

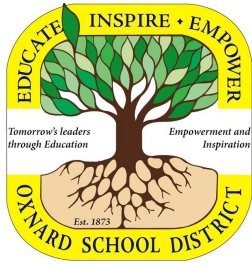
January 2013

OXNARD
SCHOOL
DISTRICT

DRAFT FACILITIES IMPLEMENTATION PROGRAM

A Comprehensive Approach for Measure "R" Improvements

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EXISTING CONDITIONS

1.1 EXISTING CONDITIONS SUMMARY

The Oxnard School District is located along the southwestern portion of Ventura County, California, primarily in the City of Oxnard. The District provides kindergarten through eighth grade educational services to the residents of the City of Oxnard and a portion of the City of Port Hueneme. District schools include 16 elementary campuses serving grades K-6, ranging in size from 550 to 1,027, and three intermediate sites serving grades 7-8, ranging in size from 777 to 1,255. The newest school, Soria, serves 1077 students in grades K-8. In total, the District provides education to approximately 17,000 students in kindergarten through eighth grades. In addition to the traditional elementary and intermediate grade levels, the District also offers Pre-K education at seven of the sixteen elementary schools and at San Miguel Preschool.

The economic base of the community is primarily agriculture, though a favorable living environment and proximity to major employment centers has attracted several new residential developments in recent years. As a result, the District continues to grow. Enrollment has increased from 13,683 students in 1995 to the current enrollment of approximately 17,133 students. Last year the District grew by more than 500 students. All schools are on a traditional calendar. Currently the District has more than 900 students who are designated as migrant education students.

The District's demographic make-up is 2% African American, 1% Asian, 2% Filipino, 89% Hispanic or Latino, and 5% White. Five percent of the students are classified as Migrant, 4% as Gifted and Talented Education (GATE), 48% English Learners (EL), and 14% as Reclassified English Learners. Eighty-five percent of the students are on free or reduced lunch (a measure of low income or poverty) and the average parent education level is 1.95 (where level 2 is equivalent to a high school graduate and level 3 represents some college). The District clusters all of the Gifted and Talented Students (GATE) at the McAuliffe school site. There are various Special Education classes at sites throughout the District. The District has Resource Specialists at the school sites as well as Special Day Classes.

The District's mission statement is: "We guarantee that each student is academically competitive and inspired to perseverant hope." The District Vision is: "Tomorrow's leaders through Education, Empowerment and Inspiration." The District continues to lose students to surrounding districts through district transfer requests and to other schools located in the area. As a result, the District wishes to offer programs to attract some of these students back. In pursuit of these goals, the District continues its effort to improve overall academic achievement and performance.

The District is currently in Program Improvement Year Three and was required in November 2008 to contract with a District Assistance and Intervention Team ("DAIT") provider to help the District improve the academic program.

The District chose New Directions for Academic Advancement to help fully implement a new State Board of Education approved curriculum. The District has continued to work with New Directions for Academic Advancement to implement all the DAIT recommendations.

Of the District's 20 schools, 20 are in Program Improvement, a State and Federal designation given to schools that fail to meet the Federal requirements of No Child Left Behind (NCLB) or the State of California academic standards assessed by the STAR testing and reporting system. While the District and its schools are making gains in English Language Arts and Mathematics, student achievement needs to be accelerated, and the gap between groups of learners, primarily African Americans, Hispanic, White, and English Learners, needs to be closed.

1.2 DISTRICT IMPROVEMENT PRIORITIES

In order to improve instruction, the District has developed three priorities based upon student achievement data.

1.2.1 IMPROVE INSTRUCTION FOR ENGLISH LEARNERS

There is a significant gap in the academic performance of English Language Learners and other students. Thus, the first priority of the Oxnard School District (OSD) is the improvement of reading language arts and mathematics instruction for English Learners (EL). In order to achieve this priority, the District designated additional staff and fiscal resources to directly support reading language arts and mathematics instruction for EL programs. At the District level, the Assistant Superintendent of Educational Services, Director of English Learner Services, and four EL Teachers on Special Assignment (TOSAs) are collectively responsible for the instructional program and progress monitoring of English Learners. In addition to the principals at the 17 elementary and 3 intermediate schools, a full-time site teacher on special assignment is also designated to support teachers and monitor EL's progress in meeting the reading language arts and mathematics standards. To assist teachers in better adapting instruction to give EL students access to the core curriculum, the District provided professional development in the Sheltered Instruction Observation Protocol (SIOP) model. Key to the success of this year's programs for English Learners is the implementation and monitoring of consistent District EL guidelines for these programs. The process for monitoring is clearly established through the English Learner Review Team (ELRT) and EL Catch-Up Plan for interventions.

The District is currently in Year 4+ of the Title III requirement for failing to make all three Annual Measurable Achievement Objectives (AMAOs) for EL students for nine years. Several focused initiatives and practices have been put into place to meet the needs of English Learner students such as the SIOP.

1.2.2 DEVELOP ASSESSMENT & DATA REPORTING SYSTEM

The second priority was to develop the comprehensive assessment and data system using the Online Assessment Reporting System (OARS) data collection system for easy access by teachers and administrators to create reports to analyze and disaggregate data to monitor student achievement at state, district, and school levels. This system for summative and formative assessments is essential to the ability of the District and site staff to monitor student learning, determine who is not learning, and provide appropriate interventions to those students who most need them. The District supports continued professional development that supports collaboration across school sites and grade levels with an emphasis on student achievement and its relationship to standards, effective assessment

practices, research-based instructional strategies, and the effective implementation of standards-aligned materials.

1.2.3 IMPLEMENT RESPONSE TO INTERVENTION

The third priority is to implement the Response to Intervention and Instruction (RtI²). In Fall 2009, the District provided two days of professional development for principals and site leadership teams in the foundational principles of RtI² including the culture of “All students can learn,” as well as the effective use of assessment, data teams, research-based instruction and interventions. Sites used surveys to determine needed changes in their practices for implementing positive school culture, common formative assessments, efficient data teams, and effective instruction and intervention strategies. Teams were given guided development for their site RtI² Pyramids of Interventions/ Preventions with Tier I, Tier II, and Tier III interventions.

EDUCATIONAL PROGRAM

After much consideration and research of available options, the District has elected to reconfigure its educational program. Improvements are designed to enhance academic achievement and provide parents with a range of educational options for their children. The District desires to have children feel more connected to their neighborhood schools, provide stronger relationships with the families, increase parent involvement, allow for more flexible educational groupings of students, decrease discipline problems and increase the self-esteem of students. The reconfigured program would support K-5, K-8 and 6-8 school models. The K-5 schools would offer educational strands that would be further enhanced by academy programs and reconfigured 6-8 middle schools. The K-8 schools would provide additional choice to parents and provide greater opportunities to extend select educational programs, such as Dual Language Immersion (DLI) instruction.

2.1 PROPOSED EDUCATIONAL PROGRAM

The proposed academic program was developed based upon research regarding the most promising practices for improved academic performance:

- 1) Smaller schools and smaller learning communities
- 2) Students feeling connected to school
- 3) Collaboration among teachers
- 4) Dual Language Immersion programs as the most promising practice for improved academic performance for English Learners.

2.1.1 SUPPORTING RESEARCH FOR K-8 PROGRAMS

Research conducted in the past decade indicates that distinct advantages exist in a K-8 school environment that support improved academic performance of students:

“Over the last decade or so, research has been put forth... that middle grades students attending K-8 schools show distinct advantages over Middle School students in both academic and nonacademic areas...First and foremost, some research has shown that students at K-8 schools have higher levels of academic achievement, both in mathematics and reading (Coladarci et.al., 2002; Offenber, 2001; Yakimowski & Connolly, 2001)... students attending K-8 schools have also been found to have higher rates of attendance (Pardini, 2002; Coladarci et. al., 2002) and better performance in terms of emotional and social outcomes such as self-esteem, leadership, and attitudes towards school (Weiss & Kipnes, 2006;

Simmons & Blyth, 1987). These social engagement and attitudinal outcomes are extremely important, not only as outcomes themselves, but because they in turn then have effects on student achievement.” (Vaughan Byrnes and Allen Ruby. Center for Social Organization, John Hopkins University, 2004).

It has also been noted that the smaller overall size of a K-8 school correlates with improved academic performance of students through an improved sense of community:

“Previous studies have linked it to virtually all of the K-8 advantages with the larger size of Middle Schools being detrimental to the student outcomes of academic achievement, attendance, and social engagement (Weiss & Kipnes, 2006; Coladarsi, 2002; Offenber, 2001; Lee & Smith, 1993; Eccles et. al., 1991; Simmons & Blyth, 1987). Fundamentally, students in smaller schools are subjected to less anomie and receive more personal attention from their teachers. In a small school, it is easier for students to get to know and develop mutual respect for each other, while it is also easier for teachers to be familiar with students who aren’t their own and know when they should not be wandering the hallways. Thus, smaller size is also a probable cause of the stronger sense of community visible in K-8 schools, as smaller size allows for students, teachers, and parents to foster closer and stronger relationships.” (Offenber, 2001; Paglin & Fager, 1997) (Vaughan Byrnes and Allen Ruby. Center for Social Organization, John Hopkins University, 2004).

The research further supports that Dual Language Immersion (DLI) programs have the most promise for improved academic performance of English Learners (EL). Dr. Margarita Calderon’s research over a three year period with a control group looked at the academic gains of students placed in traditional bilingual programs and students placed in dual language immersion programs. This study was replicated across the United States. She found:

“The academic gains at the end of the three years for third, fourth and fifth graders were significantly better for students in the two-way bilingual classrooms than for those in the other three district bilingual programs. Several of the students in the fourth and fifth grades had only been in the program one or two years. Nevertheless, their scores from the English Texas Assessment of Academic Skills (TAAS) were close to the district’s average. Although the LEP [Limited English Proficient] students were still behind the non-bilingual students, they were significantly above the other LEP students in the district after the three years of simultaneous program development and implementation.” (Margarita Calderon, John Hopkins University, August 2000).

The term “90/90/90 Schools” refers to schools that have 90% poverty as measured by the number of students qualifying for free and reduced lunch, 90% ethnic minority students, and 90% have achieved high academic standards as measured by independently conducted assessments (Doug Reeves, *Accountability in Action*, Center for Performance Assessments on 90/90/90 Schools, Chapter 19). When studying these schools, what is learned is that the techniques used are consistent over time, not taking on one fad and then another. There is consistent emphasis is on:

- 1) Writing: Students write frequently in a variety of subjects
- 2) Performance Assessment: The predominant method of assessment is performance assessment
- 3) Collaboration: Teachers routinely collaborate, using real student work as the focus of their discussion

- 4) Focus: Teachers in these schools do not try to “do it all” but are highly focused on learning

2.1.2 SUPPORTING RESEARCH FOR 6-8 PROGRAMS

A middle school serving grades 6-8 differs from a junior high school serving only grades 7-8 in that it has an educational philosophy that emphasizes the social, emotional and academic needs of the early adolescent. A middle school model may have a more willing attitude toward instructional experimentation, team teaching, utilization of multimedia teaching techniques, and offering students classes in their areas of interest. A junior high school often reinforces its naming by implying a miniature form of high school with many of the same characteristics of a high school, which often may not meet the needs of early adolescents. Early adolescents share several characteristics that are developmentally different than high school and elementary students.

The overwhelming majority of the research supports the middle school concept over the junior high concept. While there are different grade combinations that make up a middle school, the 7/8 grade combination is considered to be the least desirable configuration available based on current research. The 6-8 combination is the most common configuration at this time. (Combs, H. Jurgen, Edulink, July 25,, 2008, “Middle School Configuration”).

“The New York Middle Grade Task Force states developmentally, students in grades 6, 7, and 8 have more in common in terms of physical, social, psychological, and intellectual variables than do those in other age-grade combinations. A three year middle grade time frame allows the opportunity for strong, positive relationships to be built among students, teachers, counselors and administrators; this bonding is critical to healthy intellectual and emotional development and sets the state for future academic success and personal/social development for young adolescents.” (Combs, H. Jurgen, Edulink, July 25,, 2008, “Middle School Configuration”).

Having three grade combinations (6-8) instead of two (7-8) provides more stability to the overall educational program because:

- 1) More time exists for the development of programs
- 2) The combination promotes teacher/pupil relationships
- 3) Availability of guidance services is more readily present
- 4) Emphasis on active student participation in interest groups, low-keyed athletics and social activities is important for this age group

In addition, a middle school concept offers the exposure to application skills, the opportunity for class specialization and availability of broader curriculum.

2.1.3 SUPPORTING RESEARCH FOR ACADEMIES AT 6-8 GRADES

The sixth grade curriculum by the nature of its content becomes more difficult and robust than previous grades and is a trend that continues through 12th grade. Academies can be structured to embrace a robust and intense curriculum in an area of specialization. The implementation of academies at the middle school level can be

appropriate to assist with an increased level of difficulty of the curriculum. In addition, academies allow the student to participate in classes in an interest area to them as well as allow for teachers who have an area of specialization to teach in that area. Team teaching, in which teachers share two groups of students, or cohort teaching, in which a team of four teachers share four groups of students, allows for this staff specialization and provides students with additional connections to school as well as provides small learning environments for students (a school within a school concept).

The connectedness to school is extremely important for students, and especially important for early adolescent students. Students who feel connected to school are less likely to use substances, exhibit emotional distress, demonstrate violent or deviant behavior, experience suicidal thoughts or attempt suicide, be depressed, and become pregnant. (Lonczak, Abbott, Hawkins, Kosterman, & Catalano, 2002; Samdal, Nutbeam, Wold, & Kannas, 1998, Shochet, Ian M., Dadds, Mark R., Ham, David, Montague, Rosly, 2006). In addition, they are less likely to be truant from school or be involved in fighting, bullying, and vandalism (Schapps, 2003; Wilson & Elliott, 2003). In addition, students who feel connected to school are more likely to succeed academically and graduate (Connell, Halpern-Felsher, Clifford, Crichlow, & Usinger, 1995; Wentzel, 1998).

A study panel from the National Research Council and the Institute of Medicine (2004) identified a series of factors associated with school engagement. Educators can substantially increase school connectedness in their students when they:

- Avoid separating students onto vocational and college tracks.
- Set high academic standards for all students and provide all students with the same core curriculum.
- Limit the size of the school to create small learning environments.
- Form multidisciplinary education teams in which groups of teachers work with students.
- Ensure that every student has an advisor.
- Provide mentorship programs.
- Ensure that course content is relevant to the lives of students.
- Provide service learning and community service projects.
- Provide experiential, hands-on learning opportunities.
- Use a wide variety of instructional methods and technologies.
- Extend the class period, school day, and/or school year.
- Provide opportunities for students who are falling behind to catch up.

(Research by Robert W. Blum, "The Adolescent Learner", Educational Leadership, Number 7, April 2005, pg. 16-20).

2.1.3 RECOMMENDATIONS

In an effort to improve student achievement, improve students' and parents' connectedness to schools through smaller learning communities, improve the sense of community and collaboration, offer parents a choice, and recognizing the success and popularity of the first K-8 school in the District, Soria, the District's Board has directed staff to undertake a reconfiguration of the schools to better meet the needs of the students and the community.

The proposed reconfiguration includes:

1. Converting the three existing intermediate schools into middle schools (Frank, Fremont, Haydock) that include grades 6, 7 and 8;
2. Converting all existing elementary schools that were part of the District's former Portables to Permanent (P2P) School Construction Program to K-8 schools (Driffill, Curren, Kamala and Chavez; (Soria will remain a K-8 school) and converting Lemonwood to a K-8 school;
3. Converting Elm, Harrington, Marina West, McKinna, Rose, Sierra Linda, McAuliffe, Brekke, Marshall, Ramona, and Ritchen to K-5 schools.

Parents will then have the options of sending their child to the school that best meets their children and family needs.

K-8 CONFIGURATION

The new configuration of the schools will lead to richer academic programs in that the students and families will be more connected to the school and form closer, longer lasting relationships with the students and families. The Spanish Dual Language Immersion (DLI) Program would be expanded in the District to include all K-8 schools. This would permit students to remain in the DLI Program for nine years and be better prepared to take Advanced Placement (AP) classes in Spanish and Spanish Literature in high school. Science labs will be constructed at each K-8 school to meet the requirement for such labs at the middle school level.

MIDDLE SCHOOL (6-8) GRADE CONFIGURATION

Each of the three Middle Schools will have an Academy focus. Academies will help students to connect to schools and improve motivation as they will be able to study core academics in an area of interest to them. Teachers will also be working in teams that will improve collaboration. The teams, or cohort groups of students, will create a smaller learning environment within a larger school to help students feel more connected to school. Specific facility needs will be identified for the Academies where necessary (e.g. science labs or music and performing spaces). In addition, there will be changes to the curriculum, staffing, master schedule, electives offered, and teaming and cohort groups.

K-5 CONFIGURATION

These schools will continue to offer a more traditional academic program with a strand focus (e.g. technology, or robotics) that would be enhanced at the Academy middle school level. These schools will be smaller in size helping students and parents be more connected to schools.

2.2 MAJOR COMPONENTS REQUIRED TO IMPLEMENT THE PROPOSED CHANGES

The following major components will need to be addressed for an effective transition toward the reconfiguration of schools: academic program, collective bargaining issues, technology infrastructure and equity, desired size of schools and staffing ratios, Board policies, school boundaries, learning materials, special programs, and facility needs.

A preliminary schedule (“Educational Program Milestones for Reconfiguration”) has been prepared to guide these program changes. It is estimated that reconfiguration will require approximately 20 months to further implement, starting in January 2013. Major milestones should be reached by the end of August 2014. This schedule is included in the corollary Facilities Implementation Program documents.

2.2.1 ACADEMIC PROGRAM

Changes to the academic program require development of the academies, expansion of the DLI programs, continued staff development around collaboration and use of data for improved student achievement, and development of teaming and creation of smaller learning groups for middle school age students. Teacher credentials, such as multiple-subject versus single-subject credentials, must also be taken into consideration.

Academic program development is scheduled to take place over a 14 month period between January 2013 and the end of February 2014. For the District’s future K-5 school sites, the process begins with determining each school’s strand focus, a set of learning themes that will guide development of the site’s curriculum. After careful consideration of the strand focus, specific curriculum needs are then developed over a six month period. Educators will review options to purchase needed components of the curriculum and then acquire needed materials.

The process and recommended timing is similar for the District’s future K-8 school sites. Here, initial special education and Dual Language Immersion (DLI) program needs will be considered within the initial two months of academic program planning, while curriculum needs for the DLI program will be cultivated over a six month period ending in November 2013. Educators will review options to purchase needed components of the curriculum and then acquire needed materials.

For the District’s future 6-8 Middle School sites, development of the academic program begins with several months of research into academy offerings, including visits to successful programs in other parts of the State, feedback from current and prospective parents, and selection of sites most appropriate for each type of academy offering. Between March and end of May 2013, facility needs will be identified to support academy functions. At the same time, educators and curriculum specialists will outline course offerings for each academy, considering specific elective options and developing a preliminary instructional schedule by the end of November 2013. The development of curriculum needs to support these electives and other course improvements will also be

concluded by this point. Work during December of 2013 and January of 2014 will focus on planning the phased purchase of curriculum, as funding becomes available.

A similar program and curriculum development process is scheduled for additional District programs such as the extended day Kindergarten option and an enhanced Gifted and Talented Education (GATE) approach. Program research and planning will also begin in January 2013 and will integrate Common Core Standards for Kindergarten curriculum as well as a review of best practices and parent input for the GATE educational plan.

2.2.2 COLLECTIVE BARGAINING

Collective Bargaining issues will need to be resolved prior to the reconfiguration of the schools. These issues include method for selection of school sites by staff and principal, transfer language and requests, and other issues identified in the local Collective Bargaining Agreement.

A dialogue process with the Teachers' Association should be undertaken by February 2013. Key to this process will be a continued line of communication to update stakeholders on program developments and milestones. By September of 2013, participants should be prepared to begin development of a plan that includes policies for teacher selection of school sites. Agreement on these and other collective bargaining issues should be reached by December 2013.

2.2.3 TECHNOLOGY

In addition to identifying the technology needs in the District, a plan for reapportioning available technology across the District needs to be developed. As school site populations are revised upward or downward to better reflect their designed capacity, student and teacher technology may need to be either increased or decreased on a site by site basis to maintain desired student to equipment ratios. All school sites should move towards wireless internet access. Technology infrastructure requirements will need to be assessed.

Pursuant to the reconfiguration of school sites, a revised set of technology hardware standards will be required, and a plan for inventorying and reallocating equipment will need to be established. Site standards and existing inventory should be formalized by end of June 2013, and initial technology needs will be assessed by end of July 2013. Initial distribution and deployment of devices will occur between July and October of 2013. While reallocation of existing equipment is essential to support the revised education program, a district-wide adoption of a transformative technology improvement program will be required.

2.2.4 SIZE AND STAFFING RATIOS

The District has been significantly overcrowded for some time. Previously, the District was forced to adopt a multi-track school year system to accommodate its enrollment. Recognizing that the multi-track school year was an obstacle to student improvement, the District in FY 2009 dismantled the multi-track system and converted to a single track system. This required the acquisition of large numbers of portable buildings and resulted in the housing of students in facilities that were designed for much smaller enrollments. In dealing with the lack of permanent facilities, focus has to now be given to developing local standards for student housing and school enrollment or adhering to those standards recommended by the State.

The District has developed standards which have been incorporated into its most recent Facilities Master Plan. It speaks to the desired size for each of the schools as well as the loading standards to accommodate students. This gives the District a guideline to make decisions about future facility needs of the District (e.g. when to build new schools, when to add additional classrooms to a site).

2.2.5 BOARD POLICIES

Specific board policies need to be identified and may need to be modified or developed to accommodate the new academic programs and reconfiguration of schools in the district.

Board policy review will begin in January 2013 and continue over a nine month period. During this time policies regarding academic course offerings, promotion and retention, the GATE program, length of school day for kindergarten, elementary, and middle school students, walking distances, district transfers, and technology use may be reviewed, discussed, and updated in conformance to the educational program reconfiguration. Review of policies will begin within the appropriate department, which will make recommended changes based on program decisions. Following review by the Superintendent starting in March 2013, these policies will be brought before the Board for approval by November 2013.

Regular reports to the Board on progress in implementing the educational program will occur each month between January 2013 and at least July 2014. The following is a conceptual listing of potential progress report topics based on the corollary facilities implementation documents:

- January 2013: Overall program design and implementation plan
- February 2013: Academy options and required policy changes
- March 2013: Academies, parent input, and feedback from visits to other districts
- April 2013: Specific academies at middle schools and parent community presentations
- May 2013: Technology Plan
- June 2013: Course offerings for academies and K-5 school focus strands
- July 2013: Staff development and extended day Kindergarten program
- August 2013: Library book redistribution
- September 2013: Dual Language Immersion Programs at K-8 and GATE Program
- October 2013: Plan for parent notification of new enrollment boundaries
- November 2013: GATE program update
- December 2013: Progress on curriculum and teaming for academies; progress on boundary changes
- January 2014: Plan for teacher for transfers and parent transfer requests

- February 2014: Update on K-5 strand focus
- March 2014: Process for moving all learning materials and staff development offerings
- April 2014: Update on Community Engagement
- May 2014: Update on overall progress with Educational Reconfiguration
- June 2014: Progress on plan for moving learning materials and technology, update on facility upgrades
- July 2014: Update on learning materials, technology, facilities, and staff development

2.2.6 SCHOOL BOUNDARIES

The boundaries of each school need to be reviewed and adjusted as the size of each school changes in connection to its corresponding reconfiguration.

This process will start with a meeting of the District’s technical staff in March 2013, to establish a work plan for completing a school boundary line review using available software tools. Beginning in June 2013, an enrollment size for each school will be determined and District staff will establish a plan for communicating proposed boundary changes to parents. Boundary maps will provide a visual diagram of new school attendance areas, and will be drafted and revised between July and December 2013. Board approval of new boundaries will be sought in February 2014.

2.2.7 LEARNING MATERIALS

A plan for inventorying and allocating available library books, instructional materials, and supporting equipment is needed as the curriculum at each school is adjusted in conformance to its corresponding academic program and grade configuration.

The existing library collection will be inventoried over a four month period beginning in early February 2013. During the final month of this process, District staff will determine appropriate books and digital materials for grades 6-8 and determine if additional physical books need to be purchased, if books in the District’s existing collection may be allocated, or if a transition to a digital format for select books may be utilized.

Once the number of classrooms by grade level has been determined at each school site, a corresponding count of needed textbooks will be reached by February 2014. District and site staff will coordinate a process for moving instructional materials owned by teachers that are moving to new sites and determine a labeling process for boxes of textbooks and learning materials. An in-service will be scheduled for May 2014 to present these procedures to principals and teachers. Boxes and moving supplies will be obtained between January and May of 2014, packed and moved between June and August of 2014.

2.2.8 SPECIAL PROGRAMS

Afterschool Programs, Special Education Programs, and GATE programs will all need to be reviewed to determine site locations and if additional information or forms need to be submitted to California Department of Education

(CDE). The Consolidated Application and CALPADS will be reviewed and revised to match the District's reconfiguration. CDE will be contacted for guidance as to how they would like the district to revise the Consolidated Application and CALPADS to reflect the new grade configurations. In addition, the District will contact CDE to determine if any forms need to be submitted and/or a new CDS code obtained for any of the schools due to the reconfiguration.

2.2.9 FACILITY NEEDS

An initial assessment of school site conditions during the master planning process has indicated a need for the following facility improvements to support the education program:

- **Multipurpose Rooms:** Some sites will need new and larger multipurpose rooms to accommodate optimal multiple lunch periods. The multipurpose rooms can also be used as gyms if shade structures are erected for students to eat under during lunch when the weather is appropriate. The multipurpose/gym can also be used for performing arts, music classroom and dance classes. Shade structures could also be used at the sites where the eating space is limited in the multipurpose room. Additional needs will be identified for the middle school academies.
- **Science Lab:** Appropriate science lab rooms will need to be created at current elementary school sites once converted to house middle school students.
- **Kindergarten Classrooms:** The District desires to go to extended day kindergarten programs thus creating the need for additional kindergarten facilities. Each additional kindergarten room will need one toilet.
- **Learning Spaces:** The District desires to have "Alternative Learning" spaces rather than Technology Labs and Libraries. This space needs to have access to the internet, be designed so that students feel comfortable and can easily access information from one-to-one devices while in the space.
- **Family Resource Room:** The sites would like to have a Family Resource Room (also called a Parent Education Room) that can double as a Career Center or conference space.
- **Support Facilities:** Some of the sites will need more restrooms, improved drop off areas for students, teacher's lounges, additional offices for support staff (psychologist, speech therapist, counselors, RSP teachers and administration) and updated office space.

Implementation steps for facilities improvements are addressed in the corollary facilities implementation documents.

2.3 ROLES & RESPONSIBILITIES

The Oxnard School District Administrative Cabinet will meet for one hour each week to address the Major Components needed to implement the reconfiguration of the District. The District administration will use the detailed schedules included with the implementation program that outline tasks needed to complete major milestones. A district administrator is assigned to each task and is the person responsible for that task. The Superintendent will conduct weekly checks to make sure everyone is staying on target to meet the deadlines

identified. The Superintendent will invite to the meeting other District staff members who are not a part of cabinet on an as needed basis.

A two hour meeting will be held weekly with the District's staff and CFW to work through specific details related to the facilities program. If additional issues arise, CFW will be available to help district administrative staff. An additional two hour meeting will be held weekly with the Assistant Superintendent for Educational Services, assigned CFW staff members and selected principals to work out specific issues related to the educational program. District Administration and CFW will visit school sites, programs, and facilities throughout the State to assist in the development of the educational and facilities program.

The Assistant Superintendent for Educational Services will meet with principals at least monthly to further develop the educational plan for the District. At times, and when needed, the principals will be divided into groups to discuss specific issues related to academies, Dual Language Immersion, and grade reconfiguration (K-5, 6-8, and K-8). The Superintendent will keep the Board apprised at least at one Board meeting a month on progress made towards the reconfiguration of the District. CFW will make monthly presentations to the Board on progress towards the implementation of the reconfiguration of the schools and the facilities program.

COMMUNITY PLANNING PROCESS

3.1 DEVELOPMENT OF 2012 FACILITIES MASTER PLAN

The Oxnard School District was presented with a Long Range Educational Facilities Master Plan (FMP) in September 2012. The FMP outlines goals and objectives, an assessment of existing facilities and projected growth, and a vision for improving local schools over a horizon of approximately 15-20 years. Demographic projections within the plan found that the District's expected student population will grow to 18,900 within the next nine years.

Prior to the completion of the 2012 FMP, the District completed various modernization and classroom replacement projects, as per an earlier 1999 facilities study. Some of the improvements associated with the 1999 report include the modernization of 7 elementary schools and the Portable to Permanent ("P2P") projects at another 4 elementary schools, most of which were completed in 2004. The Driffill Elementary School P2P project will be the last of these four P2P projects to be completed, with work currently underway.

The FMP was developed as part of an interactive community process that began in 2010 and included numerous discussions with the District's cabinet, key site stakeholders, parents, and community members. The completed plan incorporates site development strategies for each of the District's school sites. The FMP also establishes basic educational specifications for elementary, K-8, and middle schools. Many of the components in the FMP require adjustments or revision to meet current District needs and the proposed educational program reconfiguration.

As part of the planning process, a community survey was conducted in July 2012 to identify projects and concepts that were widely supported by local residents. The survey results indicated widespread support for many of the projects contained within the FMP and observed sufficient levels of support for a potential local measure to fund a portion of the projects.

Following the completion of this initial facilities planning process, the District's Board adopted necessary documents to call for a November 2012 General Obligation bond election.

3.2 ELECTION RESULTS

In November 2012, District voters approved Measure "R", a \$90 million bond measure to build new classrooms, relieve student overcrowding at every school, and modernize school facilities to meet current building standards. The measure was approved by over 65% of local voters as per the following ballot language:

"To replace portable classrooms, relieve student overcrowding by building and equipping new classrooms and educational facilities and repairing and equipping existing classrooms and educational facilities throughout the District, shall Oxnard School District be authorized to issue up to Ninety Million Dollars

\$90,000,000.00 in bonds at the lowest possible legal interest rates so long as spending is annually reviewed by an independent citizens' oversight committee, annual audits are conducted and no money is used for employee salaries?"

Over 3,000 individuals and organizations endorsed Measure "R", an all-time high. An additional 150 community members and District staff volunteered their personal time during various activities to promote Measure "R" and its potential impact on the District. Effective campaign walks, phone banks, vote by mail and get out the vote campaigns were attributed to the high level of voter support and community participation. A detailed project list of Measure "R" projects is available on the District's web site.

The District has a respected tradition of delivering promised projects to the community as approved by voters in the initial ballot measure. The Oxnard School District has twice previously been able to obtain local voter approval for general obligation bonds to provide the local match for State aid grants. In 1997 voters approved Measure "L" and Measure "M" in 2006. Providing a timely, efficient, and effective program, that completes projects as promised, forms the impetus for the Facilities Implementation Program.

3.3 CITIZENS' OVERSIGHT COMMITTEE

In accordance with Education Code Section 15278, the District must establish a Citizens' Oversight Committee (COC) within (60) days of the date that the Board certifies the election results. Per the Education Code, the Board must appoint COC members that represent each of the following categories:

- ✓ Active in a business organization representing the business community
- ✓ Active in a senior citizens' organization
- ✓ Active member of a bona fide taxpayer organization
- ✓ Parent or guardian of a Oxnard School District student
- ✓ Parent or guardian active in the Oxnard PTA/PTSA or school site council
- ✓ At-large community member

The Board has adopted a resolution establishing the COC and adopting its by-laws. Furthermore, in October 2012, the Board appointed seven (7) community members to the COC. Consistent with Education Code and established procedures, the COC will be tasked with specific roles and responsibilities. These include a review of performance and financial audits prepared at Fiscal Year end by an independent auditor, ongoing review of bond expenditures, and the submission of an annual report the community.

In preparation for the first COC meeting scheduled for February 2013, committee information, binders, and applicable presentation materials will be prepared. The first committee meeting agenda will provide training on roles and responsibilities, review the Measure "R" program, elect COC officers, confirm the planned meeting schedule, and discuss website development.

A permanent COC website will be developed with assistance from District staff and consultants over a two month period ending in April 2013. Financial audits, agendas, minutes, and reports to the community will be posted online, consistent with the requirements of the Education Code.

Following the initial COC meeting, subsequent meetings are planned every six months over the life of the Measure “R” bond program. These meetings have been scheduled to occur on the first Thursday of each March and September, with annual reporting requirements taking place at the March meeting. On months where a regular meeting of the District Board of Trustees does not precede the first Thursday, the COC meeting shall occur on the second Thursday.

A detailed master schedule of Measure “R” Citizens’ Oversight Committee meetings and activities is provided in the corollary Facilities Implementation Program documents.

3.4 ONGOING COMMUNITY ENGAGEMENT

Development of the District’s new educational program and associated facilities improvements will require ongoing participation from parents and community members.

An implementation program will require the use of focus groups to engage parents in further dialogue regarding the development of middle school academy programs and DLI programs at K-8 facilities. These groups should be established by the end of January 2013 with meetings to be held in March 2013. Additional presentations to the Parent/Teacher Associations (PTA), School Site Councils (SSC), and English Learner Advisory Committees (ELAC) at each school site will be held over a two month period beginning in April 2013. District staff will also provide information and updates to interested community members and organizations. These updates are scheduled to occur as needed through May 2014.

REVIEW OF FACILITIES MASTER PLAN

In September of 2012, the District’s Board received a draft Facilities Master Plan (FMP) prepared by LPA with District staff support and community involvement. The FMP assessed the condition of existing school facilities and developed an understanding of anticipated long-range facilities needs, as well as strategies for addressing these needs in the next 15 years. As a result of this work, a project list was developed for each school, reflecting the long-range educational and community goals for the District. The FMP looked at District standards, conducted a site assessment of each school, and developed an overall demographic analysis of the proposed plan.

With voter approval of Measure “R” to provide local funding in support of facilities improvements, the District’s Board has directed staff and its consultants to review the proposed FMP and to develop a detailed facilities implementation program taking into consideration Measure “R”, other existing and projected local funds, State grants for facilities improvements and existing facilities resources. As part of the process, consultants were asked to review the FMP and provide recommendations for implementation, including any recommended adjustments.

In order to prepare the facilities implementation program, the District and its consultants completed a thorough review of the FMP, including costs, specifications, and proposed scope of work to be completed at each site. Based upon that review, the following revisions are advised:

- **Planning Horizon:** The FMP proposed changes over a 15-20 year period. It is recommended that improvements be budgeted and scheduled over a 10-12 year planning window, based on available funding. *Proposed funding sources are detailed in Sections 4.3-4.5.*
- **Site configuration:** The FMP was not driven by the District’s revised educational program or any State grant eligibility strategy. It is recommended that strategies for site reconfiguration incorporate these considerations. *Proposed strategies are included in Section 4.1.*
- **Educational Specifications:** The FMP provided building specifications in excess of State guidelines. It is recommended that revised specifications more comparable to State guidelines be utilized. *Proposed specifications are included in Section 4.2.*
- **Funding Sources:** The FMP did not incorporate funding sources for implementing proposed improvements. It is recommended that anticipated State grants, existing capital funds, and Measure “R” proceeds be incorporated into a Master Budget. *Proposed funding sources are detailed in Sections 4.3-4.5.*
- **Phasing & Program Alternatives:** The FMP did not incorporate a phasing strategy based on funding availability. It is recommended that a phasing strategy consistent with available capital improvement

dollars be utilized. It is also advised that several program alternatives be considered should State funding be unavailable, or should the District qualify for additional State Hardship grant funding. *Proposed alternatives are included in Section 4.6.*

The following subsections provide recommended additions to the FMP in each of the above categories in order to establish an implementation program. Consistent with the timing and availability of funding sources, a 12 year planning horizon has been utilized.

4.1 CHANGES TO SITE CONFIGURATION

The District currently operates campuses featuring three categories of grade level configuration: K-6, K-8, and 7-8. Within each category, site conditions can be further divided by the overall facility age, year last modernized, and permanent classroom capacity. The table below summarizes this data for the District's K-6 elementary schools.

	Elim	Harrington	Marina	McKenna	Rose	Sierra	McAuliffe	Brekke	Marshall	Ramona	Ritchien	Lemonwood	Drifill	Chavez	Curren	Kamala	Soria K-8	Subtotal K-5 / K-8
FY 2013 Acreage	6.1	8.3	10.4	9.5	9.3	10.5	12.9	11.6	11	5.4	10.9	9.9	10.7	6.1	10.4	8.9	7.2	159.1
Year Initially Built	1948	1955	1964	1954	1965	1966	1989	1997	2003	1999	1992	1981	1946	1951	1954	1952	2009	
Year Last Modernized	2003	2004	2004	2004	2004	2004	N/A	N/A	N/A	N/A	N/A	2004	2004	2004	2004	2004	N/A	
Total CBEDS	767	557	722	669	782	653	982	737	688	580	751	885	982	776	828	1,006	1,077	13,442
Permanent CR	12	17	20	17	31	21	28	27	28	26	28	41	41	40	40	40	37	494

Four distinguishing features are observed within the data:

- Year Initially Built:** The District's K-6 schools were built within several different generations, and reflect the design principles and standards of their time. One generation of schools was completed from the mid 1940's through the mid 1960's. Another generation was completed between the late 1980's through the early 2000's. One school, Lemonwood, was constructed very early in the 1980's, and the newest District school, Soria, was opened in 2009.
- Year Last Modernized:** The District has completed one modernization cycle, addressing aging buildings at several K-6 school sites between 2003 and 2004. All sites initially built between 1946 and 1981 received modernization funds during this program. Sites built from 1989 and onward have not received modernization, mostly because they have not readily qualified for appropriate State grants.
- Portable to Permanent (P2P) Improvements:** The District has completed the transformation of four existing K-6 schools by replacing existing portable classroom capacity with permanent classrooms. These schools consist of 40 or greater permanent classrooms with most added since 2004 and Drifill School to be completed by 2014.
- Permanent Classroom (CR) Capacity:** Based on staff observations, the District's current K-6 schools range in permanent classroom capacity from 12 to 41 classrooms, and total 494 permanent classrooms. The largest K-6 sites have between 37 and 41 classrooms, while smaller sites have 31 or fewer classrooms. Many of the larger sites previously hosted large numbers of relocatable classroom buildings, which have since undergone a portable to permanent (P2P) classroom replacement program.

Each of these characteristics requires further analysis to determine a strategy for reducing overcrowding and maximizing available permanent classroom space to accommodate students in a reconfigured program. Based on the District's direction to reconfigure the Education Program, the selection of appropriate sites for implementing K-5, K-8 and 6-8 programs must be identified. To create these programs, grade 6 students must be reapportioned at select sites, with remaining K-6 elementary schools converting to K-5 programs.

4.1.1 CAPACITY STUDY

In order to adopt a K-5 program and reduce overcrowding at all elementary schools as rapidly as possible, there is a need to create additional grade 6-8 capacity. Options include:

- Build additional capacity at existing 3 intermediate schools
- Build additional capacity as part of a K-8 program
- Build new middle school campus for future enrollment

There is a need to plan for additional K-5 capacity to accommodate projected growth without reintroducing overcrowding. Options include:

- Build new K-5 campuses
- Build new K-8 campuses
- Build out existing school sites to permanent school site capacity per District education specifications for maximum students per school site

The State of California defines a school's capacity to house students based on the number of permanent classrooms constructed. Targets are provided by the State to school districts for the number of students each classroom may house. Districts are not required to follow these targets for operations, and commonly set their own loading capacity standards. District loading standards more accurately reflect current funding levels for the operational expenses of each active classroom, while State loading standards are utilized to calculate the construction costs of new classroom buildings, particularly for the allotment of State grants for modernization and new construction grant funding.

The District's loading capacity standards as stipulated in the FMP is 27 students per classroom between grades K-3, and 35 students per classroom between grades 4-8. Given the need to assess potential capacity under a future reconfiguration, it is helpful to consider the average District capacity as it relates to grades K-5, K-6 and grades 6-8. For grades 6-8, there are three grade levels, each with a District capacity of 35 students per classroom; therefore the average for these grades is 35 students per classroom. For grades K-5, there are six grade levels, four with a capacity of 27 students per classroom per the FMP and two with a capacity of 35 students per classroom; therefore the average for these grades is 29.7 students per classroom. For grades K-8, there are nine grade levels, four with a capacity of 27 students per classroom per the FMP and five with a capacity of 35 students per classroom; therefore the average for these grades is 31.4 students per classroom.

State loading capacity standards are 25 students per classroom between grades K-6, and 27 students per classroom between grades 7-8. With consideration for this difference between State and local standards, a school

designed and constructed to house a given number of students under State standards will in fact house many more students under local standards. The results of this dichotomy can be observed at the District's P2P sites, which now feature a higher quantity of classrooms per State standards, but continue to serve students at local capacities, leaving large numbers of classrooms underutilized.

The excess capacities at the Lemonwood, Driffill, Chavez, Curren, and Kamala school sites provide sufficient space to house additional grades, were they each to be converted to a K-8 program. In total, these sites could utilize their capacity to house approximately 933 additional grade 6 students, 933 additional grade 7 students and 933 additional grade 8 students, for a total of 2,800 students in grades 6-8. The table below examines the capacity required for the reallocation of grade 6 students and available capacity for potential K-8 sites.

	Elm	Harrington	Malina	Mckenna	Rose	Sierra	McAuliffe	Brakke	Marshall	Remona	Ritchien	Lemonwood	Driffill	Chavez	Curren	Kamala	Sonia K-8	Subtotal K-5 / K-8	
FY 2013																			
CBEDS	K	137	88	111	132	119	79	121	85	105	80	117	130	175	134	119	170	117	2,019
CBEDS	1	120	76	112	94	126	106	140	96	92	119	107	146	180	125	126	176	126	2,067
CBEDS	2	111	79	104	101	100	96	107	99	124	80	101	137	127	139	132	155	136	1,928
CBEDS	3	121	62	110	96	118	83	133	110	89	73	114	121	156	105	116	133	113	1,853
CBEDS	4	98	89	110	88	125	99	140	108	107	68	102	116	115	97	101	139	85	1,787
CBEDS	5	83	80	82	81	90	101	191	115	69	74	105	129	105	104	126	124	98	1,757
CBEDS	6	97	83	93	77	104	89	150	124	102	86	105	106	124	72	108	109	108	1,737
CBEDS	7																	102	102
CBEDS	8																	192	192
Total CBEDS		767	557	722	669	782	653	982	737	688	580	751	885	982	776	828	1,006	1,077	13,442
(Less 6 Grade CBEDS)		(97)	(83)	(93)	(77)	(104)	(89)	(150)	(124)	(102)	(86)	(105)	(106)	(124)	(72)	(108)	(109)	(108)	(1,737)
New K-5 Enrollment		670	474	629	592	678	564	832	613	586	494	646	779	858	704	720	897	675	11,411
Permanent CR		12	17	20	17	31	21	28	27	28	26	28	41	41	40	40	40	37	494
Permanent K-5 CR		12	17	20	17	31	21	28	27	28	26	28	27	27	27	27	27	24	
Perm. CR Capacity K-5	29.7	356	504	593	504	920	623	831	801	831	771	831	801	801	801	801	801	712	12,282
Permanent 6-8 CR												14	14	13	13	13	13	13	80
Perm. CR Capacity 6-8	35.0											490	490	455	455	455	455	455	2,800
Permanent 6 CR Capacity												163	163	152	152	152	152	152	933
Permanent 7 CR Capacity												163	163	152	152	152	152	152	933
Permanent 8 CR Capacity												163	163	152	152	152	152	152	933
Permanent Capacity K-8												1,291	1,291	1,256	1,256	1,256	1,167		

The District currently has 1,737 grade 6 students attending K-6 or K-8 sites. Were the District to create new K-8 sites at its P2P schools and Lemonwood, former K-6 facilities could accommodate 933 of these students. The remaining 804 grade 6 students could be accommodated by existing grade 7-8 sites, which will in turn be relieved of the need for accommodating a portion of their current grade 7-8 student population once the K-8 schools are operational.

The following table examines the current enrollment of grade 7-8 students at the Frank, Fremont, and Haydock sites and considers the capacity required for use of these sites under a grade 6-8 program. As currently built, these schools have local capacities far exceeding their current use. This makes these sites ideal for incorporation of those grade 6 students not served by a K-8 site.

	Subtotal K-5 / K-8	Frank	Fremont	Haydock	7-8 Total	New 6-8 Total	TOTAL
FY 2013							
CBEDS K	2,019				-		
CBEDS 1	2,067				-		
CBEDS 2	1,928				-		
CBEDS 3	1,853				-		
CBEDS 4	1,787				-		
CBEDS 5	1,757				-		
CBEDS 6	1,737				-		5,428
CBEDS 7	102	648	579	402	1,833		
CBEDS 8	192	607	492	375	1,858		
Total CBEDS	13,442	1,255	1,071	777	3,691		17,133
(Less 6 Grade CBEDS)	(1,737)	n.a.	n.a.	n.a.			
New K-5 Enrollment	11,411						11,411
Permanent CR	494	45	36	32	113	607	
Permanent K-5 CR							
Perm. CR Capacity K-5	29.7	12,282					12,282
Permanent 6-8 CR	80						
Perm. CR Capacity 6-8	35.0	2,800	1,575	1,260	1,120	3,955	6,755
Permanent 6 CR Capacity	933	525	420	373	1,318	2,252	
Permanent 7 CR Capacity	933	525	420	373	1,318	2,252	
Permanent 8 CR Capacity	933	525	420	373	1,318	2,252	

4.1.2 PROGRAM PRIORITIZATION

Basic assumptions regarding permanent classroom capacity, enrollment and current grade configurations may present opportunities for the District. The total current enrollment of 17,133 students is presently being housed in 607 permanent and 212 portable classrooms. Not all of these classrooms are currently being used as teaching stations. If all permanent classrooms were used as dedicated teaching stations, there may be sufficient permanent capacity to accommodate all District students in permanent facilities.

The District has 2 options:

Option 1: The District can wait to reconfigure campuses once all draft FMP improvements are completed, as funds become available.

Option 2: The District can reconfigure campuses per the educational program and improve facilities according to the FMP thereafter.

The educational program should drive the timeline for the reconfiguration at existing schools, and as such, Option 2 is recommended. As of October 2012, it may take up to two years to fully deploy a revised educational program to accommodate the proposed reconfiguration. All site improvements needed to accommodate the reconfiguration will need to be completed within this time period.

4.1.3 CONSTRUCTION AND MODERNIZATION REQUIREMENTS

Development of a project list for construction and modernization of facilities should consider established educational program and facilities goals and the overall age, condition, and capacity of school facilities. The relationship between these characteristics is summarized as follows:

- Reduce overcrowding at elementary schools by adopting a K-5 strand and facilities program:

The oldest K-5 school sites warrant full replacement with new facilities where funding is available and the cost of modernization, per cost estimates included in the FMP, exceed 50% of the cost of new facilities. Those facilities that have not yet exceeded 25 years of age are sufficiently new to warrant modernization expenditures as they become eligible for State modernization funding in future years.

- Convert existing intermediate schools to 6-8 middle schools that support an academy based instructional program:

There is excess permanent classroom capacity at 7-8 school sites sufficient to host additional grade 6 students. Additional support facilities will be needed over time.

- Expand the K-8 instructional program and additional K-8 school facilities to increase parent choice:

Excess permanent classroom capacity at existing P2P school sites that house K-6 grades is sufficient to host additional grade 7-8 students.

- Implement an extended day kindergarten program with improved facilities:

The Draft FMP indicates the need to add additional Kindergarten classrooms in order to accommodate an extended day kindergarten program. Additional classrooms may be needed to accommodate an extended day kindergarten program.

- Increase enrollment capacity over time to accommodate projected growth in grades K-8:

As older schools in the District are replaced with newer facilities built to State loading standards, the District's overall capacity under local loadings standards will increase. For example, an existing school accommodating approximately 700 students under local standards will require a larger number of classrooms under State loading guidelines. Once replaced with a new school, the increased number of classrooms will provide significantly greater capacity when loaded according to local guidelines. However, identified new sites will need to be acquired over time to accommodate long term enrollment.

4.1.4 RECONFIGURATION STRATEGIES

Based on an assessment of available classrooms and site capacities, the following reconfiguration strategies are recommended:

- Convert all existing non-P2P elementary schools to a K-5 grade configuration
- Convert all completed P2P elementary schools to K-8 facilities
- Convert existing 7-8 intermediate schools to 6-8 middle schools
- Implement an extended day kindergarten program

The conversion of 7-8 intermediate schools to 6-8 middle schools is recommended for the following sites:

- Frank
- Fremont

- Haydock

The conversion of campuses into K-8 schools is recommended for the following sites:

- Chavez
- Curren
- Kamala
- Driffill

All remaining schools are recommended for conversion to K-5 sites. Additionally, modernization or school replacement projects should be considered for Lemonwood, Elm, and Harrington schools, and, if funding permits, for McKinna, Sierra Linda, Marina West and Rose Avenue. Land for additional elementary and middle school sites should be acquired when permitted by available funding.

4.2 CHANGES TO EDUCATIONAL SPECIFICATIONS FOR FACILITIES

Educational specifications for facilities are required by Education Code sections 14001 and 14030. Although school districts have wide latitude in the design of their schools, they must ensure that the design is consistent with the California Code of Regulations, Title 5 standards. These standards include quantifiable minimums for various school site attributes, including site acreage and classroom square footage.

Educational specifications outline essential educational concepts and detailed facility requirements so that the “form” of school facilities effectively follows the “function” required by the educational program. Educational specifications also help to anticipate activities and costs associated with the modernization and construction of school facilities.

An initial review of educational specifications was conducted as part of the District’s draft FMP. In several cases these specifications deviated significantly from established State guidelines. A review of local and State standards, as well as consideration for the District’s educational program goals, led to the development of a revised set of specifications presented to the District’s staff for consideration of the proposed modernization and construction of proposed facilities.

Proposed educational specifications for classrooms and support spaces have been reviewed with staff and adjusted downward to be within 10% of State guidelines for comparably sized K-5, K-8 and 6-8 school facilities. Proposed improvements per school site have also been reduced and prioritized based on the Board’s direction to achieve grade reconfiguration, provide for extended day kindergarten improvements, replace older schools, and upgrade required support facilities (e.g. Multipurpose Rooms/Gyms). The proposed specifications are summarized below.

4.2.1 EDUCATIONAL SPECIFICATIONS SUMMARY – ELEMENTARY SCHOOL (K-5)

Based on draft recommendations contained within the District’s FMP and revised to reflect established State guidelines, the following table summarizes the approximate square footage required for a K-5 elementary school site serving a capacity of 700 students.

K-5 Educational Specifications for Classrooms and Support Spaces

Space		LPA			CFW			Diff.
		Area	Units	Net Area	Area	Units	Net Area	
Classrooms		24,680			22,560			(2,120)
1	Classroom	960	25	24,000	960	23	22,080	-1,920
2	RSP	480	1	480	480	1	480	0
3	Workroom/Conference	200	1	200	-	-	-	-200
Kindergarten		6,700			6,440			(260)
4	Classroom	1,120	3	3,360	1,120	4	4,480	1,120
5	Flex K	1,120	1	1,120	-	-	-	-1,120
6	Workroom/Storage	200	2	400	200	2	400	0
7	Toilets	65	8	520	65	4	260	-260
8	Equipment Storage	100	1	100	100	1	100	0
9	Shade Structure	1,200	1	1,200	1,200	1	1,200	0
Flex Lab		1,400			-			(1,400)
10	Flex Lab	1,200	1	1,200	-	-	-	-1,200
11	Storage Rm	200	1	200	-	-	-	-200
Special Education		2,435			-			(2,435)
12	Classroom	960	2	1,920	-	-	-	-1,920
13	Independent Living	320	1	320	-	-	-	-320
14	Laundry/Storage Rm	100	1	100	-	-	-	-100
15	Toilet/Changing Rm	95	1	95	-	-	-	-95
Administration		1,325			1,225			(100)
16	Lobby/Waiting	400	1	400	300	1	300	-100
17	Reception/Clerical	75	2	150	75	2	150	0
18	Principal's Office	200	1	200	200	1	200	0
19	Admin Assistant	75	1	75	75	1	75	0
20	Conference Rm	250	1	250	250	1	250	0
21	Work/Main Copy Rm	250	1	250	250	1	250	0
Health Suite		415			240			(175)
22	Health Office	200	1	200	100	1	100	-100
23	Nurse/Health Clerk	75	2	150	75	1	75	-75
24	Toilet	65	1	65	65	1	65	0
Faculty/Staff		1,140			1,140			-
25	Workroom/Lounge	600	1	600	600	1	600	0
26	Kitchenette/Vending	150	1	150	150	1	150	0
27	Staff Toilets	195	2	390	195	2	390	0
Parent/Conference Center		400			400			-
28	Parent/MP/Workroom	300	1	300	300	1	300	0
29	Parent/Storage Rm	100	1	100	100	1	100	0
Student Support Services		2,470			1,510			(960)
30	Flex Office	150	1	150	150	1	150	0

31	Speech Office	250	1	250	250	1	250	0
32	Psychologist Office	150	1	150	150	1	150	0
33	Intervention Set Aside	960	1	960	-	-	-	-960
34	Special Ed/RSP	960	1	960	960	1	960	0
Media Center		4,100			2,700			(1,400)
35	Control Desk	100	1	100	100	1	100	0
36	Work/Processing Rm	200	1	200	200	1	200	0
37	Storage Room	100	1	100	100	1	100	0
38	Reading Room	900	1	900	900	1	900	0
39	Story Telling Nook	400	1	400	400	1	400	0
40	Stacks	400	1	400	400	1	400	0
41	Tech Lounge	1,200	1	1,200	-	-	-	-1,200
42	Textbook Storage	200	1	200	200	1	200	0
43	Small Breakout Rm	250	1	250	250	1	250	0
44	Tech Work/Storage Rm	200	1	200	150	1	150	-50
45	Tech Room/MDF	150	1	150	-	-	-	-150
Multi-Purpose		5,375			5,375			-
46	Multi-Purpose Rm	3,500	1	3,500	3,500	1	3,500	0
47	Chair/Table Storage	200	1	200	200	1	200	0
48	Control Room	75	1	75	75	1	75	0
49	Music Platform	1,400	1	1,400	1,400	1	1,400	0
50	Instrument Storage Rm	200	1	200	200	1	200	0
Food Service		4,700			3,600			(1,100)
51	Serving/Prep Kitchen	400	1	400	350	1	350	-50
52	Walk-in Refg/Freezer	75	2	150	75	1	75	-75
53	Serving Line	300	2	600	-	-	-	-600
54	Dry Storage	150	1	150	75	1	75	-75
55	Locker Alcove	50	1	50	50	1	50	0
56	Office/Workstation	75	1	75	75	1	75	0
57	Toilet/Changing	75	1	75	75	1	75	0
58	Lunch Shelter	2,800	1	2,800	2,800	1	2,800	0
59	Physical Ed Storage	200	1	200	-	-	-	-200
60	Custodial Services	200	1	200	100	1	100	-100
Restrooms		2,450			2,200			(250)
	Restrooms	2,450	1	2,450	2,200	1	2,200	-250
TOTAL SQ FOOTAGE		57,590			47,390			(10,200)

4.2.2 EDUCATIONAL SPECIFICATIONS SUMMARY – ELEMENTARY SCHOOL (K-8)

Based on draft recommendations contained within the District’s FMP and revised to reflect established State guidelines, the following table summarizes the approximate square footage required for a K-8 school site serving a capacity of 900 students.

K-8 Educational Specifications for Classrooms and Support Spaces

Space		LPA			CFW			Diff.
		Area	Units	Net Area	Area	Units	Net Area	
Classrooms		32,360			27,360			(5,000)
1	Classroom	960	33	31,680	960	28	26,880	-4,800
2	RSP	480	1	480	480	1	480	0
3	Workroom/Conference	200	1	200	-	-	-	-200
Kindergarten		6,700			6,440			(260)
4	Classroom	1,120	3	3,360	1,120	4	4,480	1,120
5	Flex K	1,120	1	1,120	-	-	-	-1,120
6	Workroom/Storage	200	2	400	200	2	400	0
7	Toilets	65	8	520	65	4	260	-260
8	Equipment Storage	100	1	100	100	1	100	0
9	Shade Structure	1,200	1	1,200	1,200	1	1,200	0
ES Flex Lab		1,400			-			(1,400)
10	Flex Lab	1,200	1	1,200	-	-	-	-1,200
11	Storage Rm	200	1	200	-	-	-	-200
6th - 8th Science & Electives		4,700			3,800			(900)
12	Science/Flex Lab	1,500	3	4,500	1,200	3	3,600	-900
13	Prep/Work Room	200	1	200	200	1	200	0
Special Education		2,435			2,435			-
14	Classroom	960	2	1,920	960	2	1,920	0
15	Independent Living	320	1	320	320	1	320	0
16	Laundry/Storage Rm	100	1	100	100	1	100	0
17	Toilet/Changing Rm	95	1	95	95	1	95	0
Administration		1,475			1,625			150
18	Lobby/Waiting	400	1	400	400	1	400	0
19	Reception/Clerical	75	2	150	75	2	150	0
20	Principal's Office	200	1	200	200	1	200	0
21	Asst. Principal Office	150	1	150	300	1	300	150
22	Admin Assistant	75	1	75	75	1	75	0
23	Conference Rm	250	1	250	250	1	250	0
24	Work/Main Copy Rm	250	1	250	250	1	250	0
Health Suite		415			240			(175)
25	Health Office	200	1	200	100	1	100	-100
26	Nurse/Health Clerk	75	2	150	75	1	75	-75
27	Toilet	65	1	65	65	1	65	0
Faculty/Staff		1,140			1,140			-
28	Workroom/Lounge	600	1	600	600	1	600	0
29	Kitchenette/Vending	150	1	150	150	1	150	0
30	Staff Toilets	195	2	390	195	2	390	0
Parent/Conference Center		400			400			-

31	Parent/MP/Workroom	300	1	300	300	1	300	0
32	Parent/Storage Rm	100	1	100	100	1	100	0
Student Support Services		2,470			1,510			(960)
33	Counselor Office	150	1	150	150	1	150	0
34	Speech Office	250	1	250	250	1	250	0
35	Psychologist Office	150	1	150	150	1	150	0
36	Intervention Set Aside	960	1	960	-	-	-	-960
37	Special Ed/RSP	960	1	960	960	1	960	0
Media Center		4,100			2,750			(1,350)
38	Control Desk	100	1	100	100	1	100	0
39	Work/Processing Rm	200	1	200	200	1	200	0
40	Storage Room	100	1	100	100	1	100	0
41	Reading Room	900	1	900	900	1	900	0
42	Story Telling Nook	400	1	400	400	1	400	0
43	Stacks	400	1	400	400	1	400	0
44	Tech Lounge	1,200	1	1,200	-	-	-	-1,200
45	Textbook Storage	200	1	200	200	1	200	0
46	Small Breakout Rm	250	1	250	250	1	250	0
47	Tech Work/Storage Rm	200	1	200	200	1	200	0
48	Tech Room/MDF	150	1	150	-	-	-	-150
Multi-Purpose		6,375			6,375			-
49	Multi-Purpose Rm	4,400	1	4,400	4,400	1	4,400	0
50	Chair/Table Storage	300	1	300	300	1	300	0
51	Control Room	75	1	75	75	1	75	0
52	Music Platform	1,400	1	1,400	1,400	1	1,400	0
53	Instrument Storage Rm	200	1	200	200	1	200	0
Physical Education		800			800			0
54	Changing Rooms	600	1	600	600	1	600	0
55	PE Equipment Storage	200	1	200	200	1	200	0
Food Service		5,700			4,500			(1,200)
56	Serving/Prep Kitchen	400	1	400	450	1	450	50
57	Walk-in Refg/Freezer	75	2	150	75	1	75	-75
58	Serving Line	200	4	800	-	-	-	-800
59	Dry Storage	150	1	150	75	1	75	-75
60	Locker Alcove	50	1	50	50	1	50	0
61	Office/Workstation	75	1	75	75	1	75	0
62	Toilet/Changing	75	1	75	75	1	75	0
63	Lunch Shelter	3,600	1	3,600	3,600	1	3,600	0
64	Physical Ed Storage	200	1	200	-	-	-	-200
65	Custodial Services	200	1	200	100	1	100	-100
Restrooms		3,150			2,800			(350)
	Restrooms	3,150	1	3,150	2,800	1	2,800	-350

TOTAL SQ FOOTAGE	73,620	62,175	(11,445)
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4.2.3 EDUCATIONAL SPECIFICATIONS SUMMARY – MIDDLE SCHOOL (6-8)

Based on draft recommendations contained within the District’s Facilities Plan and revised to reflect established State guidelines, the following table summarizes the approximate square footage required for a 6-8 middle school site serving a capacity of 1,200 students.

6-8 Educational Specifications for Classrooms and Support Spaces

Space		LPA			CFW			Diff.
		Area	Units	Net Area	Area	Units	Net Area	
Classrooms		46,760			39,840			(6,920)
1	Classroom	960	48	46,080	960	41	39,360	-6,720
2	RSP	480	1	480	480	1	480	0
3	Workroom/Conference	200	1	200	-	-	-	-200
Science (2 labs grouped for a total of 8)		3,200			2,600			(600)
3	Science Lab	1,500	2	3,000	1,200	2	2,400	-600
4	Prep/Work Room	200	1	200	200	1	200	0
Special Education		1,475			-			(1,475)
4	Classroom	960	1	960	-	-	-	-960
5	Independent Living	320	1	320	-	-	-	-320
6	Laundry/Storage Rm	100	1	100	-	-	-	-100
7	Toilet/Changing Rm	95	1	95	-	-	-	-95
Visual Arts Program		1,700			1,400			(300)
8	Art Lab	1,500	1	1,500	1,200	1	1,200	-300
9	Work/Storage Rm	200	1	200	200	1	200	0
Music Program		3,900			1,800			(2,100)
10	Band/Orchestra Rm	1,800	1	1,800	1,500	1	1,500	-300
11	Instrument Storage Rm	200	1	200	200	1	200	0
12	Music Workroom/Office	100	1	100	100	1	100	0
13	Rehearsal Rooms	225	2	450	-	-	-	-450
14	Choral Room	1,200	1	1,200	-	-	-	-1,200
15	Robe Storage Room	150	1	150	-	-	-	-150
Drama Program (See Platform @ MPR for TS)		290			-			(290)
16	Dressing/Green Rm	225	1	225	-	-	-	-225
17	Performing Arts Toilet	65	1	65	-	-	-	-65
Media/Technology Program		3,250			-			(3,250)
18	Design Lab	1,800	1	1,800	-	-	-	-1,800
19	Material Processing	600	1	600	-	-	-	-600
20	Video Broadcast Studio	250	1	250	-	-	-	-250
21	Editing Room	400	1	400	-	-	-	-400
22	Work/Storage Room	200	1	200	-	-	-	-200
Physical Education Program		12,200			13,150			950
23	Practice Gymnasium	7,300	1	7,300	9,600	1	9,600	2,300
24	PE Equipment Storage	200	1	200	400	1	400	200
25	Locker/Changing Rm	1,200	2	2,400	1,200	2	2,400	0

26	Fitness Center	1,300	1	1,300	-	-	-	-1,300
26	PE Staff Office	200	2	400	300	1	300	-100
27	PE Staff Locker/Toilet	150	2	300	150	1	150	-150
28	Chair/Table Storage	300	1	300	300	1	300	0
Administration		1,475			1,625			150
29	Lobby/Waiting	400	1	400	400	1	400	0
30	Reception/Clerical	75	2	150	75	2	150	0
31	Principal's Office	200	1	200	200	1	200	0
32	Admin Assistant	75	1	75	75	1	75	0
33	Asst. Principal Office	150	1	150	150	2	300	150
34	Conference Room	250	1	250	250	1	250	0
35	Work/Main Copy Rm	250	1	250	250	1	250	0
Health Suite		415			240			(175)
36	Health Office	200	1	200	100	1	100	-100
37	Nurse/Health Clerk	75	2	150	75	1	75	-75
38	Toilet	65	1	65	65	1	65	0
Faculty/Staff		1,140			1,140			-
39	Workroom/Lounge	600	1	600	600	1	600	0
40	Kitchenette/Vending	150	1	150	150	1	150	0
41	Staff Toilets	195	2	390	195	2	390	0
Parent/Conference Center		400			400			-
42	Multi-Purpose/Workrm	300	1	300	300	1	300	0
43	Storage Room	100	1	100	100	1	100	0
Student Support Services		1,660			3,480			1,820
44	Counselor Office	150	2	300	100	2	200	-100
45	Speech Office	250	1	250	250	1	250	0
46	Psychologist Office	150	1	150	150	1	150	0
47	Special Ed/RSP	480	2	960	960	3	2,880	1,920
Media Center		4,800			2,000			(2,800)
48	Control Desk	100	1	100	100	1	100	0
49	Librarian Office	100	1	100	100	1	100	0
50	Work/Processing Rm	200	1	200	200	1	200	0
51	Storage Room	100	1	100	100	1	100	0
52	Reading Room	1,600	1	1,600	1,600	-	-	-1,600
53	Stacks	600	1	600	600	1	600	0
54	Tech Lounge	1,200	1	1,200	1,200	-	-	-1,200
55	Textbook Storage Rm	300	1	300	300	1	300	0
56	Small Breakout Room	250	1	250	250	1	250	0
57	Tech Work/Storage Rm	200	1	200	200	1	200	0
58	Tech Room/MDF	150	1	150	150	1	150	0
Multi-Purpose Room		7,175			-			(7,175)
59	Multi-Purpose Rm	5,500	1	5,500	-	-	-	-5,500
60	Control Room	75	1	75	-	-	-	-75
61	MPR Platform	1,400	1	1,400	-	-	-	-1,400
62	Storage Room	200	1	200	-	-	-	-200
Food Service		5,700			3,900			(1,800)

63	Food Prep Kitchen	400	1	400	650	1	650	250
64	Walk-in Refg/Freezer	75	2	150	75	1	75	-75
65	Serving Line	200	4	800	-	-	-	-800
66	Dry Storage	150	1	150	75	1	75	-75
67	Locker Alcove	50	1	50	50	1	50	0
68	Office	75	1	75	75	1	75	0
69	Toilet/Changing Rm	75	1	75	75	1	75	0
70	Lunch Shelter	3,600	1	3,600	2,800	1	2,800	-800
71	Physical Ed. Storage	200	1	200	-	-	-	-200
72	Custodial Services	200	1	200	100	1	100	-100
Restrooms				4,200	3,000			(1,200)
	Restrooms	4,200	1	4,200	3,000	1	3,000	-1,200

TOTAL SQ FOOTAGE	99,740	74,575	(25,165)
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4.3 FUNDING SOURCES

Based on the required improvements and available sources of funding, several financing scenarios have been studied. There are three major sources of funds that may be available to fund the facilities implementation program.

- Local available funds, including proceeds from the sale of Measure “R” bonds, developer fees and Mello-Roos (Community Facilities District) funds
- Matching State grants under the State’s School Facilities Program for Modernization and New Construction
- State grants under the State’s Financial Hardship Program

These three major sources of funding are further described in the following sections. Each has been developed with guidance from District staff and presented to the Board for review.

4.4 GENERAL OBLIGATION BOND FUNDING

General Obligation (“G.O.”) bonds are the most widely used and efficient method of financing school facility improvements in California. G.O. bonds are secured by an annual levy on all taxable parcels within the boundaries of a school district. The levy is based on the assessed value (AV) of a parcel as determined by the County, pursuant to Proposition 13. The AV is typically less than current market value. Traditionally, G.O. bonds carry far lower interest and issuance costs than other financing options. Buyers of most California school bonds receive an exemption from State and Federal taxes on the interest portion of the bonds purchased, allowing for a lower rate of interest.

The passage of Measure “R” established a new tax rate of \$30 per \$100,000 of AV, generating a maximum of \$90 million in new bond proceeds over a projected 12 year period.

4.4.1 2012 SERIES "A"

On November 14, 2012 the District's Board authorized the sale of G.O. bonds not to exceed \$21 million. Subsequently, on December 6, Standard & Poor's Rating Agency affirmed the District's A+ rating citing:

- Participation in the diverse Ventura County, coupled with strong income and wealth indicators
- Strong fund balance position
- Recent positive trend in average daily attendance (ADA) levels, which drives State aid funding, followed by projections of further growth
- Good financial management practices

On December 11, the District successfully sold \$18.39 million in Series "A" G.O. bonds at an all-in total interest cost of 3.82%. The District's Series 2012 "A" bonds have a debt repayment ratio of 1.89:1, well below the 4:1 ratio recommended by State Treasurer's Office. Proceeds from the sale of bonds were deposited in the District's construction fund on December 27, 2012 and are now available to fund proposed improvements.

4.4.2 2013 SERIES "B"

Series "B" of the bond program is expected to be issued in May 2013, given favorable market conditions, and is anticipated to generate \$26.24 million in proceeds. With respect to the issuance of Series "B" G.O. bonds, the District's outstanding debt has reached the District's statutory debt ceiling set in Education Code Section 15270. The current statutory debt limit for elementary school districts is one and a quarter percent (1.25%) of the total assessed valuation of the taxable property within the District's boundaries. The District's current outstanding debt is 1.249% percent of the District's total assessed valuation. As such, the District currently has no remaining statutory net bonding capacity.

Issuing Series "B" bonds will result in the District exceeding the statutory debt limit by approximately 0.26%, resulting in a debt ratio of 1.51% of assessed valuation. In these instances, the District must seek a waiver to exceed the statutory debt limit from the State Board of Education under Section 35050 of the Education Code. Based on an analysis of the District's position and projected assessed valuation growth, the District should fall below the statutory limitation within four (4) years or by 2017. The waiver process is fairly simple and can be outlined as follows:

1. The District must publish notice of a public hearing in a newspaper of general circulation that it is considering a waiver of the statutory debt limitation from the State Board of Education. The date, time and location of the public hearing must be included in the publication.
2. The District Board of Trustees holds a public hearing to consider input from the public and adopt a resolution authorizing the District to pursue a waiver to exceed the statutory debt limitation from the State Board of Education.

3. The Superintendent or his designee must consult with the representatives of the bargaining units with respect to the waiver. The District must present to the State Board of Education the bargaining unit's respective positions regarding the waiver.

The District has published notice of the public hearing and has set the public hearing for January 9, 2013. The District's Program Manager and bond counsel will assist in preparing the final waiver application for submission to the State. The State Department of Education will consider this application and is expected to notify the District of approval by the middle of March 2013.

4.4.3 2016 SERIES "C"

Series "C" of the bond program is expected to be issued by October of 2016, and is anticipated to provide the balance of funds required for the first phase of Measure "R" improvements. Preparation for the sale of Series "C" bonds is scheduled to begin in September of 2016, given favorable market conditions.

The bond sale will require Board approval of a resolution authorizing the sale of G.O. bonds, and adoption of a Bond Purchase Agreement, Preliminary Official Statement, Paying Agent Agreement, and Continuing Disclosure. Following the preparation and adoption of required documents, District staff and its financial advisor will prepare a rating agency presentation over a two week period preceding the rating agency meeting. The District will obtain an updated rating and insurer bids by the middle of October 2016 and conduct pricing activities at that time. Transaction closing is scheduled by end of October 2016.

4.4.4 2017 SERIES "D"

Series "D" of the bond program is expected to be issued by October of 2017, and is anticipated to provide the funds required to support the second phase of Measure "R" improvements. Preparation for the sale of Series "D" bonds is scheduled to begin in September of 2017, given favorable market conditions.

The bond sale will require Board approval of a resolution authorizing the sale of G.O. bonds, and adoption of a Bond Purchase Agreement, Preliminary Official Statement, Paying Agent Agreement, and Continuing Disclosure. Following the preparation and adoption of required documents, District staff and its financial advisor will prepare a rating agency presentation over a two week period preceding the rating agency meeting. The District will obtain an updated rating and insurer bids by the middle of October 2017 and conduct pricing activities at that time. Transaction closing is scheduled by end of October 2017.

4.4.5 2021 SERIES "E"

Series "E" of the bond program is expected to be issued by October of 2021, and is anticipated to provide the funds required to support the third phase of Measure "R" improvements. Preparation for the sale of Series "E" bonds is scheduled to begin in September of 2021, given favorable market conditions.

The bond sale will require Board approval of a resolution authorizing the sale of G.O. bonds, and adoption of a Bond Purchase Agreement, Preliminary Official Statement, Paying Agent Agreement, and Continuing Disclosure. Following the preparation and adoption of required documents, District staff and its financial advisor will prepare a rating agency presentation over a two week period preceding the rating agency meeting. The District will obtain

an updated rating and insurer bids by the middle of October 2021 and conduct pricing activities at that time. Transaction closing is scheduled by end of October 2021.

4.4.6 2025 SERIES “F”

Series “F” of the bond program is expected to be issued by October of 2025, and is anticipated to provide the balance of funds required for the third phase of Measure “R” improvements. Preparation for the sale of Series “F” bonds is scheduled to begin in September of 2025.

The bond sale will require Board approval of a resolution authorizing the sale of G.O. bonds, and adoption of a Bond Purchase Agreement, Preliminary Official Statement, Paying Agent Agreement, and Continuing Disclosure. Following the preparation and adoption of required documents, District staff and its financial advisor will prepare a rating agency presentation over a two week period preceding the rating agency meeting. The District will obtain an updated rating and insurer bids by the middle of October 2025 and conduct pricing activities at that time. Transaction closing is scheduled by end of October 2025.

4.5 STATE FUNDING

The State provides periodic funding to school districts from its School Facility Program in the form of per pupil grants. The program provides new construction and modernization grants to construct new school facilities or modernize existing schools. To receive State grants, a district is required to match the grant portion of the cost of an eligible project from available district funds. This may include proceeds from local general obligation bonds, developer fees, and the general fund.

Currently, funds in the School Facility Program are limited, pending voter approval of a State facilities bond anticipated for November 2014. The District needs to proceed with a facility program that relies on local resources, but can be enhanced or extended once State funding becomes available after 2014.

The analysis conducted for the Facilities Implementation Program included the collection of data to support the District’s applications for State funding (e.g. classroom age and modernization dates, current classroom loading, anticipated residential development, and the potential for enrollment growth). This review will provide the District greater leverage to achieve its maximum eligibility and secure priority placement for allocation of future funds.

So that maximum funding can be secured and released to the District, a practice of “close out” of all remaining documentation and requirements with the Division of the State Architect for the construction of all facilities improvements should be maintained. Communications with the State and a review of existing files demonstrate that over 20 projects previously approved and constructed have not completed the “close-out” requirements to date. The District is aware of this problem and has already selected consultants to begin the full “close-out” of remaining projects. School sites with outstanding “close-out” requirements may face delays in the procurement of additional State grants.

The District should leverage State grants for immediate construction or reimbursement after construction is complete. A comprehensive strategy to maximize State grant proceeds should be adopted, followed by the submittal of necessary applications to the Office of Public School Construction. The Facilities Implementation Program details a plan of action for maximizing State grants.

4.5.1 STATE MODERNIZATION PROGRAM

The State’s Modernization Program provides state funds on a 60-40 state and local sharing basis for improvements that educationally enhance existing school facilities. Eligible projects include modifications such as air conditioning, plumbing, lighting, and electrical systems. Applications are submitted to the Office of Public School Construction in two stages:

1. **Eligibility:** Modernization funding is established separately for each school site and requires that permanent facilities be at least 25 years old and portable facilities be at least 20 years old. Students must be enrolled in those facilities based on State classroom loading standards of 25 per classroom for grades K-6 and 27 per classroom for grades 7-8. Once established, site eligibility is not subject to annual review.
2. **Funding:** A district with modernization eligibility may request funding. Funding is provided on a 60-40 State grant/local match basis. The pupil grant is currently \$3,600 for grades K-6 and \$3,809 for grades 7-8. Eligible costs include design, construction, educational technology, testing, inspection, furniture and equipment. Limited supplemental funding is available for excessive cost such as fire safety and accessibility improvements. Grant levels are periodically reviewed by the State. Program funding is subject to project performance and “close out” audits.

Based on a review by staff of existing facilities, the date of their construction and last modernization, and field visits, a preliminary estimate suggests the District may be eligible for modernization grants to enhance eligible facilities. This eligibility is school site specific and subject to the availability of funding from the State. Funding for this program is not currently available, but is projected to be available should a State School Bond be successful for the November 2014 ballot.

The table below summarizes the estimated eligibility for modernization funds. Total eligibility for permanent classrooms is estimated to be \$3.7 million in FY 2013, and estimated to increase by an additional \$11.7 million in FY 2021.

Estimated Modernization Eligibility – Permanent Classrooms 60-40 Program

School Site	Est. CRMs	Grant Eligibility FY 2013	Grant Eligibility FY 2017	Grant Eligibility FY 2021	Total
Brekke	27	0 \$ -	0 \$ -	26 \$ 2,340,000	\$ 2,340,000
Chavez	40	0 \$ -	0 \$ -	0 \$ -	\$ -
Currren	40	0 \$ -	0 \$ -	0 \$ -	\$ -
Driffill	41	0 \$ -	0 \$ -	0 \$ -	\$ -
Elm	12	0 \$ -	0 \$ -	0 \$ -	\$ -
Frank	45	0 \$ -	0 \$ -	44 \$ 4,525,092	\$ 4,525,092
Fremont	36	36 \$ 3,702,348	0 \$ -	0 \$ -	\$ 3,702,348
Harrington	17	0 \$ -	0 \$ -	0 \$ -	\$ -
Haydock	32	0 \$ -	0 \$ -	0 \$ -	\$ -
Kamala	40	0 \$ -	0 \$ -	0 \$ -	\$ -
Lemonwood	41	0 \$ -	0 \$ -	0 \$ -	\$ -
Marina West	20	0 \$ -	0 \$ -	0 \$ -	\$ -
Marshall	28	0 \$ -	0 \$ -	0 \$ -	\$ -

McAuliffe	28	0	\$ -	27	\$ 2,430,000	0	\$ -	\$ 2,430,000
McKinna	17	0	\$ -	0	\$ -	0	\$ -	\$ -
Ramona	26	0	\$ -	0	\$ -	0	\$ -	\$ -
Ritchen	28	0	\$ -	27	\$ 2,430,000	0	\$ -	\$ 2,430,000
Rose	31	0	\$ -	0	\$ -	0	\$ -	\$ -
Sierra Linda	21	0	\$ -	0	\$ -	0	\$ -	\$ -
Soria	37	0	\$ -	0	\$ -	0	\$ -	\$ -
	607	36	\$ 3,702,348	54	\$ 4,860,000	70	\$ 6,865,092	\$ 15,427,440

As the Facilities Implementation Program moves forward and as facilities age, the modernization eligibility of the District's facilities will continue to be calculated and updated for the District's consideration. The corollary Facilities Implementation Program documents to this report provide a detailed schedule for the calculation and procurement of such funds for proposed improvements.

Based on a review by staff of portable classrooms, the date of commission and last modernization, and field visits, a preliminary estimate suggests the District may be eligible for modernization grants to enhance eligible portable classroom facilities. This eligibility is school site specific and subject to the availability of funding from the State. Funding for this program is not currently available, but is projected to be available should a State School Bond be successful for the November 2014 ballot.

It is estimated that the District currently has approximately 212 portable classrooms in service. Approximately 10 percent are over 20 years old and may qualify for modernization. Most districts elect to replace portable classrooms with permanent facilities and to take eligible modernization grants for portable classrooms to improve support facilities (e.g. cafeterias, multi-purpose rooms, etc.).

Estimated Modernization Eligibility – Portable Classrooms 60-40 Program*

School Site	Est. CRMs	Grant Eligibility FY 2013		Grant Eligibility FY 2017		Grant Eligibility FY 2021		Total
Brekke	2	0	\$ -	0	\$ -	2	\$ 180,000	\$ 180,000
Chavez	0	0	\$ -	0	\$ -	0	\$ -	\$ -
Currren	2	0	\$ -	0	\$ -	1	\$ 90,000	\$ 90,000
Driffill	22	0	\$ -	6	\$ 540,000	3	\$ 270,000	\$ 810,000
Elm	19	0	\$ -	0	\$ -	19	\$ 1,710,000	\$ 1,710,000
Frank	14	0	\$ -	0	\$ -	4	\$ 411,372	\$ 411,372
Fremont	11	8	\$ 822,744	0	\$ -	2	\$ 205,686	\$ 1,028,430
Harrington	11	3	\$ 270,000	3	\$ 270,000	5	\$ 450,000	\$ 990,000
Haydock	8	0	\$ -	0	\$ -	0	\$ -	\$ -
Kamala	6	0	\$ -	0	\$ -	5	\$ 450,000	\$ 450,000
Lemonwood	24	5	\$ 450,000	3	\$ 270,000	7	\$ 630,000	\$ 1,350,000
Marina West	17	4	\$ 360,000	4	\$ 360,000	6	\$ 540,000	\$ 1,260,000
Marshall	0	0	\$ -	0	\$ -	0	\$ -	\$ -
McAuliffe	11	0	\$ -	6	\$ 540,000	2	\$ 180,000	\$ 720,000
McKinna	15	0	\$ -	7	\$ 630,000	7	\$ 630,000	\$ 1,260,000
Ramona	26	0	\$ -	0	\$ -	24	\$ 2,160,000	\$ 2,160,000
Ritchen	4	0	\$ -	0	\$ -	2	\$ 180,000	\$ 180,000
Rose	3	0	\$ -	0	\$ -	3	\$ 270,000	\$ 270,000
Sierra Linda	16	0	\$ -	8	\$ 720,000	8	\$ 720,000	\$ 1,440,000

Soria	1	0	\$	-	0	\$	-	0	\$	-	\$	-
	212	20	\$	1,902,744	37	\$	3,330,000	100	\$	9,077,058	\$	14,309,802

* Current dollars

The table above summarizes the estimated eligibility for modernization funds per site for portable classrooms in service on alternate dates. As the Facilities Implementation Program moves forward and as portable classroom facilities age, the modernization eligibility of the District’s portable classroom facilities will continue to be calculated and updated for the District’s review. As of FY 2013, the District may qualify for up to \$1.9 million in State modernization funds. Based on current State requirements and unless portables are removed from service, the total anticipated modernization eligibility for portable classrooms is anticipated to increase to approximately \$14.3 million by FY 2021.

Given the District’s desire to replace portable facilities with permanent facilities, however, will require a detailed site plan and management strategy to optimize State Modernization Program funding for portable classrooms. Once portables are removed, portable classroom eligibility may no longer be available. Therefore, it may be more appropriate to utilize available portable classroom eligibility to modernize support facilities that will remain in use, subject to State approval.

The corollary Facilities Implementation Program documents to this report further provide a detailed schedule for the calculation and procurement of such funds for proposed improvements.

4.5.2 STATE NEW CONSTRUCTION PROGRAM

The State’s New Construction Program provides state funds on a 50/50 state and local sharing basis for eligible projects that add capacity to a school district. The goal is to add capacity to school districts to house students, including the construction of a new school, or the addition of classrooms to an existing school. Applications are submitted to the Office of Public School Construction in two stages:

1. **Eligibility:** Eligibility for new construction funding is not site specific and is determined by the gap between a district’s projected enrollment and its existing classroom capacity. Classroom capacity is based on State loading standards of 25 students per classroom for grades K-6 and 27 students per classroom for grades 7-8. Historical and projected student enrollment, plus approved, but not yet built residential units, are utilized to estimate the gap between the amount of future students and the current ability to house students in permanent facilities. Portable classrooms are not counted by the State as being permanently available to house pupils. Until approved for construction, eligibility is subject to annual review.
2. **Funding:** Once eligibility is approved a district may apply for funding. Funding is provided on a 50/50 State grant/local match basis. The pupil grant is currently \$9,455 for grades K-6 and \$9,999 for grades 7-8, and is counted based on each student found to exceed a district’s permanent capacity to house students. Eligible costs include design, construction, testing, inspection, furniture and equipment, and other costs closely related to the actual construction of school buildings. Supplemental grants are available for site acquisition, utilities, on/off-site and general site development, and other excessive cost. Grant levels are periodically reviewed by the State.

Based on actual CBEDS data as of November 2012 and further verification of existing facilities, a preliminary estimate suggests the District may be eligible for up to \$71 million of State grants for new construction. This does not include the estimated cost of land acquisition, if necessary. Of this total, approximately \$52.4 million is available for grades K-6 facilities and the balance for 7-8 grade levels. These amounts are subject to a local match requirement by the District. If enrollment continues to grow, the amount of State eligibility for new construction is expected to increase. The estimated eligibility is available district wide, but subject to the availability of funding from the State. Funding for this program is not currently available, but is projected to be available should a State School Bond be successful for the November 2014 ballot.

Estimated New Construction Eligibility – 50/50 Program*

Grade Level	Est. Eligible Pupils	Est. Grant/Pupil Effective 01-12	Est. State Grant (50%)	Est. Local Match (50%)	Project Total (100%)
K-6	5,537	\$9,455	\$ 52,352,335	\$ 52,352,335	\$ 104,704,670
7-8	971	\$9,999	\$ 9,709,029	\$ 9,709,029	\$ 19,418,058
		Subtotal	\$ 62,061,364	\$ 62,061,364	\$ 124,122,728
		Est. Site Service (15%)	\$ 9,309,205	\$ 9,309,205	\$ 18,618,409
		Total	\$ 71,370,569	\$ 71,370,569	\$ 142,741,137

* Current dollars

4.5.3 STATE FINANCIAL HARDSHIP PROGRAM

The Financial Hardship Program provides assistance for districts that cannot provide all or part of their local share for a School Facility Program project. To qualify, a district must be charging the maximum developer fee and meet one of the following criteria:

- Bonded indebtedness of 60% or greater
- Successful passage of a Proposition 39 Bond
- District total bonding capacity of less than \$5 million

In addition, it must meet at least two of the following criteria:

- District has placed on the ballot within the last four years a local general obligation bond
- Bond received at least 50 percent yes votes
- Debt has been issued for capital outlay obligations at a level of at least 30 percent of the district’s total bonding capacity
- At least 20 percent of the district’s teaching stations are relocatable classrooms

Under the current Financial Hardship Program, the District’s local share of New Construction or Modernization grant funds may be provided by the State. The program requires audits of available capital facilities funding (e.g. Funds 21, 25, 35, 40, 10) throughout the project period and at “close out”. Until approved for construction,

eligibility is subject to review every 6 months. A district can apply for planning funds for site acquisition and DSA submittals and/or construction. Funding for this program is not currently available, but is projected to be available should a State School Bond be successful for the November 2014 ballot.

The District has exceeded its net bonding capacity to qualify for State Financial Hardship funding and today meets the minimum requirements to be considered for the State Financial Hardship program. The charts below demonstrate the projected maximum amount of funding the District would qualify for under the current State Financial Hardship Program.

Estimated Modernization Eligibility – Permanent & Portable Classrooms Hardship Program*

School Site	Est. Permanent Grant Eligibility	Est. Local Hardship Match	Est. Total Hardship Grant	Est. Portable Grant Eligibility	Est. Local Hardship Match	Est. Total Hardship Grant
Brekke	\$ 2,340,000	\$ 1,560,000	\$ 3,900,000	\$ 180,000	\$ 120,000	\$ 300,000
Chavez	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Currren	\$ -	\$ -	\$ -	\$ 90,000	\$ 60,000	\$ 150,000
Driffill	\$ -	\$ -	\$ -	\$ 810,000	\$ 540,000	\$ 1,350,000
Elm	\$ -	\$ -	\$ -	\$ 1,710,000	\$ 1,140,000	\$ 2,850,000
Frank	\$ 4,525,092	\$ 3,016,728	\$ 7,541,820	\$ 411,372	\$ 274,248	\$ 685,620
Fremont	\$ 3,702,348	\$ 2,468,232	\$ 6,170,580	\$ 1,028,430	\$ 685,620	\$ 1,714,050
Harrington	\$ -	\$ -	\$ -	\$ 990,000	\$ 660,000	\$ 1,650,000
Haydock	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Kamala	\$ -	\$ -	\$ -	\$ 450,000	\$ 300,000	\$ 750,000
Lemonwood	\$ -	\$ -	\$ -	\$ 1,350,000	\$ 900,000	\$ 2,250,000
Marina						
West	\$ -	\$ -	\$ -	\$ 1,260,000	\$ 840,000	\$ 2,100,000
Marshall	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
McAuliffe	\$ 2,430,000	\$ 1,620,000	\$ 4,050,000	\$ 720,000	\$ 480,000	\$ 1,200,000
McKinna	\$ -	\$ -	\$ -	\$ 1,260,000	\$ 840,000	\$ 2,100,000
Ramona	\$ -	\$ -	\$ -	\$ 2,160,000	\$ 1,440,000	\$ 3,600,000
Ritchen	\$ 2,430,000	\$ 1,620,000	\$ 4,050,000	\$ 180,000	\$ 120,000	\$ 300,000
Rose	\$ -	\$ -	\$ -	\$ 270,000	\$ 180,000	\$ 450,000
Sierra Linda	\$ -	\$ -	\$ -	\$ 1,440,000	\$ 960,000	\$ 2,400,000
Soria	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	\$15,427,440	\$10,284,960	\$25,712,400	\$14,309,802	\$ 9,539,868	\$23,849,670

* Current dollars

Estimated New Construction Eligibility – Hardship Program*

Grade Level	Est. Eligible Pupils	Est. Grant/Pupil Effective 01-12	Est. State Grant (100%)	Est. Local Match (0%)	Project Total (100%)
K-6	5,537	\$9,455	\$ 104,704,670	\$ -	\$ 104,704,670
7-8	971	\$9,999	\$ 19,418,058	\$ -	\$ 19,418,058
		Subtotal	\$ 124,122,728	\$ -	\$ 124,122,728
		Est. Site Service (15%)	\$ 18,618,409	\$ -	\$ 18,618,409
		Total	\$ 142,741,137	\$ -	\$ 142,741,137

* Current dollars

Under the Financial Hardship Program, the State would pay the District’s share of the local match above and beyond the otherwise grant level. This is true for modernization and new construction. Under the Program, however, the District must have exhausted all unencumbered capital fund balances available for modernization or new construction. In addition, any funds that become available during the time the District is in the Hardship period will reduce the amount of the State’s grant proportionally. Except for land acquisition and some site service costs, 100 percent grant funding does not typically equate to 100 percent of the total development costs associated with the design and construction of an eligible project. Often projects must be phased and alternate methods of construction (e.g. modular) must be employed to achieve the desired space requirement for housing students. Therefore, a detailed and thoughtful analysis shall be undertaken prior to proceeding with Hardship funding to meet anticipated project needs of the District. An alternate plan to accommodate Hardship funding for Phase 2 and Phase 3 projects is presented in the corollary Facilities Implementation Program documents.

4.5.4 ADDITIONAL STATE GRANT PROGRAMS UNDER REVIEW

The Overcrowding Relief Grant (ORG) Program enables districts to reduce the number of portable classrooms on overcrowded school sites and replace them with permanent classrooms. Limited funding is currently available at much lower pupil grant levels than the New Construction Program.

The Joint Use Program allows a school district to utilize funds from a joint-use partner to build a joint-use project the district would not otherwise be able to build due to lack of financial resources. No funding is currently available, but Measure “R” does permit joint use funding if additional State funding becomes available.

The Facility Hardship Program assists districts with funding when a district can demonstrate that existing facilities must be replaced or rehabilitated due to an imminent health and safety threat or that existing facilities have been lost to fire, flood, earthquake or other disaster. This program has been used in part for the funding of Drifill.

The District’s State aid consultant will provide an ongoing evaluation of these programs, once additional funding is made available for the State Facilities Program. Funding for this program is not currently available, but is projected to be available should a State School Bond be successful for the November 2014 ballot. A comprehensive strategy and recommendations will be provided to the District as to how best to proceed at that time.

4.5.5 2014 STATE FACILITIES BOND

Buoyed by voter support in November 2012 for two measures benefitting public education, legislation was introduced in December 2012 that would place a statewide school facilities bond measure on the ballot in 2014. Assembly Bill 41, introduced by Assemblywoman Joan Buchanan, would refill the state’s school construction funding pool. While Governor Brown has not taken a stance on the proposal, State Superintendent Tom Torlakson supports a 2014 bond measure.

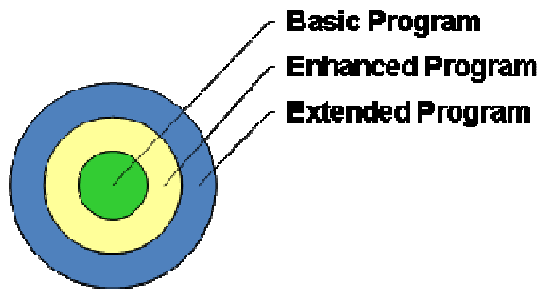
Work toward getting the bond on the ballot and campaigns for its passage are expected to begin in the coming year with an assessment of school needs throughout the State, outreach to the State’s education coalition, and voter polling to determine the potential for future support. Political challenges from competing priorities that rely on bond financing, including water and dam projects, make the passage of a new state school bond measure uncertain.

4.6 PROGRAM ALTERNATIVES

Design of the Facilities Implementation Program considered opportunities to optimize more immediate modernization needs with available local funds and maximize eligibility and eventual availability of State grants for future repayment. Proposed bond sales are scheduled to be sold in series and improvements are scheduled to be phased over time, maximizing State grants where possible. The number and size of proposed bond issuances may be adjusted based on future analysis of market conditions, assessed valuation, required funding needs, and remaining bond authorization. Additional projects may be funded in lieu of those programmed, or with the support of future State grant programs, subject to State funding being available when needed.

Based on these parameters, three alternate levels of program scope and funding may be anticipated:

- **Basic Program:** The Basic Program would rely on local funding only. These local funds include the District’s current fund balances for developer fees as well as Capital Program fund balances which include Measure “R” proceeds, and State reimbursements.
- **Enhanced Program:** The Enhanced Program would rely on the Basic Program, **plus** matching State grants for Modernization (60/40) and New Construction (50/50)
- **Extended Program:** The Extended Program would rely on the Basic Program, **plus** the Enhanced Program, **plus** State Financial Hardship Funding to provide the District’s local match share for Modernization and New Construction grants



Through a dialogue with District staff and a series of Board study and review sessions these three alternate funding levels have been analyzed to maximize the Facilities Implementation Program over time. The Basic Program would rely on local funding only, including developer fees, Measure “L” and Measure “M” funds, State bonds, Mello Roos proceeds, and State reimbursements from completed projects plus Measure “R” funds. The Basic program is estimated to total approximately \$112.1 million over the life of the program.

As State grants become available from the projected approval of a 2014 statewide bond, the District could become eligible for State matching grants for modernization and new construction on a 60-40 and 50/50 basis, respectively. The Enhanced Program provides for additional State grants, provided a local match is available. The Extended Program would rely on the strategic sequencing of projects to maximize State grants under the Financial Hardship Program, plus local funding under the Basic Program. A specific estimated amount of funds for these programs is more difficult to project at this time, although the maximum total for State matching or Hardship funding has already been provided. The ability to use these funds will be based on the passage of a future State bond, program changes by the State and local decisions or requirements to construct projects for which the District will have no opportunity to seek reimbursement or participation by the State. For example, there are an estimated \$80 million of proposed improvements in the FMP that are not individually eligible for existing State grants.

PROPOSED MASTER TIMELINE & BUDGET

Beginning in October of 2012, the Board of Education, District administrators, and consultants met regularly to develop the Facilities Implementation Program. The Program was designed to address District needs while also acknowledging the funding limitations of the District.

In total, a capital program of at least \$112 million and up to \$265 million is proposed to be implemented over time to modernize, replace and construct schools and support facilities in order to:

- Implement a grade reconfiguration for school year FY 2015 that accommodates a K-5, K-8 and 6-8 educational program
- Reduce overcrowding at elementary schools by adopting a K-5 program that replaces older schools and provides additional new schools
- Provide greater choice of elementary programs by converting “P2P” K-6 schools to K-8 facilities and significantly expand the number of K-8 options throughout the District
- Convert existing junior high facilities to a 6-8 middle school program
- Bring all facilities in substantial compliance with adopted educational specifications

5.1 MASTER TIMELINE

The FMP used a 15 to 20 year horizon to estimate the demand for school facilities based on required improvements and build out of each site, regardless of estimated costs. Alternatively, the Facilities Implementation Program has been based on projected funding only and facility priorities by the Board over the next 12 years.

Absent a proposed phasing by the FMP, a three phase program is proposed that prioritizes the grade reconfiguration, available local and State funding for modernization or construction of schools, and improved support facilities:

- Phase 1: The first phase of the implementation program begins in 2013 and extends through the fiscal year ending in 2016. Major work is focused on the implementation of the educational reconfiguration plan during this phase and includes acquisition of a new elementary school site, design and reconstruction of Harrington, Elm, and Lemonwood schools, improvement of kindergarten facilities at Ritche, Brekke, McAuliffe, Driffill, and Ramona schools, and design and construction of science labs at Chavez, Curren, Kamala, Haydock, and Fremont schools. Phase 1 also includes funding for the deployment of new

technology to improve student and teacher access to state-of-the-art learning resources, utility upgrades at Haydock and Fremont schools, and a program reserve to fulfill required, but as yet unanticipated, changes to the scope of work. This portion is highly dependent on the implementation of the Basic Program, some reimbursement funding from the State under the Enhanced Program and no Hardship funding.

- Phase 2: The second phase of the implementation program begins in 2017 and extends through the fiscal year ending in 2020. Major work during this phase includes modernization of the Fremont Middle School gym/multipurpose room and the scheduled replacement funding for new technology. A program reserve of approximately 10% has also been set aside. This portion is also highly dependent on the implementation of the Basic Program, some funding from the State under the Enhanced Program and no Hardship funding.
- Phase 3: The third and final phase of the implementation program begins in 2021 and extends through the fiscal year ending in 2025. Major work during this phase includes design and construction of multipurpose room improvements at Chavez, Curren, Kamala, Driffill, Haydock, Frank, Marina West, Rose, Sierra Linda, Brekke, McAuliffe, Ramona, and Ritche schools. This phase also includes design and improvement of kindergarten facilities at McKinna, Marina West, Rose, and Sierra Linda schools. Funds for the scheduled refresh and deployment of modern classroom technology and a Phase 3 program reserve have also been set aside.

As stated in the prior Section 4 of this document, select projects may be eligible for additional funding by State grants for new construction or modernization, as well as State hardship grants. The availability and timing of these grants do not impact the proposed work plan for Phase 1. Should State funds become available to allow for an “Enhanced” or “Extended” program, budget alternatives have been designed for Phases 2 and 3 and are presented as an alternative in the Technical Background Report of the Facilities Implementation Program.

5.2 MASTER BUDGET

A program Master Budget has been prepared based on anticipated project costs. For the most part, anticipated project costs are those derived by LPA in the design and production of the FMP. They are the foundation that has been used in LPA’s generation of allowances, estimates of quantities and unit costs for FMP. The costs associated with construction are generally identified as “Hard” costs and “Soft” costs. In combination, they comprise what is properly called the total “Project” cost. Hard costs are resultant from the construction itself (e.g. bricks and mortar). Soft costs are those costs that are an integral part of the building process and are usually preparatory to, or supportive of, the construction. These include professional fees and other related, but non-construction costs. For the purpose of designing a program master budget, all-in total project costs, inclusive of both hard and soft costs, were used.

Project costs were estimated in 2013 dollars and have been inflated to reflect anticipated cost escalation in future years. Initial estimates generated for the FMP have been reviewed. Based on the findings of this review, downward cost adjustments have been made, primarily to media centers, multipurpose rooms, food service and assumed exterior finishes. Given the demand to leverage available construction dollars, alternate methods of construction, including modular techniques have been investigated and incorporated into the project cost estimates, where applicable. Unit quantities have also been adjusted, particularly to reflect adjustments to

proposed facilities educational specifications. In certain cases, additional projects not contemplated by LPA have been estimated, especially for the implementation of the upfront costs associated with the “roll-out” of the reconfiguration plan.

The proposed Master Budget anticipates projects funded by available Capital Program and Measure “R” revenues, plus State matching grants for Modernization and New Construction. In total, the proposed master budget establishes project costs of approximately \$188.4 million. Phase 1 is expected to require \$114.9 million in funding, with approximately \$11.3 and \$62.2 million required for Phases 2 and 3, respectively. A table of estimated site improvement costs over the three phases of the implementation program is provided on the following page.

Proposed Master Budget*

School Site	Master Budget	Phase I	Phase II	Phase III
Chavez K-8	\$ 2,300,898	\$ 293,319	\$ -	\$ 2,007,579
Curren K-8	\$ 4,874,819	\$ 293,319	\$ -	\$ 4,581,500
Kamala K-8	\$ 2,902,832	\$ 818,293	\$ -	\$ 2,084,539
New Lemonwood K-8	\$ 31,402,250	\$ 31,402,250	\$ -	\$ -
Driffill K-8	\$ 2,582,769	\$ 794,671	\$ -	\$ 1,788,097
Soria K-8	\$ -	\$ -	\$ -	\$ -
Fremont MS	\$ 7,844,354	\$ 2,286,919	\$ 5,557,436	\$ -
Haydock MS	\$ 7,689,910	\$ 2,132,475	\$ -	\$ 5,557,436
Frank MS	\$ 4,750,837	\$ -	\$ -	\$ 4,750,837
New Elm ES	\$ 20,170,543	\$ 20,170,543	\$ -	\$ -
New Harrington ES	\$ 22,822,171	\$ 22,822,171	\$ -	\$ -
New McKinna ES	\$ 1,307,554	\$ -	\$ -	\$ 1,307,554
New Marina West ES	\$ 6,027,002	\$ -	\$ -	\$ 6,027,002
New Rose ES	\$ 7,992,686	\$ -	\$ -	\$ 7,992,686
New Sierra Linda ES	\$ 5,024,564	\$ -	\$ -	\$ 5,024,564
New ES	\$ 8,450,000	\$ 8,450,000	\$ -	\$ -
Brekke ES	\$ 983,557	\$ 286,000	\$ -	\$ 697,557
Marshall ES	\$ -	\$ -	\$ -	\$ -
McAuliffe ES	\$ 2,068,904	\$ 628,179	\$ -	\$ 1,440,725
Ramona ES	\$ 4,443,937	\$ 2,688,463	\$ -	\$ 1,755,474
Ritchen ES	\$ 3,535,459	\$ 265,571	\$ -	\$ 3,269,888
Technology	\$ 24,174,300	\$ 11,201,175	\$ 4,714,613	\$ 8,258,513
Subtotal	\$ 171,349,347	\$ 104,533,347	\$ 10,272,048	\$ 56,543,951
Program Reserve	\$ 17,134,935	\$ 10,453,335	\$ 1,027,205	\$ 5,654,395
Total	\$ 188,484,282	\$ 114,986,682	\$ 11,299,253	\$ 62,198,347

*Current dollars

5.2.1 MASTER BUDGET PHASE 1

The proposed Phase 1 Master Budget establishes project costs of approximately \$114.9 million. Phase 1 is expected to require \$8.4 million for the acquisition of land for a new K-5 elementary facility, and a total of \$47.6 million for the upgrading of existing schools to meet the reconfiguration needs for K-5 campuses, including rebuilt Elm and Harrington K-5 schools. Additionally, Phase 1 includes \$31.4 million for the design and reconstruction of the Lemonwood site to support an educational program serving grades K-8. Science lab and utility upgrades at five sites total \$5.8 million. Technology funding, including upgrades to core infrastructure and deployment of new student and teacher devices, totals \$11.2 million. A program reserve of \$10.4 million has also been budgeted. A table of estimated project costs during Phase 1 of the implementation program is provided on the following page.

Phase 1 (2013-2016)*

Project	Year	Budget
Acquire site New Elem. K-5	2013/16	\$8,450,000
Design & Reconstruct Harrington Elem. K-5	2013/14	\$22,822,171
Design & Reconstruct Lemonwood K-8	2014/16	\$31,402,250
Design & Reconstruct Elm Elem. K-5	2015/16	\$20,170,543
Design & Improve K-5 Kindergarten Facilities	2013-2014	
Ritchen	2013	\$265,571
Brekke	2013	\$286,000
McAuliffe	2013	\$628,179
Driffill	2014	\$794,671
Ramona	2013	<u>\$2,688,463</u>
Est. Subtotal Kindergarten Facilities		\$4,662,884
Design & Construct Science Labs		
Chavez Science Labs K-8	2013	\$293,319
Curren Science Labs K-8	2013	\$293,319
Kamala Science Labs K-8	2013	\$818,293
Haydock Science Labs 6-8 & Utility Upgrades	2014	\$2,132,475
Fremont Science Labs 6-8 & Utility Upgrades	2013	\$2,286,919
Est. Subtotal Science Labs		\$5,824,324
Technology	2013/2016	\$11,201,175
Program Reserve	2013-2016	\$10,453,335
Est. Total		\$114,986,682

*Current dollars

5.2.2 MASTER BUDGET PHASE 2

The proposed Phase 2 Master Budget establishes project costs of approximately \$11.3 million. Phase 2 is expected to require \$5.5 million for gym/multipurpose room improvements at the Fremont site to meet the reconfiguration needs of a 6-8 campus. Additionally, Phase 2 includes \$4.7 million for technology funding, allowing for a scheduled

refresh of technologies and continued upgrades to District infrastructure. A table of estimated project costs during Phase 2 of the implementation program is provided below.

Phase 2 (2017-2020)*

Project	Year	Budget
Fremont 6-8 Gym/Multipurpose Room	2019	\$5,557,436
Technology	2020	\$4,714,613
Program Reserve	2017-2020	\$1,027,205
Est. Total		\$11,299,253

*Current dollars

5.2.3 MASTER BUDGET PHASE 3

The proposed Phase 3 Master Budget establishes project costs of approximately \$62.2 million. Phase 3 is expected to require \$10.4 million for the design and construction of multipurpose room improvements at planned K-8 campuses, \$18.6 million for multipurpose room improvements at planned K-5 campuses, and \$10.3 million for gym/multipurpose room improvements at planned 6-8 campuses. Additionally, Phase 3 includes \$8.8 million for improvements to kindergarten facilities at four sites to better serve an educational program serving grades K-5. Science lab and utility upgrades at five sites total \$5.8 million. Phase 3 includes \$8.2 million for technology improvements and a program reserve of \$5.6 million. A table of estimated project costs during Phase 3 of the implementation program is provided below.

Phase 3 (2021-2025)*

Project	Year	Budget	
Design & Construct K-8 Multipurpose Room			
Chavez	2023	\$2,007,579	
Curren	2025	\$4,581,500	
Kamala	2023	\$2,084,539	
Driffill	2023	<u>\$1,788,097</u>	
Est. Subtotal K-8 Multipurpose Room			\$10,461,715
Design & Construct 6-8 Gym/Multipurpose Room			
Haydock	2021	\$5,557,436	
Frank	2021	<u>\$4,750,837</u>	
Est. Subtotal 6-8 Gym/Multipurpose Room			\$10,308,273
Design & Construct K-5 Multipurpose Room			
Marina West	2025	\$3,511,836	
Rose	2025	\$4,812,469	
Sierra Linda	2025	\$3,197,339	
Brekke	2025	\$697,557	
McAuliffe	2022	\$1,440,725	
Ramona	2022	\$1,755,474	
Ritchen	2021	<u>\$3,269,888</u>	
Est. Subtotal K-5 Multipurpose Room			\$18,685,288
Design & Improve K-5 Kindergarten Facilities			
McKinna	2022	\$1,307,554	
Marina West	2022	\$2,515,166	
Rose	2024	\$3,180,218	
Sierra Linda	2022	<u>\$1,827,226</u>	
Est. Subtotal Kindergarten Facilities			\$8,830,164
Technology	2025		\$8,258,513
Program Reserve	2017-2020		\$5,654,395
Est. Total			<u>\$62,198,347</u>

*Current dollars

5.3 ESTIMATED SOURCES OF FUNDING

There are several available sources of funds that are anticipated to meet project needs under the Basic, Enhanced, and Extended implementation programs. The Basic Program relies exclusively on local funding, including developer fees, Mello Roos funds, Capital Program balances and voter approved Measure “R” proceeds. The Enhanced Program is a combination of the Basic Program, plus matching State grants for Modernization (60-40) and New Construction (50/50). The Extended Program is a combination of the Basic Program and the Enhanced Program, plus State Financial Hardship Funding to provide the District’s local match share for Modernization and New Construction grants.

5.3.1 FUNDING SOURCES PHASE 1

In Phase 1, the Basic Program is funded by a combination of existing Capital Funds totaling an estimated \$22.1 million that includes:

- Measure L \$ 3.9 million
- Measure M \$ 1.9 million
- State Bonds \$.3 million
- Developer Fees \$ 2.8 million
- Mello Roos Proceeds \$ 8.5 million
- State Reimbursements \$ 4.7 million

Additionally, Phase 1 funding sources include proceeds from the sale of the first three series of Measure “R” bonds. These bond sales are projected to generate \$49.1 million toward District improvement projects. Over the four year planning horizon of Phase 1, the District will also continue to collect developer fees. These are projected to generate \$7.2 million. In total, an estimated \$78.4 million is projected to be available for projects funded as part of the Basic Program for Phase 1.

Funds for augmenting Phase 1 may be available pending passage of a 2014 State bond program for new construction and modernization grants equivalent to the District’s current estimated eligibility. Based on projected eligibility and the projects that may be funded, the District may be eligible for \$31.8 million under the State New Construction Program. Based on the age of school facilities, the District may also be eligible for \$1.7 million under the State Modernization Program for proposed projects. In total, \$33.5 million in State Aid reimbursements is projected to be available for the Enhanced Program during Phase 1.

The estimated grand total of these funding sources in inflated dollars for Phase 1 is projected to be approximately \$115 million, equaling the anticipated costs of Phase 1 projects and program reserve allocations.

5.3.2 FUNDING SOURCES PHASE 2

In Phase 2, the Basic Program is funded by a combination of Measure “R” proceeds from the sale of Series D bonds and Developer Fees. Bond sales are projected to generate \$11.1 million and developer fees are projected to generate \$11.4 million toward District improvement projects. In total, an estimated \$22.5 million is projected to be available for projects funded by the Basic Program.

Funds for an Enhanced Program rely on the availability Modernization grants during this period. Based on projected eligibility and the projects that may be funded, the District may be eligible for \$4.5 million. The estimated grand total of these funding sources in inflated dollars for Phase 2 is projected to be \$27.0 million.

5.3.3 FUNDING SOURCES PHASE 3

In Phase 3, the Basic program is funded up to \$45.5 million over a five year period. Bond sales are projected to generate \$27.7 million and generate \$17.8 million in developer fees toward District improvement projects. Funds

for an Enhanced Program rely on \$5.7 million in new construction grants and \$21.1 million in modernization grants to fund proposed improvements

The estimated grand total of these funding sources in inflated dollars for Phase 3 is projected to be \$72.3 million, equaling the anticipated costs of Phase 3 projects and program reserve allocations. It should be noted, however, that the type of projects that have been allocated for funding in Phase 3 are those least likely to receive substantial eligibility and amounts of State funding. Absent other funding, they will be substantially dependent on local funding.

5.4 SUMMARY OF RECOMMENDATIONS

Based on the above analysis and findings, and with consideration for dialogue between District staff and the Board of Trustees, the preceding findings and recommendations are summarized in the accompanying Facilities Implementation Program Report. Detailed timelines and budgets are also included in the accompanying Facilities Implementation Program Technical Report to guide District staff and consultants in the implementation of the Program.