

Board of Education Executive Summary

Capital Asset Management Services

Reallocation of Bond Funds

January 19, 2012



I. Overview/History:

On February 17, 2011, the Board reallocated the remaining balance of the \$225 million "Measure I" General Obligation Bond. The Board set aside \$7,900,000 for a consent decree high school program. To date the funds have not been used. Staff will ask for Board approval to reallocate remaining consent decree funds to other projects.

II. Driving Governance:

- California Government Code section 53559 states that the county director of finance will continue to administer the tax levy for debt service for the bonds
- Sacramento City Unified School District Measure I Ballot language

III. Budget:

\$7,900,000 – Consent Decree High School (Allocated by Board of Education February 17, 2011)

PROJECTS:

East Sacramento/Midtown Area High School Options, Opportunities

Summary:

Families in East Sacramento/Midtown have expressed interest in the District providing a broader range of high school options and opportunities for their neighborhoods. Currently, East Sacramento/Midtown students are in the attendance areas of CK McClatchy, Rosemont and Johnson, depending on where they live, and have the option of applying to an Open Enrollment small high school or to a criteria-based campus or program such as West Campus, John F. Kennedy's Program in America and California Explorations (PACE) and Humanities and International Studies Program (HISP) at CK McClatchy.

Recommendation:

The District recommends setting aside funds that could be used to provide new high school options and opportunities for East Sacramento/Midtown.

Funding: \$3 million

Board of Education Executive Summary

Capital Asset Management Services

Reallocation of Bond Funds

January 19, 2012

Deferred Maintenance

Summary:

The District has an urgent need to address maintenance projects that must be addressed in order to ensure the health and safety of students and staff. At this point all deferred maintenance dollars are recommended to be swept from Tier III toward eliminating the general fund deficit. During all deferred and routine maintenance the district is committed to utilizing sustainable/ green practices when applicable to the specific project.

Recommendation:

We will keep these dollars for emergency projects which may include: roofing and dry rot repair, exterior siding repairs, plumbing/fixture upgrades, exit lighting repairs, fire alarms, telephone and intercom upgrades, flooring replacement, upgrades to doors and locks, window replacements and paving repairs/overlay.

Funding: \$462,000

Technology Upgrades and Improvements

Summary:

The District is making great strides to keep up with the evolving technological demands of an education system that aims to prepare students for the 21st century workforce. This request enables the district to modernize schools and classrooms and leverage federal E-Rate funding to potentially 34 school sites.

Recommendation:

The District recommends continuing system upgrades to include communication systems, secure and stable wired and wireless infrastructure and tools.

The infrastructure technology plan, presented to the Board on November 17, 2011, will be rolled out to school sites across the district with the use of federal E-Rate funds and the FCC required matching funds contributed by the District.

The outcome of District and E-rate funded upgrade projects is the implementation of a secure and stable Cisco designed infrastructure that connects schools to centralized District technology services, delivering a 21st Century learning environment.

Board of Education Executive Summary

Capital Asset Management Services

Reallocation of Bond Funds

January 19, 2012

Upgrades include:

- Providing a secure and stable wired and wireless infrastructure
- Unifying communications systems
- Providing a common platform for voice, video and data
- Providing a video library that will enable professional development and collaboration for both teachers and students

Funding: \$1,000,000

Phoebe Hearst Elementary School

Summary:

Beginning in the 2012-13 school year, and in response to community demand, Phoebe Hearst will add kindergarten to its grade configuration. This change creates the need for four additional classrooms on the Phoebe Hearst campus: Three for kindergarten and one for first grade, as well as splitting three 640sq ft classrooms to two 960sq ft classrooms, the installation of four portable classrooms and a playground.

Recommendations:

Four Additional Classrooms

Currently, all existing classrooms at the site are used for instruction. The District therefore recommends relocating four existing modular classrooms from school sites with excess capacity. Relocating existing classrooms, as opposed to purchasing new classrooms, allows the District to participate in the School Facilities Modernization Program. While the program will not pay the relocation costs, it will provide up to 60% for “green” improvements. These renovations would create a healthier learning environment and reduce energy and resource consumption. The renovations include installation of solar tubes and additional windows, improved insulation, upgraded HVAC equipment, improved interior acoustics, and the installation of low VOC materials and lighting controls.

Funding: \$1,088,000

Conversion of Primary Classrooms

Currently, Phoebe Hearst’s three first-grade classrooms are designed for a 20-to-one student-to-teacher ratio. To increase the number of students per class and comply with occupant regulations, the District recommends converting these three 640-square-foot classrooms to two 960-square foot classrooms.

Funding: \$63,000

Board of Education Executive Summary

Capital Asset Management Services

Reallocation of Bond Funds

January 19, 2012

New Kindergarten Playground

The District recommends installing an age-appropriate play structure near new kindergarten classrooms.

Funding: \$40,000

Kindergarten Restroom Upgrades

The District recommends renovating in-room restrooms in the new kindergarten classrooms.

Funding: \$50,000

Alice Birney Waldorf-Inspired K-8 School

Summary:

Utilizing a Waldorf-inspired model, the school has an extensive waiting list and enrollment is projected to grow from 480 students to 530 students next year. Alice Birney expanded to two classes of first graders five years ago. Within the Waldorf-inspired methodology, teachers “loop”, or stay with their students as they move from first through eighth grades. After eighth-grade promotion, the cycle begins again as the teachers receive new first grade classes. There are currently double classes at Alice Birney in first through fifth grade. As these classes advance through the middle school years, they will be replacing current singleton classes of sixth, seventh and eighth grades, creating the need for one additional classroom for the 2012-13 school year.

Recommendations:

One Additional Classroom

Currently, all existing classrooms are used for instructional programs, including the stage, library and front office. One additional classroom will be needed for the 2012-13 school year. The District therefore recommends relocating one existing modular classroom from a school site with excess capacity. Relocating an existing classroom, as opposed to purchasing new, allows the District to participate in the School Facilities Modernization Program. While the program will not pay the relocating costs it will provide up to 60% for “green” improvements. These renovations would create a healthier learning environment and to reduce energy and resource consumption. The proposed renovations include installation of solar tubes and additional windows, improve insulation, upgrade HVAC equipment, improve interior acoustics, and install low VOC materials and lighting controls.

Funding: \$272,000

Board of Education Executive Summary

Capital Asset Management Services

Reallocation of Bond Funds

January 19, 2012

Additional Fire Hydrant

The installation of additional classrooms would exceed the capacity of the current fire hydrant system. An additional fire hydrant was added last year when we installed one additional classroom. With the addition of three more classrooms we will need to add another fire hydrant to meet local Fire Marshall requirements.

Funding: \$91,000

Hubert H. Bancroft Elementary School

Summary:

With the closure of Thomas Jefferson Elementary School in 2009, the Bancroft boundary was expanded and its student enrollment increased. This growth continues and the number of students next year is projected to increase from 530 to 570. Exceptionally large first-, third- and fifth-grade classes will need additional space. The blending of two schools, the growth in enrollment, and the need to better utilize the library, create the need for one additional classroom at Hubert Bancroft. This will address projected future growth needs.

Recommendation:

One Additional Classroom

Currently, all existing classrooms are used for instructional programs, including the library. There is a need for one additional classroom. The District therefore recommends relocating one existing modular classroom from a school site with excess capacity. Relocating an existing classroom, as opposed to purchasing new, allows the District to participate in the School Facilities Modernization Program. While the program will not pay the relocating costs it will provide up to 60% for "green" improvements. These renovations would create a healthier learning environment and to reduce energy and resource consumption. The proposed renovations include installation of solar tubes and additional windows, improve insulation, upgrade HVAC equipment, improve interior acoustics, and install low VOC materials and lighting controls.

Funding: \$272,000

Leonardo da Vinci K-8 School

Summary:

With its innovative Integrated Thematic Instruction model, Leonardo da Vinci has a long waiting list of students seeking enrollment and is continually growing as a popular option for parents.

Board of Education Executive Summary

Capital Asset Management Services

Reallocation of Bond Funds

January 19, 2012

Leonardo da Vinci was originally built as a middle school, Joaquin Miller, with classrooms, a gymnasium, stage and multiple large activity spaces/buildings, including a large activity room that was used as the Indian Education Program library for several years. To accommodate growth, that library was moved to Caroline Wenzel in the Summer of 2011. This space is now needed to accommodate growth and create an additional classroom.

Recommendation:

Room split

The District recommends renovating the former Indian Education Program library into two regular-sized kindergarten classrooms. These classrooms would not include in-class restrooms, which will require male students to use the restroom at the end of the wing and female students to use the restroom at the end of the next wing.

Funding: \$77,000

Sustainable Facilities Master Plan Update

Summary:

The Sustainable Facilities Master Plan (SFMP) is a compilation of information, policies and statistical data about the District. The SFMP is organized to provide a continuous basis for planning educational facilities that will meet the changing needs of a community and alternatives in allocating facility resources to achieve the District's goals and objectives. It is used for planning facilities needs for either pupil enrollment growth or decline and is critical in assessing and planning facility needs related to future and pending local and state construction bonds.

Recommendation:

The current District Facilities Master Plan (FMP) reflects "School Data and Summary" of existing facilities and facts for a 2006-2015 timeline. During the period of time when this master plan was generated, the market was robust and in continued growth. While the master plan identified these projected trends, it did not forecast the ultimate decline in growth and its potential impact on facilities, operations and expenses. The 2006 FMP provided a scoring system that reviewed three areas (The Site, Physical Plant Assessment and Adequacy & Environment for Education) at each of our schools. According to these findings, the average District school ranked "satisfactory." One glaring omission in the current FMP is the lack of unique educational program needs identified and incorporated into the plan. The plan was built

Board of Education Executive Summary

Capital Asset Management Services

Reallocation of Bond Funds

January 19, 2012

on national, not District-specific, standards and needs. In fact, many District schools and facilities are not satisfactory and are in need of improvements.

Furthermore, the construction and modernization of school facilities has undergone significant changes in the ensuing years since the original FMP was developed. Newer methods of collaborative and flexible learning require changes to our facilities not previously envisioned. The MET is an example. Whereas the former schools of thought in designing school facilities were strictly based upon the perspective of a teacher lecturing to a class of students in desks, today's newer design allows us to meet the needs of different kinds of learners and teachers in user-driven flexible spaces. It allows for a truly collaborative learning process.

Additionally, technological advances and the use of technology in the classroom continue to grow from a learning and operations perspective. The FMP did not adequately address this technology or opportunities to make our facilities more sustainable and energy efficient. The original FMP could not have envisioned the prevalent laptop driven classrooms or iPad technologies.

The District recommends updating the current Facilities Master Plan to create a Sustainable Facilities Master Plan (SFMP) that looks at our facilities as a strategic tool for alignment with the District's Strategic Plan while creating a roadmap for successful 21st century learning environments for our students. The SFMP is an essential tool that will allow us to define the District's needs as we turn aging facilities into High Performing Facilities for our students and community. It will also allow us to strategically align the District to take full advantage of potential incentives and grants, state and local bonds and alternative funding mechanisms.

The Sustainable Facilities Master Plan (SFMP) envisions the following outcomes:

- Integrated educational, architectural and capital program management strategies. Our facilities are our best capital asset and provide a significant impact on the learning environment of our students. We have traditionally viewed facilities as what's required to meet basic safety, educational and operational requirements. More recent studies have shown that well-planned facilities are an essential component to transforming teaching and learning. We need to optimize our facilities to meet 21st century educational requirements for our students, to maximize their utilization based upon the school site capacity and student enrollments and control the financial, operational and maintenance requirements.
- Community transparency and collaboration in decision making. The SFMP will be conducted through student, staff, administrator, parent and community engagement, feedback, participation and outreach. The educational outreach will be performed through representative

Board of Education Executive Summary

Capital Asset Management Services

Reallocation of Bond Funds

January 19, 2012

grade level configurations with several opportunities to share, discuss and seek feedback from District, community and stakeholders. This transparent process is necessary to allow the community and stakeholders the opportunity to understand District needs and support the program prioritization in pursuit of funding, particularly a local bond.

- Enhanced student achievement opportunities. The SFMP will capture and utilize the educational goals to determine the facility requirements necessary for supporting teaching and learning. Improvements will be defined to meet and optimize the learning environments while providing flexibility and adaptability to support changing program and enrollment needs, as was done with The MET modernization.
- High Performance Facility Assessment for every school site. A high performance facility assessment is a detailed analysis of an individual campus site and building conditions that utilizes, as its basis, multiple areas of sustainable design criteria. This provides a system in which to provide guidance for all future campus-related facility projects. The intent is to relate energy and water efficiency, green building materials and practices, indoor environmental quality, etc. to all aspects of current and future educational and construction needs and opportunities at a specific school site.
- Reduced operational and general fund expenditures. The SFMP will be focused on the District Board Policy 3511 Green and Grid Neutral Model Schools Initiative and the ability to assess and propose facility improvements that will reduce money and resource expenditures to allow a greater amount of funds to remain in the classroom for the staff and students. Unlike the existing FMP, the SFMP will enable the district to utilize today's sustainable and energy efficient technology, reducing the District's carbon footprint while potentially saving millions of dollars per year in General Fund expenditures. We want all of our facilities to be both CHPS and LEED certified (e.g. The MET).
- Sustainable resource management outcomes. The SFMP will become the single District document that aligns our social, environmental and economic goals for linking education and facilities as a sustainable initiative.

Our time is now to utilize the Sustainable Facilities Master Plan as a means to define our facility assets and the requirements necessary for maximizing their return on investment while creating the learning environments that our students and community deserve.

Board of Education Executive Summary

Capital Asset Management Services

Reallocation of Bond Funds

January 19, 2012

This approach focuses on transforming education and facilities that will yield benefits for years to come.

- Step I: Vision -- Establish Educational Program & Goals
 - Build consensus with all stakeholders (faculty, staff, students, parents and the community) of shared vision through Community/District visioning process, District facility standards, facility analysis and research.
- Step II: Evaluate -- Audit Prior Planning & Existing Conditions
 - Build consensus of shared vision through District facility standards, facility analysis and research.
- Step III: Identify -- Program Initiatives
 - Determine educational needs through investigations Community/District trends, clarification of Community/District Educational vision and presentation of facility/program opportunities.
- Step IV: Optimize -- Explore Alternate Solutions and Prioritization
 - Develop facilities recommendations that prioritize needs and take into account funding and other limitations.
- Step V: Create -- Develop Sustainable Master Plan
 - Finalize the Sustainable Facilities Master Plan and obtain approval.

Funding: \$1,485,000 (The cost of the SFMP has decreased by \$418,000 since the original staff report before the Board of Education. Upon the direction of the Board, staff met with the District's facilities partners and identified areas in the original proposal that were not absolutely essential to development of the SFMP and scaled down the plan accordingly.

TOTAL: 7.9 million

IV. Goals, Objectives and Measures:

Measure I established certain "Accountability Requirements." Among them are the evaluation of needs, an independent Citizen's Oversight Committee and financial and performance audits. An independent Citizen's Oversight Committee (COC) has been functioning since the passage of Measure I. COC's last meeting was held on November 29, 2011. Annual financial and performance audits have been conducted and reviewed by COC for fiscal years 2003 – 2010.

V. Major Initiatives:

Staff is recommending Board approval on the reallocation of remaining bond funds to the above listed projects.

Board of Education Executive Summary

Capital Asset Management Services

Reallocation of Bond Funds

January 19, 2012

VI. Results:

The reallocation of the remaining Consent Decree bond funds allows the district the opportunity to provide additional teaching space, and reduce vehicle operating and maintenance costs and align our facilities with district strategic initiatives.

VII. Lessons Learned/Next Steps:

- Contract for architectural design services
- Prepare bid packages, where appropriate
- Inform stakeholders of project scopes and timelines