



Evergreen School District

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EVERGREEN SCHOOL DISTRICT

School Consolidation Report and Superintendent's Recommendations to the Board of Trustees

EXECUTIVE SUMMARY

In October 2019, the Board of Trustees approved closing two schools in 2020-21 school year, and a third school in 2021-22 school year as a part of its fiscal stabilization plan, and on November 14, 2019 approved the timeline for the school consolidation process.

The Superintendent determined that the best way to serve all interests of the community was to develop a broad-based committee with the goal of creating a consensus on recommendations, and appointed a School Consolidation Advisory Committee responsible for the following charge: 1) Become fully informed on the District's current and future financial situation, issues, and challenges and consider strategies to maintain the District in a sound fiscal condition; 2) Become fully informed on the District's current and future demographics as they relate to enrollment and school boundaries; 3) Consider all schools for potential closure for consolidation, considering the positive and negative factors and variables (location, capacity, programs, community impact, etc.) for each school; 4) Consider the potential for each school to host educational programs that would maintain or enhance enrollment and provide educational programs to meet the diverse needs and interests of students, families, and staff; 5) Develop and utilize criteria and demographic data to base its recommendations on the most appropriate schools for closure or consolidation; 6) Based on this criteria and data, provide the Superintendent recommendations on new school boundary areas, educational programs offered at specific sites, including Dual Language Immersion, and other factors which could maintain or improve enrollment in the District and its schools; 7) Identify and recommend schools for closure; 8) Develop specific transition support plans for any schools recommended for closure; and 9) Provide recommendation on schools to close including boundaries and potential transportation to the Superintendent by the end of January 2020.

To carry out its charge, the committee would need to include co-facilitators, meet regularly, integrate the work of subcommittees to address business services, educational services and human resources matters, and involve all district stakeholders--parents, teachers, staff, and community--to recommend to the Superintendent the names of schools to be closed and actions to help the District deal with significant decline in students, increasing costs, and other financial demands. Following a districtwide application process, 24 parents, staff, and community members were appointed by the Superintendent and met weekly from November 20, 2019 - January 22, 2020.

In order to provide transparency, ongoing communications, and opportunities for community engagement, 1) the School Consolidation Committee also held Community Input Sessions prior to each of their meetings and the Superintendent held two Community Information Sessions on December 19, 2019 and January 16, 2020; 2) the district launched a School Consolidation website with consistently updated information, timelines, School Consolidation Committee agendas and summaries, frequently asked questions, and informational videos; and 3) The Superintendent responded to emails sent to the schoolconsolidation@eesd.org email address, and held informal meetings in person and by phone with parents, staff and community members throughout the process.



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SUPERINTENDENT'S RECOMMENDATIONS:

1. Close Laurelwood Elementary and Dove Hill Elementary Schools at the end of the 2019-20 school year.
2. No changes to the boundaries for the three middle schools--Chaboya, LeyVa, and Quimby Oak--at this time. Adjusting middle school boundaries would have further reaching impacts on the community. While adjustments may be called for in the future, a focus only on boundaries would be required.
3. No changes to Holly Oak Elementary School due to the start of the school's Dual Language Immersion Program.
4. Reconfigure attendance boundaries for the following areas (see Exhibit A-Proposed Attendance Boundary Map and Exhibit B-Current Attendance Boundary Map):
 - a. The area encompassed by San Felipe Road and Yerba Buena Avenue, not including the Yerba Buena Villas Condominiums, will be absorbed by Cadwallader
 - b. The Yerba Buena Villas Condominiums near San Felipe Road and Yerba Buena Avenue will attend James F. Smith.
 - c. The area north of Canyon Creek Park, West of San Felipe Road, South of Yerba Buena Road, and East of Bentley Ridge Drive and Hillstone Drive will be absorbed at James F. Smith.
 - d. The area East of San Felipe Road, North of the Villages, South of the Evergreen College will be absorbed by Matsumoto.
 - e. The area encompassed by Capitol Expressway, Silver Creek Road, Yerba Buena Road, and Highway 101 will attend Montgomery.
 - f. The area south of Yerba Buena Road, North of Wheatley Place, West of Silver Creek Road, and East of Highway 101 will be absorbed by James F. Smith.
 - g. The area South of Rigoletto Dr., East of King Road, North-North East of Chopin Ave., and West of Mozart Ave. will be absorbed by Katherine Smith.
5. No changes to Cedar Grove, Chaboya, Carolyn Clark, Evergreen, Millbrook, Norwood Creek, Silver Oak, or Whaley Elementary School.
6. Direct staff to analyze new enrollment patterns to determine if any additional support will be needed for safety.
7. Whether through Interdistrict or Intradistrict (School Choice) transfer, the school that has been approved through the aforementioned process, the District recognizes that this is the home school of the student. Therefore, the following actions are recommended relating to school re-assignments:
 - a. Students impacted by school consolidation will have the option to participate in the reassignment process to choose an alternate school, should the families decide the new home school is not a good fit for them.
 - b. District staff will contact all families attending Laurelwood and Dove Hill on School Choice transfer. We will work with parents/guardians to determine family preference to attend their home school or other school that is receiving students due to school consolidation.
 - c. District staff will contact all interdistrict families attending Laurelwood and Dove Hill. Maintaining current interdistrict students is also a priority. Students in good standing (attendance, academics, etc.) will continue to be approved with priority transfer to schools receiving students due to school consolidation. Interdistrict transfers that are based upon the Allen Bill will receive higher priority.
8. Work with the City of San Jose and other governmental agencies to develop safe routes for students who will be attending new schools and expand information regarding safe school routes for all sites.
9. By February 14, the District will release an updated seniority list for all employee classifications, consistent with the terms of the collective bargaining agreements with each employee group. The Administration will continually work with employee bargaining

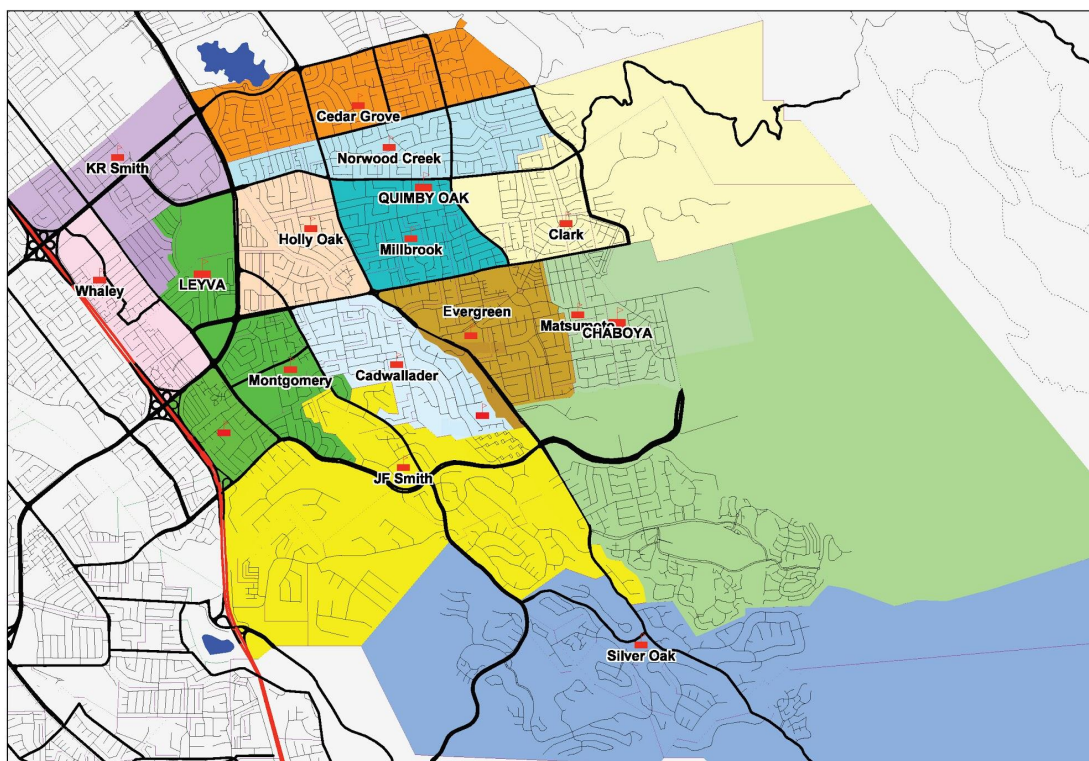


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- units to facilitate the relocation of displaced employees. Priority will be given to retaining current employees through attrition when possible.
10. In order to coordinate a smooth consolidation plan, staff will convene transition planning committees at the closing schools and the receiving schools, which will include all stakeholders.

Exhibit A: Proposed Attendance Boundary Map

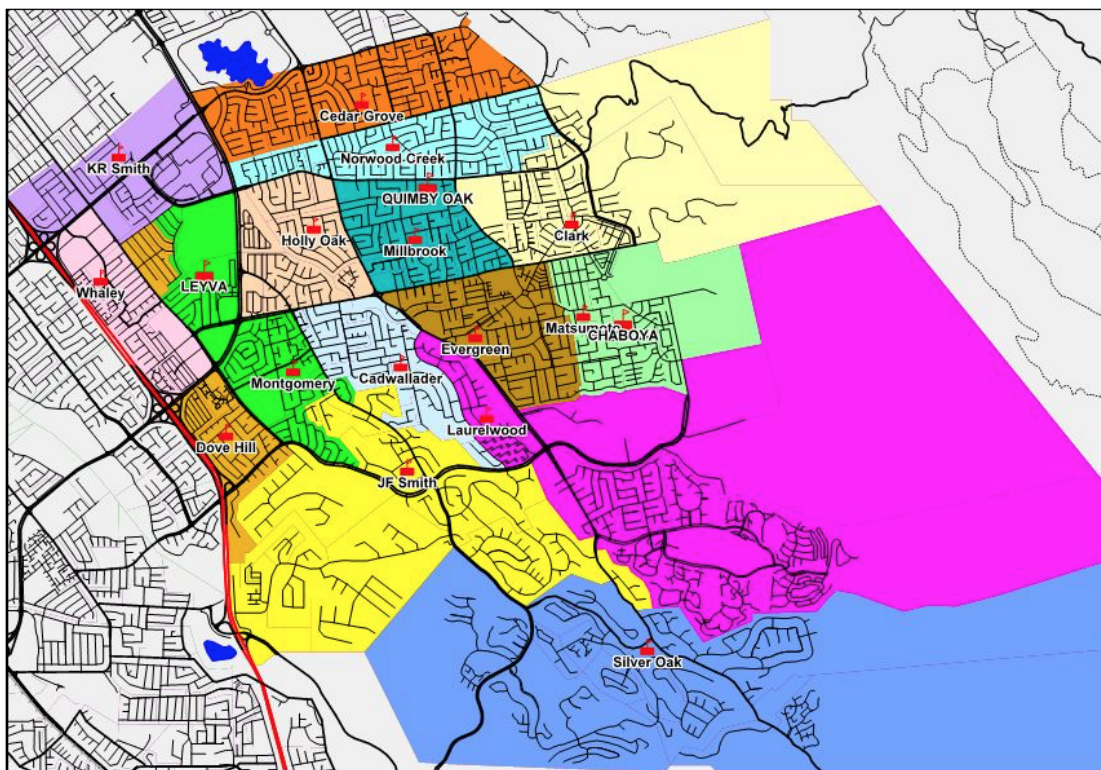




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Exhibit B: Current Attendance Boundary Map



BACKGROUND

The Evergreen School District has a \$12 million financial shortfall that is the result of rising costs and declining enrollment. As a result, the district was directed by the Santa Clara County Board of Education (Exhibit H) to develop a fiscal stabilization plan to address how this shortfall would be closed within three years.

FISCAL STABILIZATION PLAN:

On September 6, 2019, the County Superintendent notified Evergreen Elementary School District (EESD) that its adopted budget was conditionally approved and the county required EESD to submit, by October 8, 2019, a revised Adopted Budget and Multi-Year Projection to reflect the following: 1) Any increases or decreases to fund balance as a result of the 2018-19 end of year closing; 2) A board-approved fiscal stabilization plan that provides for a reserve for economic uncertainties that exceeds the 3% minimum requirement in all three fiscal years of the multi-year projection.

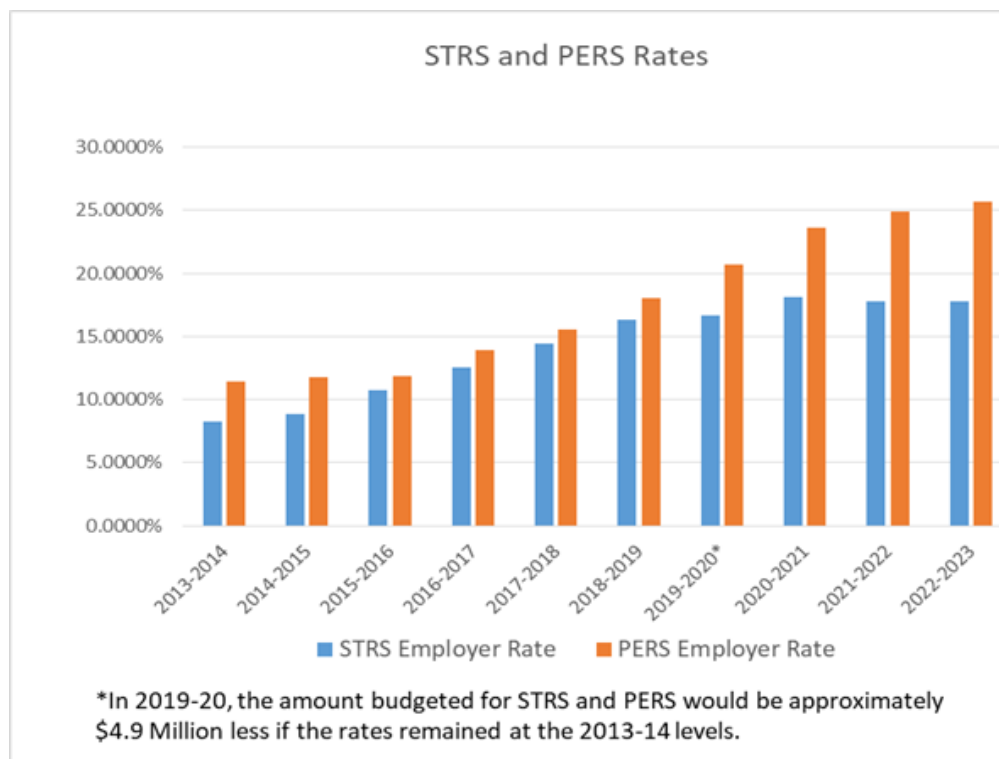
It should also be noted that in addition to the impact of declining enrollment to the District's fiscal challenges, there is a statewide change in state mandated contributions to employee retirement systems for district employees. The fiscal contributions to the California State Teachers Retirement System (STRS), for teachers and other certificated employees, and the California Public Employee Retirement System (PERS) for classified employees, has increased significantly and will continue to increase in the future years without any additional funding support from the State (see chart below). These rates and other changes are necessary to fully fund the State's pension obligations.



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Chart: STRS/PERS Contribution Increases



The multi-year enrollment decline has had a significant impact on the District's operating budget. In the 2016-17 school year, a Facilities Advisory Committee (FAC) was created by the Board of Trustees to ultimately deliver a set of recommendations to the Board of Trustees as to how it might maximize the use of its facilities. The Committee members met twice a month from July 2016 to April 2017, analyzing enrollment projections, school boundaries, school capacities, and all facilities conditions until they presented recommendations to the board on April 13, 2017. No action was taken on the recommendations at that time. However, the district has since encountered a \$12 million financial shortfall, which resulted in the Santa Clara County Board of Education directing the district to develop a fiscal stabilization plan to address how this shortfall would be closed within three years.

On September 24, 2019, the Board of Trustees held a budget study session and special meeting to adopt a fiscal stabilization plan that addressed how it intended to eliminate the \$12 million fiscal shortfall, which identified additional cost reduction measures including the consolidation of three schools; two by the end of the 2019-20 school year and one by the end of the 2020-21 school year.



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Table: Evergreen School District Fiscal Stabilization Plan Approved October 2019

Options:		2019-20	2020-21	2021-22	TOTAL
Increase Revenues					
1	Development of Martin property - conservative estimate based on going rate of property value		200,000	400,000	600,000
2	Saturday School Attendance Recovery Revenue		60,000	175,000	235,000
3	Increase Use of Facilities Revenue	120,000	120,000	120,000	360,000
4	Additional Savings in MYP since Budget Adoption (STRS/PERS, etc.)		200,000	200,000	400,000
5	18/19 Unrestricted Ending Balance Savings	2,950,167			2,950,167
Reduce Expenditures					
6	Savings in Supplemental funding		260,668	308,497	569,165
7	Contribution to Nutrition - Surplus in 18/19 will reduce 19/20 contribution	250,000	175,000	175,000	600,000
8	Reduce Licenses		175,000	175,000	350,000
9	Communications Position Savings	150,000	150,000	150,000	450,000
10	Maximize Restricted Funding with salaries	215,000	215,000	215,000	645,000
11	Management Positions (TBD) Reductions 3.0 FTE		525,000	525,000	1,050,000
12	Unrestricted GF Department Allocation - 20%	252,185	252,185	252,185	756,555
13	Additional FTE and retirement Savings due to declining enrollment (total of 7)		249,796	254,588	504,384
14	2 Furlough Days - Management, Supervisory, Confidential			80,000	80,000
15 *	2 Furlough Days - Certificated			575,000	575,000
16 *	2 Furlough Days - Classified			65,000	65,000
17	School Consolidation (2 schools in 20-21, 1 in 21-22)		800,000	1,200,000	2,000,000
Total Possible Resources		3,937,352	3,382,649	4,870,270	12,190,271

* Items Subject to Negotiation



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DECLINING ENROLLMENT:

Evergreen School District, consistent with other districts in Santa Clara County and the Bay Area, has experienced a decline in enrollment over the last five years and this trend will continue for the next five years. Specifically, over the past five years, the total enrollment has fallen by more than 2,500 students. The district also faces a projected enrollment decline of over 1,500 students over the next five years, totaling a 10-year loss of more than 4,000 students. The following table presents data for a sample of neighboring districts in their Kindergarten to Eighth Grade (K-8) enrollments during the period of 2014-15 to 2018-19:

Table: K-8 Declining Enrollment of Neighboring Districts 2014-15 to 2018-19

District	2014-2015 Enrollment	2018-2019 Enrollment	Enrollment Gain/(Loss)
Evergreen	13,162	10,839	(2,323)
Oak Grove	11,156	9,877	(1,279)
San Jose Unified (K-8)	22,718	20,806	(1,912)
Berryessa	7,936	6,988	(948)
Franklin-McKinley	11,193	10,275	(918)
Alum Rock	12,386	10,744	(1,642)
Santa Clara County (K-8)	194,436	182,523	(11,913)
State of California (K-8)	4,278,755	4,235,192	(43,563)

Source: California Department of Education (latest available certified data is from 2018-19)

Although there are some new housing developments in the area, students generated by new housing will be minimal, and Evergreen still expects to be in a pattern of declining enrollment for the next several years, based on current demography data reported by the district's demographer, DecisionInsite. The significant decline in enrollment can be attributed to several factors:

- A. Escalated home and rental prices resulting in a shortage of affordable housing in the area;
- B. Progressively declining birth rates locally, in Santa Clara County, in California, and nationally, resulting in fewer students available to enter our school system in Transitional Kindergarten (TK) or Kindergarten,
- C. The Evergreen community has matured and initial growth in the district has stabilized since previous housing bubbles,
- D. An aging population with many "empty nesters" remaining in their homes and,
- E. Other individual demographic, social or economic factors.

The following chart depicts Evergreen School District's actual and projected TK-8 enrollments, 1993 to 2025.



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Chart

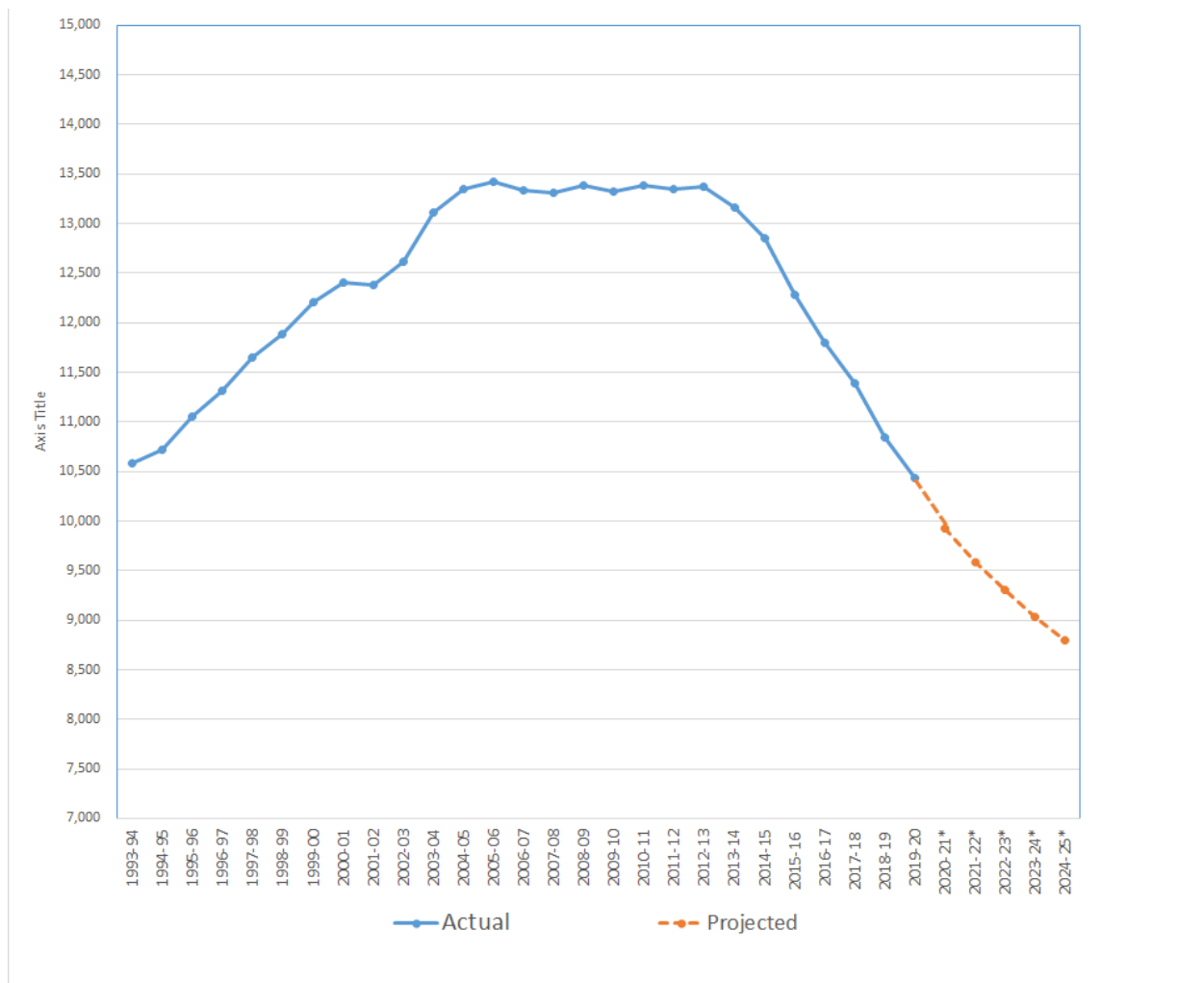


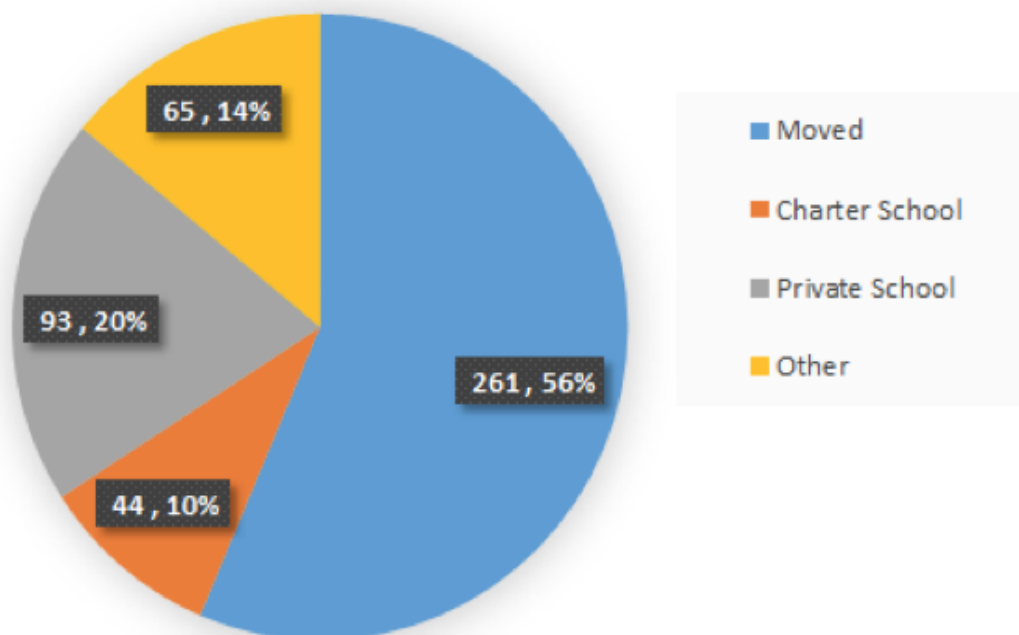
Chart: Reasons Students Did Not Return Between 2018-19 and 2019-20

While Evergreen experiences a loss of students to charter and private schools each year, this number is small (approximately 137 students), has remained steady, and is not growing.



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Multi-Year Impact of Enrollment Loss, as of 2019-2020 First Interim Budget

The cumulative loss of unrestricted revenue due to declining enrollment since 2011-12 is nearly \$21.5 million. In addition to other budget reductions, such as reducing staff, eliminating open positions, maximizing restricted resources, enhancing revenue opportunities with attendance recovery and facility use, the district's fiscal solvency depends on larger budget reductions on an ongoing basis, which was the rationale behind the Board of Trustees' decision to close and consolidate schools.

PROCESS

Superintendent's School Consolidation Advisory Committee:

The Superintendent determined that the best way to serve all interests of the community was to develop a broad-based advisory committee with the goal of creating a consensus on school closure recommendations to the Superintendent. In order to do so, the process would need to include co-facilitators, meet regularly to integrate the work of subcommittees to address business services,

educational services and human resources matters, and involve all district stakeholders including parents, teachers, staff, and members of the community.

To provide transparency, ongoing communications, and opportunities for community engagement, 1) the School Consolidation Committee also held Community Input Sessions prior to each of their meetings and the Superintendent held Community Information Sessions on December 19, 2019 and January 16, 2020; 2) the district launched a School Consolidation website with consistently updated information, timelines, School Consolidation Committee



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agendas and summaries, frequently asked questions, and informational videos for public access on the district's website; and 3) The Superintendent responded to emails sent to the schoolconsolidation@eesd.org email address, as well as held informal meetings in person and by phone with parents, staff and community members throughout the process.

Committee Composition:

Following a districtwide application process, 24 parents, staff, and community members from various ethnic backgrounds representing 17 schools (no volunteer from one school), were appointed by the Superintendent to the Superintendent's School Consolidation Advisory Committee.

The Superintendent also retained two facilitators, Manny Barbara of the Silicon Valley Education Foundation and a retired superintendent of Oak Grove School District who lead his district through a school consolidation process, and Kim Kianidehkian, Director, Educational Services, Evergreen School District, who served as Lead Principal on the school consolidation committee in Oak Grove School District; a demographer, DecisionInsight; and a communications consultant, Heather McGowan of Sounding Board Marketing and Communications; and other advisors as necessary to assist with the following:

- **Facilitation:** To ensure an objective process, an outside facilitator was retained to support the Committee, the Superintendent, and the Board's efforts.
- **Demographics:** To ensure accurate enrollment projections and enrollment analytics, review and project population trends, demographics, and likely student enrollment data, now and in the future.
- **Communications:** To ensure an effective communication plan that outlines the delivery of the specific details of school closure and consolidation to staff, students, teachers, parents, and the general public. To ensure on-going and regular communication with all stakeholders.

Other key District staff members were asked to serve as resources to the Committee, and additional staff, parents and community members were also appointed to serve on the subcommittees that would manage the details related to school consolidation. The subcommittees were set up to meet until the end of the school year in order to provide feedback related to school consolidation:

Educational Services: The Educational Services Subcommittee's focus is on matters related to teaching and learning, instructional materials, school libraries, educational programs, etc.

Human Resources: The Human Resources Subcommittee's focus is on matters related to staffing, contract agreements, transfers, layoffs, etc.

Business Services: The Business Services Subcommittee's focus is on matters related to budget, facilities, space, technology, nutrition services, maintenance and operations of school facilities, transportation, etc.

(See: Committee Members and Staff Resources- Exhibit C, Subcommittee Members and Staff Resources-Exhibit D)

Superintendent's School Consolidation Advisory Committee Charge



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Committee Charge: The Superintendent's School Consolidation Advisory Committee will be responsible to meet the following charge:

1. Become fully informed on the District's current and future financial situation, issues, and challenges and consider strategies to maintain the District in a sound fiscal condition.
2. Become fully informed on the District's current and future demographics as they relate to enrollment and school boundaries.
3. Consider all schools for potential closure for consolidation, considering the positive and negative factors and variables (location, capacity, programs, community impact, etc.) for each school.
4. Consider the potential for each school to host educational programs that would maintain or enhance enrollment and provide educational programs to meet the diverse needs and interests of students, families, and staff.
5. Develop and utilize criteria and demographic data to base its recommendations on the most appropriate schools for closure or consolidation.
6. Based on this criteria and data, provide the Superintendent recommendations on new school boundary areas, educational programs offered at specific sites, including Dual Language Immersion, and other factors which could maintain or improve enrollment in the District and its schools.
7. Identify and recommend schools for closure.
8. Review specific transition support plans for any schools recommended for closure.
9. Provide recommendation on schools to close including boundaries and potential transportation to the Superintendent by the end of January 2020.

Charge of the Business Services Subcommittee: The Business Services Subcommittee is charged with establishing processes and procedures for moving teacher classrooms, desks, computers, phones, cafeteria equipment, and supplies, etc. The committee will also determine and coordinate facility needs, transportation routes and changes, nutrition department needs, and any budget-related items. Delores Perley, Chief Business Officer serves as the facilitator of this Subcommittee.

Charge of the Human Resources Subcommittee: The Human Resources Subcommittee is charged with reviewing and establishing processes and procedures for the transfer and proper placement of employees affected by school consolidation. This committee will look at contract language as well as all applicable EdCodes and laws to ensure the smoothest transition for our affected employees. Cesar Torrico, Assistant Superintendent of Human Resources, serves as the facilitator of this Subcommittee.

Charge of the Educational Services Subcommittee: The Educational Services Subcommittee is charged with establishing processes and procedures for redistribution of instruction related materials (textbooks, library materials, student files, technology etc.) and ensuring appropriate plans for student transitions are established. Dan Deguara, Assistant Superintendent of Educational Services serves as facilitator of this Subcommittee.



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Exhibit C- Superintendent's School Consolidation Committee Members and Staff Resources

Facilitator - Manny Barbara, Retired Superintendent, Oak Grove School District
Co-Facilitator - Kim Kianidehkian, Director, Educational Services, Evergreen School District
Dr. Emy Flores - Superintendent

Superintendent's Cabinet in attendance:

Dan Deguara, Assistant Superintendent of Instruction
Rick Navarro, Director of Operations
Delores Perley, Chief Business Officer
Cesar Torrico, Assistant Superintendent of Human Resources
Johanna Villareal, Director of Board & Administrative Services

School Site	Member Name	Stakeholder Group
Cadwallader & LeyVa	Rajnish Verma	Parent
Cadwallader	Ramesh Mudhiredy	Parent & Community
Carolyn Clark	Harjit Sanghera	Parent & Community
Carolyn Clark	Tami Compton	Certificated Staff
Chaboya	Denyse Badhesha	Parent
Cedar Grove & Quimby	Jelili Apalara	Parent
Dove Hill	Jacqueline Pedroza	Parent & Community
Dove Hill	Amy Anderson	Parent & Classified Staff
Dove Hill	Linda Mora	Principal
Evergreen	Megan Pacumio	Parent & Community
Holly Oak & Quimby	Chris Roberts	Parent
K. Smith	Rachel Trowbridge	Principal
Laurelwood	Jose Cortes	Parent
Laurelwood	MyLinh Chan	Parent
Laurelwood	Kameelah Green	Principal
Millbrook	Marie Truong	Parent & Community
Montgomery	Gilbert Contreras	Classified Staff
Norwood Creek	Miwa Adaniya	Parent
O.B. Whaley	Nancy Keo	Parent & Community
Tom Matsumoto	Maria Solis	Parent & Community
Evergreen Teachers Association	Brian Wheatley	Bargaining Unit
California School Employees Association	Pauline Benton	Bargaining Unit



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Community	Stacey Johnston	Community
Business Office	Kim McNiven	Management Staff & Community

Exhibit D - Superintendent's School Consolidation Subcommittee Members and Staff Resources

Members of each of the subcommittees were selected in an effort to ensure that there was sufficient expertise in all areas that provide support to the school sites, students and community.

Business Services Subcommittee

- Delores Perley, Chief Business Officer, Facilitator
- Rick Navarro, Director of Operations
- Steve Fowles, Supervisor, Maintenance and Operations
- Sam Sweilem, Manager, Information Services
- David Reyes, Supervisor, Transportation
- Lida Gaines, Supervisor, Child Nutrition Services
- Melanie Warren, Assistant Supervisor, Child Nutrition Services
- Chris Fuentes, Community Member
- Laura Jarvis, Teacher, Norwood Creek Elementary School
- Pat Colantriano, School Secretary, Norwood Creek Elementary School
- Derrick Watkins, Principal, Chaboya Middle School
- Armando Lara, Assistant Principal, LeyVa Middle School

Educational Services Subcommittee

- Dan Deguara, Assistant Superintendent, Facilitator
- Taunya Adams-Bailess, Coordinator of Pupil Services
- Kristi Frankina, Assistant Principal, LeyVa Middle School
- Lori Lim, District Librarian
- Missy Marsh, Library Media Assistant, Quimby Oak Middle School
- Kevin Armstrong, Principal, Katherine Smith Elementary
- Kate Murphy, Secretary, Evergreen Elementary School
- Sam Sweilem, Manager, Information Services

Human Resources Subcommittee

- Cesar Torrico, Assistant Superintendent of Human Resources, Facilitator
- Brian Wheatley, President of ETA
- Jaime Calderon, Teacher, Laurelwood Elementary
- Patricia Valdillez, Teacher, Cedar Grove Elementary
- Marcia Araujo, Teacher, Katherine Smith Elementary
- Pauline Benton, President of CSEA, Chapter No. 432
- Diane Hobbs, Library/Media Assistant, Carolyn Clark Elementary
- Gail Regalado, Health Office Assistant, Norwood Creek Elementary
- Tonya Bailey, Principal of Norwood Creek
- Maureen McClintock, Principal of Cadwallader



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Committee Process and Timelines

The Superintendent's School Consolidation Advisory Committee meetings were held Wednesday evenings from November 20, 2019 through January 22, 2020, except for November 27, December 4, December 25 and January 1. All meetings were posted on the district's website. The subcommittees also held meetings on a regular schedule that was posted on the district's website. Because these committees are advisory to the Superintendent, they were not open to the public. However, the School Consolidation Advisory Committee began opening their meetings for a public input session on December 11, 2019 through January 22, 2020 from 4-4:30 p.m. to listen to community input from stakeholders. In addition, summaries of the meetings, including information and data presented to the committee, were posted and available to the public on the district's website.

At the first meeting, facilitators Manny Barbara and Kim Kianidehkian explained the charge of the committee, a basic framework of the committee's meeting schedule, group agreements and meeting norms, roles and responsibilities of the facilitators, who would serve as advisors supporting the committee with its charge, and staff, who would serve to answer questions and provide information and data to the committee.

Information/Presentations

At the December 11th meeting, demographer DecisionInsite presented the District's updated enrollment demographics and projections. The demographic report provided comprehensive background and context relative to the District's enrollment decline. DecisionInsite also provided school specific enrollment information and identified specific information regarding students enrolled in schools outside of their geographic neighborhoods (See Enrollment Trends - Exhibits D and E). At the following meeting on December 18th, Delores Perley, Chief Business Officer, presented the multi-year District budget. The committee reviewed the District's revenues and expenditures and clarified the fiscal impact of the multi-year loss of enrollment. Additionally, Ms. Perley explained the district's Fiscal Stabilization Plan that was approved by the Board of Trustees and submitted to the county in October 2019, and the multiyear projection with the Fiscal Stabilization Plan (Exhibit F).



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Exhibits D and E: Conservative and Moderate 5-Year Enrollment Projections

Conservative 5-Year Enrollment Projection

Grade	2019	2020	2021	2022	2023	2024
K	1026	1001	995	994	998	979
1	1005	906	886	879	878	879
2	1041	1027	926	907	901	888
3	1042	1062	1046	946	926	909
4	1109	1042	1061	1046	946	925
5	1192	1112	1045	1065	1050	947
6	1202	1178	1100	1035	1054	1045
7	1246	1195	1177	1103	1031	1046
8	1400	1248	1197	1179	1106	1031
Subtotals:	10263	9771	9433	9154	8890	8649
Pct Chg:	-3.5%	-4.8%	-3.5%	-3.0%	-2.9%	-2.7%
SDC:	168	160	156	152	149	146
Totals:	10431	9931	9589	9306	9039	8795

Moderate 5-Year Enrollment Projection

Grade	2019	2020	2021	2022	2023	2024
K	1026	1029	1024	1023	1023	1014
1	1005	919	918	912	907	907
2	1041	1035	947	946	936	919
3	1042	1070	1063	975	970	947
4	1109	1048	1077	1069	976	970
5	1192	1124	1062	1091	1080	981
6	1202	1190	1123	1062	1087	1079
7	1246	1206	1200	1136	1058	1085
8	1400	1254	1214	1207	1137	1059
Subtotals:	10263	9875	9628	9421	9174	8961
Pct Chg:	-3.5%	-3.8%	-2.5%	-2.1%	-2.6%	-2.3%
SDC:	168	162	159	157	154	152
Totals:	10431	10037	9787	9578	9328	9113



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Exhibit F: 2019-20 First Interim Multi-Year Projection With the Fiscal Stabilization Plan

Multi-Year Projection				
	2018-19	2019-20	2020-21	2021-22
Revenue	125,722,798	114,684,802	113,507,921	113,348,234
Expense	120,635,276	120,029,845	122,303,224	125,870,520
Surplus (Deficit)	5,087,522	(5,345,043)	(8,795,303)	(12,522,286)
Reserve for Economic Uncertainties	27,578,904	23,257,439	15,763,479	4,616,828
GF Reserve	22.86%	19.38%	12.89%	3.67%
Unrestricted Reserve Surplus(Shortfall) of 3%	23,959,846	19,656,544	12,094,382	840,713

During the December 18th Committee meeting and December 19th Community Input Session, Dr. Flores also announced to the committee that four schools would not be included for consideration for closure due to factors that would create additional expenses that would outweigh the benefits of closing the schools: 1) The three middle schools: Closing the middle schools would be considered too disruptive, as there are many elementary schools that feed into each middle school, and there would then be a need to add additional transportation, which would increase cost, offsetting any savings; 2) Holly Oak Elementary School: will host the district Dual Immersion Program.

The Committee was also provided comprehensive data relative to the District's sites, including current school enrollment, current classroom utilization, as well as excess capacity for each of the schools. The Committee evaluated information presented, requested clarification from staff and/or additional data that was provided at the next meeting.

Committee members received information on a multitude of topics (District budget, enrollment trends, school district boundaries, school profiles, transportation, facilities and modernization) and then worked to establish rating criteria to evaluate each school and narrow down the number of schools to consider for school closure.



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Committee Questions/Discussions

In addition to asking clarifying questions about the information presented at the meetings, Committee members also raised questions and discussed matters pertaining to transportation, student safety, a K-8 option, the district's budget and efficiency of the use of funds in the district, details related to the demographer's report, and avoiding school closures in the future. In order to provide thorough information, questions raised at a meeting or in Committee members' emails to the Superintendent were placed in a "Parking Lot" so that District staff and the Superintendent could research and provide thorough answers and additional resources at the following meeting to the full Committee. The Committee was then provided a printed version of the answers for their future reference.

Some examples of the Parking Lot Questions, include:

- A few months ago, the Board approved the start of new STEM labs. Will these projects be placed on hold until a school closure decision is made? *Answer: Currently, there are no new STEM labs scheduled for construction before the end of the school year.*
- One thing I keep hearing from parents. "The school isn't going to save a lot of money closing/consolidating schools, why would they do it?" *Answer: Consolidating schools is part of a number of decisions the district is making to close a \$12 million shortfall as part of its district fiscal stabilization plan. The main cost savings will come from reductions of operating costs for schools that are not operating at maximum capacity. The average cost savings per school closed will be \$450K/site/year. In addition to cost savings, the future uses of these sites will generate revenue for the district, which will benefit all students in Evergreen SD.*
- Are there any schools in our district that were built for only temporary use in mind? *Answer: Schools were not built with the goal of having a temporary use. Some schools have portables due to the past growth of the school over the years in order to accommodate additional students.*
- Dr. Emy Flores brought up that if we choose to close or consolidate Silver Oak, we will need to provide bus transportation. Are kids being provided bus transportation presently? Are there kids walking to Silver Oak this year?" *Answer: Bus transportation is currently provided because of safety concerns, not distance. Students that are transported would cross King and Capitol. If Silver Oak were to close, we would need to provide transportation due to safety reasons.*
- Cedar Grove - I know this school isn't on our [narrowed and]current list, but can a Scenario Option Consideration be made available? I ask because Norwood and Cedar Grove are schools in such short proximity to each other. *Answer: Cedar Grove is at capacity and is not able to accommodate an additional school population like Norwood Creek.*
- An increase in enrollment means more bodies and more vehicles. What's the plan to keep students and adults safe during drop off and pick up? *Answer: Safety is a district priority. In partnership with the City of San Jose Traffic & Safety and Walk 'N Roll Program, we evaluate safety and traffic issues of all district schools on an annual basis.*



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Evaluation Criteria: At the December 11th meeting, facilitators Manny Barbara and Kim Kianidehkian shared a starting point for possible criteria based on criteria used in the past in other school districts. After sharing the criteria, members of the Committee were asked for input and recommended other rating criteria the Committee should consider for evaluating each of the schools. After much discussion, at the December 18th meeting, the Committee identified a total of five criteria elements (Exhibit G). The committee then weighted the criteria based on highest to lowest priority and confirmed the criteria elements and weighting by consensus. Because this committee is not a 7-11 committee, factors related to the facilities' uses were not included in the criteria.

Exhibit G: Evaluation Criteria

Approved School Consolidation Committee Evaluation Criteria

At its January 15th meeting, the Superintendent's School Consolidation Advisory Committee worked through an exercise to finalize evaluation criteria for determining whether a school is a candidate for closure consideration. The committee then reviewed each criteria as a whole group, asked and received answers to clarifying questions, then worked in groups of 2-3 people to prioritize each criterion on a point value scale of 1-5 (1= most important, 5= least important). Each group's points were then averaged per evaluation criteria, and the results were discussed and affirmed by the committee as a whole. The results of this prioritization exercise is summarized as follows:

1. There are neighboring schools to receive the school's student population (safety of students, traffic flow) *1.75*
2. The school population is low (*less than 600*) *2.0*
3. School closure would allow geographical neighborhoods to stay together *2.5*
4. There are transported students *4.1*
5. School is not within the close proximity of charter schools *4.6*

Note: The higher weighted point responses indicate that the criteria is less of a priority. The lower point responses indicate the criteria that is a higher priority.

The weighted criteria was used to develop the list of eight schools for which the committee narrowed its consideration for closure/consolidation.

Narrowing the Number of Schools for Consideration

During the January 22nd meeting, the Superintendent's School Consolidation Advisory Committee reviewed the Committee's charge to close/consolidate two schools. The committee then used the same weighted criteria described above to review the eight schools identified at its January 15th meeting, and then narrowed the number of schools for consideration through a pros and cons activity - pros (reasons to close the school) and cons (reasons not to close the school) for each school on the list. Next, the committee was instructed to review the information they had been given throughout the process. The

members wrote each pro/con and posted it to the appropriate chart. The charts were reviewed after this activity was completed. The committee was then asked to voice questions, concerns, and/or clarifications



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and all were discussed. Lastly, the committee members were asked to each individually vote by following a protocol in order to determine consensus on the two schools to recommend for closure/consolidation. This activity included small and large discussions and many opportunities to ask clarifying questions.

Some combinations of schools for closure/consolidation are not recommended, such as the Cadwallader and Laurelwood combination. These two schools are located in the same neighborhood closure of both schools would leave an entire neighborhood without a neighborhood school.

After lengthy discussion and consideration of the pros and cons for each school, the Committee narrowed down their selection for school closure to two schools: Laurelwood Elementary School and Dove Hill Elementary School.

Pros and Cons-Schools Recommended for Closure-Dove Hill:

PROS - reasons committee members cited in favor of closure

- Students can attend a school closer to their homes
- Major renovations needed to bring the school up to date
- Fewer transportation costs: some students live closer to Whaley and Katherine Smith and are being bused to Dove Hill
- Least number of families disrupted due to low enrollment (390)
- Hiring a crossing guard is more cost effective than hiring a bus driver
- Closure would allow students to attend a school in their neighborhood
- Repairs, maintenance costs will be too high, due to the amount and age of portables on campus
- Close proximity to a receiving school with capacity to house them
- School foundation issue that needs to be addressed in the coming years, need to replace portables in the future due to their age
- Needs renovation - poor condition of facilities
- Costs too much to repair facilities
- Maintenance costs too high
- Less students impacted to move/transfer
- Some students already live close to OB Whaley and are being bused
- Low student enrollment (390)
- Small schools means more combination classes
- Neighborhood school
- No SCCOE (Santa Clara County Office of Education) Special Education Program to disrupt
- Portables need updating - poor condition
- Montgomery is able to accommodate almost entire student population

CONS - reasons committee members cited in favor of keeping the campus open

- Students would need to cross a major road (Silver Creek) travel to neighboring school
- This is a walking school: low income families may not have the means to drive their children to a school further away
- Title 1 School
- SEAL (Sobrato Early Academic Language) trained teachers at this school
- One charter school located within two miles of school



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- Has room to add students-has the second largest capacity in the district
- Serves south end of border near freeway
- Transportation in place
- 2nd largest capacity in the district
- Many low income families, parents might not afford time and money to drop off their kids to the school they're newly assigned to even though schools are within walking distance
- School is surrounded by single family home neighborhood
- Has Transitional Kindergarten program
- Has room to add classes
- Walking school - many parents do not drive

Pros and Cons-Schools Recommended for Closure-Laurelwood:

PROS - reasons committee members cited in favor of closure

- Large number of annual requests for school choice out of Laurelwood
- Least number of families disrupted due to low enrollment (292)
- Close proximity to a receiving school with capacity to house the students
- Classroom sizes are small (780 square feet vs. 960 square feet)
- One way in and out, which creates traffic issues
- Shared neighborhood with Cadwallader
- Lowest number of students (enrollment) and transfers 49 students to other schools in the district
- No Transitional Kindergarten
- Traffic concerns
- Laurelwood is not able to accommodate Cadwallader's student population
- Less number of students to be impacted by closure (290)
- Small school means more combination classes each year
- Smaller classroom size
- Not a S.E.A.L. school (Sobrato Early Academic Language)

CONS - reasons committee members cited in favor of keeping the campus open

- County Office Special Education program would need to be relocated
- Involved parent community
- Poor lease opportunity: smallest property, only one way in and out for traffic
- High academic scores
- Money was spent on recent modernization
- School can accept students from Cadwallader
- Cannot do much with the property as far as repurposing
- Neighborhood School
- Stable demographic data over time
- High academic performance and scores
- Strong PTA and parent involvement
- Tight knit community who loves their school
- Lower chance of leasing opportunity
- Recent spending on modernization
- Facilities in good condition



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Summary of Analysis and Recommendations

The recommendation to close Dove Hill and Laurelwood Elementary Schools and consolidate these schools with Cadwallader, J.F. Smith, Matsumoto, Montgomery and Katherine F. Smith Elementary Schools is the result of a thorough analysis of the current and future demographics as they relate to the Evergreen School District's enrollment and school boundaries, consideration of the positive and negative factors related to closing these schools, as well as variables, including location and community impact. From a fiscal perspective, the Committee considered the potential costs of facility improvements for the schools, as well as transportation costs, in addition to the impacts that lower enrollment has on the efficient operation of schools.

In addition to achieving the fiscal stability goals for the district, this analysis and the Committee's work showed that the resulting school closures and consolidations will, in fact, provide some benefits to the community, including: providing some students a home school of attendance closer to their residence in the community, reducing challenges for families to getting into and out of Laurelwood Elementary School, reducing the potential number of grade combination classes, and moving students to schools with larger classrooms to accommodate new approaches to teaching and learning. While recognizing that school closures do have an impact on staff and students, this recommendation also takes into consideration impacting the least number of staff and students. For all of these reasons, when looking at the final number of schools to consider for closure and consolidation Dove Hill and Laurelwood Elementary Schools became the most obvious choices for the Committee to recommend for closure.

Transition Considerations

A transition subcommittee comprised of school staff (veteran and new staff joining the school campus), current parents and newly entering parents, upper grade student reps (current and newly entering), and district staff will plan multiple opportunities for families to interact on the new campuses. Once staffing has been affirmed, joint activities will be planned so that new families can see the campus and classrooms and will begin to feel familiar and included. The receiving school principals will start including new families in their communications so that new families are aware of things that are happening and can participate. Parents will be encouraged to attend any and all parent meetings at the new school. Any planned events will occur in the spring, as soon as the students, teachers, and staff have been placed.

As previously outlined, the Business Services, Educational Services, and Human Resources Subcommittees will plan processes and procedures related to staff reassignment, moving equipment, supplies, instructional materials, and technology from the closing school sites to the receiving school sites, proper disposal of supplies and equipment, as well as coordinating the transitioning of programs, supplies and equipment pertaining to the closing schools' archives and those purchased through the site's PTA and fundraisers.

CONCLUSION

Closing schools is a difficult and emotional process for school districts. However, we also know that we cannot ignore the rising costs and declining enrollment that we have been facing--and will continue to face as a district, resulting in a \$12 million financial shortfall. Our Superintendent's School Consolidation Advisory Committee and district staff should be commended for all of their hard work over the past two months. These recommendations are based on a transparent process, consideration of the overall financial health of the Evergreen School District and the district's ability to maintain the level of excellence that our families have



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come to expect for our students. We will continue to work with the students, staff and community during the next phase of the process in moving school materials and supplies, and determining the use of the closed sites. Our Evergreen family is supportive and strong, and as our students and staff transition into their new schools, they will be welcomed and supported every step of the way.



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EXHIBIT H: Conditional Budget Approval Letter, Santa Clara County Office of Education



Santa Clara County Office of Education

Mary Ann Dewan, Ph.D.
County Superintendent of Schools

September 6, 2019

Bonnie Mace, Ph.D., Board President
Evergreen Elementary School District
3188 Quimby Road
San Jose, CA 95148

Dear Board President Bonnie Mace,

Subject: Conditional Budget Approval of the Evergreen School District 2019-20 Adopted Budget

In accordance with Education Code (EC) Sections 42127 and 52070, the Santa Clara County Office of Education (SCCOE)/Santa Clara County Superintendent of Schools (County Superintendent) is required to approve, conditionally approve, or disapprove the Evergreen School District's (District) 2019-20 Adopted Budget in conjunction with the Local Control Accountability Plan (LCAP). A review of the Budget was completed by the Santa Clara County Superintendent of Schools to determine whether it allows your district to meet its financial obligations during the fiscal year, and is consistent with a financial plan that will enable your district to satisfy its multi-year financial commitments. Additionally, the adopted budget includes the expenditures necessary to implement the local control and accountability plan or annual update to the local control and accountability plan approved by the county superintendent of schools.

Our office is also required to review and approve the LCAP prior to the approval of the district's adopted budget per EC Section 52070(d) if staff determines that the following criteria have been met:

- The LCAP adheres to the template adopted by the State Board of Education (EC 52064).
- The budget includes expenditures sufficient to implement the specific actions and strategies included in the LCAP.
- The LCAP adheres to the expenditure requirements for funds apportioned on the basis of the number and concentration of unduplicated pupils (EC 42238.02 and 42238.03).

In accordance with EC section 52070, the SCCOE's District LCAP Advisory Services and District Business and Advisory Services teams have reviewed and **approved the District's 2019-20 LCAP**. The District's approved LCAP and Budget Overview for Parents have been posted on our SCCOE website.

Based on our review, the district's 2019-20 Adopted Budget is CONDITIONALLY APPROVED.

I would like to recognize and thank the Board and leadership team of Evergreen Elementary School District for their efforts in the development and submission of the Adopted Budget and Local Control Accountability Plan. The board has enacted many elements of a fiscal stabilization plan addressing the structural deficit, and we commend you for those actions. But the work is not complete. The district must

County Board of Education: Joseph Di Salvo, Rosemary Kamei, Kathleen M. King, Grace H. Mah, Peter Ortiz, Claudia Rossi, Anna Song
1290 Ridder Park Drive, San Jose, CA 95131-2304 (408) 453-6500 www.sccoe.org

Transforming Education through Leadership, Service, and Advocacy



Evergreen School District

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EXHIBIT H, CONTINUED:

Conditional Budget Approval Letter, Santa Clara County Office of Education

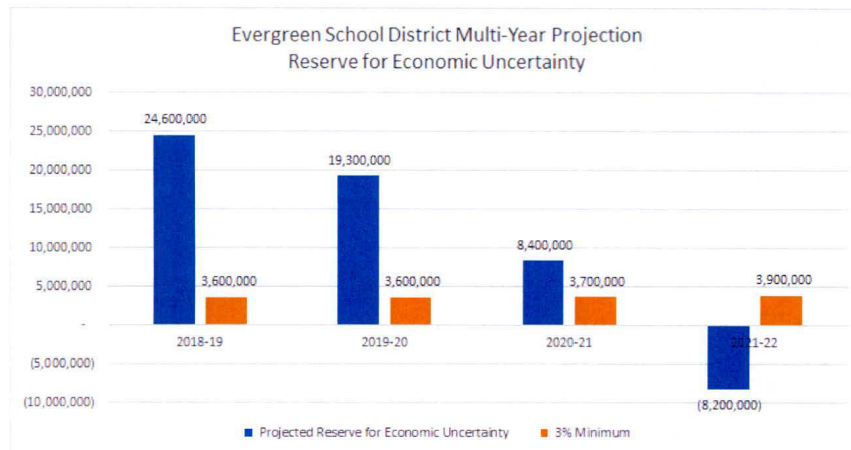
Bonnie Mace, Ph.D., Board President

September 6, 2019

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approve a new fiscal stabilization plan that provides for a balanced budget with a reserve for economic uncertainty of 3% or more for all fiscal years.

In accordance with Education Code 42127(c)(2), it is the county office of education's responsibility to determine that the district is able to satisfy its multi-year commitments. Since the fiscal year 2019-20 multi-year budget adopted by the Board includes a projection that the District will be fiscally insolvent by the third year (negative \$8.2 M), the county office is not able to approve the fiscal year 2019-20 budget at this time.



By October 8, 2019, the 2019-20 budget and multi-year projection should be revised to reflect the following:

- a) Any increases or decreases to fund balance as a result of the 2018-19 end of year closing.
- b) A board-approved fiscal stabilization plan that provides for a reserve for economic uncertainty that exceeds the 3% minimum requirement in all three fiscal years of the multi-year projection.

We look forward to receiving a revised budget by October 8, 2019, that reflects the updates to the budget as indicated above.

In closing, I'd like to congratulate the Governing Board on the successful recruitment of Dr. Emy Flores, as Superintendent and to welcome her to Santa Clara County. Additionally, I would like to thank Chief Business Officer Delores Perley and the business office team for all their hard work throughout this

EXHIBIT H, CONTINUED:

Conditional Budget Approval Letter, Santa Clara County Office of Education



Evergreen School District

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Bonnie Mace, Ph.D., Board President
September 6, 2019
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challenging budget development process. The SCCOE staff and I look forward to working together to meeting the goal of improved District fiscal health.

If we can be of assistance on any questions or concerns, please contact your District Business Advisor, Susan Ady, at (408) 453-6957.

Sincerely,

Mary Ann Dewan, Ph.D.
County Superintendent of Schools

cc: Emy Flores, Ed.D., Superintendent, Evergreen Elementary School District
Delores Perley, Chief Business Officer, Evergreen Elementary School District
Dan Deguara, Assistant Superintendent Instructional Services, Evergreen Elementary School District
Gary Waddell, Ed.D., Assistant Superintendent, Santa Clara County Office of Education
Chris Izor, Director – District LCAP Advisory Services, Santa Clara County Office of Education
James Novak, Ed.D., Chief Business Officer, Santa Clara County Office of Education
Judy Lee Kershaw, Director – District Business Services, Santa Clara County Office of Education
Susan Ady, District Business Advisor, Santa Clara County Office of Education