	-2%	6%	1%	6%	2%	0%	6%
LAGO VISTA MS	404	x	x	4%	-2%	-3%	-9%	1%	-2%	5%	4%	3%
LAGO VISTA HS	817	x	x	11%	6%	3%	5%	0%	-3%	-6%	-4%	0%

Fall 2019		Projected Enrollment as % of Program Capacity										
LAGO VISTA ES	641	62%	65%	66%	69%	71%	73%	75%	77%	79%	81%	82%
LAGO VISTA IS	198	125%	121%	117%	112%	109%	116%	118%	125%	128%	128%	135%
LAGO VISTA MS	404	99%	109%	113%	111%	108%	98%	99%	96%	101%	105%	108%
LAGO VISTA HS	817	62%	70%	77%	82%	85%	89%	89%	87%	82%	79%	79%



FACILITY NEEDS



FACILITIES ASSESSMENT

Aging Concerns	Functional Challenges	Code or Compliance Concerns
<u>HS & MS</u> : Power issues	<u>HS</u> : Library configuration and Cafeteria capacity	<u>All</u> : Door hardware at all campuses
<u>HS & ES</u> : Irrigation & drainage issues	<u>MS</u> : Campus size, detached design and security	<u>All</u> : Accessible paths of travel
<u>MS & IS</u> : Cooling tower & chiller	<u>IS</u> : Campus size and portables	<u>All</u> : Vestibule entries
<u>ES</u> : Plumbing issues	<u>ES</u> : Classroom sizes	<u>All</u> : Card reader access
<u>Admin</u> : Roof conditions	<u>Athletics</u> : Locker Rooms at Gym & Field House	<u>All</u> : Site fencing
	<u>Admin</u> : Building size	



FACILITIES ASSESSMENT

TEA CLASSROOM SIZE REQUIREMENTS:

Pk – 1 st Grade	800 SF
2 nd – 12 th	700 SF
Computer Labs	900 SF

LAGO VISTA ISD:

Elementary School	14 CLASSROOMS AROUND <u>650 SF</u>
Intermediate School	6 (OUT OF 10) CLASSROOMS AROUND <u>650 SF</u>
Middle School	2 COMPUTER LABS AROUND <u>650 SF</u>
High School	All spaces meet TEA minimum requirements



EDUCATIONAL PROGRAMS



EXISTING PATHWAYS

PATHWAYS			
STEM	BUSINESS & INDUSTRY	ARTS & HUMANITIES	PUBLIC SERVICE
AP Math	Audio/Video Production	Fine Arts	Health Science: EMT
AP Science	Business Leadership	Spanish	
Science	Business Information Management		
	Computer Information Technology		
	Floral & Landscape Design		
	Journalism		
	Speech Communication		



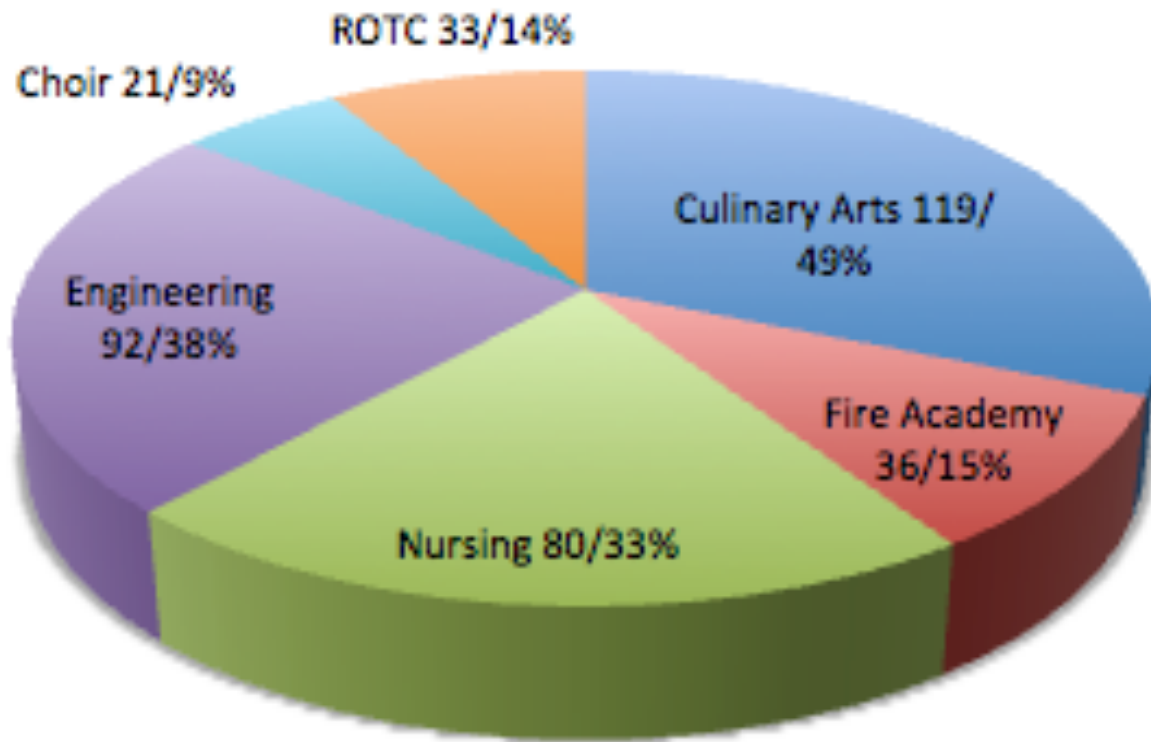
EXISTING CERTIFICATION OPPORTUNITIES

- Floral Design Certification - Level 1
- Floral Design Certification - Level 2
- Microsoft Office Specialist – Word, Excel, & PowerPoint – Expert
- Microsoft Office Specialist - Word, Excel, & PowerPoint Master
- Microsoft Technology Associate -- Introduction to Programming HTML and CSS
- Microsoft Technology Association-- Introduction to Programming Java
- Microsoft Technology Associate (MTA) Software Development Fundamentals
- American Welding Society (AWS) SENSE Certification
- National Registry of MET'S EMT-Basic Certification
- Occupational Safety & Health Administration (OSHA) 10-Hour Course



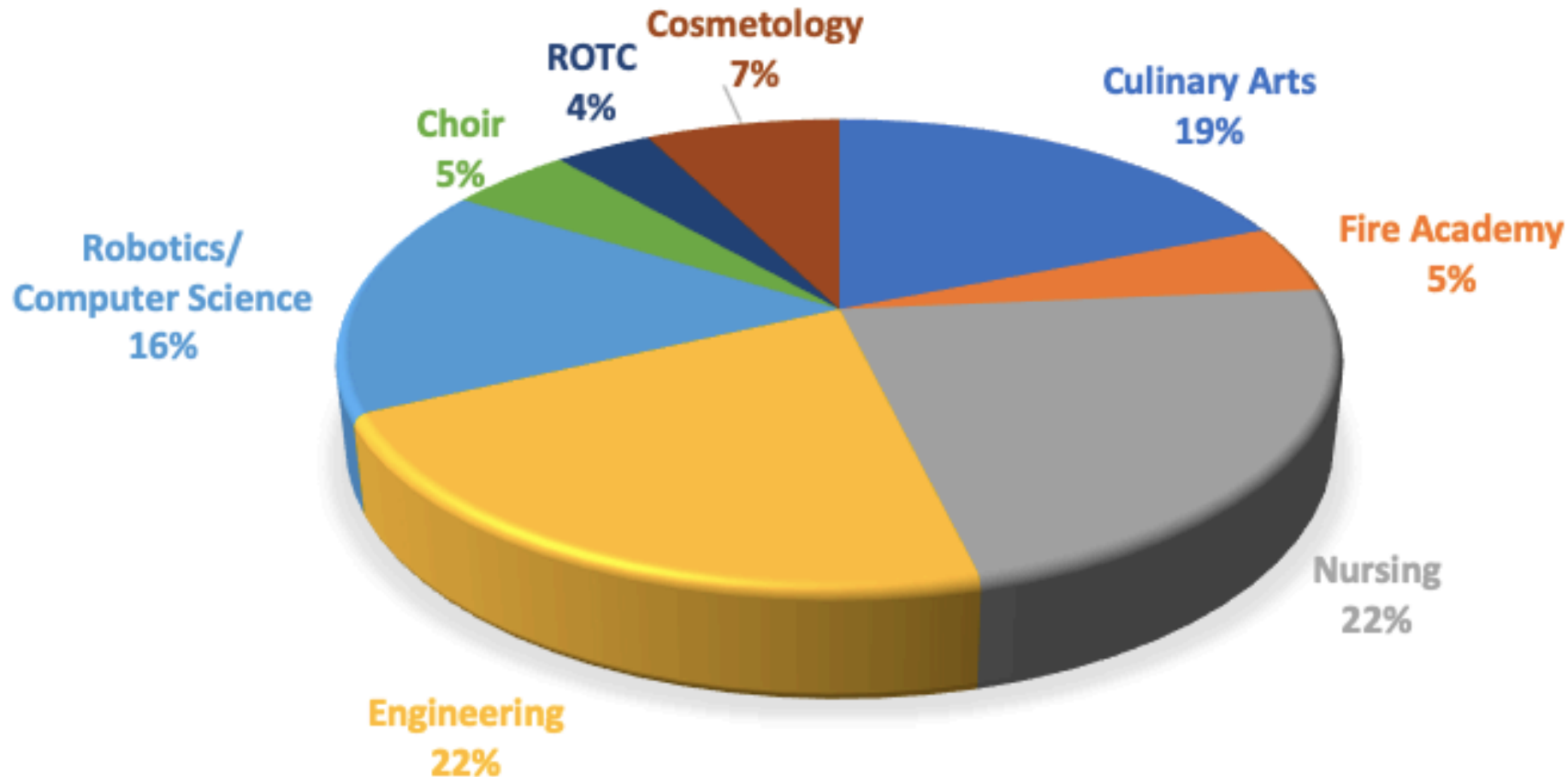
HIGH SCHOOL SURVEY OF PROGRAMS

Percent of LVHS Students Showing Interest in Endorsement Area (n = 241)



MIDDLE SCHOOL SURVEY OF PROGRAMS

PERCENT OF LVMS 7TH AND 8TH GRADE STUDENTS SHOWING INTEREST IN ENDORSEMENT AREAS



FUTURE OPPORTUNITIES

- Programs in the works + programs being considered for the future



QUESTIONS?



LOOKING AHEAD

Next Meeting:

- Tuesday, October 22 at 2pm
- Viking Hall

October 22 Agenda:

- Elementary School Tour
- Review Bond Capacity
- Potential Projects + Solutions



Thank You!

