

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT

BOARD OF EDUCATION

CSBA Professional Governance Standards

Adopted by the Santa Maria Joint Union High School District April 11, 2001

THE BOARD

School districts and county offices of education are governed by boards, not by individual trustees. While understanding their separate roles, the board and superintendent work together as a “governance team.” This team assumes collective responsibility for building unity and creating a positive organizational culture in order to govern effectively.

To operate effectively, the board must have a unity of purpose and:

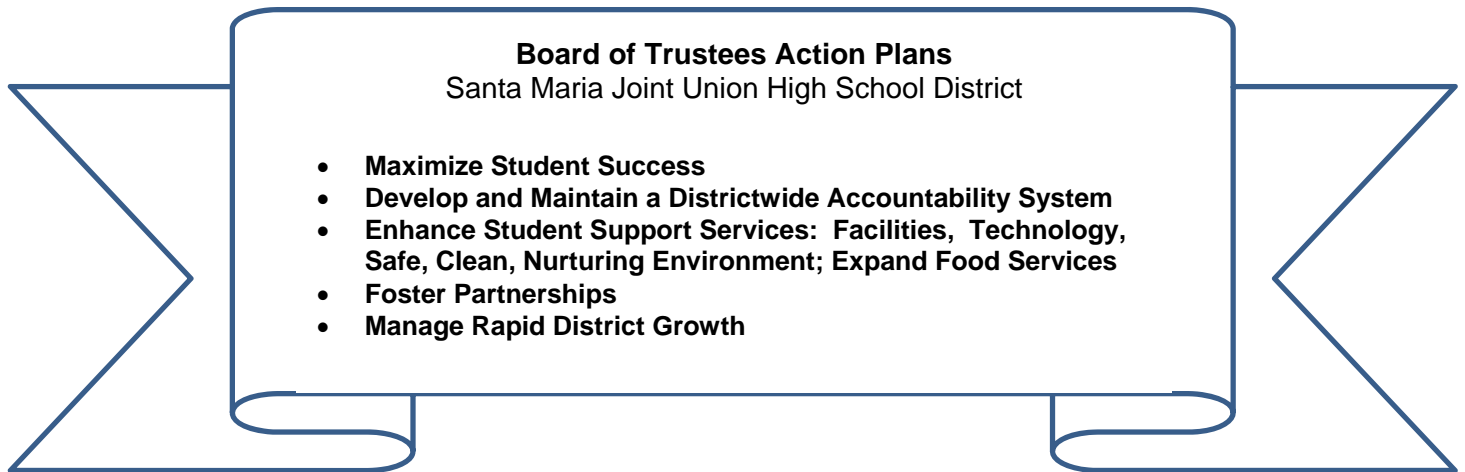
- Keep the district focused on learning and achievement for all students.
- Communicate a common vision.
- Operate openly, with trust and integrity.
- Govern in a dignified and professional manner, treating everyone with civility and respect.
- Govern within board-adopted policies and procedures.
- Take collective responsibility for the board’s performance.
- Periodically evaluate its own effectiveness.
- Ensure opportunities for the diverse range of views in the community to inform board deliberations.

THE INDIVIDUAL TRUSTEE

In California’s public education system, a trustee is a person elected or appointed to serve on a school district or county board of education. Individual trustees bring unique skills, values and beliefs to their board. In order to govern effectively, individual trustees must work with each other and the superintendent to ensure that a high quality education is provided to each student.

To be effective, an individual trustee:

- Keeps learning and achievement for *all* students as the primary focus.
- Values, supports and advocates for public education.
- Recognizes and respects differences of perspective and style on the board and among staff, students, parents and the community.
- Acts with dignity, and understands the implications of demeanor and behavior.
- Keeps confidential matters confidential.
- Participates in professional development and commits the time and energy necessary to be an informed and effective leader.
- Understands the distinctions between board and staff roles, and refrains from performing management functions that are the responsibility of the superintendent and staff.
- Understands that authority rests with the board as a whole and not with individuals.



RESPONSIBILITIES OF THE BOARD

The primary responsibilities of the board are to set a direction for the district, provide a structure by establishing policies, ensure accountability and provide community leadership on behalf of the district and public education. To fulfill these responsibilities, there are a number of specific jobs that effective boards must carry out.

Effective boards:

- Involve the community, parents, students and staff in developing a common vision for the district focused on learning and achievement and responsive to the needs of all students.
- Adopt, evaluate and update policies consistent with the law and the district's vision and goals.
- Maintain accountability for student learning by adopting the district curriculum and monitoring student progress.
- Hire and support the superintendent so that the vision, goals and policies of the district can be implemented.
- Conduct regular and timely evaluations of the superintendent based on the vision, goals and performance of the district, and ensure that the superintendent holds district personnel accountable.
- Adopt a fiscally responsible budget based on the district's vision and goals, and regularly monitor the fiscal health of the district.
- Ensure that a safe and appropriate educational environment is provided to all students.
- Establish a framework for the district's collective bargaining process and adopt responsible agreements.
- Provide community leadership on educational issues and advocate on behalf of students and public education at the local, state and federal levels.

**SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT
BOARD OF EDUCATION**

Regular Meeting

June 14, 2016

**Santa Maria Joint Union High School District
2560 Skyway Drive, Santa Maria, California 93455**

5:30 p.m. Closed Session/6:30 p.m. General Session

*The Santa Maria Joint Union High School District mission is,
"We prepare all learners to become productive citizens and college/career ready by providing chal-
lenging learning experiences and establishing high expectations for achievement."*

Any materials required by law to be made available to the public prior to a meeting of the Board of Education of the District can be inspected at the above address during normal business hours.

Individuals who require special accommodation including, but not limited to, American Sign Language Interpreter, accessible seating or documentation in accessible formats should contact the superintendent or designee within a reasonable amount of time before the meeting date.

I. OPEN SESSION

A. Call to Order

II. ADJOURN TO CLOSED SESSION

Note: The Board will consider and may act upon any of the following items in closed session. They will report any action taken publicly at the end of the closed session as required by law.

- A. Certificated and Classified Personnel Actions** – Government Code Section 54957. The Board will be asked to review and approve hiring, transfers, promotions, evaluations, terminations, and resignations as reported by the Assistant Superintendent, Human Resources. **Appendix A**
- B. Conference with Labor Negotiators** - The Board will be provided a review of negotiations with the Faculty Association (California Teachers Association) and the California School Employees Association (CSEA).
- C. Student Matters** – Education Code Sections 35146 & 48918. The Board will review proposed expulsions/suspended expulsion(s) and/or requests for re-admission. *NOTE: The education code requires closed sessions in these cases to prevent disclosure of confidential student record information.*

III. RECONVENE IN OPEN SESSION

Call to Order/Flag Salute

IV. ANNOUNCE CLOSED SESSION ACTIONS – Dr. Richardson

V. REPORTS

A. Superintendent's Report

B. Board Member Reports

VI. PRESENTATION

A. Athletic Director Presentation

VII. Items Scheduled for Action

A. General

1. Declaration of Need for Fully Qualified Educators

The California Commission on Teacher Credentialing requires the Governing Board to adopt a "Declaration of Need for Fully Qualified Educators" certifying there is an insufficient number of certificated persons who meet the District's specified employment criteria. The Declaration, printed on the following pages, shall remain in force for the 2016/17 school year.

Resource Person: Tracy Marsh, Asst. Superintendent of Human Resources

***** IT IS RECOMMENDED THAT** the Board of Education approve Resolution Number 22-2015-2016 to certify the Declaration of Need for Fully Qualified Educators for the 2016/17 school year.

Moved _____

Second _____

A Roll Call Vote is Required:

Dr. Garvin	_____
Dr. Karamitsos	_____
Ms. Perez	_____
Mr. Palera	_____
Ms. Lopez	_____

**SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT
RESOLUTION NUMBER 22-2015-2016**

**DECLARATION OF NEED FOR FULLY QUALIFIED EDUCATORS
FOR 2016/2017**

WHEREAS, The California Commission on Teacher Credentialing requires the Governing Board to adopt a "Declaration of Need for Fully Qualified Educators" certifying there is an insufficient number of certificated persons who meet the District's specified employment criteria. The Declaration, printed on the following pages, shall remain in force for the 2016/17 school year.

WHEREAS, The District will continue to make all possible efforts to recruit and hire fully qualified applicants.

NOW, THEREFORE BE IT RESOLVED that the Governing Board of the Santa Maria Joint Union High School District does hereby adopt the attached "Declaration of Need for Fully Qualified Educators" for the 2016/17 school year.

This resolution was passed and adopted at a regular meeting of the Board of Education of the Santa Maria Joint Union High School District of Santa Barbara County, California, on June 14, 2016, by the following vote:

ROLL CALL VOTE

AYES:
NOES:
ABSENT:
ABSTAIN:

President/Clerk/Secretary of the Board of Education
Santa Maria Joint Union High School District

B. INSTRUCTION

1. Textbook Review

The following textbook is presented to the Board of Education for preview. This textbook is aligned with the common core.

PVHS Agriculture Department / Christine Linne

Title: Modern Livestock & Poultry Production
Author: Frank B. Flanders
Publisher: Delmar
Copyright: 2012

Resource Person: John Davis, Asst. Supt. of Curriculum

***** IT IS RECOMMENDED THAT the Board of Education preview the presented textbook and approve it upon the second reading at the next board meeting.**

Moved _____ Second _____ Vote _____

2. LCAP Public Hearing

The Board is asked to hold a Public Hearing and receive comments on the district LCAP. The district began the LCAP process with a 46 member committee. The draft information was then distributed via “blog” for comment from committee members. The draft plan was shared with the following groups for input: Site Associated Student Body Officers, District Migrant Parent Advisory Committee, Site English Learner Advisory Committees, Site Parent Advisory Committees, Districtwide Staff Blog, Faculty Association, and CSEA. We ask that the board now hold a public hearing for any additional comments on the district’s LCAP.

A PUBLIC HEARING IS REQUIRED.

- 1. Open Public Hearing
- 2. Take Public Comments
- 3. Close Public Hearing

Resource Person: John Davis, Asst. Supt. of Curriculum

C. BUSINESS

1. Award of Bid for Portable Re-roofs– RMS. 613-618 – PROJECT #16-212

The administration opened bids on May 27, 2016 for the Portable Re-Roofs - Rms. 613-618 project at Pioneer Valley High School. The bid recap and administrative recommendation follows:

BIDDER	BASE BID	PLYWOOD DECK REPLACEMENT (per sq.ft.)
Falcon Roofing Co.	\$102,886.00	\$3.50/per sq.ft.
Channel Islands Roofing	\$103,146.00	\$3.60/per sq.ft.
Pueblo Construction	\$117,897.00	\$5.00/per sq.ft.

After review of the three bids received by administration, Falcon Roofing Co. was determined to be the initial apparent low bidder; however an irregularity was identified in their bid package, specifically, they were missing the required Sub List and Bidder’s Reference forms. The second lowest bidder, was Channel Islands Roofing who provided a complete bid package as specified.

Resource Person: Yolanda Ortiz, Asst. Superintendent of Business Services

*** **IT IS RECOMMENDED THAT** the Board of Education find Falcon Roofing Co. bid non-responsive due to their failure to provide the Sub List and the Bidder’s Reference forms in their bid per the specified requirements, and award the bid for the PORTABLE RE-ROOFS – RMS. 613-618 AT PIONEER VALLEY HIGH SCHOOL – PROJECT #16-212 to Channel Islands Roofing for the base bid amount of \$103,146.00 and \$3.60/per sq. ft. for Plywood Deck Replacement, to be paid from the Deferred Maintenance Fund.

Moved _____ **Second** _____ **Vote** _____

2. Award of Bid for Santa Maria High School – Paving Areas E, F, R, U & G - PROJECT #16-211

The administration opened bids on June 3, 2016 for the SANTA MARIA HIGH SCHOOL – PAVING AREAS E, F, R, U & G - PROJECT #16-211. The bid recap and administrative recommendation follows:

BIDDER	BASE BID
Potter Enterprises	\$105,050.00
Vernon Edwards Constructors	\$209,998.00

After review of the two bids received by administration, Potter Enterprises was determined to be the apparent low bidder.

Resource Person: Yolanda Ortiz, Asst. Superintendent of Business Services

*** **IT IS RECOMMENDED THAT** the Board of Education award the bid for the SANTA MARIA HIGH SCHOOL – PAVING AREAS E, F, R, U & G - PROJECT #16-211 to the lowest bidder Potter Enterprises, for the bid amount of \$105,050.00, to be paid from the Deferred Maintenance Fund.

Moved _____ **Second** _____ **Vote** _____

3. Adoption of School Facilities Needs Analysis – Level II Fees – Appendix C

Pursuant to Government Code Sections 66995.5 et. seq., the District is required to adopt a School Facilities Analysis in order to levy the alternative school facility fees provided under Senate Bill 50. The School Facilities Needs Analysis, prepared by School Works, Inc. and shown as Appendix C of this agenda, demonstrates that the District may continue to impose a maximum of \$2.23 per square foot in Level II Fees on new residential construction. Prior to adopting the School Facilities Needs Analysis, the Board must conduct a public hearing and respond to any comments it receives.

Current Fee	Level II	Proposed Fee	Level II
Through June 14, 2016	\$2.03	Effective June 15, 2016	\$2.23

Resolution Number 23 authorizes the District to adjust the Level II fees for new residential construction pursuant to Government Code Section 65995. The District’s School Facilities Needs Analysis was available for public review at least 30 days prior to the public meeting, as required by law.

A PUBLIC HEARING IS REQUIRED.

1. Open Public Hearing
2. Take Public Comments
3. Close Public Hearing

Resource Person: Yolanda Ortiz, Asst. Superintendent of Business Services

*** **IT IS RECOMMENDED THAT** the Board of Education review, consider, and adopt the findings contained in the School Facilities Needs Analysis and adopt the Level II Fees identified in Resolution 23, presented as Appendix C.

Moved _____ **Second** _____

A Roll Call Vote is Required:

Dr. Garvin _____
Dr. Karamitsos _____
Ms. Perez _____
Mr. Palera _____
Ms. Lopez _____

4. Budget Hearing for Fiscal Year 2016/17 – Appendix D

Education Code Section 42127 requires that on or before July 1 of each year the Governing Board of the school district shall hold a public hearing on the budget to be adopted for the subsequent year. Pursuant to Education Code Section 33127, the proposed adopted budget complies with the standards and criteria as established by the State Board of Education.

Assembly Bill 97 as signed by the Governor on July 1, 2013, created the Local Control Funding Formula (“LCFF”) and made numerous revisions and additions to California’s Education Code. The District’s Governing Board is now required to conduct a public hearing to review its Local Control and Accountability Plan (“LCAP”) at the same meeting as the hearing for the District’s budget.

The Governor in his May Budget - the “May Revise” – continued his support of full implementation of the LCFF as well as keeping the ongoing expenses of the State within its means and not deficit spending. For the first time in several years, the estimate of total state revenues as of the May Revise, is less than amounts contained in the Governor’s January proposal. The calculations for COLA are complete, and it’s 0.00% for the coming fiscal year. In contrast with previous years, the growth in education has slowed markedly because payments for Prop 98 restoration are nearly

gone, and the gap closure for LCFF funding will reach 95.7% implementation with the 2016/17 budget. Once LCFF is fully implemented, the only funding educational agencies will receive will be based on COLA adjustments and with a slowing economy, many fiscal watchdogs are saying now is the time to start preparing for slower revenue growth.

Several items of concern which have been discussed in previous budget versions remain unaddressed in the May Revise. The first is the “hard cap” on district reserves, as required by Prop 2 passed in November 2014. The specified conditions to trigger the cap have not been met in 2015/16 nor are they expected to be met in 2016/17. Due to the conditions which must be met in order to trigger the cap, and having not been met in 2016/17, it will be three years before the cap could be triggered. In the meantime, efforts continue to repeal the legislation.

The second issue is the increasing share of costs borne by school districts for funding of retirement systems in California, and no recognition by, or funding stream from, the State budget outside of LCAP requirements, to support those increased costs. Given these increased costs, at full implementation the LCFF model does not meet the commitment to restore purchasing power to districts equal to their 2007/08 levels. The employer share of payments to CalPERS and STRS is estimated to consume 25% of all new dollars, and state-wide it is estimated that by the end of full implementation of LCFF, \$4.5 ***billion*** will have been shifted from salaries and wages to retirement costs.

Thirdly, a state facilities bond has been qualified for the November ballot. If passed, flexibility which now exists for the amount of General Fund dollars that must be committed to Routine Restricted Maintenance will be eliminated. All districts will then be required to contribute a minimum of 3% of their total General Fund expenditures towards Routine Restricted Maintenance.

Finally, enough signatures have been gathered on an initiative to place a measure on the November ballot to extend that portion of the Prop 30 “temporary taxes” applicable to high income taxpayers. It is estimated that this tax generates about \$6 to \$8 billion annually for the State budget. Absent this measure, the tax is set to expire at the end of 2018. There is no equivalent measure to extend the other part of the temporary tax, which is sales tax; therefore this item, estimated to contribute about \$1.5 billion annually to the State budget, will expire at the end of the 2016 year. If Prop 30 is not extended and a recession occurs, state revenues could drop below prior-year levels and we could be facing cuts to education.

The District’s LCAP plan contains many goals and initiatives to provide increased services to its target population of foster youth, low income and

English learners. The plan was developed after many hours of meetings and consultations with stakeholders. These meetings were used to evaluate the progress towards the goals that were contained in the prior year's plan, and to make revisions for the District's 2016/17 LCAP plan. The District's budget that is being proposed for adoption for the 2016/17 year reflects the goals and expenditures contained in its LCAP plan.

Based on guidance from the Santa Barbara County Education Office, which has oversight authority for approval of the District's Adopted Budget, this budget for the District utilizes the LCFF simulator tool as provided by the Fiscal Crisis and Management Assistance Team ("FCMAT") to compute the District's expected revenue from LCFF sources.

A summary of the proposed budget for 2016/17 is presented as Appendix D for consideration by the Board of Education. Due to the new requirements with LCFF and LCAP, adoption will occur at subsequent meeting.

A PUBLIC HEARING IS REQUIRED AT THIS TIME.

1. Open Public Hearing
2. Take Public Comments
3. Close Public Hearing

Resource Person: Yolanda Ortiz, Asst. Superintendent of Business Services

5. Consider accepting and adopting the Master Schools Improvement Program – Appendix E

In August 2014, the Board adopted a Reconfiguration and Facilities Program to serve as a blueprint for future improvements and aid in the implementation of 21st century learning environments and innovative academic initiatives for all students served by the District and its four high schools.

To complete the next phase of planned improvements to the Reconfiguration and Facilities Program, a Master Schools Improvement Program ("MSIP"), presented as Appendix E, is proposed. The MSIP builds upon the first phase of improvements of the Reconfiguration and Facilities Program and integrates proposed modifications to the educational and facilities program into the next phase of proposed improvements to maintain an equitable educational program offering at all of the District's high schools.

Pursuant to its work plan, CFW has authored an MSIP report for Board consideration, and is pleased to present the report to the Board of Education at this time. The MSIP report has been supplied to allow the Board

and District administrators to evaluate program design, inform the community of proposed elements and stages of the implementation process, and summarize as well as organize estimated costs, schedules and funding required for consideration in the proposed adoption of a new general obligation bond to implement the Master Schools Improvement Program, including a Master Budget and Master Schedule.

Resource Person: Yolanda Ortiz, Asst. Superintendent of Business Services

*** **IT IS RECOMMENDED THAT** the Board of Education accept and adopt the Master Schools Improvement Program (MSIP) as presented, and take all actions to implement the proposed program.

Moved _____ **Second** _____ **Vote** _____

VIII. CONSENT ITEMS

*** **IT IS RECOMMENDED THAT** the Board of Education approve the following consent items as presented.

All items listed are considered to be routine and may be enacted by approval of a single roll call vote. There will be no separate discussion of these items; however, any item may be removed from the consent agenda upon request of any member of the board and acted upon separately.

Moved _____ **Second** _____

A Roll Call Vote is Required:

Dr. Garvin	_____
Dr. Karamitsos	_____
Ms. Perez	_____
Mr. Palera	_____
Ms. Lopez	_____

A. Approval of Minutes

Regular Board Meeting – May 10, 2016

B. Approval of Warrants for the Month of May 2016

Payroll	\$6,391,075.69
Warrants	<u>3,249,084.65</u>
Total	\$9,640,160.34

C. Attendance Report

Mrs. Yolanda Ortiz, Assistant Superintendent of Business Services, will be available to answer questions regarding the 2015-2016 ninth monthly attendance report presented on the last page of this agenda.

D. Facility Report – **Appendix B**

E. Educator Effectiveness Grant Proposal

The grant was previewed at the May 10, 2016 board meeting. It is recommended that the Board of Education approve the Educator Effectiveness Grant Proposal.

F. Athletic Code Approval – **Appendix F**

The revised Athletic Code is presented for board approval.

G. Cal-SAFE Program

Agreement with Cal-SAFE Program through the Santa Barbara County Office of Education to support up to eight (8) children of teen parents referred by the district who will benefit from the Cal-SAFE school setting. The term of the agreement is from August 1, 2016 to June 30, 2017.

H. Student Teacher Agreements for 2016/17 School Year

California Polytechnic University/San Luis Obispo, Brandman University, National University, University of Phoenix, Western Governors University, University of LaVerne, and University of Southern California Rossier have requested the District's participation in their teacher training programs for the 2016/17 school year, whereby the District would provide teaching experience through practice teaching to their students. The District's participation in these programs benefit both the new teachers that are training for the teacher credentialing program and also allows the District first-hand experience with prospective teaching candidates for future teaching vacancies.

I. Pupil Matters - Education Code Sections 35146 & 48918

Administrative Recommendation for student re-admission from expulsion/suspended order and/or expulsion: Student #'s 340213, 340866, 342895

Expelled student(s) who did not meet the terms of their expulsion/suspended order and/ or expulsion agreement: Student #'s 344629

J. Purchase Orders

PO #	Vendor	Amount	Description/Funding
PO17-00001	SchoolCity, Inc.	\$60,310.50	Software License – Student Assessments/LCAP
PO17-00004	Dell	\$1,147,728.35	Tablets/LCAP

K. Out of State Field Trips

School/Group Funding	Place	Dates
PVHS Center Stage ASB Center Stage	New York City	4/17/2017 to 4/21/2017

L. Notice of Completion – SMHS Admin Roof Repairs

The following project has been substantially completed and in order to file the necessary Notice of Completion forms with the County of Santa Barbara, the Acceptance of Substantial Completion needs to be formally accepted by the Board of Education.

- 1) Santa Maria High School – Admin Roof Repairs - Project #15-190; Channel Islands Roofing - General Contractor

M. Authorization to Piggyback on Palo Verde Unified School District for Flooring Materials and Installation District-Wide for the Length of the Contract through April 18, 2017

Section 20118 of the Public Contract Code provides an alternative for obtaining supplies, furniture, and equipment, commonly referred to as “piggybacking”, where notwithstanding Section 20111 and 20112 of the Public Contract Code, the governing Board of any school district without advertising for bids and if the Board of Education has determined it to be in the best interest of the district may authorize the purchase of such supplies, furniture and equipment.

Palo Verde Unified School District has awarded their flooring materials and installation bid to Tandus Centiva Inc. (Unit Bid Contract #B-111202) which expires April 18, 2017, and with Board approval the district may “piggyback” on their bid.

- N. Authorization to Piggyback on Santa Monica Malibu Unified School District for Flooring Materials and Installation District-Wide for the Length of the Contract through July 1, 2017

Section 20118 of the Public Contract Code provides an alternative for obtaining supplies, furniture, and equipment, commonly referred to as “piggybacking”, where notwithstanding Section 20111 and 20112 of the Public Contract Code, the governing Board of any school district without advertising for bids and if the Board of Education has determined it to be in the best interest of the district may authorize the purchase of such supplies, furniture and equipment.

Santa Monica Malibu Unified School District has awarded their flooring materials and installation bid to KYA Services LLC. (Piggyback Bid #16.01, year two of a five-year contract) which expires June 30, 2017, and with Board approval the district may “piggyback” on their bid.

- O. Claim Denial – Aubrey Dillon/Aleigha Zarate

The District is in receipt of an Application for Permission to Present Late Claim and a Claim for Damages from Hoyt E. Hart, Attorney-at-Law, on behalf of Aubrey Dillon, parent and GAL for Aleigha Zarate, Righetti High School Student, with regards to alleged personal injury that occurred on August 1, 2015.

- P. Acceptance of Gifts

Pioneer Valley High School		
<u>Donor</u>	<u>Recipient</u>	<u>Amount</u>
PVHS Boosters	Various Clubs	\$1,970.00
Dohi Farms, Inc.	Center Stage	\$500.00
San Simeon Restaurant	El Club Cultural	\$350.00
Total Pioneer Valley High School		<u>\$2,820.00</u>
Righetti High School		
<u>Donor</u>	<u>Recipient</u>	<u>Amount</u>
Target	School	\$300.00
Adept Events LLC	Film Festival	<u>\$435.00</u>
Total Righetti High School		<u>\$735.00</u>
Santa Maria High School		
<u>Donor</u>	<u>Recipient</u>	<u>Amount</u>
Target	School	\$100.00
ARP Automotive Racing Products	Auto Club	\$787.00
Save Mart Supermarkets	ASB	\$12.75
Sonya Garcia Morries	FFA Swine	\$800.00
Douglas & Patricia Bradley	Auto Club	\$300.00
Total Santa Maria High School		<u>\$1999.75</u>

<u>Donor</u>	Delta High School	<u>Recipient</u>	<u>Amount</u>
Target		School	\$32.59
John Davis		Grad Nite	\$130.00
			<u>\$162.59</u>

IX. REPORTS FROM EMPLOYEE ORGANIZATIONS

X. OPEN SESSION PUBLIC COMMENTS

The public may address the Board on any matter (except personnel) concerning the District and not on the agenda. Note: The time limit to address the Board may not exceed two minutes. The Board is not required to respond to the Public Comment. The public may also address the Board on each item on the Agenda as the Board takes up those items. Persons wishing to speak should complete a blue request form and hand it to the Board secretary.

XI. ITEMS NOT ON THE AGENDA

Note: The law generally prohibits the Board from discussing items not on the agenda. Under limited circumstances, the Board may discuss and act on items not on the agenda if they involve an emergency affecting safety of persons or property, or a work stoppage, or if the need to act came to the attention of the District too late to include on the posted agenda.

XII. NEXT MEETING DATE

Unless otherwise announced, the next regular meeting of the Board of Education will be held on June 21, 2016. Closed session begins at 5:30 p.m. Open session begins at 6:30 p.m. The meeting will be held at the District Support Services Center.

XIII. FUTURE REGULAR BOARD MEETINGS FOR 2016

July 12, 2016	October 11, 2016
August 2, 2016	November 8, 2016
September 13, 2016	December 13, 2016

XIV. ADJOURN

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT
MONTHLY REPORT OF ATTENDANCE
NINTH MONTH OF 2015-16

March 28, 2016 through April 22, 2016

	Ninth Month 2014-15			Ninth Month 2015-16			Accumulated ADA			
	Ending Enrollment	ADA	ADA % of Poss. Enroll.	Ending Enrollment	ADA	ADA % of Poss. Enroll.	Prior Year		Current Year	
							ADA % to CBEDS	ADA	ADA % to CBEDS	ADA
ERNEST RIGHETTI HIGH										
Regular	1808	1726.77	95.3%	1905	1826.60	95.7%		1810.71		1861.46
Special Education	79	73.31	92.8%	69	64.93	94.8%		75.88		68.70
Independent Study	49	37.85	80.1%	65	52.33	79.6%		25.38		36.05
Independent Study 12+	1	0.00	---	0	0.00	---		0.45		0.00
Independent Study Spec Ed	0	0.00	---	0	0.00	---		0.00		0.48
CTE Program	7	6.23	89.0%	6	5.33	88.9%		6.78		6.04
Home and Hospital-Reg Ed	6	5.69	82.2%	4	2.40	67.9%		2.62		1.21
Home and Hospital-Spec Ed	4	2.38	79.5%	4	3.53	91.4%		2.06		2.91
TOTAL RIGHETTI	1954	1852.23	95.2%	2053	1955.13	95.6%		1923.88		1976.85
SANTA MARIA HIGH										
Regular	2230	2147.15	95.7%	2249	2155.67	96.0%		2249.30		2288.07
Special Education	87	81.92	94.1%	85	79.27	93.6%		85.67		78.48
Independent Study	117	99.69	88.4%	83	77.07	92.5%		49.05		73.31
Independent Study 12+	3	1.23	41.0%	1	1.00	100.0%		1.48		1.07
Independent Study Spec Ed	2	1.00	50.0%	1	1.00	100.0%		0.96		0.62
CTE Program	7	4.77	74.7%	8	6.33	79.2%		4.93		5.97
Home and Hospital-Reg Ed	10	7.31	89.6%	11	9.27	81.3%		6.86		7.64
Home and Hospital-Spec Ed	2	0.31	---	1	0.20	20.0%		0.14		0.88
TOTAL SANTA MARIA	2458	2343.38	95.6%	2439	2329.80	95.9%		2398.39		2456.05
PIONEER VALLEY HIGH										
Regular	2462	2378.46	96.6%	2467	2380.87	96.7%		2449.48		2434.52
Special Education	115	105.62	91.0%	110	102.67	92.5%		112.63		103.98
Independent Study	27	17.38	64.4%	18	14.00	85.4%		17.43		8.67
Independent Study Spec Ed	5	3.62	72.3%	4	3.13	88.7%		2.62		1.86
Home and Hospital-Reg Ed	13	11.15	76.7%	23	18.87	84.7%		8.08		11.93
Home and Hospital-Spec Ed	0	0.00	---	0	0.00	---		0.00		0.00
TOTAL PIONEER VALLEY	2622	2516.23	96.4%	2622	2519.53	96.5%		2590.24		2560.96
DAY TREATMENT @ LINCOLN STREET	7	5.31	69.7%	5	3.93	80.8%		6.01		4.13
DISTRICT SPECIAL ED TRANSITION	10	9.23	92.3%	22	21.20	96.4%		9.78		21.91
DISTRICT SPECIAL ED TRANS/VOC MM	12	11.54	94.3%	16	15.67	97.9%		11.79		15.23
ALTERNATIVE EDUCATION										
Delta Continuation	314	252.10	78.5%	336	274.55	82.2%		245.04		256.11
Delta 12+	0	0.00	---	0	0.00	---		0.57		0.73
Delta Independent Study	63	53.16	87.5%	21	18.19	74.9%		35.27		20.42
Delta Independent Study 12+	10	9.87	82.2%	3	2.92	81.2%		21.48		12.09
Delta Independent Study Spec Ed	2	0.00	0.0%	3	0.40	12.2%		0.00		0.80
DHS Home and Hospital Reg Ed	3	0.00	---	0	0.00	---		0.21		0.62
Reach Program--SMHS	25	17.62	68.8%	12	8.47	72.6%		9.02		6.64
Reach Program--PVHS	18	13.23	74.1%	16	13.93	78.9%		7.41		7.21
Home School @ Library Program	55	44.77	83.4%	47	39.40	83.8%		35.94		40.42
Delta HS I.S. Program P	---	---	---	21	21.01	90.8%		---		22.61
TOTAL ALTERNATIVE EDUCATION	490	390.75	79.7%	459	378.86	82.5%		354.94		367.66
TOTAL HIGH SCHOOL DISTRICT	7553	7128.67	94.4%	7616	7224.13	94.9%	93.7%	7295.03	93.7%	7402.78

June 14, 2016

CLASSIFIED PERSONNEL ACTIONS						
Name	Action	Assignment	Site	Effective	Pay Rate	Hours
	39-Month Reemploy	Guidance Technician	SMHS	7/27/16	22/E	8
	Resign	Instructional Asst-Spec Ed I	DHS	6/9/16	13/B	5.5
	Increase Hours	Food Service Worker I	SMHS	8/8/16	9/E	5 to 6
	Employ	Bus Driver	DO	5/18/16	18/A	4
	Resign	Career Center Specialist	RHS	5/17/16	20/A	8
	Promote	Grounds Maintenance II	SMHS	5/16/16	20/D	8
	Layoff	Transition Specialist	SMHS	7/9/16	26/B	8
	Employ	Food Service Worker I	RHS	6/2/16	9/A	2
	39-Month Reemploy	Guidance Technician	SMHS	7/27/16	22/E	8
	Dismiss	Instructional Asst-Spec Ed II	RHS	6/8/16	15/A	3.5
CERTIFICATED PERSONNEL ACTIONS						
Name	Action	Assignment	Site	Effective	Salary	FTE
	Column Advance	Counselor	DHS	2016-17	3/V +5	1.0
	Resignation	Math	PVHS	6/9/16	23/V	1.0
	Resignation	Band	RHS	6/9/16	8/V	1.0
	Resignation	Band Stipend	RHS	6/9/16	\$3,106.00	~~
	Column Advance	Science	PVHS	2016-17	3/V	1.0
	Transfer	Science to EL Coordinator	PVHS to MMEP	2016-17	13/V	1.0
	Employ/Prob 1/Column Advance	Counselor	RHS	2016-17	1/V +5	1.0
	Transfer	Social Science	SMHS to DHS	2016-17	23/V	1.0
	Employ/Prob 1	SPED	RHS	2016-17	2/III	0.8
	Resignation	Sp Ed Coordinator	SMHS	6/9/16	9/V + 7	1.0
	Employ/Prob 2	Social Science	SMHS	2016-17	2/V	1.0
	Transfer	English	SMHS to PVHS	2016-17	21/V	1.0
	Column Advance	English	SMHS	2016-17	2/IV	1.0
	Column Advance	Math	SMHS	2016-17	8/V	1.0
	FMLA	Counselor	PVHS	8/8-10/28/16	7/IV +5	1.0
	Site Change	SPED	RHS to LC	2015-16	11/V	1.0
	Employ/Prob 1	Physical Education	PVHS	2016-17	2/III	1.0
	Resignation	International Lang/French	PVHS	6/9/16	8/III	1.0
	Employ/Prob 1/Transfer	Physical Education	SMHS to RHS	2016-17	3/III	1.0

Santa Maria Joint Union High School District

June 14, 2016

CERTIFICATED PERSONNEL ACTIONS						
Name	Action	Assignment	Site	Effective	Salary	FTE
	Transfer	English to Sped	SMHS to PVHS	2016-17	9/V	1.0
	Rescind Transfer	SPED Mild/Mod	SMHS to RHS	2016-17	11/V	1.0
	Transfer	English	PVHS to SMHS	2016-17	16/V	1.0
	Resignation	English	PVHS	6/9/16	7/IV	1.0
	Transfer	SPED	SMHS/TLC to SMHS/CTE	2016-17	6/IV	1.0
	Column Advance	English	RHS	2016-17	2/III	1.0
COACHING PERSONNEL ACTIONS						
Name	Action	Assignment	Site	Effective	District	ASB/Booster
	2 Sport Stipend	Coaching	SMHS	2015-16	\$500.00	
	Stipend	Baseball Head JV Coach	SMHS	Spring	\$1,852.00	
	2 Sport Stipend	Coaching	SMHS	2015-16	\$500.00	
	2 Sport Stipend	Coaching	SMHS	2015-16	\$500.00	
	Stipend	Varsity Dance	ERHS	2016-17		\$1,500.00

Appendix B

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT FACILITIES REPORT May 2016

1. Santa Maria High School Construction Projects

C2004 SMHS New Classroom Building at Broadway – Rachlin Partners

- Activation of the new solar panels is pending final DSA inspection and coordination of interconnection with PG&E. Final contract closeout activities for the main building continue.

SMHS Camino Colegio Parking Area – Rachlin Partners

- Work completed this period includes drainage systems, fencing, paving, and handrail installations. **(Photos)**

SMHS Breeze Way Canopy Removal – Support Services

- Final contract closeout activities continue.

SMHS Administration Roof Repairs – Support Services

- Final contract closeout activities continue.

SMHS 2016 Paving Projects – Flowers & Associates

- Bids were received June 3, 2016. The results of the bid and staff recommendations will be presented at the June 14 Board meeting. Work is scheduled to start July 5, 2016 and conclude August 3, 2016.

2. Ernest Righetti High School Construction Projects

ERHS New 38-Classroom Building – Rachlin Partners

- The DSA continues their reviews of project plans and specifications. The revised tentative construction currently targeting summer 2016 will move to fall pending DSA approval and contractor cost negotiations.

ERHS Cafeteria Walk-In Freezer Project – Rachlin Partners

- The plans are in DSA structural review. The construction period is pending final reviews and approvals.

ERHS Maintenance and Operations Building Project – Rachlin Partners

- Initial project cost estimates were determined to be too high. The architect was requested to provide other options to minimize costs. A proposal for architectural and engineering services will be provided once the general scope is determined.

3. Pioneer Valley High School Construction Projects

C2004 District Performing Arts Center – BCA Architects

- Site construction activities occurring this period include the continued installation of steel structural elements and structural block for the theater as well as the lobby.
(Photos)

6 Portable Roof Replacement -613-618 – Support Services

- A bid notice was issued on May 13, 2016. Three bids were received May 27, 2016. The results of the bid and staff recommendations will be presented to the Board at the June 14 meeting.

4. New Facility

C2004 New Facility School CTE Component – PMSM Architects

- Remaining title exceptions have been resolved and the acquisition of the 25+ acre parcel was completed May 31, 2016. Architect and General Contractor agreements are being finalized. Design development work will commence immediately following completion of these agreements. Design development, DSA approval, and contracting is estimated to be complete in late spring 2017 with construction to start shortly thereafter. Construction is estimated to be complete by end of year 2018.

5. District Wide and Support Services Center

District Wide Energy Upgrade – Johnson Controls Inc.

- Punch list and final contract closeout activities are ongoing.

District Wide Project Closeout – Support Services

- Review of project closeout issues continues. Projects under current review and their status are as follows:
 - PVHS Pool: Evaluations continue on revisions to eight concrete block pilasters at the pool building.
 - PVHS 12 Modular Classrooms: Coordination of modifications to the fire sprinkler system continues. Revisions are scheduled for summer 2016.
 - SMHS CHCCC: Awaiting DSA confirmation of reopened file to review status of change orders.
 - ERHS Industrial Arts: The DSA online file indicates closeout certification has been given. Awaiting formal notification. This project is closed.
 - ERHS Campus: An assessment of remaining legacy unclosed projects is under review.

SSC New West Parking Area – Flowers and Associates

- Design development continues. Soils and surveying activities were conducted in May. Construction scheduling will occur following design completion and City approval.

SSC Commodities Walk-In Freezer Project – Rachlin Architects

- Santa Barbara County Health Department and City of Santa Maria continue their reviews of the plans and specification. The construction period is pending County and City approvals.

6. Summer Activities

District Wide Summer Projects Planning

- Several roofing, carpeting, painting, electrical, communications, plumbing, landscaping, and various small projects are being developed.

Gary Wuitschick
Director – Support Services

Maintenance & Operations

PVHS

- Setup lunch lines for the sandwich bar.
- Setup for the Dinner Theater at the Music Building Amphitheater.
- Repaired the turf in the football stadium.
- Repaired an irrigation problem between the 300 and 400 buildings causing water puddling on the walkways each day. Removed elevated soil, repaired the sprinklers, and replanted grass.
- Hydroseeded tall fescue on the south end of the football stadium.
- Displayed student artwork in the Administration Building.
- Mounted banners in the library.
- Repaired handrails in the stadium bleachers in preparation for graduation. **(Photo)**
- Pressured washed the stadium bleachers in preparation for graduation.
- Painted the concession and restroom doors in preparation for graduation. **(Photo)**
- Modified the window blinds in classroom 609 to improve operation.
- Repaired the varsity baseball backstop.
- Repaired broken classroom chairs.
- Assembled rolling storage rack for the Home Economics foods lab.
- Performed monthly inspection of science fume hoods and emergency eye washes.
- Installed a new computer keyboard tray for the library technician.
- Performed quarterly HVAC service in the 300 building, music building, shop building, and portable classrooms 616 - 630.
- Replaced worn tires on security carts.
- Reprogrammed handheld radios following installation of the new radio repeater.
- Installed backup batteries in the 400 building student restrooms. These batteries operate the flushers in the event of a power outage.
- Repaired the milk refrigerator in the cafeteria kitchen.
- Installed communications cables for a relocated Smart Board in classroom 617.
- Completed painting the fence along the front of the school.
- Setup several events – graduation assembly, cheer banquet, end of year presentations in room 551/552/553, Future Panther Night, testing in the library, community outreach meeting, spring concert, international language fair, track, boys' volleyball, baseball, softball, weekend mens' soccer, and Crosspointe Church.
- Preventive work order hours – 41
- Routine work order hours – 54
- Total work orders completed – 128
- Event setup hours – 133

REGULAR MEETING

June 14, 2016

ERHS

- Prepared grounds for baseball, softball, tennis, and track & field. **(Photo)**
- Prepare the football stadium for graduation.
- Fertilized turf at ERHS and DHS. **(Photo)**
- Mounted an automatic projection screen in the cafeteria dining room.
- Replaced damaged boards in the football stadium bleachers in preparation for graduation.
- Repainted areas of the football stadium, Administration building, and classroom 429.
- Repaired the public address system in room 112A.
- Reconfigured lighting dimmers and electrical wiring in the drama classroom. **(Photo)**
- Performed quarterly HVAC preventive maintenance at Industrial Arts and Delta High School.
- Performed annual HVAC preventive maintenance in the gymnasium and Administration.
- Performed annual inspection of gymnasium sump pumps.
- Assembled tables, stools, and chairs for classrooms 504 and 505.
- Repaired plumbing problems in the staff restrooms, boys' locker room, portable restroom, and maintenance shop.
- Pressure washed the football stadium in preparation for graduation. **(Photo)**
- Celebrated California School Employee Week.
- Replaced the exterior flags at Delta High School.
- Setup several events – CST Testing, SAT preparation course, Ed Camp professional development (10 classrooms), Career Fair, suicide awareness assembly, Class of 2018 T-shirt distribution, Film Festival, Cheer and Dance tryouts, College Signing Celebration, LCAP meeting (DHS), sports physicals, baseball, JV baseball tournament, boys' tennis, boys' volleyball, and powder puff football game.
- Preventive work order hours – 52
- Routine work order hours – 154
- Total work orders completed – 142
- Event setup hours – 86

REGULAR MEETING

June 14, 2016

SMHS

- Performed gopher and ant control maneuvers.
- Groomed the stadium turf.
- Pressure washed the patio around the Cafeteria Multipurpose Room.
- Repaired the natural turf in the practice field: aerated and installed new sod. **(Photo)**
- Repaired sprinklers on the Lincoln Street site, along Stowell Road, 100's classrooms, and the baseball field,
- Repaired the soccer goals in the football stadium.
- Hosted the "Every 15 Minutes" drunk driving event.
- Repaired the greenhouse thermal hydronic heating system.
- Performed touch-up painting in the Cafeteria Multipurpose Room.
- Installed a new public address and sound system in the Cafeteria Multipurpose Room.
- Repaired plumbing problems in Wilson gymnasium locker room, Administration north women's restroom, Ag Science boys' restroom, south campus student restrooms, classroom 315, and the boys' restroom at the pool.
- Completed renovation of the maintenance shop restrooms.
- Repaired doors in several places on campus: Wilson Gymnasium, Small Gymnasium, as well as classrooms 105, 214, and 512.
- Setup a "College Bound" bulletin board in the Administration hallway.
- Repaired the kitchen range hood in classroom 334.
- Repaired restroom dispensers throughout campus: 100 girls', Administration staff, 400 boys', 216 staff, 900 men's, south campus girls' and boys', classroom 214, and the Cafeteria Multipurpose Room girls' and boys'.
- Tested and repaired computer projectors in classrooms 232, 336, 351, 528, 634, 640, and 904.
- Replaced fluorescent lamps in several areas of campus: Cafeteria Multipurpose Room, Administration hallway, 243, Multi-media Learning Center girls' restroom, Wilson Gymnasium trainer's room, and classrooms 211, 212, 215, 411.
- Replaced damaged ceiling panels in classrooms 531 and 645.
- Picked up school mail daily due to the closure of the front entrance during construction of the Camino Colegio parking lot.
- Setup several events: Delta Saturday school, Migrant Families Domingo Familiar, student registration, teacher appreciation, One Community Action Coalition, LCAP meeting, Truancy, SAT prep, Cal-Safe graduation, DELAC, Talking in Class workshop, AP testing, Every 15 Minutes, band spring concert, girls' wrestling banquet, baseball, softball, swimming, tennis, volleyball, swim meets, track, Fighting Back Santa Maria Valley, Allan Hancock College classes, Orcutt Union School District Film Festival, Adult soccer, Presidential candidate rally **(Photo)**, and Adult soccer league.
- Preventive work order hours – 13
- Routine work order hours – 113
- Total work orders completed – 152
- Event setup hours – 302

Graffiti & Vandalism

- | | | |
|--------|----|-------|
| • ERHS | \$ | 420 |
| • DHS | \$ | 80 |
| • SMHS | \$ | 1,050 |
| • PVHS | \$ | 0 |

Reese Thompson
Director – Facilities and Operations

Photo Gallery – Major Projects



SMHS – Camino Colegio Parking Lot Required Revising the School Entrance



SMHS – Reconfigured Camino Colegio Parking Lot is Paved



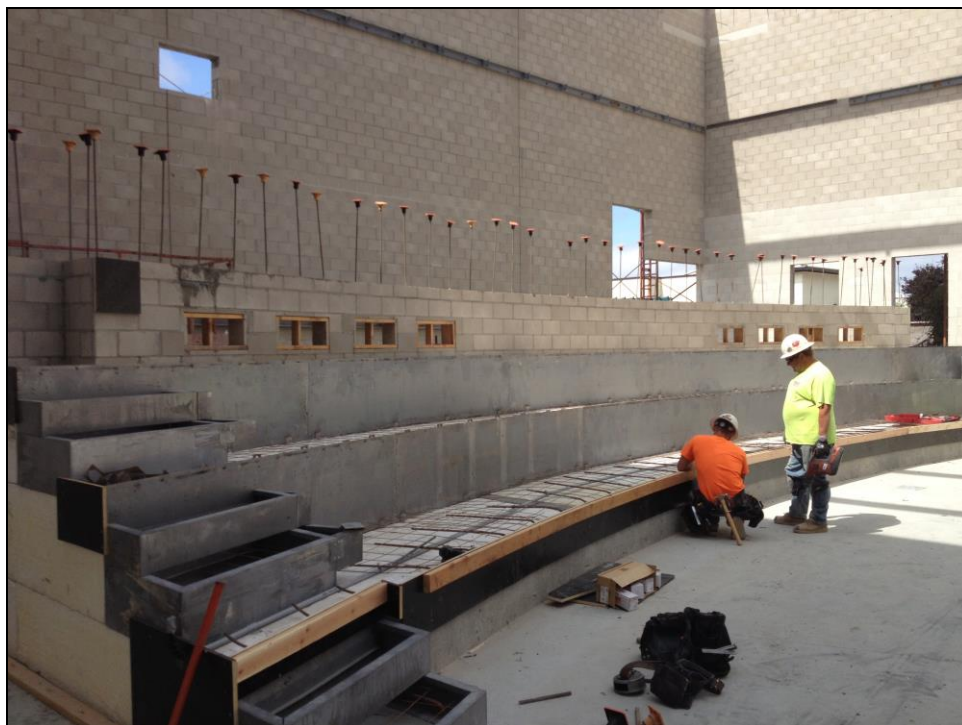
PVHS – A Crane Hoists Roof Beams for the Theater



PVHS – Performing Arts Center Lobby Walls Begin to Take Shape



PVHS – Theater Interior as Roof Beams are Placed



PVHS – Construction Crew Forms Risers for Back Row Seats

Photo Gallery – Maintenance & Operations



PVHS – Elias Camacho tunes up the bleachers for graduation.



PVHS – Ray Segovia Paints the Football Stadium Concession Doors.



ERHS – Juan Rodriguez Fertilizes School Lawns



ERHS – David Burrill Operates the Pro Groomer on the Varsity Softball Field



ERHS – Del Ward Upgrades the Lighting in the Drama Classroom



ERHS – Leo Avila Pressure Washes the Football Stadium for Graduation



SMHS – Newly Repaired Practice Field Natural Turf



SMHS – Presidential Candidate Rally in the Football Stadium

**APPENDIX C
2015-2016**

**RESOLUTION NUMBER 23 – 2015-2016
Regarding the Levying and Collection of
Alternative School Facilities Fees
(Level II Fees)**

and

SCHOOL FACILITIES NEEDS ANALYSIS

**(This report is available for viewing on the
District webpage.)**

**SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT
RESOLUTION NUMBER 23 - 2015-2016**

**INCREASING FEES ON DEVELOPMENT PROJECTS
PURSUANT TO GOVERNMENT CODE SECTION 65995
LEVEL 2**

WHEREAS, Education Code section 17620 authorizes school districts to impose certain fees as set forth in Government Code section 65995 *et seq.* to finance the construction and reconstruction of school facilities, and;

WHEREAS, under Senate Bill 50 (“SB 50”), the Leroy F. Greene School Facilities Act of 1998 (chapter 407, Statutes of 1998), Government Code section 65995.5 provides that in lieu of a residential fee imposed under Government Code section 65995, subdivision (b)(1), a school district may impose alternative fees on new residential construction in amounts calculated pursuant to Section 65995.5, subdivision (c) and 65995.7; and

WHEREAS, pursuant to Government Code section 65995.5, subdivision (b), the District is currently levying a fee of **\$2.16** per square foot of assessable residential construction, and;

WHEREAS, pursuant to Government Code section 65995.5, subdivision (b), in order to be eligible to impose fees in these alternative amounts, the school district is required to do all of the following: (1) make a timely application to the State Board of Allocation (“SAB”) for new construction funding and be deemed by SAB to meet the eligibility requirements for new construction funding; (2) conduct and adopt a School Facilities Needs Analysis pursuant to Government Code section 65995.6; and (3) satisfy at least two of the requirements set forth in subparagraphs (A) to (D) inclusive of Government Code section 65995.5, subdivision (b) (3), and;

WHEREAS, the District has conducted a School Facilities Needs Analysis as specified by Government Code section 65995.5.

NOW, THEREFORE, BE IT RESOLVED that the Board makes the following findings:

1. The District has been determined by the State Allocation Board to meet the eligibility requirements for new construction funding.
 - a. The District has satisfied the requirements of Government Code section 65995.5, subdivision (b)(3)(C)(ii), in that the District has issued debt or incurred obligations for capital outlay in an amount greater than fifteen percent (15%) of its local bonding capacity.

- b. In addition, the District meets the requirement of Government Code section 65995.5, subdivision (b)(3)(D), in that at least twenty percent (20%) of the teaching stations within the District are relocatable classrooms.
2. The District has conducted a School Facilities Needs Analysis consistent with the requirements of Government Code section 65995.6 whereby the District has determined the need for school facilities to accommodate unhoused pupils that are attributable to projected enrollment growth from the development of new residential units over the next five (5) years.
3. The District's School Facilities Needs Analysis results in a maximum alternative residential fee of **\$2.23** per square foot of assessable residential construction.
4. The purpose of the alternative Level 2 fees is to provide school facilities for unhoused students that will be generated as a result of the construction of new residential units in the District over the next five (5) years.
5. The alternative Level 2 fees must be used exclusively for the school facilities identified in the District's School Facilities Needs Analysis consistent with Government Code section 65995.5, subdivision (f).
6. There is a reasonable relationship between the need for school facilities and the type of development on which the fees are imposed because, as set forth in the District's School Facilities Needs Analysis, the construction of new residential units generates students that cannot be housed without additional facilities in that the District currently lacks facility capacity to house significant numbers of existing students in grades kindergarten through twelfth grade.
7. There is a reasonable relationship between the use of the fees and the types of development projects on which the fees are imposed in that new residential units of all types generate students who will attend the District schools, these students cannot be housed by the district without the construction of additional facilities, and the fees will be solely expended to finance these new additional facilities.
8. There is a reasonable relationship between the amount of the fees and the cost of the facilities attributable to the construction of new residential units on which the fees are imposed in that the square footage of all types of residential units has a direct relationship to the number of students generated and, thus, to the facilities which the District must add to accommodate these students.

BE IT FURTHER RESOLVED that the Board conducted a noticed public hearing at a board meeting on June 14, 2016 at the District Support Services Center, 2560 Skyway Drive, Santa Maria, CA 93455; at which time information contained in the District's School Facilities Needs Analysis was presented, together with the District's responses to all written comments received regarding the School Facilities Needs Analysis. The Board hereby adopts the School Facilities Needs Analysis and incorporates its School Facilities Needs Analysis herein by reference; and

BE IT FURTHER RESOLVED, that the Board hereby establishes an alternative Level 2 Fee of **\$2.23** per square foot of new residential construction; and

BE IT FURTHER RESOLVED, that the District has established a separate Developer Fee Fund, Level 2 Fees in which all Level 2 fees collected pursuant to this Resolution, along with any interest income earned therein, shall be deposited in order to avoid any commingling of the fees with other fees, revenues and funds of the District, except for temporary investments, and that the District is authorized to make expenditures or to incur obligation solely for the purposes for which the fees are collected, which the Governing Board hereby designates to be those purposes permitted by any applicable law; and

BE IT FURTHER RESOLVED, that the District will review the above-mentioned Developer Fee Fund, Level 2 Fees on a fiscal year and five year basis in accordance with Government Code section 66001 and 66006; and

BE IT FURTHER RESOLVED, that if the District has unexpected or uncommitted fees within five (5) years of collection, the District will make required findings or refund the fees as set forth in Education Code Section 17624; and

BE IT FURTHER RESOLVED, that the alternative Level 2 fees established pursuant to this Resolution are not subject to the restriction contained in subdivision (a) of Government Code section 66007, and that no building permit shall be issued for any development absent certification of compliance by the development project with the fees imposed pursuant to this Resolution; and

BE IT FURTHER RESOLVED, that the Superintendent give notice to all cities and counties with jurisdiction over the territory of the District of the Board's action by serving a copy of this Resolution, the supporting documentation and a map indicating the areas subject to the Level 2 alternative fees on each agency and requesting that no building permits or, for manufactured homes, certificates of occupancy, be issued on or after the date of this Resolution without certification from the District evidencing compliance with the District's Level 2 alternative fees as specified herein.

PASSED AND ADOPTED this 14th day of June, 2016 by the following vote:

ROLL CALL:

AYES:

NOES:

ABSENT:

ABSTAIN:

President/Secretary/Clerk of the Board of Education

Santa Maria Joint Union High School District

2560 Skyway Dr.

Santa Maria, CA 93455-1507

(805) 922-4573

School Facilities Needs Analysis

April 2016

Level 2 Developer Fee Study

Mark Richardson,
Superintendent

Prepared by:
SchoolWorks, Inc.
8331 Sierra College Blvd. #221
Roseville, CA 95661
(916) 733-0402
www.SchoolWorksGIS.com



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Chapter 1: Executive Summary

The Santa Maria Joint Union High School District serves the cities of Santa Maria, Guadalupe, Orcutt, and Los Alamos and surrounding areas in Santa Barbara County, California. The District serves students in grades nine through twelve.

Enrollment in grades 9-12 for the current school year (2015/16) was 7,900 students at the time of the official enrollment census taken in the fall. Most schools are operating close to maximum capacity, and some schools are over design capacity and rely on portables to temporarily accommodate students. Projects will be needed to provide additional space.

Residential development is projected to add 1,580 homes in the next five years according to the new development projects being planned in the communities served.

Applying the methodology prescribed by State law for Level 2 Fees (see next section for a more detailed discussion), this School Facilities Needs Analysis finds the Santa Maria Joint Union High School District justified in levying a fee of **\$2.23 per square foot** on residential development subject to the fee. This fee may be applied by the District as an alternate to other School Facility Fees.

Expected revenues from Level 2 fees in the next five years are projected to be approximately \$6.7 million. This fee will provide up to one-half of the cost of needed school projects, with the other half expected to be provided by the State. Additional District funds may be required to supplement these fees to provide the quality of schools required by the District's students.

Chapter 2: Context and Legal Requirements

This document, the Santa Maria Joint Union High School District's School Facilities Needs Analysis, exists to fulfill a statutory requirement established by the California Government Code. A school district must prepare or have prepared a School Facilities Needs Analysis (SFNA) as a prerequisite to imposing "Alternate" fees on new housing to provide funding for additional school facilities needed to accommodate students anticipated from those new homes.

The SFNA is not used to justify other forms of fees or mitigation agreements, and is not a facilities plan or financing study for the school district. Its purpose is narrowly defined and this document should be used only to fulfill statutory requirements for the stated fees.

A. History and Context of SB 50 School Facility Fees

Senate Bill 50 (SB 50)¹ was passed during the 1998 session of the California Legislature as a comprehensive restructuring of the state's school facility construction and funding process. Parts of the legislation became effective when the state's voters approved Proposition 1-A, a \$9.2 billion school and university construction/modernization bond².

SB 50 also changed the legal process whereby builders of new homes could be required to pay for new or expanded schools to serve the new homes. A spectrum of local ordinances, policies, and requirements were largely replaced with a statewide, three-tier system. In this new system, tiers or levels are:

Level 1: similar to 1986 fee structure, now \$3.48 per sq. foot³

Level 2: up to 50% of the State allowed cost for construction and sites, if the school district meets specified eligibility tests⁴ (assumes State pays other 50% of cost.)

Level 3: same as Level 2, but includes State's 50% share only when the State declares it is out of funds for new construction.⁵

Level 2 Fees are new grants of authority to school districts, but are counterbalanced by a firm prohibition on other local fees and other requirements on housing developments. Level 2 Fees are referred to by the Legislation as "Alternate" fees.

A significant change with the current fee program is the local school district's ability, if it meets the eligibility tests, to impose a Level 2 without involving the city or county having control of land use approvals within the school district.

¹ Chapter 407, Statutes of 1998

² Statewide Proposition 1-A, November 3, 1998

³ Rate effective January 27, 2016

⁴ See Calif. Government Code Section 65995.5

⁵ See Calif. Government Code Section 65995.7

Many other changes to the school building process occurred with passage of SB 50 and Proposition 1-A. This report focuses only on fees, but these changes should be viewed in the context of the amended system.

B. Legal Requirements to Impose Alternate Fees

For a school district to impose Level 2 Fees, it must meet a number of eligibility tests specified in SB 50. The Santa Maria Joint Union High School District has satisfied these requirements, including **3c** (over 15% debt) and **3d** (there are 130 portable classrooms out of a total of 356 classrooms, or 36.5%).

1. Apply for New Construction funding to establish a baseline capacity

The Santa Maria Joint Union High School District has submitted its documents to OPSC for new construction and has had its eligibility baseline established. The District will apply for new construction funding as projects arise.

2. Be eligible for New Construction funding

The Santa Maria Joint Union High School District has been determined by the Office of Public School Construction and the State Allocation Board to be eligible for new construction funding.

3. Satisfy two of the four following tests:

- a. Have substantial enrollment⁶ on Multi-Track calendar,
- b. General Obligation bond in past four years with at least 50% yes vote,
- c. Have issued debt or incurred obligations used for capital outlay equal to 15% of district's bonding capacity⁷,
- d. Use relocatable (portable) classrooms for at least 20% of the district's total classrooms.

The Santa Maria Joint Union High School District satisfies at least two of these four tests:

(c) The existing capital facility debt is over 15% of the bonding capacity. The bonding capacity is \$161,868,393 and the capital facility debt is \$94,826,120 or 58.6%. The debt consists of GO bonds and COP financings.

⁶ Generally defined as 30% of the District's K-6 enrollment; special rules for 9-12 districts.

⁷ If the debt includes landowner-voted Mello Roos debt approved after 11/4/98, then the threshold level is 30% rather than 15%.

(d) More than 20% of the District's total classrooms have been determined by criteria of the Office of Public School Construction to be "portable" classrooms. There are currently 356 classrooms in the District of which 130 are portables. This results in a total of 36.5% portables.

4. Prepare a School Facilities Needs Analysis

The Santa Maria Joint Union High School District caused this School Facilities Needs Analysis to be prepared for review and adoption by the Board of Education.

5. Follow the procedures and process identified in State law

The Santa Maria Joint Union High School District will follow the adoption process and procedures as specified in state law.

Chapter 3: Data Used in Analysis

This Chapter presents the data used to calculate the fee. Chapter 4 contains the actual calculation. Many of these data elements are prescribed in state law and are presented as required.

Data elements to be reviewed include:

- A. Historic pupil-per-home yield rates.**
- B. Housing projection for the next five years.**
- C. Enrollment from new homes built in the next five years.**
- D. Available capacity in existing schools.**
- E. Grant amount per pupil.**
- F. Site Acquisition and Site Development allowances.**

A. Pupil-per-Home Yield Rates

SB 50 prescribed how pupil-per-home yield rates are to be calculated for a SFNA. The method is to identify homes built in the past five years that are similar to homes expected to be built in the projection period (the next five years).

The Student Yield Rates are calculated for high school students and includes any special education students. Yield rates were calculated as a combined rate for the various housing types (single family detached, single family attached, multi-family/apartment).

The homes built in the District during the past five years were matched with the data base of students enrolled to determine these yield factors. The addresses for the housing units were compared to the student data for 2015. The method was to identify as many new homes built within the five year window that could be mapped in the GIS program. The permits were pulled at least 6 months prior to the date of the student data collection (October 2015) to ensure they could be occupied.

Data is presented as required by grade level group. All housing types have been combined since only one fee may be assessed for all residential development types and the type of housing unit was not tracked on the permit.

Pupil-per-home yield results:

	9-12	Total
All Types	0.182	0.182

B. Housing Projection for Next Five Years

As required by SB 50, new housing units have been projected for the next five years. Data from city and county planners have been used to make the projection shown below along with a review of the historic construction rates.

**New Residential Units in the Next Five Years
 (2016-17 through 2020-21)**

Dwelling Type	<u>5 Year Total</u>
All Types	1,580

These projections are estimates and precise numbers in a given year may vary from the table, however the total for the five year period reflects plans approved and in process.

C. Enrollment from New Housing in Five Years

Multiplying the number of new homes by the pupil-per-home yield rate gives the expected number of pupils from the new homes to be built in the next five years. This approach, which is prescribed in State law, has certain limitations: first, the yield rate is likely to be lower as new homes typically have fewer students soon after construction than will be seen after the neighborhood is established; and second, the five year window minimizes the need for intermediate and high school facilities which often need more than five years of enrollment growth to require a full size facility. As a result, the formula under SB 50 generally understates a school district's long term need.

SB 50 allows a five year projection to be utilized to determine the number of projected students from new residential development. Using this methodology, the District has projected the number of new housing units for the next five years and multiplied by the yield factors to determine an estimate of students to be projected from new housing.

**Santa Maria Joint Union High
 New Students Projected by Grade Level
 For Development Through 2021**

Grade Level	Student Yields for New Residential Dev.	Enrollment Projections
All Development		1580 Units
9-12	0.182	288
Total		288

D. Capacity and Space Available for Students from New Residential Units

As calculated by the State's prescribed methodology on form SAB 50-02 and then adjusting for the projects constructed since the baseline was established, a total of 6,934 spaces exist in the District's schools as shown below.

SANTA MARIA JOINT UNION HIGH				
Capacity of Existing Facilities				
		<u>9-12</u>	<u>SDC</u>	<u>TOTAL</u>
SB50 Baseline:		3,348	144	3,492
Completed Projects	Project #	Capacity Added/Grants Funded		
Pioneer Valley High	1	2,697	70	2,767
Righetti (Ernest) High	2	54	0	54
Delta High	3	243	0	243
Santa Maria High	4	378	0	378
Totals for Completed Projects		3,372	70	3,442
Grand Totals		6,720	214	6,934

After determining the enrollment, the number of students must be compared to the District's existing capacity based on the "baseline" capacity total used when applying for state new construction funds. The difference between the students and existing capacity is the "space available". The "unhoused students" generated from the new housing developments are those that remain after accounting for any space available and used to calculate the allowable Level 2 Fees.

**Santa Maria Joint Union High
 Unhoused Students from Development Through 2021**

Grade Level	Students From New Housing	Total Enrollment through 2021	Space Needed	Capacity per SB 50	Space Available	Net Unhoused Students
	[1]	[2]	[3]	[4]	[5]	[6]
9-12	276	9,633	9,357	6,720	0	276
SDC	12	420	408	214	0	12
Total	288	10,053	9,765	6,934	0	288

- [1] Projected added enrollment through 2021 based on planned residential development
- [2] Based on SAB 50-01 methodology with 1580 housing units
- [3] Space needed within existing facilities to house students living in existing housing units
- [4] Based on SB 50 methodology of capacity calculation
- [5] Space available for students from new developments
- [6] Net unhoused students in 2021 due to new housing developments

The "Total Enrollment through 2021" shows the projected enrollment in five years based on the cohort survival methodology and adjusts for the projected impact of the new housing developments. It is not a demographics based analysis and may not match the local district projections.

The "Space Needed" is determined based on a more complex analysis of the District's current, past and projected enrollments independent of any new housing units. For each grade grouping, the maximum enrollment is shown during the past four years and the next five years. The result is the number of seats that need to be reserved for students from the existing housing units in the District. This insures adequate seats will be available for the housing units that are already existing within the District. The current and past enrollments are shown on the SAB 50-01 which is included in the appendix.

The "Capacity per SB 50" summarized in this table is from the calculations done on the previous page and is based on State loading standards.

The "Space Available" is determined by comparing the "Space Needed" to the "Capacity per SB 50". If the District has excess capacity, then those seats will be used to reduce the number of unhoused students projected from new developments. The Total Space Available is assumed to be zero since the total district capacity is less than the total space needed.

The result of this table is the "Net Unhoused Students" which will be used to determine the costs of the facility needs. Therefore, of the 288 new students projected from new developments, there are 288 (100.0%) that will need to be housed in new facilities.

E. State Construction Grant Amount for Unhoused Pupils from New Housing

When calculating the Level 2 Fees, the number of projected unhoused students is multiplied by the State’s new construction grant amount. Those amounts which are shown below are updated annually by the State Allocation Board each January.

The following chart assumes that 4.2% of the new student population generated from new housing units will consist of special education students. This is equal to the current ratio of students who are enrolled in special education classes.

Grant Amounts Projected for Unhoused Students

<u>Grade Level</u>	<u>Students</u>	<u>Allowance</u>	<u>Grant</u>
9-12	276	\$14,560	\$4,018,560
SDC	12	\$20,399	\$244,788
TOTALS	288		\$4,263,348

The cost per student amounts include State funded allowances for required fire alarm and sprinkler requirements for new school projects as of January 2016.

F. Site Acquisition and Site Development Grant Allowance

1. Eligible Site Acquisition Costs

When calculating the Level 2 Fees, the grant totals listed above are added to half the estimated site acquisition costs that are projected for the next five years, and eligible site development costs. The following table shows the total acres needed based on the CDE (California Department of Education) standards for site sizes.

Site Needs

Average Size Schools	<u>Acres</u>	<u>Students</u>	<u>Projected Unhoused Students</u>	<u>Equivalent Sites Needed</u>	<u>Site Acres Needed</u>
High School	40	1500	288	0.19	7.68
				TOTAL	7.68

For purposes of calculating the Level 2 Fee, the District will need 7.68 acres of additional land. The site costs are based on acquisition at \$301,640 per acre for sites useable for school purposes based on Department of Education standards. The total site cost is projected to be \$2,316,595. The total amount included for 50% of the total site acquisition costs is \$1,158,298.

The average cost per acre used for site acquisition is based on the last site purchase by Santa Maria-Bonita Elementary School District for the Acquistapace site. It is in the OPSC records as project number 50/69120-00-017. The site cost was \$3,378,364 for an 11.2 acre parcel.

2. Eligible Site Development Costs

SB 50 allows the inclusion of site development costs in the fee calculation. These costs are limited to one half of the actual or estimated service site improvements, off site improvements and utility costs which would be allowed by the State Allocation Board. These improvements can include applicable drainage, utility and road improvements. In addition, the SAB now has a grant that provides for general site development costs which is based on a per acre value in addition to a percentage of the projects pupil grant allowance.

The development costs were derived from historical project costs funded by the State. The average amounts totaled \$251,034 for high school sites. The total need is for 7.68 acres developed at a cost of \$1,927,941. The 50% eligible site development costs that can be included in the Level 2 computation totals \$963,971. The allowance for general site development costs amount to \$283,621 for the 7.68 acres that need to be developed. The following figure summarizes the site acquisition and development costs.

COST OF SITES NEEDED

	Acres To Be Bought	Land Cost/Acre	Land Cost	Development Cost/Acre	Dev. Cost	TOTAL SITE NEEDS
High School	7.68	\$301,640	\$2,316,595	\$251,034	\$1,927,941	\$4,244,536
Totals	7.68		\$2,316,595		\$1,927,941	\$4,244,536
		50%	\$1,158,298		\$963,971	\$2,122,268

General Site Development

	Acres	Allowance/ Acre	Base Cost	% Allowance	Added Cost	Total Cost
High School	7.68	\$17,308	\$132,925	3.75%	\$150,696	\$283,621
Totals	7.68					\$283,621

The “Added Cost” was determined by multiplying the percentage allowance by the pupil grant funding amounts shown on page 9.

G. Projects to be Financed with Level 2 Fees

Fees collected in the next five years will be spent on known and future school construction projects. Projects may include but are not limited to the following:

- 1. New schools**
- 2. Land for new or existing schools**
- 3. New classrooms at existing schools**
- 4. Additional support facilities at existing campuses to accommodate increased enrollments**
- 5. Portables used for interim housing needs**

As provided by State law, fees may be used for the reasonable administrative costs of collecting the fees, and for legal and other costs of justifying and imposing the fees.

Current facility projects include an expansion for Righetti High School. A new high school will likely need to be planned to accommodate the future growth anticipated.

Chapter 4: Calculation of Level 2 Fee

This Chapter applies the data identified above and calculates the fee justified. The process follows requirements of SB 50 as enacted in the Government Code and Education Code.

After figuring the aggregate projected costs, the total was divided by the number of projected residential units to derive the per unit cost. After dividing the per unit cost by the average square footage for the average residential unit, the per square foot assessment amount was established. Based on these calculations, the Level 2 Fee within the Santa Maria Joint Union High School District for the next 12 months is calculated to be \$2.23 per square foot, for residential units.

The average size home built in the District in the past five years has averaged 1,890 square feet. We are using the historic average in this study as that is representative of the future development projects planned in the District.

Santa Maria Joint Union High SB 50 Fee Determination

Grade Level	Base Need			Land Acquisition & Site Development			Total Need
	Unhoused Students	Cost per Student	Total Cost	Land Acquisition	Site Development	Total Land & Site Dev.	
		[1]		[2]	[3]	[4]	
9-12	276	\$14,560	\$4,018,560	\$1,158,298	\$1,247,592	\$2,405,890	\$6,424,450
SDC	12	\$20,399	\$244,788	\$0	\$0	\$0	\$244,788
Totals	288		\$4,263,348	\$1,158,298	\$1,247,592	\$2,405,890	\$6,669,238

New Housing Unit Area

Unit Type	Number of Units	Area per Unit	Total Area
All	1,580	1,890	2,986,200
Totals	1,580		2,986,200

Level 2 Fee \$ /Sq. Ft.
\$2.23

- [1] Cost per student per SB 50 allowance for new construction projects
- [2] Equals one half of the estimated land acquisition costs
- [3] Equals one half of the estimated site development costs including general site development costs
- [4] Total cost assumes 7.68 acres to be acquired

Average Site Costs: \$301,640 per acre for acquisition

The grant amounts shown include the amounts allowed by OPSC for fire alarms and sprinklers as of 1/27/2016.

A. Reduce Cost by Other Available Funds, Including Owned Sites

SB 50 requires that the cost of serving students from new housing be reduced by other available local funds. The Santa Maria Joint Union High School District potentially has several such sources of funds.

1. Fees on Senior Housing, Residential Additions, and Commercial/ Industrial Projects

Fees collected on senior housing, residential additions, and commercial or industrial development projects must be used to reduce the Level 2 Fee amount, unless the fees are committed to other projects.

The District has applied these revenues to pay the lease cost of portable classrooms that provide space for students from existing housing that accommodates workers in the senior housing projects, or commercial/ industrial projects. By entering into such lease agreements, the Governing Board has not dedicated these funds to facilities necessitated by new residential construction subject to Alternate Fees⁸.

2. Voter Approved Bond Measure

District voters last approved a bond measure in 2004 in the amount of \$79 million to modernize the community's schools and build facilities. The new facilities assisted the District in replacing temporary portables and housing students from existing homes. No funds from the bond issue are available to offset costs identified in this report for students projected from new housing.

3. Surplus Property

The District does not have any surplus property which can be used to reduce the costs of facility needs identified in this report.

Based on the preceding paragraphs, there are no local funds available to reduce costs to accommodate students from future new residential development.

⁸ See Government Code Section 65995.5 (c)(2) and 65995.5 (f).

Chapter 5: Nexus Between Fees and Projects Subject to Fees

California law allows school districts that have demonstrated a need for new or expanded school facilities to assess a fee on each building permit issued within its territory⁹. The fee only may be used to offset the capital cost needed to serve students from projects subject to the fee. (A small amount may be used for administering the fee program.) Other means of funding school building projects are available, and many residential developments provide funding for new or expanded schools by arrangements not based on this statutory authority.

A. Procedural Requirements for School Facility Fees

Before levying any fee, a school district or other public agency must show a connection between the fee and the project or activity that must pay the fee, and further must show that the fees will be used to alleviate a cost or burden caused by that development activity. Statutory and case law is clear that fees may not be used to address general or unrelated needs of the public agency. These justification requirements are sometimes known as the "Nexus tests" or "AB 1600" criteria. A nexus test demonstrates the linkage or closeness of the fee and its use to the activity causing the need. AB 1600 is shorthand for the procedural requirements found in the Government Code to levy any fee on a development project in California.¹⁰

Later sections of this chapter will address each of the statutory tests and evaluate whether School Facility Fees at the adjusted rate meet the necessary legal requirements. The facts and analyses in this document are presented for use by the governing board of this school district when making the findings needed to adopt a resolution levying a fee.

B. Background and Current Conditions in the District

The Santa Maria Joint Union High School District continues to experience overcrowding from the growth seen over the past several years and anticipates this to be a continuing problem until more projects can be completed. Earlier sections have discussed school expansion and construction projects to accommodate students from the new homes.

Combining the preceding factors has established a cost to accommodate new students from residential developments of \$4.47 per square foot, the local one-half share of which is **\$2.23** per square foot. Fees under other statutes apply to commercial and senior housing projects.

⁹ See Calif. Education Code Section 17620 *et. seq.* and Government Code Section 65995, *et seq.*

¹⁰ See Govt. Code Section 66000, *et. seq.*, also known as the Mitigation Fee Act. (Assembly Bill 1600 was the law that codified and reorganized these requirements.)

C. Specific Criteria for Levy of School Facility Fees

Various specific criteria must be satisfied to impose Level 2 School Facility Fees. The following discussion will show that the proposed Alternate fees meet these criteria.

1. Purpose of the Fee: Government Code Section 66001(a)(1)

School Facility Fees may be levied "for the purpose of funding the construction or reconstruction of school facilities"¹¹. Fees may not be used for regular maintenance, routine repair, inspection or removal of asbestos containing materials, or purposes of deferred maintenance, as defined¹².

Level 2 School Facility Fees shall be used by this school district for the construction of school facilities at existing and future campuses. Specific uses were listed in Chapter 3.

2. Uses to Which the Fee will be Put: Section 66001(a)(2)

Specific uses may include but are not limited to: the design of new construction projects, acquisition of land, construction of new permanent buildings, placement of modular classrooms on a short term or long term basis, modernization and/or reconstruction projects, necessary permit and plan checking fees, testing and inspection costs, necessary furnishing and equipment, and related costs of construction projects. In addition, fees will be used for the lease of interim school facilities pending availability of newly constructed, modernized or reconstructed facilities. Fees may be used for the legal and administrative costs of establishing and administering the fee program and for planning needed new schools to serve growth areas.

Facilities that may be affected include those projects listed in Chapter 3 and all existing properties owned by the District and future sites to be acquired for school purposes.

In addition, Government Code Section 65995.5 (f) requires that "A fee, charge, dedication, or other requirement . . . shall be expended solely on the school facilities identified in the needs analysis as being attributable to projected enrollment growth from the construction of new residential units." This requirement is met by tracking the use of the fees in a specific accounting fund and is made public through an annual report to the school board that documents the use of such fees.

¹¹ Educ. Code 17620(a)(1)

¹² Educ. Code 17620(a)(3)

3. **Reasonable Relationship Between Use of Fee and Type of Project on Which Fee is Levied: Section 66001(a)(3)**

For residential projects, the relationship of new homes to public school enrollment is demonstrated by the students living in the new homes. Yield data from recently built housing in the District confirms this relationship. Housing projects that prohibit occupancy by school age children typically are exempt from Level 2 Fees¹³.

4. **Reasonable Relationship Between the Need for the Public Facility and Type of Project: Section 66001(a)(4)**

This section will show: (1) that additional school facilities are needed to accommodate students from projects subject to the fee, (2) the school facility construction/reconstruction projects identified are reasonable given the need created by the projects subject to the fee, and (3) that no other funding source is available or expected which will preclude the need for fees on new development projects.

a. **Need for additional school facilities**

Enrollment projections show that all existing facilities will continue to be needed to serve existing students and enrollment other than from new development. There is insufficient space available for students from residential development without planning, designing, and constructing additional school facilities.

b. **Reasonableness of the Identified Projects**

The number of students expected clearly indicates the need for new school facilities. The District has considered and rejected temporary measures such as long-term use of temporary classrooms at existing schools, converting schools to a Multi-Track calendar, and other means of avoiding construction that will adversely affect the students and the community.

c. **Alternative Funding for the Identified Projects**

Other funding sources are not available or reasonably expected for the projects needed to accommodate students from new housing. Any current balances in the fee fund are pledged to current projects or paying off earlier expansion, modernization, improvement, or other projects. Voter-approved bond funds are committed to other projects, including the non-growth portion of projects listed such as replacement of existing school spaces. Other funding sources are required to meet existing non-

¹³ Generally, this requires a specific deed restriction.

development related facility needs, including modernization/renovation of existing schools, replacement of existing temporary classrooms, or other needs of the School District.

5. **Reasonable Relationship Between Amount of Fee and Cost of Facility Attributable to Development Paying Fee: Section 66001(b)**

This test requires that the public agency show two relationships: (1) that the amount of the fee is properly based on the portion of the needed facility that is attributable to new development, and (2) that the amount of the expected fees from new development be feasible to have the needed project financed and built.

a. **Amount attributable to residential development**

Preceding discussion has shown that new school facilities are needed to serve students expected from future new homes. The financial analysis is based on costs per pupil so that total costs may be prorated or allocated between new development and any other causes.

b. **Feasibility of funding project**

The cost of needed new facilities to serve students is greater than may be funded by fees alone. The school district will seek additional funding or reductions in cost from all sources. It is anticipated that bond funds, state funds, existing agreements with builders, other local funds, and future state reimbursement will provide sufficient funding to build the needed school projects. Funding, including borrowing based on fees expected more than five years in the future, may be used to allow projects to begin construction to better meet public needs.

6. **Fees collected for projects more than five years in future: Section 66001(d)**

It is not expected that any fees will remain unspent and held for projects more than five years after collection. School district staff will monitor requirements of this section through their annual reports on fees collected and spent.

7. **Fees that are conditions of approval: Section 66005(a)**

This section requires that fees imposed as a condition of approval of a development or a development project not exceed the "estimated reasonable cost of providing the service or facility for which the fee or exaction is imposed". Fees levied for school facility purposes by this school district are based on the actual cost of needed facilities and will not exceed the estimated reasonable cost of the facilities for which they are imposed.

8. Time of payment of School Facility Fees: Section 66007

School Facility Fees for this School District will be collected, absent other arrangements, prior to issuance of a building permit. An account has been established, ongoing appropriations have been made of funds for planning, design, or construction of needed facilities, and a proposed construction schedule or plan has been adopted. Except as modified by other documentation of the school district, the construction schedule for the needed school facilities identified in this plan will be within the next five years.

9. Exemption for project to replace damaged buildings due to a Natural Disaster: Govt. Section 66011 and Education Code Section 17626

This School District will not levy fees on projects statutorily exempt as replacements for structures damaged or destroyed by a natural disaster as determined by the Governor.

10. Fees on Commercial, Industrial, and Agricultural Projects: Education Code Sections 17621, 17622

This section does not apply as Level 2 Fees are not imposed on commercial, industrial, or agricultural construction projects.

D. Notice of Change and Time of Implementation

Following action of the governing board to adopt a resolution establishing rates for Level 2 Fees, staff will transmit a copy of the resolution and a map of the District's boundaries to the planning/building departments of the county and all cities which are served by the District informing those agencies of the revised amounts and the effective date of the new fees. The effective date of the fees shall be immediately upon action of the Governing Board¹⁴.

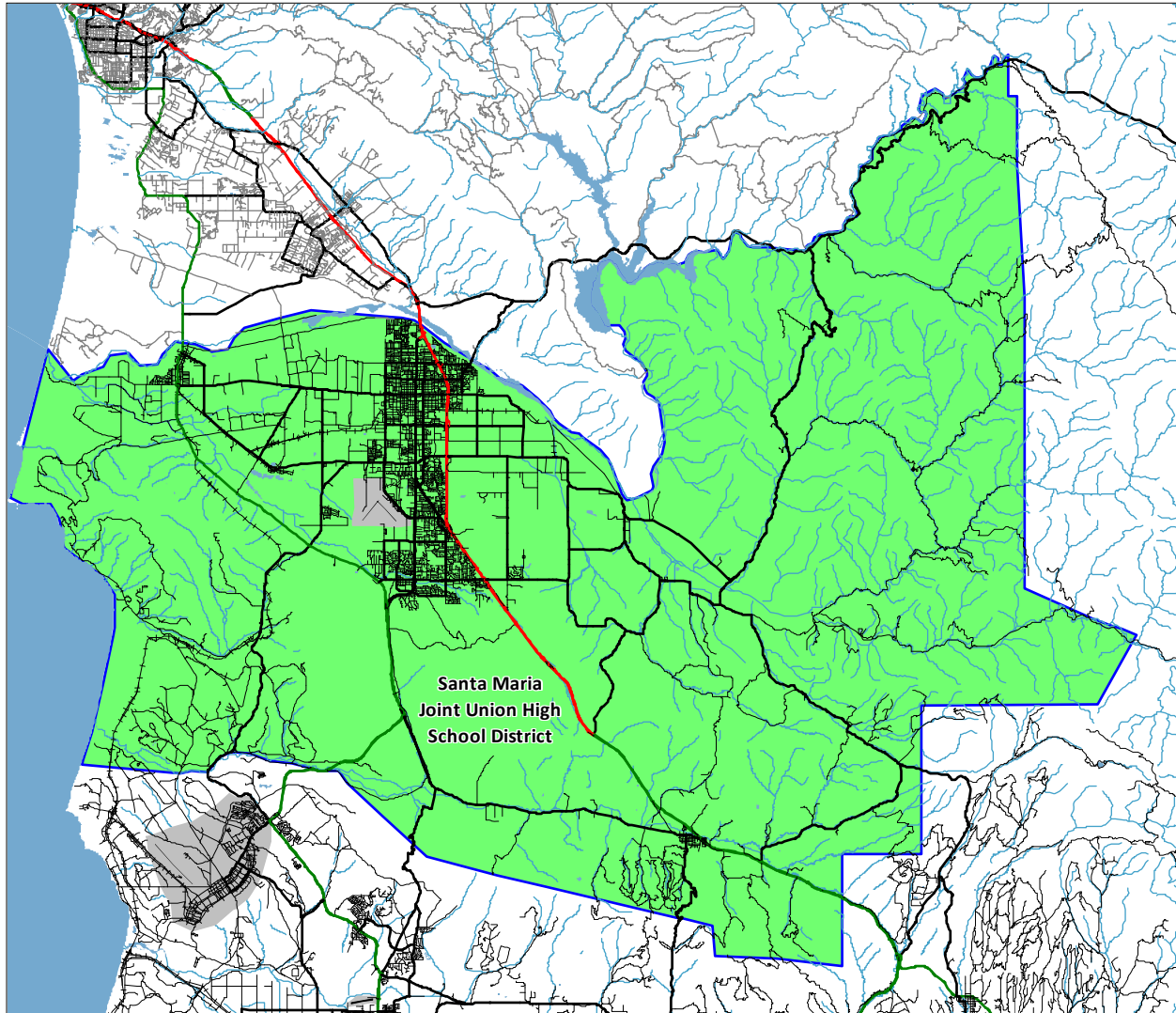
E. Conclusion

Compliance with the preceding nexus requirements establishes that the Santa Maria Joint Union High School District is eligible to impose these fees authorized by State law. The following map shows the geographic area for which the District is authorized to collect these fees.

¹⁴ See Government Code Section 65995.6(f).

F. District Map

The following map shows the extent of the areas for which development fees are applicable to the Santa Maria Joint Union High School District.



Chapter 6: Findings and Conclusions

Based on the preceding analysis, the following Conclusions are submitted for the Board's review and consideration.

- A. The Santa Maria Joint Union High School District has applied for and been found to be eligible for New Construction funding from the State School Facilities Program.**
- B. The Santa Maria Joint Union High School District has completed a School Facilities Needs Analysis, and properly adopted that Analysis after providing public notice, responding to comments, and taking action as prescribed by law.**
- C. The Santa Maria Joint Union High School District meets at least two of the four tests required by Government Code Section 65995.5 (b)(3):**
 - a. The District has capital facility debt in an amount that exceeds 15% of the District's bonding capacity.
 - b. The District has more than 20% of the teaching stations in the District that are relocatable classrooms.
- D. Fees collected under authority of Section 65995.5 or Section 65995.7 shall be expended as required by statute.**
- E. The District has met necessary nexus and notice requirements.**
- F. A Level 2 "Alternate" Fee is justified in the amount of \$2.23 per square foot of residential development. This is an increase of \$1.16 above the high school portion of the standard Level 1 Fee (30.77% of \$3.48 = \$1.07 Level 1 Fee)**

Respectfully Submitted,



Ken Reynolds
SchoolWorks, Inc.

Appendices

SCHOOL FACILITY NEEDS ANALYSIS 2016

Santa Maria Joint Union High School District

- *CBEDS (2015-16)*
- *SAB 50-01 Enrollment Certification/Projection*
- *SAB 50-02 Existing School Building Capacity*
- *New Construction Eligibility (OPSC)*
- *Annual Adjustment to School Facility Program Grants*
- *Site Development Costs*
- *Capital Facility Debt*

Academic Year: 2015-2016
 View: Snapshot

LEA: Santa Maria Joint Union High
 School Type: ALL
 School: ALL

User ID: jeallen
 Create Date: 2/11/2016 4:48:23 PM
 Print Date: 2/12/2016 2:06:44 PM

1.3 Enrollment - Primary Status Disaggregated

School Code	School Name	Grade	Gender	Total		Hispanic		Am Indian/Alskn Nat		Asian		Black/African Am		Nat Hwim/Othr Pac Islndr		White		Multiple		Missing	
				#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
4231452	Delta High	Total			7900	83.42%	22	0.28%	250	3.16%	95	1.20%	13	0.16%	830	10.51%	68	0.86%	32	0.41%	
					372	88.71%	0	0.00%	1	0.27%	7	1.88%	0	0.00%	31	8.33%	3	0.81%	0	0.00%	
					372	88.71%	0	0.00%	1	0.27%	7	1.88%	0	0.00%	31	8.33%	3	0.81%	0	0.00%	
					1	100.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	
4234613	Ernest Righetti High	Total			2139	61.62%	17	0.79%	91	4.25%	49	2.29%	8	0.37%	594	27.77%	40	1.87%	22	1.03%	
					2139	61.62%	17	0.79%	91	4.25%	49	2.29%	8	0.37%	594	27.77%	40	1.87%	22	1.03%	
					588	64.29%	9	1.53%	29	4.93%	12	2.04%	2	0.34%	143	24.32%	12	2.04%	3	0.51%	
					544	58.27%	4	0.74%	20	3.66%	16	2.94%	3	0.55%	164	30.15%	9	1.65%	11	2.02%	
0102285	Pioneer Valley High	Total			2694	62.55%	1	0.04%	116	4.31%	24	0.89%	4	0.15%	119	4.42%	19	0.71%	5	0.19%	
					2694	62.55%	1	0.04%	116	4.31%	24	0.89%	4	0.15%	119	4.42%	19	0.71%	5	0.19%	
					687	91.70%	0	0.00%	24	3.49%	3	0.44%	2	0.29%	24	3.49%	3	0.44%	1	0.15%	
					717	89.12%	0	0.00%	29	4.04%	6	0.84%	0	0.00%	40	5.58%	3	0.42%	0	0.00%	
4236030	Santa Maria High	Total			625	88.00%	0	0.00%	28	4.48%	9	1.44%	0	0.00%	30	4.80%	7	1.12%	1	0.16%	
					2695	94.10%	4	0.15%	42	1.56%	15	0.56%	1	0.04%	86	3.19%	6	0.22%	5	0.19%	
					2695	94.10%	4	0.15%	42	1.56%	15	0.56%	1	0.04%	86	3.19%	6	0.22%	5	0.19%	
					663	96.34%	0	0.00%	4	0.59%	3	0.44%	0	0.00%	18	2.64%	0	0.00%	0	0.00%	
			758	93.93%	3	0.40%	13	1.72%	3	0.40%	3	0.40%	1	0.13%	25	3.30%	0	0.00%	1	0.13%	

This report is confidential and use is restricted to authorized individuals.

The data that appears on this report are filtered by the user selections that appear on the last page of this report.

=

1.3 Enrollment - Primary Status Disaggregated

	Total	Hispanic		Am Indian/Alskn Nat		Asian		Black/African Am		Nat Hwim/Othr Pac Islndr		White		Multiple		Missing	
		Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
11	Total	655	95.27 %	0	0.00 %	5	0.76 %	5	0.76 %	0	0.00 %	13	1.98 %	6	0.92 %	2	0.31 %
12	Total	599	90.48 %	1	0.17 %	20	3.34 %	4	0.67 %	0	0.00 %	30	5.01 %	0	0.00 %	2	0.33 %

Grade:	ALL	District of Geographic Residence:	ALL	Special Education:	ALL
English Language Acquisition Status:	ALL	Ethnicity/Race:	ALL	Gender:	ALL
Title I Part C Migrant:	ALL	Title III Eligible Immigrant:	ALL		
Gifted and Talented:	ALL	Socio-Economically Disadvantaged:	ALL		
Interdistrict Transfer:	ALL				

This report is confidential and use is restricted to authorized individuals.

The data that appears on this report are filtered by the user selections that appear on the last page of this report.

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SCHOOL DISTRICT Santa Maria Joint Union High	FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory) 69310
COUNTY Santa Barbara	HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (if applicable)

Check one: **Fifth-Year Enrollment Projection** **Tenth-Year Enrollment Projection**
HSAA Districts Only - Check one: **Attendance** **Residency**
 Residency - COS Districts Only - (Fifth Year Projection Only)

<input type="checkbox"/> Modified Weighting (Fifth-Year Projection Only)	3rd Prev. to 2nd Prev.	2nd Prev. to Prev.	Previous to Current
<input type="checkbox"/> Alternate Weighting - (Fill in boxes to the right):			

Part G. Number of New Dwelling Units
 (Fifth-Year Projection Only)

Part H. District Student Yield Factor
 (Fifth-Year Projection Only)

Part I. Projected Enrollment

1. Fifth-Year Projection

Enrollment/Residency - (except Special Day Class pupils)

K-6	7-8	9-12	TOTAL
0	0	8924	8924

Special Day Class pupils only - Enrollment/Residency

	Elementary	Secondary	TOTAL
Non-Severe	0	0	0
Severe	0	0	0
TOTAL	0	0	

2. Tenth-Year Projection

Enrollment/Residency - (except Special Day Class pupils)

K-6	7-8	9-12	TOTAL

Special Day Class pupils only - Enrollment/Residency

	Elementary	Secondary	TOTAL
Non-Severe			
Severe			
TOTAL			

Part A. K-12 Pupil Data

Grade	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
	/	/	/	/	2012 / 2013	2013 / 2014	2014 / 2015	2015 / 2016
K					2623	2825	2899	3062
1					2543	2471	2555	2315
2					2564	2507	2488	2504
3					2451	2536	2560	2478
4					2249	2469	2544	2537
5					2131	2254	2501	2541
6					2086	2132	2291	2427
7					2175	2122	2152	2227
8					2074	2151	2126	2094
9					1962	1921	1993	1958
10					1882	1992	1952	2020
11					1878	1822	1961	1908
12					1913	1984	1876	2014
TOTAL					28531	29186	29898	30085

Part B. Pupils Attending Schools Chartered By Another District

7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
				0	0	0	0

Part C. Continuation High School Pupils - (Districts Only)

Grade	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
9					0	0	0	0
10					0	0	0	0
11					0	0	0	0
12					0	0	0	0
TOTAL					0	0	0	0

Part D. Special Day Class Pupils - (Districts or County Superintendent of Schools)

	Elementary	Secondary	TOTAL
Non-Severe	0	0	0
Severe	0	0	0
TOTAL	0	0	

Part E. Special Day Class Pupils - (County Superintendent of Schools Only)

7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
/	/	/	/	2012 / 2013	2013 / 2014	2014 / 2015	2015 / 2016

Part F. Birth Data - (Fifth-Year Projection Only)

County Birth Data Birth Data by District ZIP Codes Estimate Estimate Estimate

8th Prev.	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current

I certify, as the District Representative, that the information reported on this form and, when applicable, the High School Attendance Area Residency Reporting Worksheet attached, is true and correct and that:

- I am designated as an authorized district representative by the governing board of the district.
- If the district is requesting an augmentation in the enrollment projection pursuant to Regulation Section 1859.42.1 (a), the local planning commission or approval authority has approved the tentative subdivision map used for augmentation of the enrollment and the district has identified dwelling units in that map to be contracted. All subdivision maps used for augmentation of enrollment are available at the district for review by the Office of Public School Construction (OPSC).
- This form is an exact duplicate (verbatim) of the form provided by the Office of Public School Construction. In the event a conflict should exist, then the language in the OPSC form will prevail.

NAME OF DISTRICT REPRESENTATIVE (PRINT OR TYPE) _____

SIGNATURE OF DISTRICT REPRESENTATIVE _____

DATE _____ TELEPHONE NUMBER _____

E-MAIL ADDRESS _____

COPY

STATE OF CALIFORNIA
EXISTING SCHOOL BUILDING CAPACITY

STATE ALLOCATION BOARD
 OFFICE OF PUBLIC SCHOOL CONSTRUCTION
 Page 4 of 4

SAB 50-02 (Rev. 07/00) Excel (Rev. 08/15/2000)
 SCHOOL DISTRICT
 SANTA MARIA JOINT UNION HIGH
 COUNTY
 SANTA BARBARA

FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory)
 69310
 HIGH SCHOOL ATTENDANCE AREA (if applicable)
 District Wide

PART I - Classroom Inventory NEW ADJUSTED

Line 1. Leased State Relocatable Classrooms		48			48
Line 2. Portable Classrooms leased less than 5 years		11			11
Line 3. Interim Housing Portables leased less than 5 years		16			16
Line 4. Interim Housing Portables leased at least 5 years					
Line 5. Portable Classrooms leased at least 5 years		29	4		33
Line 6. Portable Classrooms owned by district		95	5	3	103
Line 7. Permanent Classrooms		199	9	3	211
Line 8. Total (Lines 1 through 7)					

PART II - Available Classrooms

a. Part I, line 4					
b. Part I, line 5		29	4		33
c. Part I, line 6		95	5	3	103
d. Part I, line 7		124	9	3	136
e. Total (a, b, c, & d)					

Option B

a. Part I, line 8		199	9	3	211
b. Part I, lines 1,2,5 and 6 (total only)					92
c. 25 percent of Part I, line 7 (total only)		53	3		66
d. Subtract c from b (enter 0 if negative)		136	6	3	145
e. Total (a minus d)					

PART III - Determination of Existing School Building Capacity

Line 1. Classroom capacity		3,348	117	27
Line 2. SER adjustment				
Line 3. Operational Grants				
Line 4. Greater of line 2 or 3		3,348	117	27
Line 5. Total of lines 1 and 4				

I certify, as the District Representative, that the information reported on this form is true and correct and that:
 I am designated as an authorized district representative by the governing board of the district; and,
 This form is an exact duplicate (verbatim) of the form provided by the Office of Public School Construction (OPSC).
 In the event a conflict should exist, then the language in the OPSC form will prevail.

SIGNATURE OF DISTRICT REPRESENTATIVE

Diane Bennett

DATE

January 3, 2001



District Main Page

[Return to Search Results](#)

District: Santa Maria Joint Union High
District Rep: Mr. Mark Richardson

[Modernization Eligibility](#)
 [New Construction Eligibility](#)
 [Fund Release](#)

District Code	Attendance Area	Original SAB Approval Date	Recent SAB Approval																																
69310	0	2/27/2002	8/22/2012																																
<p>SAB 50-03 New Construction Eligibility Information</p> <p>New Construction Baseline Eligibility</p> <table> <thead> <tr> <th>Grade Level:</th> <th>K - 6</th> <th>7 - 8</th> <th>9 - 12</th> <th>Non-Severe</th> <th>Severe</th> </tr> </thead> <tbody> <tr> <td>Established Eligibility:</td> <td>0</td> <td>0</td> <td>3648</td> <td>53</td> <td>19</td> </tr> <tr> <td>SAB Approvals/Adjustments:</td> <td>0</td> <td>-1</td> <td>-1259</td> <td>91</td> <td>82</td> </tr> <tr> <td>Remaining Eligibility:</td> <td>0</td> <td>-1</td> <td>2389</td> <td>144</td> <td>101</td> </tr> </tbody> </table> <hr/> <p>SAB 50-03 Eligibility Document Status/Dates</p> <table> <tbody> <tr> <td>Status:</td> <td>PM Complete</td> </tr> <tr> <td>Date Signed:</td> <td>1/3/2001</td> </tr> <tr> <td>Date Received:</td> <td>1/8/2001</td> </tr> <tr> <td>SAB Approval Date:</td> <td>2/27/2002</td> </tr> </tbody> </table>				Grade Level:	K - 6	7 - 8	9 - 12	Non-Severe	Severe	Established Eligibility:	0	0	3648	53	19	SAB Approvals/Adjustments:	0	-1	-1259	91	82	Remaining Eligibility:	0	-1	2389	144	101	Status:	PM Complete	Date Signed:	1/3/2001	Date Received:	1/8/2001	SAB Approval Date:	2/27/2002
Grade Level:	K - 6	7 - 8	9 - 12	Non-Severe	Severe																														
Established Eligibility:	0	0	3648	53	19																														
SAB Approvals/Adjustments:	0	-1	-1259	91	82																														
Remaining Eligibility:	0	-1	2389	144	101																														
Status:	PM Complete																																		
Date Signed:	1/3/2001																																		
Date Received:	1/8/2001																																		
SAB Approval Date:	2/27/2002																																		

ATTACHMENT B

ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS
State Allocation Board Meeting, February 24, 2016

Grant Amount Adjustments

		Regulation Section	Current Adjusted Grant Per Pupil Effective 1-1-15	Current Adjusted Grant Per Pupil Effective 1-1-16
New Construction	Elementary	1859.71	\$10,345	\$10,634
	Middle	1859.71	\$10,942	\$11,247
	High	1859.71	\$13,923	\$14,311
	Special Day Class – Severe	1859.71.1	\$29,070	\$29,881
	Special Day Class – Non-Severe	1859.71.1	\$19,442	\$19,984
	Automatic Fire Detection/Alarm System – Elementary	1859.71.2	\$12	\$12
	Automatic Fire Detection/Alarm System – Middle	1859.71.2	\$17	\$17
	Automatic Fire Detection/Alarm System – High	1859.71.2	\$28	\$29
	Automatic Fire Detection/Alarm System – Special Day Class – Severe	1859.71.2	\$53	\$54
	Automatic Fire Detection/Alarm System – Special Day Class – Non-Severe	1859.71.2	\$36	\$37
	Automatic Sprinkler System – Elementary	1859.71.2	\$173	\$178
	Automatic Sprinkler System – Middle	1859.71.2	\$206	\$212
	Automatic Sprinkler System – High	1859.71.2	\$214	\$220
	Automatic Sprinkler System – Special Day Class – Severe	1859.71.2	\$548	\$563
	Automatic Sprinkler System – Special Day Class – Non-Severe	1859.71.2	\$368	\$378
	Modernization	Elementary	1859.78	\$3,939
Middle		1859.78	\$4,167	\$4,283
High		1859.78	\$5,455	\$5,607
Special Day Class - Severe		1859.78.3	\$12,555	\$12,905
Special Day Class – Non-Severe		1859.78.3	\$8,399	\$8,633
State Special School – Severe		1859.78	\$20,925	\$21,509
Automatic Fire Detection/Alarm System – Elementary		1859.78.4	\$127	\$131
Automatic Fire Detection/Alarm System – Middle		1859.78.4	\$127	\$131
Automatic Fire Detection/Alarm System – High		1859.78.4	\$127	\$131
Automatic Fire Detection/Alarm System – Special Day Class – Severe		1859.78.4	\$352	\$362
Automatic Fire Detection/Alarm System – Special Day Class – Non-Severe		1859.78.4	\$235	\$242
Over 50 Years Old – Elementary		1859.78.6	\$5,472	\$5,625
Over 50 Years Old – Middle		1859.78.6	\$5,788	\$5,949
Over 50 Years Old – High		1859.78.6	\$7,577	\$7,788
Over 50 Years Old – Special Day Class – Severe		1859.78.6	\$17,442	\$17,929
Over 50 Years Old – Special Day Class – Non-Severe		1859.78.6	\$11,664	\$11,989
Over 50 Years Old – State Special School – Severe		1859.78.6	\$29,069	\$29,880

(Continued on Page Two)

ATTACHMENT B

ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS
February 2016

Grant Amount Adjustments

New Construction / Modernization / Joint-Use	Regulation Section	Current Adjusted Grant Per Pupil Effective 1-1-15	Current Adjusted Grant Per Pupil Effective 1-1-16
Therapy/Multipurpose Room/Other (per square foot)	1859.72 1859.73.2 1859.77.3 1859.82 1859.125 1859.125.1	\$169	\$174
Toilet Facilities (per square foot)	1859.72 1859.73.2 1859.82 1859.125 1859.125.1	\$304	\$312
New Construction Only			
Parking Spaces	1859.76	\$13,155	\$13,522
General Site Grant (per acre for additional acreage being acquired)	1859.76	\$16,838	\$17,308
Project Assistance (for school district with less than 2,500 pupils)	1859.73.1	\$6,327	\$6,504
Modernization Only			
Two-stop Elevator	1859.83	\$105,240	\$108,176
Additional Stop	1859.83	\$18,943	\$19,472
Project Assistance (for school district with less than 2,500 pupils)	1859.78.2	\$3,374	\$3,468
Facility Hardship / Rehabilitation			
Current Replacement Cost - Other (per square foot)	1859.2	\$338	\$347
Current Replacement Cost - Toilets (per square foot)	1859.2	\$608	\$625
Interim Housing – Financial Hardship (per classroom)	1859.81	\$34,687	\$35,655
Charter School Facilities Program - Preliminary Apportionment Amounts			
Charter School Elementary	1859.163.1	\$10,399	\$10,689
Charter School Middle	1859.163.1	\$11,009	\$11,316
Charter School High	1859.163.1	\$13,972	\$14,362
Charter School Special Day Class - Severe	1859.163.1	\$29,209	\$30,024
Charter School Special Day Class - Non-Severe	1859.163.1	\$19,534	\$20,079
Charter School Two-stop Elevator	1859.163.5	\$87,700	\$90,147
Charter School Additional Stop	1859.163.5	\$15,786	\$16,226

(Continued on Page Three)



Determination of Average State allowed amounts for Site Development Costs

Elementary Schools

District	Project #	Acres	Original	Inflation	2009 Adjusted	Project	2009	
			OPSC Site Development		Site		Cost/Acre	
Davis Jt Unified	3	9.05	\$532,282	38.4%	\$1,473,469	2004	\$162,814	
Dry Creek Jt Elem	2	8.5	\$516,347	46.2%	\$1,509,322	2002	\$177,567	
Dry Creek Jt Elem	5	11.06	\$993,868	20.1%	\$2,387,568	2006	\$215,874	
Elk Grove Unified	5	12.17	\$556,011	48.2%	\$1,648,316	2001	\$135,441	
Elk Grove Unified	10	11	\$690,120	48.2%	\$2,045,888	2001	\$185,990	
Elk Grove Unified	11	10	\$702,127	48.2%	\$2,081,483	2001	\$208,148	
Elk Grove Unified	14	10	\$732,837	46.2%	\$2,142,139	2002	\$214,214	
Elk Grove Unified	16	9.86	\$570,198	46.2%	\$1,666,733	2002	\$169,040	
Elk Grove Unified	17	10	\$542,662	46.2%	\$1,586,243	2002	\$158,624	
Elk Grove Unified	20	10	\$710,730	43.2%	\$2,034,830	2003	\$203,483	
Elk Grove Unified	25	10	\$645,923	38.4%	\$1,788,052	2004	\$178,805	
Elk Grove Unified	28	10.03	\$856,468	24.4%	\$2,130,974	2005	\$212,460	
Elk Grove Unified	39	9.91	\$1,007,695	20.1%	\$2,420,785	2006	\$244,277	
Folsom-Cordova Unified	1	9.79	\$816,196	20.1%	\$1,960,747	2006	\$200,281	
Folsom-Cordova Unified	4	7.5	\$455,908	46.2%	\$1,332,654	2002	\$177,687	
Folsom-Cordova Unified	5	8	\$544,213	46.2%	\$1,590,776	2002	\$198,847	
Folsom-Cordova Unified	8	8.97	\$928,197	11.2%	\$2,063,757	2007	\$230,073	
Galt Jt Union Elem	2	10.1	\$1,033,044	38.4%	\$2,859,685	2004	\$283,137	
Lincoln Unified	1	9.39	\$433,498	46.2%	\$1,267,148	2002	\$134,947	
Lodi Unified	3	11.2	\$555,999	46.2%	\$1,625,228	2002	\$145,110	
Lodi Unified	10	11.42	\$1,245,492	46.2%	\$3,640,669	2002	\$318,798	
Lodi Unified	19	9.93	\$999,164	11.2%	\$2,221,545	2007	\$223,721	
Lodi Unified	22	10	\$1,416,212	7.7%	\$3,051,426	2008	\$305,143	
Natomas Unified	6	8.53	\$685,284	46.2%	\$2,003,138	2002	\$234,834	
Natomas Unified	10	9.83	\$618,251	43.2%	\$1,770,061	2003	\$180,067	
Natomas Unified	12	9.61	\$735,211	24.4%	\$1,829,275	2005	\$190,351	
Rocklin Unified	8	10.91	\$593,056	46.2%	\$1,733,548	2002	\$158,895	
Stockton Unified	1	12.66	\$1,462,232	7.7%	\$3,150,582	2008	\$248,861	
Stockton Unified	2	10.5	\$781,675	43.2%	\$2,237,946	2003	\$213,138	
Stockton Unified	6	12.48	\$1,136,704	20.1%	\$2,730,703	2006	\$218,806	
Tracy Jt Unified	4	10	\$618,254	46.2%	\$1,807,204	2002	\$180,720	
Tracy Jt Unified	10	10	\$573,006	38.4%	\$1,586,202	2004	\$158,620	
Washington Unified	1	8	\$446,161	46.2%	\$1,304,163	2002	\$163,020	
Washington Unified	4	10.76	\$979,085	7.7%	\$2,109,575	2008	\$196,057	
Totals		341.16			\$68,791,833	Average	\$201,641	2016 Adjustment \$228,819

Middle and High Schools

District	Project #	Acres	Original	Inflation	2009 Adjusted	Project	2009	
			OPSC Site Development		Site		Cost/Acre	
Western Placer Unified	4	19.3	\$5,973,312	24.4%	\$7,431,085	2005	\$385,030	
Roseville City Elem	2	21.6	\$1,780,588	48.2%	\$2,639,311	2000	\$122,190	
Elk Grove Unified	4	66.2	\$8,659,494	48.2%	\$12,835,704	2000	\$193,893	
Elk Grove Unified	13	76.4	\$9,791,732	48.2%	\$14,513,986	2001	\$189,974	
Elk Grove Unified	18	84.3	\$13,274,562	43.2%	\$19,002,626	2003	\$225,417	
Grant Jt Union High	2	24	\$2,183,840	48.2%	\$3,237,039	2000	\$134,877	
Center Unified	1	21.2	\$1,944,310	46.2%	\$2,841,684	2002	\$134,042	
Lodi Unified	2	13.4	\$1,076,844	46.2%	\$1,573,849	2002	\$117,451	
Lodi Unified	6	13.4	\$2,002,164	46.2%	\$2,926,240	2002	\$218,376	
Galt Jt Union Elem	1	24.9	\$2,711,360	46.2%	\$3,962,757	2002	\$159,147	
Tahoe Truckee Unified	2	24	\$2,752,632	43.2%	\$3,940,412	2003	\$164,184	
Davis Unified	5	23.3	\$3,814,302	43.2%	\$5,460,199	2003	\$234,343	
Woodland Unified	3	50.2	\$8,664,700	46.2%	\$12,663,792	2002	\$252,267	
Sacramento City Unified	1	35.2	\$4,813,386	46.2%	\$7,034,949	2002	\$199,856	
Lodi Unified	4	47	\$7,652,176	46.2%	\$11,183,950	2002	\$237,956	
Stockton Unified	3	49.1	\$8,959,088	43.2%	\$12,824,996	2003	\$261,202	
Natomas Unified	11	38.7	\$3,017,002	38.4%	\$4,175,850	2004	\$107,903	
Rocklin Unified	11	47.1	\$11,101,088	24.4%	\$13,810,282	2005	\$293,212	
Totals		679.3			\$142,058,711	Average	\$209,125	2016 Adjustment \$215,274
Middle Schools:		260.7			\$49,447,897	Middle	\$189,704	\$215,274
High Schools:		418.6			\$92,610,814	High	\$221,217	\$251,034

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT
 NOTES TO FINANCIAL STATEMENTS, continued
 JUNE 30, 2015

NOTE 8 – LONG-TERM DEBT (continued)

B. Certificates of Participation

The annual requirements to amortize the certificates of participation outstanding at June 30, 2015 are as follows:

Year Ended June 30,	Principal	Interest	Total
2016	\$ 313,836	\$ 118,269	\$ 432,105
2017	338,232	107,873	446,105
2018	368,468	96,636	465,104
2019	393,646	84,458	478,104
2020	413,601	71,504	485,105
2021 - 2024	1,889,084	139,333	2,028,417
Total	\$ 3,716,867	\$ 618,073	\$ 4,334,940

C. General Obligation Bonds

The outstanding general obligation bonded debt of the District as of June 30, 2015 is as follows:

Series	Maturity Date	Interest Rate	Original Issue	Bonds			Bonds Outstanding June 30, 2015
				Outstanding July 01, 2014	Additions	Deductions	
Election 2000, Series B	2025	2.0%-4.375%	\$ 12,000,000	\$ 2,525,000	\$ -	\$ -	\$ 2,525,000
Election 2004, Series 2005	2031	2.0%-5.010%	34,998,222	5,208,221	-	680,000	4,528,221
2006 Refunding	2021	4.0%-5.000%	25,452,727	16,310,000	-	1,935,000	14,375,000
Election 2004, Series 2013	2038	2.0%-5.350%	14,999,873	14,999,873	-	840,000	14,159,873
2013 Refunding	2027	4.0%-5.000%	26,820,000	26,545,000	-	20,000	26,525,000
Election 2004, Series 2014	2038	3.0%-5.000%	28,996,159	-	28,996,159	-	28,996,159
				\$ 65,588,094	\$ 28,996,159	\$ 3,475,000	\$ 91,109,253

REGULAR MEETING
June 14, 2016

APPENDIX D
General Fund
2016-17 Proposed Budget

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT 2016-17 ADOPTED BUDGET

Education Code Section 42127 requires that on or before July 1 of each year the Governing Board of a school district shall hold a public hearing on the budget to be adopted for the subsequent year. Pursuant to Education Code Section 33127, this Adopted Budget complies with the criteria and standards as established by the State Board of Education.

Assembly Bill 97 as signed by the Governor on July 1, 2013, created the Local Control Funding Formula ("LCFF") and made numerous revisions and additions to California's Education Code. The District's Governing Board is now required to conduct a public hearing to review its Local Control and Accountability Plan ("LCAP") at the same meeting as the hearing for the District's budget. The District's LCAP plan contains many goals and initiatives to provide increased services to its target population of foster youth, low income and English learners. The plan was developed after many hours of meetings and consultations with stakeholders. These meetings were used to evaluate the progress towards the goals that were contained in the prior year's plan, and to make revisions for the District's 2016/17 LCAP plan. The District's budget that is being proposed for adoption for the 2016/17 year reflects the goals and expenditures contained in its LCAP plan.

While both national and state economies continue to improve, the rate is much slower than a year ago. The Governor in his May Budget - the "May Revise" – continued his support of full implementation of the LCFF as well as keeping the ongoing expenses of the State within its means and not deficit spending. However – and as a sign of the slowing economic growth - estimate of total state revenues as of the May Revise is less than amounts contained in the Governor's January proposal. The calculations for COLA are complete, and it's 0.00% for the coming fiscal year. In contrast with previous years, the growth in education funding has slowed markedly because payments for Prop 98 restoration are nearly gone, and the gap closure for LCFF funding will reach 95.7% implementation with the 2016/17 budget. Once LCFF is fully implemented, the only funding educational agencies will receive will be based on COLA adjustments and with a slowing economy, many fiscal watchdogs are saying now is the time to start preparing for slower revenue growth.

Several items of concern which have been discussed in previous budget versions remain unaddressed in the May Revise. The first is the "hard cap" on district reserves, as required by Prop 2 passed in November 2014. There are specific conditions that must be met in order to trigger the cap. These have not been met in 2015/16 and will not be met in 2016/17. So it will now be three years before the cap can be triggered. In the meantime, efforts continue to repeal the legislation.

The second issue is the increasing share of costs borne by school districts for funding of retirement systems in California, and no funding support from the State, either within the LCFF model, or separate from the LCFF. Given these increased costs, at full implementation the LCFF model does not meet the commitment to restore purchasing power to districts equal to their 2007/08 levels. The employer share of payments to CalPERS and STRS is estimated to consume 25% of all new dollars, and state-wide it is estimated that by the end of full implementation of LCFF, \$4.5 **billion** will have been shifted from salaries and wages to retirement costs.

Thirdly, a state facilities bond has been qualified for the November ballot. If passed, flexibility which now exists for the amount of General Fund dollars that must be committed to Routine Restricted Maintenance will be eliminated. All districts will then be required to contribute a

minimum of 3% of their total General Fund expenditures towards Routine Restricted Maintenance.

Finally, enough signatures have been gathered on an initiative to place a measure on the November ballot to extend that portion of the Prop 30 "temporary taxes" applicable to high income taxpayers. It is estimated that this tax generates about \$6 to \$8 billion annually for the State budget. Absent this measure, the tax is set to expire at the end of 2018. There is no equivalent measure to extend the other part of the temporary tax, which is sales tax; therefore this item, estimated to contribute about \$1.5 billion annually to the State budget, will expire at the end of the 2016 year. If Prop 30 is not extended and a recession occurs, state revenues could drop below prior-year levels and we could be facing cuts to education.

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT 2016-17 ADOPTED BUDGET ASSUMPTIONS

Ending Fund Balance Reconciliation

As a District adopts its budget for any given year, it must also report the estimated actuals for the prior year. These estimated actuals are based on the District's most current working budget, and they typically are not the same as the budget presented on the 2nd Interim Revised Budget. Adjustments and revisions to the District's working budget are made when new facts or events occur. The following table summarizes the major changes the District has made to its working budget since the 2nd Interim Revised Budget. These changes are included in the "2015-16 Estimated Actuals" columns in the District's 2016-17 Adopted Budget.

ENDING FUND BALANCE		Unrestricted	Restricted	Total
A)	As of 2015-16 2nd Interim Revision ("Projected Year Totals")	\$ 4,224,458	\$ 1,147,311	\$ 5,371,769
	CHANGES IN REVENUES:			
	STRS On-behalf calculation (matched by expenditures below)		2,104,637	2,104,637
	Perkins program (CTE) notice of increased award amount		16,028	16,028
	CTEIG Career Tech Ed Incentive Grant earned revenue		15,980	15,980
	Lottery, increases from prior year adjustments	3,340	3,610	6,950
	Other local revenue based on actual receipts	2,013	2,450	4,463
	Dept of Rehab TPP grant		(30,140)	(30,140)
	Adjustment to award for discretionary funds "1-time"	(128)		(128)
	Contribution changes due to increased expenditures			
	Routine restricted maintenance	31,380	(31,380)	-
	Special Education	(3,111)	3,111	-
B)	Total Increases (Decreases) in Revenues	33,494	2,084,296	2,117,790
	CHANGES IN EXPENDITURES and TRANSFERS			
	STRS On-behalf calculation (matched by revenues above)		2,104,637	2,104,637
	Increased legal & professional services	100,000		100,000
	Perkins award adjustment (matched by revenues above)		16,028	16,028
	CTEIG grant TOSA, supplies, subs		15,980	15,980
	Lottery		3,610	3,610
	Vehicle bus garage storage rack system	3,600		3,600
	Special Ed regional program housing costs		3,111	3,111
	JCI contract balance, shift from 15/16 to 16/17	(229,000)		(229,000)
	Reallocate MOT equipment budget	31,380	(31,380)	-
	Miscellaneous all other	1,751	3,000	4,751
C)	Total Increases (Decreases) in Expenditures and Transfers	(92,269)	2,114,986	2,022,717
	As of 2016-17 Budget Adoption ("2015-16 Estimated Actuals")	\$ 4,350,221	\$ 1,116,621	\$ 5,466,842
	(A + B - C)			
	Net change in Ending Fund Balance since 2nd Interim:	\$ 125,763	\$ (30,690)	\$ 95,073

The District's 2016-17 Adopted Budget

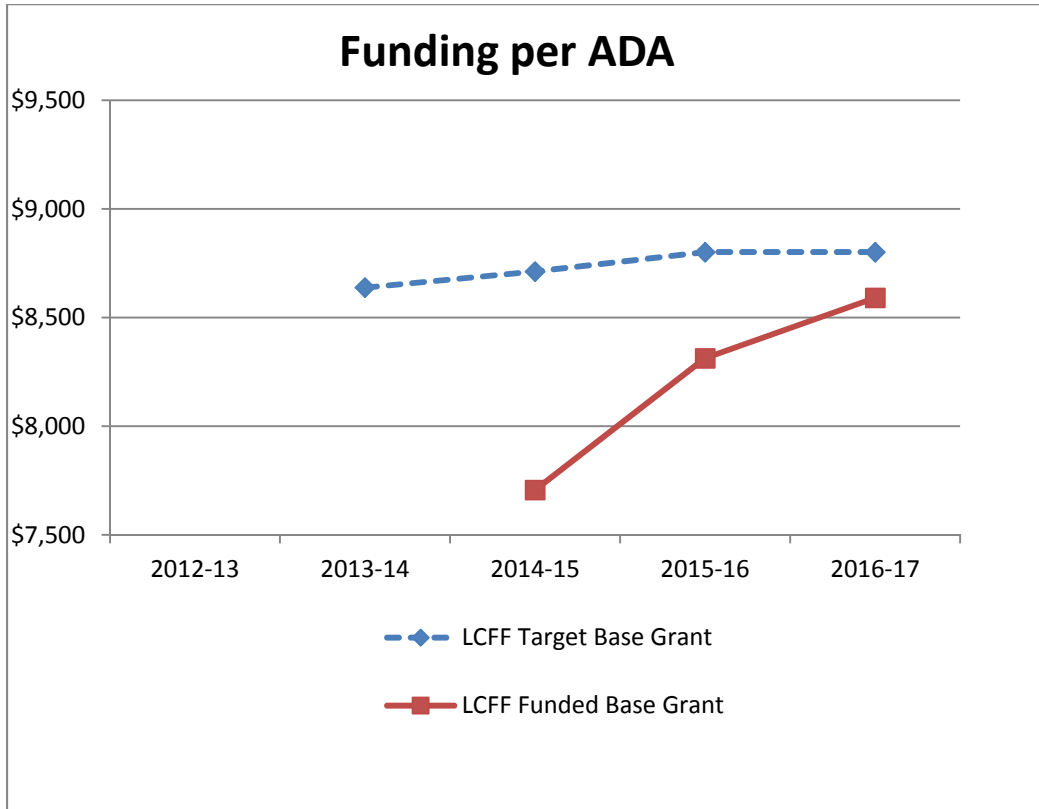
REVENUES:
LCFF Sources

For the District's 2016-17 Adopted Budget, revenue from LCFF sources is projected utilizing the LCFF simulator tool as provided by the Fiscal Crisis and Management Assistance Team ("FCMAT"). A comparison to the 2015-16 Estimated Actuals in the components of LCFF revenue is summarized in the table below.

	2015-16 Estimated Actuals	2016-17 Budget	Difference
LCFF State Aid Funding			
Base Grant	\$62,126,413	\$64,541,261	\$ 2,414,848
Supplemental/Concentration Grant	11,032,319	13,954,351	2,922,032
Total LCFF State Aid	<u>73,158,732</u>	<u>78,495,612</u>	<u>5,336,880</u>
In-Lieu taxes			-
Property Tax Transfer SBCEO for Special Education	<u>1,445,069</u>	<u>1,445,069</u>	-
Total Revenues, LCFF Sources	<u>\$74,603,801</u>	<u>\$79,940,681</u>	<u>\$ 5,336,880</u>
Funded LCFF <u>Base Grant</u> / ADA:	<u>\$ 8,302</u>	<u>\$ 8,591</u>	<u>\$ 289</u>
Funded ADA	7483	7513	

Other factors applicable to the LCFF simulator tool, as provided by the California Department of Finance, normally would include a COLA adjustment to the target base grant per ADA for the District's 9-12 grade span; however the COLA for the 16/17 year is 0.00%. The gap funding percentage is 54.84%. Supplemental and concentration grant funding is based on a three-year average of the percentage of the District's pupils that are either low-income, English learners, or Foster youth. For 2015-16, the District's percentage was 74.64%. For the 2016-17 budget year, this average has declined to 74.33%. As part of the legislation that enacted the LCFF funding model, and the accompanying requirement for an LCAP plan, supplemental and concentration grant funding is required to be expended to provide increased services to the target groups of low income, English learner, and foster youth students.

A graphical display of the Base Grant amounts per ADA, funded and target, is presented on the following page.



Federal Revenues

Year to year changes in Federal revenues are summarized below:

2015-16 Estimated Actuals	\$ 4,538,388
2016-17 Budget year	
Increase in projected award, Perkins	13,209
Decrease in Migrant due to decline in eligible students and increase in county administrative costs	<199,561>
Dept of Rehab TPP contract termination	<185,663>
Eliminate revenues attributable to prior yr unused carryovers	<u><40,495></u>
Total Federal Revenues 2016-17 Budget year	<u>\$ 4,125,878</u>

State Revenues

Year to year changes in State revenues are summarized below:

2015-16 Estimated Actuals	\$ 12,653,133
2016-17 Budget year	
Removed discretionary funding at \$601/ADA that originated in 2015-16	\$ <3,920,971>
Discretionary funding \$237/ADA, funded in 2016-17	1,760,600
STRS On-behalf (directly offset by expenditures)	761,427
CTEIG grant, adjust earned revenue based on eligible expenditures (half of the grant has already been received in cash)	51,301

Mandate Block Grant, adjust based on increased ADA 4,494

State Revenues (continued)

Educator Effectiveness grant (one time, funded in 2015-16)	<578,911>
Decrease in projected award, Ag Incentive supplemental grant	<10,000>
Decrease in lottery, removed amounts attributable to prior year adjustments as well as ending balance carryover	<44,915>
Decrease in amounts for Prop 30 Energy (received 3 years' of appropriation in prior year)	<519,478>
CCPT California Career Pathways (one time, funded in 2015-16)	<u><53,758></u>

Total State Revenue 2016-17 Budget year \$ 10,102,922

Local Revenues

Local revenues consist of a variety of items from reimbursements, billings for use of facilities, donations, funding from the Medi-Cal Reimbursement Activities, E-rate, interest, and other irregular and/or non-recurring items. Other than the few items that are regular in nature, it is the District's practice to budget local revenue when actually received. In total, local revenues ***decline*** by \$888,961 from 2015-16. Ongoing sources of local revenue amount to \$483,659 and include interest income, transportation billings for field trips, interagency fees for bus maintenance, pass through revenues from the SELPA for LCI funding (special ed), and use of facilities.

TOTAL REVENUES HAVE INCREASED BY: \$ 1,485,198

EXPENDITURES:

Salaries, Wages, and Benefits

Projected expenditures for salaries, wages, and benefits total \$70.75 million in the 2016-17 budget year. This total amounts to 78% of the District's total expenditures. Of this amount, \$8.15 million is budgeted in the LCAP plan. In total, salaries, wages, and benefits increase by \$2,491,959 from the estimated actuals. Components of this increase, by bargaining unit/employee group, are detailed in the tables below and on the following page. Note that there are assignments of the District's ending fund balance, related to the certificated bargaining unit.

CERTIFICATED	FTE	COST
Increased cost for step/column movement including statutory benefits		\$ 659,429
Increased costs due to 1.85 percentage point increase in STRS		563,285
Increased costs due to 2.04 percentage point increase in PERS (15 members of Certificated staff are in the PERS retirement system)		22,870
Decrease due to the expiration of the QEIA program	(17.00)	(1,576,182)
New staffing:		
Counselors, LCAP Goal 4	2.00	144,739
TOSA, LCAP Goal 7, Academic Support Specialist	1.00	75,880
CERTIFICATED total	(14.00)	(109,979)

CLASSIFIED	FTE	COST
Increased cost for step/column movement including statutory benefits		\$ 228,145
Increased costs due to 2.04 percentage point increase in PERS		259,442
Increased costs due to 1.85 percentage point increase in STRS		1,231
Increases due to approved reclassification requests, work calendar changes, shift differential		169,575
Cost associated with tentative agreement with bargaining unit for 3.0% salary schedule increase		477,388
New staffing:		
Attendance assistants (3)	1.50	56,088
HR benefits & recruitment specialist (0.25 in LCAP Goal 6)	1.00	49,719
Computer tech, tablet repair support LCAP Goal 5	1.00	62,193
Day-time, school year custodians 3 per site LCAP Goal 6	9.00	375,134
Bi-lingual instructional assistants (4) LCAP Goal 7	3.25	114,672
Security assistants LCAP Goal 6	3.00	98,308
Purchasing tech (1) LCAP Goal 4	0.75	28,586
CLASSIFIED total	19.50	\$ 1,920,481

MANAGEMENT/CONF	FTE	COST
Increased cost for step/column movement including statutory benefits		\$ 32,396
Increased costs due to 1.85 percentage point increase in STRS		56,515
Increased costs due to 2.04 percentage point increase in PERS		31,746
Cost associated with tentative settlement for 3.0% salary schedule increase		159,750
MANAGEMENT/CONF total	-	\$ 280,407

OTHER ITEMS	FTE	COST
STRS On-behalf (directly offset by revenues)		761,427
Retirees:		
Increase, retirement trust fund deposit		24,260
Decrease, early retiree incentive pymts		(288,333)
Decrease, post-employment retirement benefits pay as you go		(96,304)
OTHER ITEMS total	-	\$ 401,050

Books and Supplies, Services, Capital Outlay

In total, expenditures for Books and Supplies, Services, and Capital Outlay **decrease** by \$3,725,205 from the estimated actuals, as shown in the table below:

SUPPLIES, SERVICES, CAPITAL OUTLAY		
Remove expenditure items in 2015/16 that are non-recurring for 2016/17:		
Expenditures supported by funding from the Discretionary Block Grant including textbooks, technology, equipment, professional development		\$ 3,609,548
Expenditures related to carryover of prior year's unused grants and/or ending balances		690,050
Expenditures related to one-time only grants (Educator Effectiveness, Ag Incentive supplemental grant, California Career Pathways Grant)		687,912
Expenditures for specific capital outlay purchases or projects		
School bus purchase		182,188
Solar Energy project evaluation consultant		112,500
Repairs including pool tile deck, parking lot gate, water damages		176,770
MAA Medi-Cal Administrative Activities		176,323
Voter survey, inventory services		38,500
PVHS scoreboard installation		20,000
Note: although budgeted in 2015/16, amounts attributable to any of the above items which remain unspent when the District completes its year end closing for the 2015/16 year, will be included in the District's 2016/17 1st Interim Revised Budget.		
Subtotal (decrease) removal of non-recurring expenditures		\$ (5,693,791)
Expenditures in the 2016/17 Adopted Budget		
Prop 39 California Clean Energy planned projects		987,361
Operations and maintenance equipment needs		500,000
Info Technology upgrades (VOIP at PVHS, storage array)		175,000
JCI Energy retrofit contract (amount removed from 15/16 & rebudgeted in 16/17)		229,000
Provide funding for unforeseen repairs		100,000
Vehicles for school site use (2)		58,000
Election Expense		45,000
Decrease legal & negotiations expenses		(102,444)
All other departmental adjustments		(23,331)
TOTAL CHANGE IN SUPPLIES, SERVICES, CAPITAL OUTLAY		\$ (3,725,205)

Other Outgo (debt service) and Transfers of Indirect Costs **decreased** \$437,809

TOTAL EXPENDITURES HAVE DECREASED BY: **<\$ 1,671,054>**

OTHER FINANCING SOURCES/USES reflect transfers out of the General Fund, totaling \$2,135,600. Of this amount, \$375,000 is transferred to the District's Deferred Maintenance Fund. The remaining \$1,760,600 represents 2016/17 funding from the so-called "1 time Discretionary" funds, and it is transferred to the District's Special Reserve Capital Outlay fund for facility improvement projects. These projects include replacing the RHS maintenance shop, and pool lighting, turf replacement and track resurfacing at PVHS.

TOTAL CHANGE OF "INCREASE (DECREASE) IN FUND BALANCE:

Total Revenues have <u>increased</u> by:	\$ 1,485,198
Total Expenditures have <u>decreased</u> by:	1,671,054
Total Other Financing Uses have <u>increased</u> by:	<u><1,205,600></u>

Total change of "Increase (Decrease) in Fund Balance": \$ 1,950,653

The District's Fund Balance:

- Note that this proposed budget contains several one-time items associated with discretionary funding and capital outlay contained in the 2016/17 Adopted Budget.
- There is an assignment in the ending fund balance for the Certificated bargaining unit in the amount of \$3,616,817.
- After providing for the above referenced amount, non-spendable components, and the 3% statutory minimum reserve for economic uncertainties, the District's ending available unappropriated General Fund balance is \$123,189.
- Remember that there are **no minimum funding level requirements** contained in the LCFF law. So while LCFF has resulted in significant additional revenue to the District, it is still an ADA driven model, and changes in the District's unduplicated FRPM/EL percent can have a significant impact, either up or down, on the amount of revenue. Additionally, the gap percentage funding factor is subject to revision by the California Department of Finance throughout the year, and efforts to enact legislative reform to hold districts harmless for such changes have so far been unsuccessful.
- The next budget event to happen will be the official adoption of the State's budget for the 2016/17 year, which should occur in mid- to late June. Stay tuned....

Santa Maria Joint Union High School District			
2016/17 ADOPTED BUDGET- MULTI YEAR PROJECTION - GENERAL FUND			
	2016/17	2017/18	2018/19
	Total	Total	Total
Current year enrollment	7,947	8,151	8,482
Projected Actual ADA	7513	7705	8017
Projected Funded ADA (greater of)	7446	7705	8017
Beginning Balance	5,466,841	7,140,433	11,291,166
Revenues			
LCFF Sources	79,940,681	86,299,354	91,133,430
Federal Revenues	4,125,878	4,125,878	4,125,878
State Revenues	10,102,922	7,650,488	7,650,488
Local Revenues	483,659	433,659	433,659
Total Revenues	94,653,140	98,509,379	103,343,455
Expenditures			
1000 Certificated Salaries	35,830,766	36,623,805	37,679,850
2000 Classified Salaries	15,456,569	15,620,224	15,741,017
3000 Employee Benefits	19,540,872	20,801,354	22,171,595
4000 Books & Supplies	6,614,235	8,037,017	8,324,322
5000 Services and Other Operating	11,037,593	12,322,456	12,461,101
6000 Capital Outlay	2,130,361	315,000	315,000
		-	-
Other Outgo, debt service, State Sp. S	401,182	465,105	478,106
Direct Support/Indirect Cost	(167,629)	(201,315)	(201,315)
Total Expenditures	90,843,948	93,983,646	96,969,674
Operating Surplus/(Deficit)	3,809,192	4,525,733	6,373,781
Transfers Out	(2,135,600)	(375,000)	(375,000)
Increase (Decrease) in Fund Balance	1,673,592	4,150,733	5,998,781
Ending Fund Balance	7,140,433	11,291,166	17,289,947
Components of Ending Fund Balance			
Nonspendable (revolving cash, stor	168,846	168,846	168,846
Economic uncertainty reserve	2,897,883	2,830,760	2,920,341
Restricted programs ending balance	333,696	84,215	-
Certificated bargaining unit	3,616,817	6,027,225	8,470,637
Unappropriated amount, General Fu	123,191	2,180,120	5,730,123

All ongoing sources of Revenues and Expenditures from the 2016/17 Adopted Budget are assumed to continue at the same level for the next two years with the following adjustments:

REVENUES

LCFF Sources

- For this Adopted Budget, the District is projecting revenue from LCFF sources using the simulator tool provided by the Fiscal Crisis and Management Assistance Team (“FCMAT”). FCMAT’s calculations use inflation and gap funding percentage estimates provided by the California Department of Finance, and then allows for entry of district-variable data such as ADA by grade span, and the percentage of the count of unduplicated students who are English learners, foster youth, or who qualify for free or reduced-price meals. This factor is often referred to as “FRPM/EL”. The table below illustrates the various components of income from LCFF sources for the budget and two subsequent years.

	2016-17	2017-18	2018-19
LCFF State Aid Funding			
Base Grant	\$64,541,261	\$68,263,758	\$72,589,322
Supplemental/Concentration Grant	13,954,351	16,590,527	17,099,039
Total LCFF State Aid	78,495,612	84,854,285	89,688,361
Property Tax Transfer SBCEO for Special Education	1,445,069	1,445,069	1,445,069
Total Revenues, LCFF Sources	\$79,940,681	\$86,299,354	\$91,133,430
Funded LCFF Base Grant / ADA:	\$ 8,591	\$ 8,860	\$ 9,054
Funded ADA (includes COE)	7513	7705	8017

- In 2017/18, revenues from LCFF sources **increase** from 2016/17 by \$6,358,673. Of this amount, \$2,636,176 is attributable to an increase in supplemental/concentration grant funding and is required to be expended on increasing services for the District’s target population of English learners, foster youth, and economically disadvantaged students (“FRPM/EL”). The estimated funded LCFF base grant per ADA is \$8,860.
- In 2018/19, revenues from LCFF sources **increase** from 2017/18 by \$4,834,076. The amount of the increase attributable to the District’s FRPM/EL population is \$508,512. The estimated funded LCFF base grant per ADA is \$9,054.

Federal Revenues

- As of budget adoption, Federal Revenues are projected to remain unchanged for the next two subsequent years.

State Revenues

- In 2017/18 State Revenues **decrease** by \$2,452,434 from 2016/17, as follows:
 - Discretionary funding \$1,760,600
 - Prop 39 California Clean Energy Jobs Act 324,739
 - California Career Pathways Trust grant 299,813
 - CTEIG Calif. Career Tech Ed grant 67,282
- In 2018/19 State Revenues remain unchanged from 2017/18.

Local Revenues

- Local Revenues include interest earnings, facility use fees, and a variety of reimbursements and fee-for-service programs. Typically the District adjusts its budget for Local Revenues based on actual receipts and reimbursements. Beginning in 2017/18, local revenues decrease by \$50,000 due to the elimination of the CAPP grant program. This grant is budgeted each year once award confirmation is received.
- For 2018/19, Local Revenues remain unchanged from 2017/18.

EXPENDITURES

Salaries, wages and benefits:

- Step and Longevity increases for all employees of \$827,220 for 2017/18 and \$790,719 for 2018/19.
- The District annually projects attrition of 5.0 Certificated FTE's from retirements. The salary and benefit savings from these retirements, offset by salary and benefit costs for replacement employees, and continuing health benefits for the retirees, results in a net decrease of \$107,635 in 2017/18 and \$110,332 in 2018/19.
- In 2017/18 there is an **increase** of \$586,635 for approximately 7 certificated FTEs in support of increased enrollment. In 2018/19 there is an **increase** of \$951,850 for approximately 12 FTEs in support of increased enrollment.
- Legislation passed last year has resulted in statutory rate increases for the District's contribution to the State Teachers' Retirement System. The rate increases for the subsequent two years are 1.85 percentage points in each year. Therefore there is an increase of \$673,140 in 2017/18 and \$680,228 in 2018/19.
- Similarly, while not set in statute, the rates for the District's contribution to the Public Employees' Retirement System are projected by the PERS board annually. For 2017/18 the increase is 1.61 percentage points, or \$251,798 in expense. For 2018/19 the increase is \$251,856 corresponding to a rate increase of 1.60 percentage points.
- Based on an actuarial study of the District's OPEB liability, the provision for the retiree health benefits pay as you go amount increases by \$86,017 in 2017/18, and decreases by \$4,741 in 2018/19. An actuarial study is required bi-annually and the next study will be due for the 2016/17 school year. Projected amounts for pay as you go retiree payments will be updated when the new report is received.
- In 2013/14 the District offered an early retirement incentive program, and eligible participants could choose to take the payout of \$50,000 in installments varying from two to five years. The payments began in the 2014/15 school year. Payments of \$122,500 are included in the budget year. The remaining balance as of the end of the 2016/17 year is \$32,500 of which \$22,500 is payable in 2017/18 and the final payment of \$10,000 is due in 2018/19.
- In total, costs for salaries, wages, and benefits **increase** from 2016/17 to 2017/18 by \$2,217,176 and **increase** from 2017/18 to 2018/19 by \$2,547,080. All of the changes noted above are summarized in the table on the following page.

- PLEASE NOTE: There are no COLA increases for salaries and benefits included in 2017/18 or 2018/19, as these are subject to negotiations.

SALARIES, WAGES, AND BENEFITS			
2016/17 balance			\$ 70,828,207
2017/18			
Step-column costs		827,220	
STRS rate increase 1.85 percentage points		673,140	
PERS rate increase 1.62 percentage points		251,798	
Staffing increases due to increased enrollment		586,635	
Increase in retiree health benefits pay as you go		86,017	
Estimated annual retirements 5 FTE's		(107,635)	
Reduction in early retirement incentive pymts		(99,999)	
Total change from 2016/17 to 2017/18			2,217,176
2017/18 balance			73,045,383
2018/19			
Step-column costs		790,719	
STRS rate increase 1.85 percentage points		680,228	
PERS rate increase 1.60% percentage points		251,856	
Staffing increases due to increased enrollment		951,850	
Decrease in retiree health benefits pay as you go		(4,741)	
Estimated annual retirements 5 FTE's		(110,332)	
Reduction in early retirement incentive pymts		(12,500)	
Total change from 2017/18 to 2018/19			2,547,080
2018/19 balance			\$ 75,592,463

Books and Supplies, Services, Capital Outlay

- Year to year changes in supplies, services, and capital outlay are summarized in the table below.

SUPPLIES, SERVICES, CAPITAL OUTLAY			
2016/17 balance			\$ 19,782,189
2017/18			
	Provision for increased LCAP expenditures to serve FRPM/EL population, based on projected increase in supplemental/concentration grant revenue	\$ 2,636,176	
	School site allocations based on ADA increase	14,400	
	Adjust projected expenditure in restricted programs subject to available funding	269,061	
	Remove expenditures associated with one time grants:		
	CCPT California Career Pathways	(168,000)	
	Prop 30 California Clean Energy (approved project schedule subject to funds availability and phasing over several years)	(1,037,361)	
	CAPP grant	(19,888)	
	Non-recurring equipment and capital outlay		
	JCI Contract	(229,000)	
	Technology infrastructure VOIP at PVHS and storage array upgrade	(175,000)	
	Maintenance & operations equipment, student furniture	(290,000)	
	Vehicle purchase	(56,000)	
	Transportation ID card printer	(1,105)	
	Actuarial & self insurance study (bi-annual)	(6,000)	
	Elections Expense	(45,000)	
	Total change from 2016/17 to 2017/18		892,283
2017/18 balance			20,674,472
2017/18			
	School site allocations based on ADA increase	23,400	
	Actuarial & self insurance study (bi-annual)	51,000	
	Adjust projected expenditure in restricted programs subject to available funding	(156,961)	
	Decrease in LCAP expenditures to serve FRPM/EL population, based on projected increase in supplemental/concentration grant revenue	508,512	
	Total change from 2017/18 to 2018/19		425,951
2018/19 balance			\$ 21,100,423

Other Outgo

- Other outgo includes the District's required payments for debt service including Certificates of Participation ("COPs") and PG&E financing, in support of a variety of energy management, conservation, and retrofit projects throughout the District. Amounts projected in accordance with debt service schedules are \$465,105 in 2017/18, and in \$478,106 in 2018/19.

Other Financing Uses

- The budget year includes transfers out in support of the District's facilities and deferred maintenance projects. Note that funding for deferred maintenance, formerly a "Tier III" categorical program, is eliminated due to the LCFF funding formula. The District is continuing to budget a transfer of \$375,000 per year for necessary deferred maintenance projects. A transfer to the District's special reserve fund for capital outlay for facility projects in the amount of \$1,760,600 is included in the budget year, and eliminated in the succeeding years.
- Additionally, the transfer of Needy Meal revenues to the Cafeteria Fund, which has typically been \$250,000 in the past, is not reflected in the budget and two succeeding years. The need for this transfer is monitored on an ongoing basis. Depending upon reserve levels and food costs, this transfer may need reinstating in future years.

PLEASE NOTE: This projection is based on assumptions and factors from existing current law, as well as proposals contained in the Governor's May Revise Budget. The Legislature has yet to take action on the Governor's proposal, so some or all of the factors and assumptions used may change when the state budget is officially adopted into law. If any of the factors or assumptions used are significantly different when the state budget is officially adopted into law, the District will have a 45-day period to adjust its budget accordingly. Otherwise, the next budget revision for the District will be the "First Interim Revised Budget" based on actual results through October 31, and required to be presented to the Board on or before December 15.



Regular Meeting

June 14, 2016

APPENDIX E



**SANTA MARIA
JOINT UNION
HIGH SCHOOL
DISTRICT**

**MASTER SCHOOLS IMPROVEMENT
PROGRAM**

**The Next Phase of the Ongoing Reconfiguration and
Facilities Program**

Caldwell Flores Winters, Inc.



PREPARED BY:

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SECTION 1

INTRODUCTION

1.1 INTRODUCTION

In August 2014, the Board of Education for the Santa Maria Joint Union High School District (“District”) adopted a Reconfiguration and Facilities Program (“Program”) to serve as a blueprint for future improvements and aid in the implementation of 21st century learning environments and innovative academic initiatives for all students served by the District and its four high schools. The Program relies on a dedicated process of analysis of the District’s educational vision, facility needs, capital and financing options, required specifications, and available resources. Planned improvements have been developed consistent with the District’s Strategic Plan, whose primary mandate is to prepare students for success in college, a career with growth potential, and productive citizenship in an interconnected world. The District has identified five goals for this mandate:

Goal 1: Develop and implement a course sequence in supporting programs and services that increase the number of students successfully completing A-G courses and/or becoming prepared for a career with growth potential

Goal 2: Provide all students with equal access to learning experiences that enable them to meet the high expectations established by the District

Goal 3: Strengthen District wide support systems, processes, and practices so that they support student learning and success

Goal 4: Strengthen partnerships with parents and the local community

Goal 5: Develop and implement effective strategies for helping all students become responsible for their learning and become lifelong learners

Ongoing development of the educational program requirements at each of the comprehensive high schools has included a review of the adopted reconstruction program, study of the school site plans, consideration of each school’s master schedule of classes taught and the quantity of classrooms needed within each department today, as well as needs anticipated by the District’s future education program goals. Additional campus assessments have been conducted and meetings with site and District administration held to discuss room uses and required capacities. Periodic presentations and reviews to the Board have been provided and adjustments made as directed. A departmental approach to the construction of new classrooms and the need for a seven period instructional program has been determined.

Already, significant progress has been undertaken. District investments in its educational and facilities programs over the past two years have included:

- The construction and 2015 opening of the modern, 12-classroom “Broadway Building” at Santa Maria High School, completed with upgraded 21st century learning environments that supply expanded capacity for the site’s world languages program and delivering purpose built environments for the band, choir, and theater programs.
- Design and preconstruction analysis of a 38-classroom facility at Righetti High School to replace outdated portable classrooms with 21st century learning environments with ground breaking anticipated in early fall 2016.
- Ongoing construction of a District Performing Arts Center at Pioneer Valley High for assembly and performance space during and after school hours for student and community use.
- The acquisition and design development of a state-of-the-art, centralized facility to support career technical education (CTE) and agricultural science opportunities district wide
- A technology program in which every student has been provided a handheld computing device to use for 24/7 instruction.

To complete the next phase of planned improvements to the Reconfiguration and Facilities Program, a Master Schools Improvement Program (MSIP) is proposed. The MSIP builds upon the first phase improvements of the Reconfiguration and Facility Program and integrates proposed modifications to educational and facilities program into the next phase of proposed improvements to maintain an equitable educational program offering at all of the District’s four high schools.

As outlined by the Strategic Plan, the District recognizes that all students need to have quality classrooms and improved facilities to be better prepared for college or good paying careers after high school. Improved classrooms and support facilities will ensure that all students have the same opportunity to compete and succeed in the new economy. By making a renewed investment in the local schools, businesses and economic opportunities will be attracted to the community. This in turn will provide well-paying jobs for both students and community members and create a stronger economy and future for Santa Maria. It is important to the District that these improvements be made so all students have the facilities and education they need in order to succeed.

To assist in coordinating the planning and implementation of an integrated facility, educational, and capital program, the Board selected Caldwell Flores Winters, Inc. (“CFW”) to serve as its Program Manager and work in conjunction with District staff (Program Team) to guide the development and design of projects, maintain program budgets and schedules, and ensure effective implementation in line with expected outcomes and District goals. The following report, including its included findings and recommendations, is presented to the Board of Education by the Program Team to allow the Board and District administrators to evaluate program design, inform the community of proposed elements and stages of the implementation process, and summarize as well as organize estimated costs, schedules and funding required for consideration in the proposed adoption of a new general obligation bond to implement the Master Schools Improvement Program, including a Master Budget and Master Schedule.

SECTION 2

PROPOSED PROGRAM

The planning and implementation of a 21st century high school environment is driven by two programs – an **education program** that outlines academic achievement opportunities at the District level, and a **facilities program** that implements capital improvements in support of educational program initiatives. Combined, the Program formalizes an educational, capital, and financing strategy that matches the District’s vision and goals, and establishes the specifications for future capital facilities.



The combined focus of the Program is to:

- Enhance career pathway educational programs and develop new career technical facilities
- Upgrade classroom facilities and improve digitally interactive learning environments for every teacher and student Districtwide
- Construct new classrooms to replace aging portables and renovate existing classrooms to support 21st century learning
- Implement new support facilities to complement enhanced educational programming and technology

The Program is designed to complete the transformation of the District’s comprehensive high schools, and consists of planned improvements that include:

- Reconstruction of the Santa Maria High School campus into a 21st century learning facility reflective of its heritage, including restoration of the historic Ethel Pope Auditorium, and facilities available at companion high schools
- Renovation of existing permanent classrooms at Pioneer Valley and Righetti High schools to achieve similar 21st century functionality to newly constructed District facilities

- Construction of a new practice gymnasium and visual/performing arts facility at Righetti High School to expand physical education, performance and educational support space
- Development of a Career Technical Education (CTE) and Agricultural Farm facility on newly acquired District property for capstone classes that transition students from Grade 12 to college and/or high-demand jobs
- Construction of an Ag Pavilion at the CTE Center/Ag Farm to meet educational requirements for student demonstrations and exhibits in support of the District’s academic pathway programs

Informed and guided by the District’s educational program, the proposed capital program addresses these facilities improvements based on planning and sequencing considerations, verification of existing conditions through site assessments, collaborative envisioning of school facility standards, and consideration of available resources and timelines for implementation.

2.1 EXISTING FACILITIES SUMMARY

As noted in previous reports, half of the District’s schools were built over 50 years ago and the balance were constructed within the last ten years. Santa Maria and Righetti were first constructed in 1920 and 1960, respectively, and Pioneer Valley and Delta high schools were correspondingly constructed in 2004 and 2010. As enrollment has increased over the last 50 years, portable classrooms have been brought onto school sites to meet the demand for additional enrollment. Today, 33 percent of all District classrooms consist of portable buildings, of which close to 55 percent will exceed their useful lives within the next 5 years without further modernization or replacement.

In 2000, local voters approved a \$30 million general obligation bond program that provided funding, when coupled with state matching grants, to modernize and improve existing school facilities. In 2004, voters approved a \$79 million bond to further modernize schools, leverage matching state grants, and construct additional facilities. For the most part, the periodic modernization of existing school facilities have focused on the need to comply with contemporary building code requirements, including electrical, plumbing, seismic, health and safety, and handicap accessibility and on the refurbishment of deferred maintenance items. New construction has focused on building additional permanent classrooms and in providing additional support facilities.

Given the overall age of the District’s older facilities and the continual demand for their usage, state modernization grants and local funding options have been insufficient to meet the ongoing need for maintaining contemporary classroom environments and equity with the District’s newer schools. Likewise, state matching grants for new construction have been used, in most part, to construct Pioneer Valley and, most recently, Delta High. Additional new construction improvements include a 12 classroom expansion at Santa Maria High and a new performing arts theater at Pioneer Valley. Nonetheless, the need to replace aging permanent and portable facilities beyond their useful life has exceeded available funding.

In combination with improved facilities and those in need of replacement or substantial repair, the District houses approximately 7,900 students in existing facilities. Of the 352 District classrooms, the vast majority

of portable classrooms (74.1%) are at Santa Maria High and Righetti. Many of the portables are in need of replacement while many of the older permanent facilities are in need of transformation to today's 21st century classroom requirements. Regardless of their age, the District has done a good job of maintaining its classrooms to the best extent possible, given available funding, but replacement facilities are now required. The District has also been diligent in building new classrooms to accommodate increased enrollment, whenever possible. Beyond the need for classroom improvements, there is a general lack of adequate support facility spaces at most sites; including the need to improve Pope Auditorium, construct additional practice gym and performance facilities at Righetti, rebuild playfields and areas at the older schools and upgrade technology infrastructure to current standards throughout the district.

2.2 DISTRICT EDUCATIONAL PROGRAM SUMMARY

Public schools continue to seek improved academic achievement of students—both as matter of public policy and as a means of survival. With the emergence of charter schools and other educational options, public schools must offer choices that appeal to parents and children and improve educational achievement. It is also important that students be given more opportunities to engage in math, science, and engineering in preparation for college or for career opportunities in fast-growing, well-paying sectors of the economy. Students in these kinds of educational environments are more motivated to remain in school, are more engaged in the instruction given to them, and improve academically at a faster rate than students in more traditional programs.

One way to increase academic achievement and provide student choice is by introducing academy or pathway programs. These are integrated efforts to attract and reinforce areas of study by students that guide and better prepare them for success with improved access to better quality colleges or good paying jobs and careers immediately upon graduation. The District continues to be committed to the implementation of pathway programs at each of its high schools. The focus has been on development of programs of study and a sequence of courses within the following nine industry clusters which have been identified as supporting the fastest growing and economically rewarding careers in the region:

- Agriculture and Natural Resources
- Arts, Media, and Entertainment
- Business and Finance
- Energy, Environment, and Utilities
- Engineering and Architecture
- Health Science and Medical Technology
- Hospitality, Recreation, and Tourism
- Information and Communication Technologies
- Manufacturing and Product Development

A preliminary course sequence has been developed for some of these pathways programs. Teachers and administrators are now in the process of adding and refining these programs of study while others are at the beginning stages of development of the required course sequence for each pathway. As part of the District's receipt of a CTE Incentive Grant from the state, teacher professional development for high

quality instruction has begun and industry partners are being recruited to serve on the District CTE Advisory Board and (Pathway) Career Field Advisory Committees. There is also ongoing development of course sequences to build out the programs of study and to purchase of industry standard equipment to meet the instructional needs of the pathway programs. In addition, career technical student organizations are being organized in support of the program and course requirements.

Each of these pathway programs needs to be housed in appropriate facilities to meet the instructional needs of the program of study. The classrooms need to have 21st century functionality to provide for the instructional shifts that encourage collaboration, creativity, problem solving and communication among the students in the class. They also need to provide flexibility and mobility to meet the changing instructional needs and provide for students to engage in developing and creating student projects to demonstrate mastery of the pathway curriculum. Collectively, this requires the District to establish a learning and instructional environment wherever possible to support the needs and appropriate spaces to meet the instructional needs of these programs of study.

In determining the future occupancy of new and modernized buildings to be undertaken at the District's older Santa Maria and Righetti High School campuses, two main configurations for the campus were considered. Classrooms could either be grouped by pathway programs so that the core classes within each pathway are located together to improve pathway planning and coordination, or they could be grouped by department to improve collaboration around Common Core State Standards and optimize the use of existing facilities. Subsequent to a thorough planning and evaluation process at each campus, it was decided that grouping classrooms in the future by department at the older schools was also the most appropriate solution, in part to:

- promote greater flexibility to accommodate the need for pathway courses to develop and change over time
- support greater interdepartmental collaboration while allowing for pathway fluctuations without substantially impacting adjacent uses into the future
- avoid costly reconstruction and rearrangement of specialty labs as part of individualized pathway centers
- provide the ability to substantially reduce the number of portable classrooms in use while relinquishing the most number of existing permanent classrooms that may be used to further consolidate departments with less demand for total classroom spaces
- limit the anticipated number of existing permanent classrooms that would otherwise need to be repurposed on an interim basis

In addition, this approach provides the greatest positive economic impact to the District by providing the opportunity for less costly general purpose classrooms to be constructed within the budget of proposed new construction classrooms. It also establishes a more straightforward means of accommodating larger pathway classrooms to be provided as part of any new construction effort as opposed to the costlier alternative of combining and remodeling existing classrooms into a larger space. In addition, it allows more costly dedicated specialty classrooms or labs that would otherwise need to be reconstructed to remain in place and be reutilized. This approach is likewise more consistent in the allocation of any

available State grants where larger per pupil grants are provided for new construction and more focused grants are available for modernization of existing spaces.

As a newer school, the design of classroom buildings at Pioneer Valley reflects a stronger awareness for the support functions and interdepartmental collaboration activities required in a modern teaching and learning space. For example, in the main classroom buildings, science labs and specialized classrooms are arranged around—and have doors that open onto—a large central space where collaborative activities can take place. This built environment is already more conducive to the District’s configuration and pathway program goals, and planned improvements are thus more targeted to enhancing the existing configuration and upgrading of classroom interiors and facilities to proposed District specifications.

As part of the implementation of the ongoing Reconfiguration and Facilities Program improvements, classroom interior specifications for new construction and modernization of existing classrooms have been established and will continue to evolve as implementation of the educational program is further revealed or adjusted. These specifications are meant to better accommodate a 21st century learning experience and are proposed to be applied to the MSIP projects and focus on:

- full-height, sliding marker boards that cover an entire wall of each room that promote a 360 degree learning experience and mitigate acoustic reverberation
- modern and flexible furnishings for up to 36 students per room in the form of modular tables and ergonomic chairs that can be easily reconfigured in the classroom as required
- a new teaching station and a moveable multimedia presentation shuttle
- high-definition video displays that allow students to view content from anywhere in the room and, with media interface devices, project content from a computer or mobile device
- durable flooring, and required technology upgrades

Overall, the District continues to move forward with a vision for providing equitable instructional spaces and facilities at each of the high schools to meet the needs of the educational programs that will prepare the students for today’s career and college requirements. The following sections summarize the existing conditions at the District’s high schools as detailed in previous reports, demonstrate how the above District educational requirements are proposed to be applied at each site and describe the manifestation of these efforts in proposed facility improvements that are required.

2.3 SANTA MARIA HIGH SCHOOL

2.3.1 EXISTING CONDITIONS

Santa Maria High School is the oldest high school in the District, founded in 1892, and has developed in parallel with the nearby downtown of Santa Maria. The school presently enrolls nearly 2,700 pupils on a 36.4-acre site, drawing its student enrollment from the center of the Santa Maria Valley. The campus itself is bounded by Broadway to the east, Thornburg to the west, Stowell Road to the south, and Morrison Avenue to the north, with residential and retail uses occupying a portion of the eastern side of the campus,

south of Camino Colegio and extending approximately 450 feet west of Broadway toward the campus interior.

Original structures from the 1890s were replaced by new facilities in 1920 to form the basis of the current campus layout. These earliest structures were built toward the northeast of the campus, proximate to the intersection of Morrison and Broadway, with newer structures filling out the interior of the campus. After new building codes were enacted in the 1970s, many older structures were replaced, and today the Ethel Pope auditorium remains as the most historically significant structure on campus, along with a few less noteworthy structures representing the site's remaining early 20th century architecture.

A total of 86 permanent classrooms are currently available with many having aged considerably and in need of significant upgrades or replacement. In addition, 46 portable classroom buildings have been placed on the campus over the years. Twelve of these are at the far northwest corner of the campus, while the remaining 34 require students and staff to traverse to the far southern or western edges of the campus, making efficient passage between academic periods more challenging. A small Learning Center with an additional 14 portable classrooms and one permanent structure is located just north of the high school. The site has been used for a variety of school or District purposes over the years and currently houses alternative programs for the District.

Recent improvements to the campus include the August 2015 opening of the school's "Broadway Classroom Building," a 26,000-square-foot, 12-classroom facility located between the Ethel Pope Auditorium and the administration building. With a band room, choir room, and 10 general purpose classrooms, the new building houses up to 324 students by state standards. Other past improvements focused on the modernization of several classroom wings in 2000 and significant improvements to the school's library, which features an open-floor plan, a computer lab, extensive book storage, and group study areas and furnishings.

An assessment of existing facilities has been conducted and documented in previous detailed study reports of the site. For orientation purposes, a summary of topical characteristics is presented in Figure 1 on the previous page and demarcated in the accompanying legend "A-F" categories. As noted, Santa Maria High School has many facilities in good condition that are to be maintained and labeled "A" as well as many others that are aging and in need of replacement and labeled "B".



The new two-story classroom building on Broadway (left) and adjacent Ethel Pope Auditorium (right)

Students and visitors access the administration building “C” via Camino Colegio, which suffers from limited parking, prompting many to park in nearby residential communities or across Broadway. Portable classrooms “D” are in varying condition, but were meant to be only temporary solutions and should be replaced upon the end of their useful life. Existing athletic fields “E” are well maintained, but lack a coherent arrangement for integrating athletic events, while the site lacks basketball or tennis courts comparable to other District schools. Parking and pedestrian access “F” to the site is currently provided from Camino Colegio on the east, Thornburg Street on the west, and Stowell Road on the south. Collectively, these sets of existing conditions establish the basis from which to construct a redeveloped campus based on the reconfiguration of the educational program as established by the District for a new Santa Maria High School campus.

Figure 1



2.3.2 EDUCATIONAL RECONFIGURATION

As discussed above, previous studies demonstrate the need to replace older permanent and portable facilities that have exceeded their economic life, repurpose existing permanent facilities to new uses and to construction additional classroom and support facilities. This provides a once-in-a-generation opportunity to rebuild a large part of the Santa Maria High School campus in a manner that uses spaces more efficiently, incorporates a campus design that honors the high school's heritage and promotes a state-of-the-art 21st century learning environment responsive to the District's educational requirements with similar facilities available at the other District's schools. The goal is to create educational program enhancement and a more cohesive and logical arrangement of classroom assignments by grouping classrooms by department (e.g., English, science, social studies, international languages) to improve interdepartmental collaboration and optimize the use of existing facilities to preserve the historical character and reduce costs on the demand for new construction facilities. Therefore, program and facility improvements are proposed to be considered as follows in response to new construction requirements and the reuse of existing facilities to be improved. They are depicted in Figure 2.

Additional new labs and science classrooms are proposed to be provided for general sciences (e.g. biology, chemistry, and physics) in a clustered area of new classroom facilities. Five lab rooms along with five adjoining science classrooms would also be departmentalize for science instruction in new facilities. Given the high cost of retrofitting existing facilities to 21st century science learning environments with necessary gas and plumbing lab activities, their placement within new facilities may also optimize limited State modernization dollars more effectively and maximized available state new construction grants for these purposes.

English instruction classes present the greatest demand for classroom spaces with a need for 21 classrooms, followed by math instruction with a need for 16 classrooms. Their relocation by department into newly constructed classroom facilities provides the ability to substantially reduce the number of portable classrooms in use while relinquishing the most number of existing permanent classrooms that may be used to further consolidate departments with less demand for total classroom space.

A classroom within a new science and math classroom facility could also be set aside for the Engineering and Architecture Pathway program. With its location strategically placed near the new math and science classrooms, there is a better opportunity to accommodate the often instructional overlap that occurs within these core classes.

The current administration building is poorly placed and lends itself to be better repurposed for classrooms that need large open areas for students to work, making this be an ideal location for many of the classroom requirements for non-science labs in the Arts, Media and Entertainment pathway/department. It is also in close proximity to the newly built 12-classroom Broadway building that currently houses the band, choir and theater programs, thus creating an opportunity for the departments to be in close proximity of each other and optimize further collaboration.

Certain specialty classrooms are already arranged by department and would be costly to reconstruct and rearrange as individualized pathway centers. For example, there are eight science labs currently provided by the 240 Building; these labs would need to be removed or reconstructed elsewhere to accommodate

a non-department approach. Instead, the labs may be retained and reutilized by Ag Science, enabling these classes to meet instructional and educational needs to complete science lab work and reducing the number of lab spaces overall to be moved or reconstructed in other locations. Remaining classrooms in the 24s Building could accommodate Health instruction courses. The 500 Building will remain in use, thereby removing the need for the high construction cost of a new shop and electronics lab building being constructed elsewhere on site.

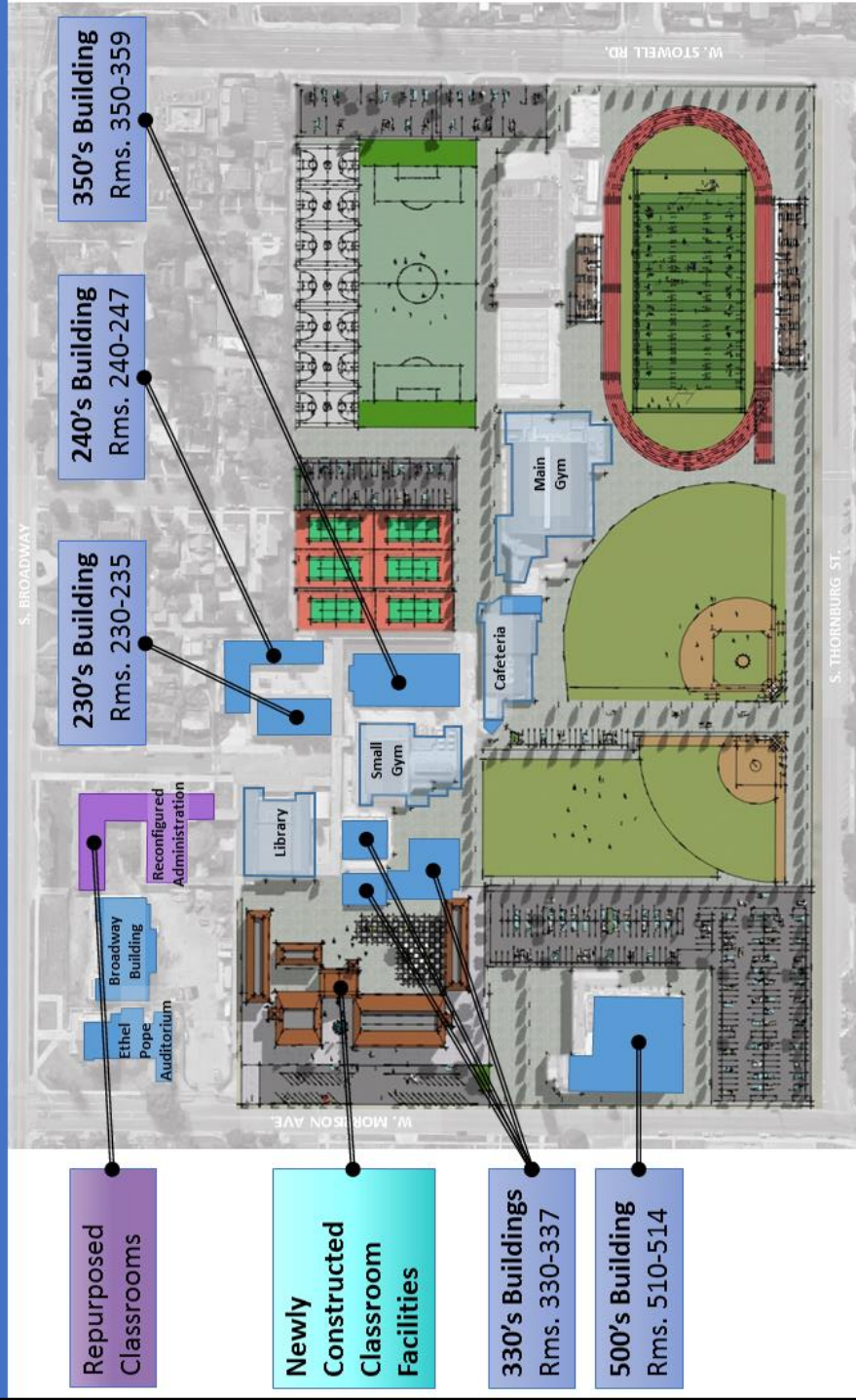
Remaining permanent facilities on the campus would be optimized to provide departmental adjacency along with a centralized and compact relationship between related fields. The Social Studies Department would be located in the 230 and 350 Buildings, which are in close proximity to each other. The severely handicapped program will remain in its current location as the space has been designed to meet the unique needs of the students. Other special education classes are located throughout the campus so that they are either located in a central location or are in close proximity to other classes.

Given that 2016 is the final year for QEIA funding at the school, which provided for additional teachers to reduce the class size in the core subject areas, there will be a reduction in the total number of required teaching stations. Combined with the anticipated growth in enrollment, the school is scheduled to lose up to 14 of the 17 QEIA funded teachers resulting in the need for 14 fewer teaching stations. This provides an opportunity to utilize these classrooms as “swing” space during construction and as a net savings in the cost of replacement facilities.

A study of the proposed Santa Maria High School educational program reconfiguration has been undertaken concurrent with the publishing of the MSIP, including existing facilities to be retained and modernized, new facilities to be constructed, and the existing administration building planned for reconfiguration into classroom and support space. In total 102 permanent classrooms are proposed to accommodate the new Santa Maria High School educational program.

SANTA MARIA HIGH SCHOOL – EDUCATIONAL RECONFIGURATION

Figure 2



2.3.3 PLANNED IMPROVEMENTS

Figure 3 depicts proposed major planned improvements. Table 1 summarizes specific projects for consideration. Specific improvements planned for Santa Maria High School include:

- a reoriented main campus entrance on Morrison Avenue, with visitor parking, pedestrian access, student services/administration and classroom buildings all anchored by a bell tower - a direct evocation of the bell tower that once existed by Ethel Pope Auditorium
- approximately 80,000 square feet of new classroom facilities to replace nine aging structures and divided among a series of two or three story buildings built to high energy efficiency and sustainability standards that architecturally fit with the Spanish colonial style evident in many of the school's existing buildings
- new learning spaces anticipated to consist of 48 classrooms as well as extensive interior modernization to 38 existing permanent classroom facilities and the existing administration building that may be reutilized for an additional 8 classrooms
- rehabilitation and modernization of the Ethel Pope Auditorium
- improved outdoor athletic facilities for baseball, softball, tennis, and basketball as well as the addition of several all-purpose practice fields
- eventual removal of all portables to free up space for academic and athletic uses and reconfiguration of the existing campus to improve pedestrian circulation, unify the campus architecturally, and increase the school site's curb appeal
- grouping more like uses in the same space to facilitate student and teacher collaboration
- shaded courtyards between buildings to provide outdoor learning opportunities
- expanded parking for visitors, staff, and students at the main campus entrance and mid-campus athletic facilities

Planned improvements are proposed to be phased to eliminate the need for additional interim facilities and to minimize the impact of construction on the ongoing educational program. That said, there will be a need to relocate classrooms, teachers and students during these periods. First, there is a need to create an interim phase to relocate existing facilities and uses in the area required to construct the new 48 classroom wing. Secondly, there is a need to construct the new classroom building and relocate planned uses of the building from existing and interim locations to their permanent space. Third, there is a need to modernize and repurpose remaining permanent facilities and eliminate all remaining portable classrooms. Throughout each phase there is a need to accommodate as much interim and permanent parking, field areas and support facilities as possible.

Table 1: Santa Maria High School – Planned Improvements

Santa Maria High		
Proj. Category	Description	Estimated Cost
NEW FACILITIES	New Classroom and Lab Facilities - 48 new classrooms and labs within up to 3 new buildings - Restrooms, storage rooms, and common areas	\$ 39,378,853
MODERNIZATION	Convert Classroom to Teaching Kitchen - Create new teaching kitchen in Room 105 of Broadway Building - Equip with countertops and sinks, ovens, microwaves, ranges hoods, refrigeration	\$ 358,000
NEW FACILITIES	New Student Services & Support Building - Student counseling, advising, staff workrooms, parent conference room, nurse/health, offices	\$ 3,921,964
NEW FACILITIES	New Main Entry Area on Morrison Avenue - Visitor parking, bus drop-off lane - Flagpole, walkways, courtyard	\$ 902,610
MODERNIZATION	Improvement of Athletic Fields - Outfield fencing and other improvements - Resurfacing of multipurpose field	\$ 597,140
MODERNIZATION	Relocation and Reconfiguration of Main Parking Lot - Relocated to north side of new softball/soccer field	\$ 2,056,920
MODERNIZATION	Renovation of Admin Building as Classroom Facility - 8 classrooms recovered from existing rooms	\$ 1,132,220
NEW FACILITIES	New Parking Lot - New lot will augment and be accessed from existing parking lot to the south - Will extend from main gym to Pershing St - 18 portables will be removed	\$ 1,218,240
NEW FACILITIES	New Tennis Facility - 6 tennis courts will replace 13 existing portables (Rooms 628-640)	\$ 759,307
NEW FACILITIES	New Practice Field - Will replace 16 portables (Rooms 611-626) and ballet facility (Rooms 609/610, restrooms)	\$ 1,525,917
MODERNIZATION	21st Century Improvements to General Purpose Classrooms - Modular and reconfigurable tables and chairs at 26 classrooms - Ceiling mounted HD monitors - New carpeting and flooring	\$ 2,713,649
MODERNIZATION	Renovation of Ethel Pope Auditorium - Extensive remodeling of interior - Compliance with ADA and other requirements - Installation of new windows, doors, walkways, balconies - Replacement of stage lighting and fixtures - New auditorium seating and backstage area - Renovated HVAC, electrical, and plumbing systems	\$ 12,229,379
MODERNIZATION	Improved Athletic Facilities - Repurpose rooms to house weight room; upgrade flooring and finishes	\$ 629,494
MODERNIZATION	IT Infrastructure Integration - Integration of data & communications backbone between new and modernized facilities - Wireless network expansion, including coverage in new plazas and outdoor spaces	\$ 3,042,342
Total		\$ 70,466,034



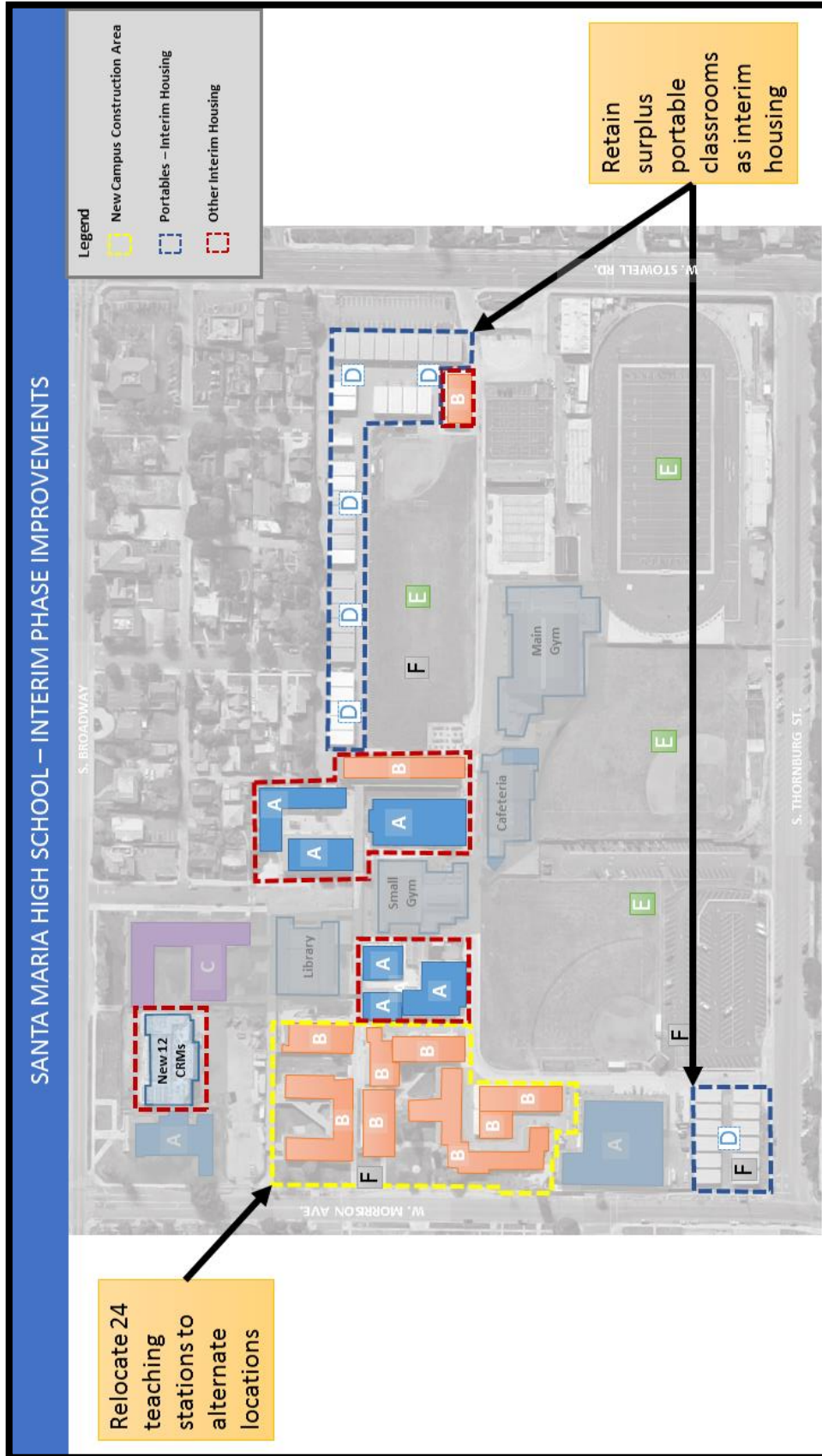
Proposed configuration of Santa Maria High School campus. Source: CFW

2.3.4 INTERIM PHASE IMPROVEMENTS

Figure 4 indicates the proposed interim reconfiguration of the campus to facilitate demolition and reconstruction of campus buildings along Morrison Avenue. As contemplated, there appear to be enough portables at Santa Maria High School to provide for interim housing during construction, thus reducing the amount of capital outlay required for temporary facilities and preserving that investment to permanent facilities. Depending on staffing needs during the first year of implementation, additional interim classroom assignments may also be assigned to available permanent facilities that are not initially impacted by the reconstruction, if needed.

A total of 24 teaching stations have been identified for demolition, including 9 classrooms within the 200 Buildings, 8 classrooms within the 300 Buildings, and 15 classrooms within the 400 Buildings. Of these, 10 interim classrooms will be provided from the available portable classroom facilities that will no longer be needed to support the previous QUIA program. The balance of the teaching stations required are planned to be accommodated by consolidating existing computer labs (3), science labs (2), RSP rooms (5), and the shared and interim use of existing permanent facilities. The estimated cost of required interim improvements is estimated to be \$358,000.

Figure 4



2.3.5 NEW CONSTRUCTION – 48 CLASSROOM BUILDING

Upon completed construction of the new facilities, the new buildings will be occupied by all administrative offices, 21 English classes, 16 math classes, 10 science classes and 1 engineering/architecture class. A total of 48 new classrooms have been planned and budgeted as part of the Santa Maria High School new construction program. This phase will also supply a new main campus entrance on Morrison Avenue, featuring one or more plazas anchored by a new bell tower, along with reconfigured and upgraded playfields on the northwest side of the site. An enlarged and reconfigured main parking lot will be supplied, easing access to the site, and reaching its full size upon eventual removal of remaining portables. Figure 5 presents the graphic depiction of the New Construction phase and Table 2 summarizes the major projects and estimated cost.

Table 2: Santa Maria High School New Construction – 48 Classroom Building

Santa Maria High		
Proj. Category	Description	Estimated Cost
NEW FACILITIES	New Classroom and Lab Facilities - 48 new classrooms and labs within up to 3 new buildings - Restrooms, storage rooms, and common areas	\$ 39,378,853
NEW FACILITIES	New Student Services & Support Building - Student counseling, advising, staff workrooms, parent conference room, nurse/health, offices	\$ 3,921,964
NEW FACILITIES	New Main Entry Area on Morrison Avenue - Visitor parking, bus drop-off lane - Flagpole, walkways, courtyard	\$ 902,610
NEW FACILITIES	New Parking Lot - New lot will augment and be accessed from existing parking lot to the south - Will extend from main gym to Pershing St - 18 portables will be removed	\$ 1,218,240
Total		\$ 45,421,667

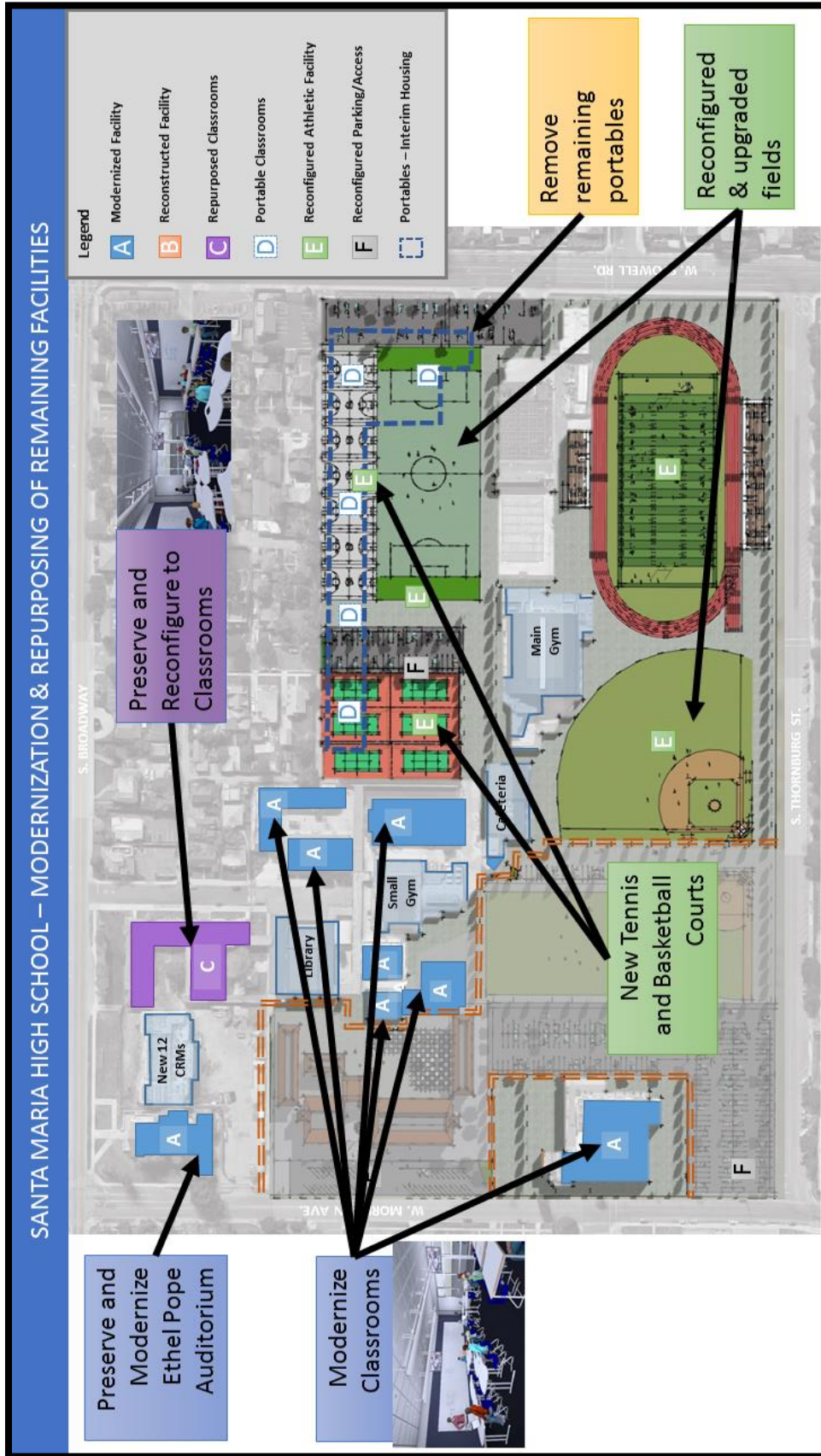
2.3.6 MODERNIZATION & REPURPOSING OF REMAINING FACILITIES

Figure 6 depicts the proposed modernization and repurposing phase of the Santa Maria site. The program provides for the modernization of the remaining 34 permanent classrooms into 21st century classrooms. The proposed reconfiguration of the prior administration facility accommodates 8 classrooms for the Arts, Media and Entertainment pathway/department. It also accommodates 4 educational support spaces for the Resource Specialist Program (RSP). The proposed improvements are summarized in Table 5 with a total estimated cost of \$24,686,367.

Table 3: Santa Maria High School Modernization & Repurposing of Remaining Facilities

Santa Maria High		
Proj. Category	Description	Estimated Cost
MODERNIZATION	Improvement of Athletic Fields - Outfield fencing and other improvements - Resurfacing of multipurpose field	\$ 597,140
MODERNIZATION	Relocation and Reconfiguration of Main Parking Lot - Relocated to north side of new softball/soccer field	\$ 2,056,920
MODERNIZATION	Repurpose Existing Admin Building as Classroom Facility - 8 classrooms recovered from existing rooms	\$ 1,132,220
NEW FACILITIES	New Tennis Facility - 6 tennis courts will replace 13 existing portables (Rooms 628-640)	\$ 759,307
NEW FACILITIES	New Practice Field - Will replace 16 portables (Rooms 611-626) and ballet facility (Rooms 609/610, restrooms)	\$ 1,525,917
MODERNIZATION	21st Century Improvements to General Purpose Classrooms - Modular and reconfigurable tables and chairs at 26 classrooms - High-definition video displays - New carpeting and flooring	\$ 2,713,649
MODERNIZATION	Renovation of Ethel Pope Auditorium - Extensive remodeling of interior - Compliance with ADA and other requirements - Installation of new windows, doors, walkways, balconies - Replacement of stage lighting and fixtures - New auditorium seating and backstage area - Renovated HVAC, electrical, and plumbing systems	\$ 12,229,379
MODERNIZATION	Improved Athletic Facilities - Repurpose rooms to house weight room; upgrade flooring and finishes	\$ 629,494
MODERNIZATION	IT Infrastructure Integration - Integration of data and communications backbone between new and modernized facilities - Expansion of wireless network, including coverage in new plazas and outdoor spaces	\$ 3,042,342
Total		\$ 24,686,367

Figure 6





Architectural concept of Santa Maria High School planned improvements

2.4 RIGHETTI HIGH SCHOOL

2.4.1 EXISTING CONDITIONS

Built between 1960 and 1964, Ernest Righetti High School is the southernmost comprehensive high school in the District. The school’s 37.7 acre rectilinear site is situated in the middle of an extensive residential district that extends from Orcutt Road on the west to Highway 101 on the east. Righetti High is bounded by Larch Avenue on the north, Foster Road on the south, Berrywood Drive on the west (buffered by a row of single family housing), and Bradley Road on the east. The majority of the school’s buildings and parking are in the southern half of the site, with the northern half containing the football stadium and track, basketball courts, tennis courts, and ball fields. This arrangement is partly a consequence of topography; the site is unique among District schools in that the southern third of the site is at a notably higher elevation than the northern two-thirds.

As with Santa Maria High, prior facility assessment documentation and findings for Righetti High have been consulted. For orientation purposes, a summary of topical characteristics is presented in Figure 7 on the following page and demarcated in the accompanying legend “A-D” categories. The school’s primary facilities include four permanent main classroom buildings “A”, as well as support facilities “B” that include an administration building, a cafeteria/multipurpose room, and a gymnasium. In 2014, the District initiated a planning and design process to construct a state-of-the-art permanent classroom

building “C” to replace the many aging portables at site “D” that are approaching the end of their useful life.

Existing classroom buildings provide for 59 permanent rooms which are augmented by 37 general purpose portable classrooms, with all but six portables occupying an area on the southeast corner of the campus formerly used for parking. Smaller permanent facilities include a weight room, an agricultural science lab, and a career center. Classroom uses tend to be grouped in separate buildings according to their space and infrastructure requirements. The new three-story, 38-classroom building, consisting of general purpose, pathway, and assessment classrooms, is anticipated to provide sufficient new permanent capacity at the site to allow the phased replacement of all aging relocatable classrooms on the campus, many of which are approaching the end of their useful life and are expensive to maintain.

Parking at the site, located primarily on the southern and southwestern edges of the campus, is insufficiently sized to meet growing student, staff, and visitor demand. Most classrooms are generally well maintained, but lack the flexibility and modern finishings that are often a part of developing and utilizing newer teaching modalities. Likewise, the school features a very traditional and conventional Library, which provides far less overall functionality than more contemporary approaches. Student performances in the arts have limited practice and presentation space, and most courses limit their practice to spaces within their currently assigned classrooms. Athletic practice space is also a concern, with a single gymnasium facility that is insufficiently sized to meet the demand for athletic practice, often requiring back-to-back scheduling late into every night. Outdoor athletic fields and courts are well appointed, however the site has fewer tennis and basketball courts than comparably enrolled schools, and lacks a playfield configuration conducive to varsity baseball, softball, and soccer uses.

Recent improvements to the campus include the summer 2015 resurfacing and upgrade to Righetti’s all-weather track as well as replacement of 34,000 square feet of roofing at the school’s gymnasium. Additional capital investment over the years includes stadium construction completed in the late 1980s, artificial turf and track improvements in 2006, and a swimming pool facility constructed in 2009. A modernization of classroom and support buildings was carried out in 2000 – including upgrades to HVAC, flooring, ceilings, roofing, materials abatement, data and internet infrastructure, and ‘teaching walls’. Modernization of the administration building followed in 2011. The overall result is a campus that is in generally sound shape. However, given evolving technologies and building codes, there may be continued need for improvements to the data network and safety infrastructure.

Figure 7



2.4.2 EDUCATIONAL RECONFIGURATION

As noted above, Righetti High School requires the replacement of aging portable classrooms, construction of a new classroom building designed to 21st century standards and the upgrade of existing classroom facilities to comparable standards. As with Santa Maria High, it was necessary to determine the future occupancy of new and modernized buildings on the Righetti campus and a departmental configuration was selected to improve collaboration around Common Core State Standards, optimize the use of existing facilities, and promote greater flexibility to accommodate the need for pathway courses to develop and change over time.

When the new 38 classroom building is completed, the facility will supply 29 classrooms, along with four pathway classrooms, each approximately 25% larger than a general purpose classroom, to meet the needs of academic pathway programs at the site, and five assessment classrooms that incorporate retractable center walls that allow for a combined 4,800 square feet of flexible space for testing or other general assembly functions. The math and English classes currently housed in portable classrooms will move to the new structure and be joined by those math and English classes currently housed in Buildings D and E. The health class will move into the new facility as well as the Digital Arts/Photo class. The remaining rooms in the new building will house pathway labs to be assigned to the pathway programs under development.

Upon occupancy of the 38 classroom building, work will proceed to modernize all of the remaining 59 permanent classrooms into 21st century classrooms. This project will be done building by building. When one building group is finished, the next building group will begin. For example, Building C classrooms could be modernized in the summer. When Building C is finished, the Building D classrooms will be modernized. This will require the need for interim housing utilizing the school's available portables as all of the permanent classrooms cannot be completed over the summer.

The newest portable classrooms would be used for interim housing and those portables that are 20 years or older will be removed from the site. Portable classrooms are eligible for state grant modernization funding when they are 20 years or older from the date they were first placed into service. By removing only those portables that were placed into service 20 or more years ago, the District will be able to maximize State funding. Portables 609, 610, 611, 627, 628, 625, 626, 605, 606, and 608 will all be 20 years or older in 2015 and will be removed immediately upon occupancy of the new classroom structure. These portables are all located on the former parking lot at the southeast corner of the campus in a group at the north end of the parking area. The remaining 27 portables will be used for interim housing.

Following movement only as needed on an interim basis for modernization work, classes currently housed in portables will move into the empty classrooms in Buildings D & E made available by occupancy of the 38 classroom building. Social studies, special education, and leadership will be permanently located in Building D, while world languages, band, choir, tech communication, multimedia, and special education and support classes will be permanently located in Building E. Science, Home Ec, and art will remain in Building C and be joined by an additional art class that will move into Room 104. Dance and video production will remain in Rooms 502 and 503, respectively, of the Gym. The Ag classes will move into Rooms 404, 405 and 407. Should the Ag classes be temporarily displaced during the construction of the

new classroom building or support facilities, they would be assigned to unoccupied portable classrooms on an interim basis.

2.4.3 PLANNED IMPROVEMENTS

Figure 8 depicts proposed major planned improvements. Table 4 summarizes specific projects for consideration. Specific improvements planned for Righetti High School include:

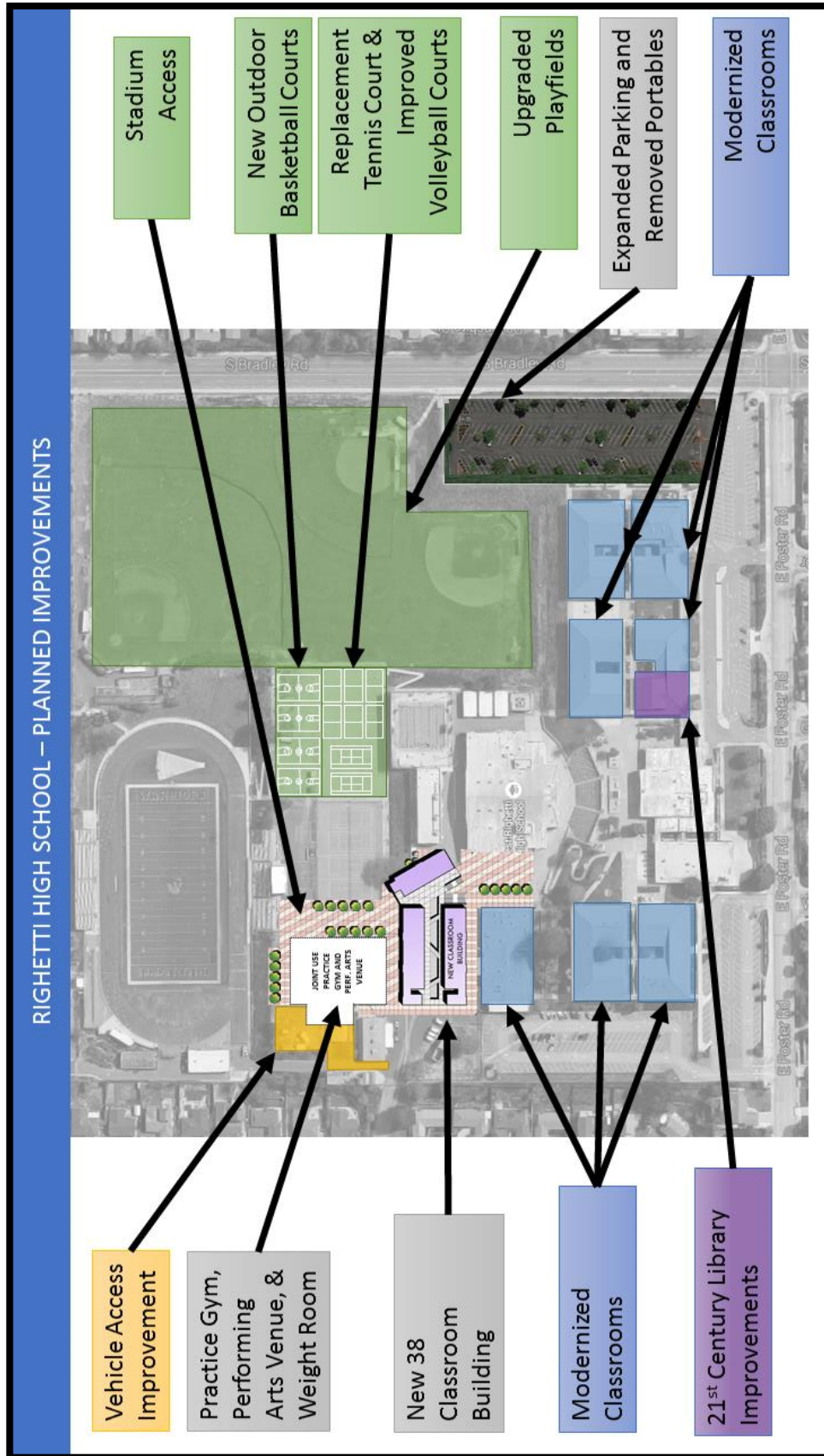
- Removal of all portables upon occupancy of the new 38 classroom building
- An expansion of the existing parking lot, utilizing land area made available by removal of portables
- Modernization of classrooms, labs, and the library with improved interior materials consistent with a 21st century learning space
- Design and construction of an additional indoor athletic practice space
- Design and construction of a performance venue for dramatic, theatrical, or musical assemblies adjoining the practice gym
- Expansion of outdoor courts for tennis and basketball, along with reconfiguration of the turf practice area to sufficiently support varsity baseball, softball, and soccer uses.
- Upgraded campus IT and safety infrastructure, including data network and fire alarm systems

These additions would provide a level of functionality for the school's educational and athletic programs commensurate to other District sites and require careful phasing to eliminate the need for additional interim facilities and to minimize the impact of construction on the ongoing educational program. First, immediately following the construction and occupancy of the new 38 classroom building, modernization of existing permanent classroom and library facilities will proceed, requiring the need to relocate some classrooms, teachers and students to existing portables on the campus as interim housing. Once all 59 classrooms and the library are all updated as 21st century classrooms, all portable buildings will be removed once they have been in service for 20 years and the state eligible funding has been applied for and received. Thereafter, the majority of land area occupied by portable facilities will be repurposed for expanded parking and vehicular circulation. The subsequent phase of improvements will include the reconfiguration of athletic fields and the addition of required basketball and tennis courts, as well as the design and construction of performing arts and athletic support facilities.

Table 4: Righetti High School – Planned Improvements

Righetti High		
Proj. Category	Description	Estimated Cost
NEW FACILITIES	Removal of Portable Classrooms - Removal of 37 portables (Rooms 559, 600-629) and restrooms	\$ 483,473
MODERNIZATION	Recapture & Improve Parking Lots - Reclaim parking area covered by portables; integrate improvement w/ existing parking	\$ 1,576,729
MODERNIZATION	Upgraded Labs in C Block - Upgrade 11 science labs in C Block to modern standards	\$ 4,474,959
MODERNIZATION	Upgraded Classrooms in E Block for Academy Purposes - Convert SE quadrant of E Block into 4 rooms suitable for arts, media, and drama - Convert Rooms 321 and 326 into digital design labs	\$ 1,154,416
MODERNIZATION	Upgraded Classrooms in D Block for Academy Purposes - Convert 2 rooms into industrial kitchens for family science academy	\$ 1,186,932
MODERNIZATION	Upgraded Industrial Arts Block - Convert Room 403 into ag science shop - Convert Rooms 404 and 405 into classrooms for teaching English to ag academy students - Convert Room 407 to engineering lab - Convert Room 405 to maker's lab	\$ 555,068
MODERNIZATION	21st Century Improvements to General Purpose Classrooms - Modular and reconfigurable tables and chairs at 30 classrooms - High-definition video displays - High-powered all-in-one desktop computers	\$ 2,628,269
NEW FACILITIES	New Joint Use Practice Gym & Performing Arts Venue - Practice gym facility with indoor basketball court, weight room - New shared performance space for theater, choir, band, and other uses - Two flex classrooms / training rooms to support athletic or performing arts programs - Outdoor basketball and tennis court improvements	\$ 15,990,297
MODERNIZATION	IT Infrastructure Integration - Integration of data & communications backbone btwn. new and modernized facilities - Wireless network expansion, including coverage in new outdoor spaces - Upgraded fire alarm panels and system, where required	\$ 2,997,645
MODERNIZATION	Upgraded Library Facility - Modular and reconfigurable tables and chairs - New storage amenities, circulation desk, and computer workstations	\$ 545,691
Total		\$ 31,593,477

Figure 8



2.4.4 MODERNIZATION IMPROVEMENTS

Modernization work at Righetti focuses on the renovation of 59 permanent classrooms in Buildings C, D, and E, along with upgraded 21st century learning environment for the school’s library. Renovation of classroom interiors will focus on those aspects not achieved by the 2000’s era infrastructure upgrades, including learning environment standards mentioned earlier in support of the educational program, including improvements to furnishings, fixtures, and equipment that enable greater collaboration, critical thinking, and creativity during classroom learning activities. Figure 9 presents the graphic depiction of the modernization phase and Table 5 summarizes the major projects and estimated cost.

Among the most notable transformations of its existing facilities, a modernized Library or “Student Information Resource Center” will serve as an academic focal point among the revitalized classroom buildings. Today the Righetti High School library, at approximately 7,000 square feet, encompasses the southwest quarter of Building D. It is well lit by large windows and fluorescent ceiling fixtures and contains traditional furnishings and equipment similar to those found in older more conventional libraries. There are markerboards on a “teaching wall”, desktop computer workstations, ceiling-mounted projectors, conventional school library furniture, and book stacks. Book storage includes regular shelving units and hideaway rolling cabinets that can safely secure materials. Overall, the library is an underutilized space on the Righetti campus, in part because it may not be viewed as inviting or modern to the students but rather stiff and unpromising.

The modernized and upgraded Student Information Resource Center will provide a place on the campus where students come to inquire about new ideas, share concepts and thoughts or locate new information. The District and school desires to create this kind of atmosphere and encourage these student behaviors. Increased functionality will be achieved by upgrading the interior of the current library with flexible, comfortable furniture of different heights that are arranged to create interactions between people while at the same time creating large open physical space. This approach allows for a number of different activities and uses, all encouraging students to collaborate, seek new ideas and challenges, solve problems, and share information. These upgrades will also provide the Student Information Resource Center with the same modern look and feel as the rest of the campus.

Also included in the upgraded space are three small study rooms constructed of glass walls with glass doors and furnished with flexible tables and chairs so that students can work in small groups and be monitored from the main room. Other upgrades include sliding markerboards that can cover the windows when needed, replacement of the current “teaching wall” with modular and moveable storage units, book stacks relocated around the perimeter of the room, and a large digital monitor placed on one wall to facilitate different types of groups and meetings. The carpets will be replaced along with older, damaged ceiling tiles.

Modern, flexible and comfortable furniture of differing heights much as you see at a coffee shop will replace old, outdated furniture. Differing height furniture such as café tables and chairs are placed along one wall with windows for students to sit at and use their hand held devices. The use of flexible, mobile furniture allows the space to be easily and quickly reconfigured to accommodate a variety of student

projects and school activities. The furniture includes mobile flexible student desks and chairs, café type tables and stools, large soft furniture that encourages seating and reading or discussion, and mobile book carts as well as a media cart that can be used in different locations throughout the room. If needed, upgrades to the wireless internet connectivity will be made to provide sufficient data bandwidth for large numbers of students use their 1:1 devices simultaneously.



As part of the planned modernization, a range of ancillary improvements across the site will be carried out. The removal of portables on the east side of campus, enabled by the construction of the new classroom facility, will allow a major expansion of the parking lot in the southeast corner of the site. Reclaiming this space is seen as essential to alleviating the on-site parking shortage experienced during peak times.

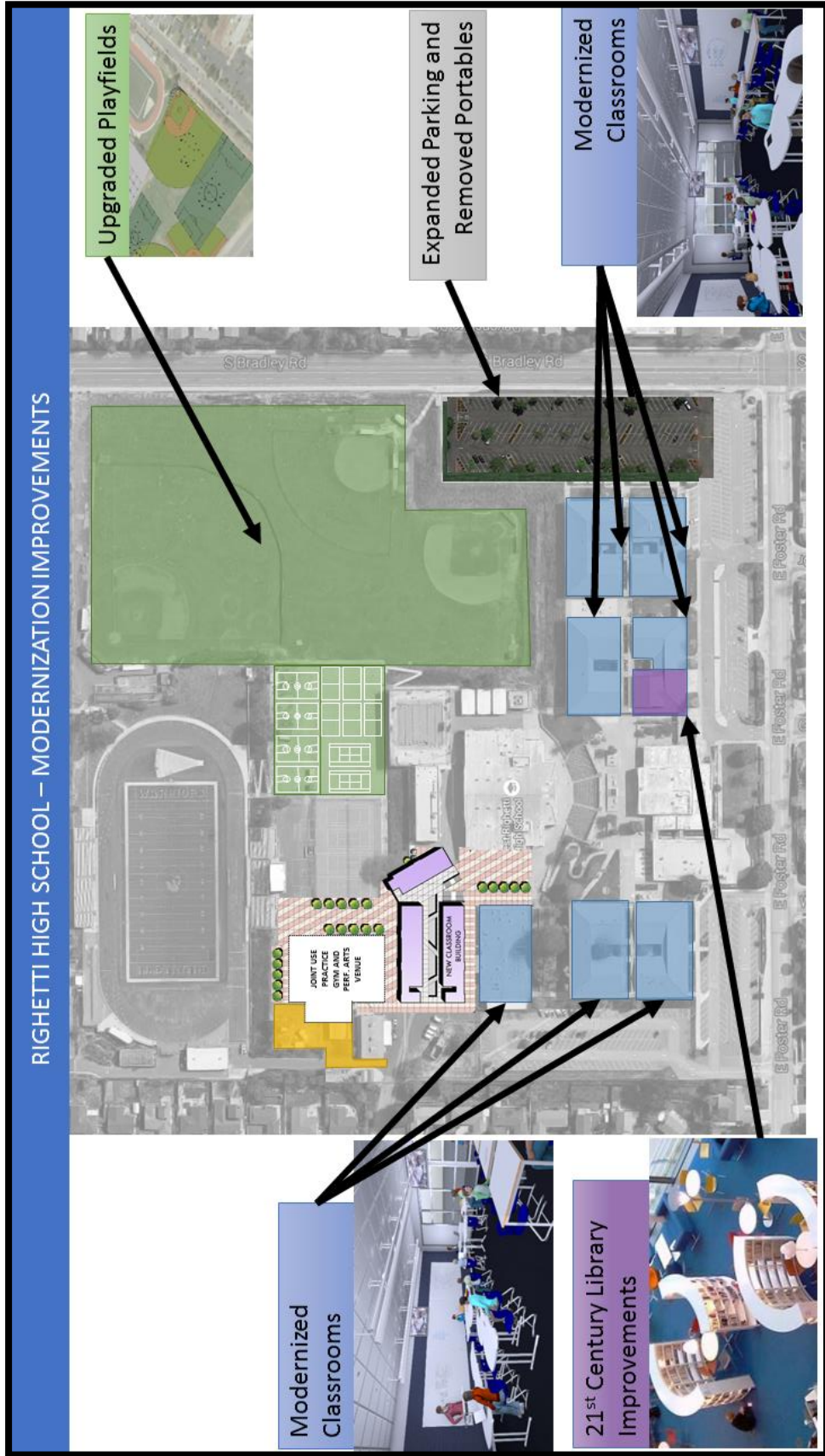
Athletic projects to be completed during this phase of work include the expansion of outdoor tennis and basketball courts to increase current capacity as well as generate sufficient pedestrian and circulation space to permit the construction of a new practice gym and performance venue. The baseball field north of Buildings D and E will also be enlarged and improved to regulation standards.

Also, information technology needs will be addressed by ensuring a reliable and robust infrastructure for wired and wireless broadband connections is installed—including wireless access points in classrooms, offices, and exterior locations where a strong wireless signal will be needed. Necessary repairs to the fire alarm and suppression system will be made.

Table 5: Righetti High School – Modernization Improvements

Righetti High		
Proj. Category	Description	Estimated Cost
NEW FACILITIES	Removal of Portable Classrooms - Removal of 37 portables (Rooms 559, 600-629) and restrooms	\$ 483,473
MODERNIZATION	Recapture & Improve Parking Lots - Reclaim parking area covered by portables; integrate improvement w/ existing parking	\$ 1,576,729
MODERNIZATION	Upgraded Labs in C Block - Upgrade 11 science labs in C Block to modern standards	\$ 4,474,959
MODERNIZATION	Upgraded Classrooms in E Block for Academy Purposes - Convert SE quadrant of E Block into 4 rooms suitable for arts, media, and drama - Convert Rooms 321 and 326 into digital design labs	\$ 1,154,416
MODERNIZATION	Upgraded Classrooms in D Block for Academy Purposes - Convert 2 rooms into industrial kitchens for family science academy	\$ 1,186,932
MODERNIZATION	Upgraded Industrial Arts Block - Convert Room 403 into ag science shop - Convert Rooms 404 and 405 into classrooms for teaching English to ag academy students - Convert Room 407 to engineering lab - Convert Room 405 to maker's lab	\$ 555,068
MODERNIZATION	21st Century Improvements to General Purpose Classrooms - Modular and reconfigurable tables and chairs at 30 classrooms - High-definition video displays - High-powered all-in-one desktop computers	\$ 2,628,269
MODERNIZATION	IT Infrastructure Integration - Integration of data & communications backbone btwn. new and modernized facilities - Wireless network expansion, including coverage in new outdoor spaces - Upgraded fire alarm panels and system, where required	\$ 2,997,645
MODERNIZATION	Upgraded Library Facility - Modular and reconfigurable tables and chairs - New storage amenities, circulation desk, and computer workstations	\$ 545,691
Total		\$ 15,603,180

Figure 9



2.4.5 NEW CONSTRUCTION – PERFORMING ARTS VENUE & PRACTICE GYM

Today, the Righetti High School campus lacks a dedicated Performing Arts facility. The drama class is located in a converted shop room in the Industrial Arts Building adjacent to the current welding shop. While this space is larger than a regular classroom, it does not meet the needs for student performances for drama, choir or band. The choir and band have sufficient classrooms, but lack a venue for student performances or concerts. The school also has the smallest interior athletic practice space of any of the high schools in the Santa Maria valley, with a gymnasium insufficiently sized to accommodate the demand for court time from the multiple varsity and junior varsity teams. Because of the high demand, the gym is in almost constant use and practices for certain teams can begin as late as 9 PM. The high level of use also increases maintenance costs.

As indicated in Figure 10 on the following page, the ideal placement of a facility that meets both of these needs is to the north of the new 38 classroom building. This location was recommended by the Architect of Record assigned to the 38 classroom building as well as carefully studied amongst several location options by the District’s Program Team. Considerations include:

- Pedestrian access to the facility from other related academic and athletic uses on the campus
- District, staff and emergency vehicle access to and around the perimeter of the proposed building mass
- Location and availability of existing on-site utilities including water, electrical, sewer, and data

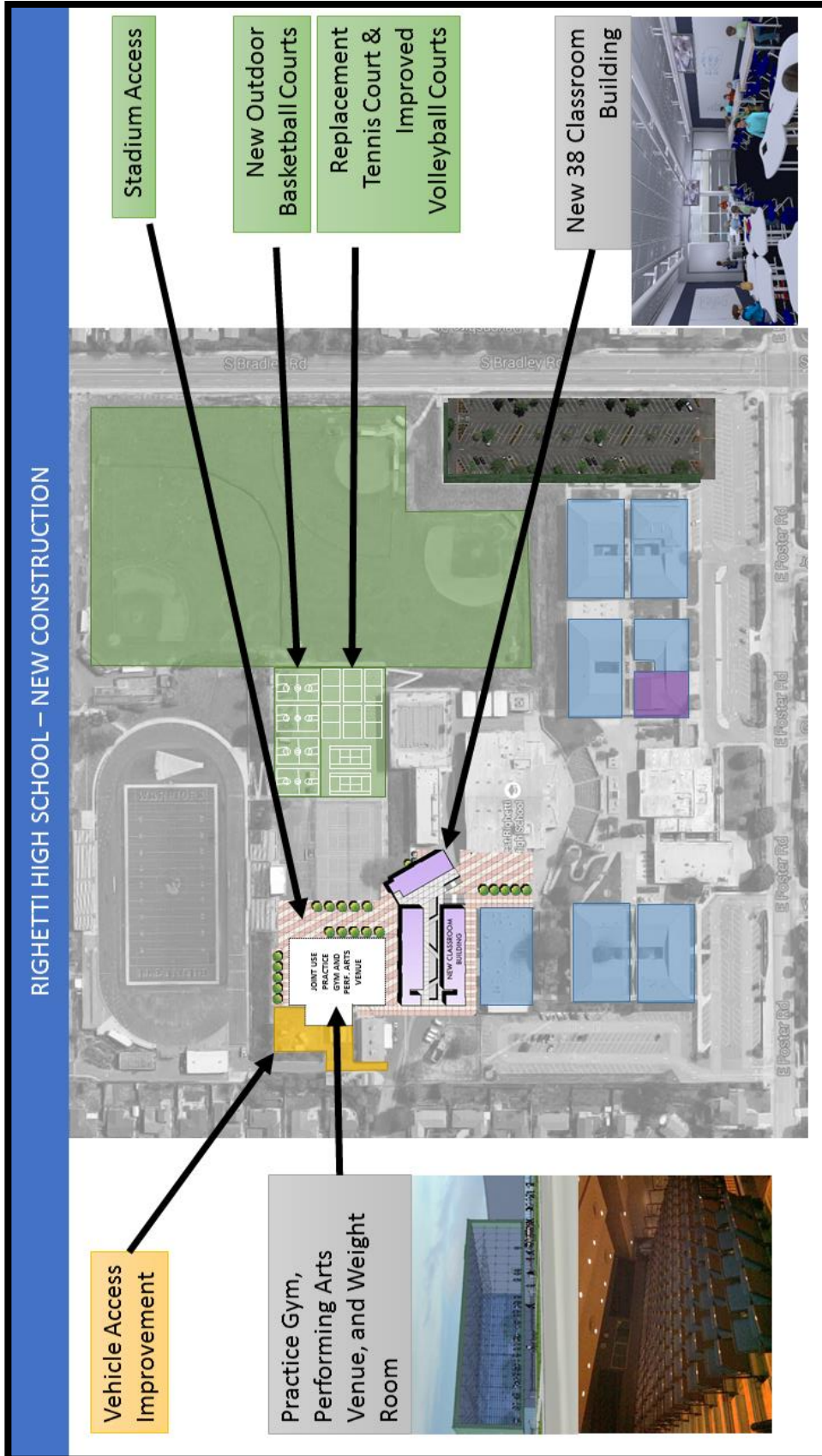
Construction in this location will require the demolition of several portable classroom buildings, along with a 2,200 square foot weight room that may be moved to an interim location and ultimately reconstructed as part of the new facility.

Building a new joint purpose facility that includes both a performing arts venue, a practice gym, and a weight room will provide the students at Righetti High School with a place for student musical and drama performances as well as an additional gym for athletic practices. Students will not need to begin practice late at night and the athletic program may better coordinate sports practices at reasonable times. Once built, the facility will also provide a classroom space for the drama program, thus freeing up the current converted shop room so that it can be used for learning space for the expanding Agriculture Pathway and the newly developed Engineering Pathway. The proposed improvements are summarized in Table 6 with a total estimated cost of \$15,990,297.

Table 6: Righetti High School – New Construction

Righetti High		
Proj. Category	Description	Estimated Cost
NEW FACILITIES	New Joint Use Practice Gym & Performing Arts Venue - Practice gym facility with indoor basketball court, weight room - New shared performance space for theater, choir, band, and other uses - Two flex classrooms / training rooms to support athletic or performing arts programs - Outdoor basketball and tennis court improvements	\$ 15,990,297
Total		\$ 15,990,297

Figure 10



2.5 PIONEER VALLEY HIGH SCHOOL

2.5.1 EXISTING CONDITIONS

Pioneer Valley High School, on the east edge of Santa Maria, presently enrolls almost 2,700 pupils. Completed in 2004, Pioneer Valley High is the District’s most recently built comprehensive high school. The site is bounded by residential neighborhoods and Sierra Vista Park (a city-owned facility) on the north, and more neighborhoods on the west and south. Land uses to the east and south of Pioneer Valley High are almost entirely agricultural. Apart from Panther Drive bounding the site on the east, the only other major road near the school is Main Street, which is offset 500 feet from the school’s southern edge.

Concentrated along the northern half of the high school’s 53-acre parcel, 59 permanent classrooms and labs are contained in two main structures that—along with support facilities—surround a large quad. Nineteen additional permanent classrooms are located in smaller buildings around the campus and include twelve modular classrooms, one student leadership classroom located in the gym building, four industrial arts classrooms located at the north end of campus, three performing arts classrooms located at the northeast corner of campus, and five others attached to the cafeteria building. The five adjacent to the cafeteria do not have assigned students and contain retractable walls intended for operation either as one large space for ad hoc uses (e.g., testing, student activities, etc.) or divisible into five separate classrooms to accommodate capacity overflow. At present, this multipurpose space is being used only for ad hoc activities.

A facilities assessment was previously conducted as to the condition, use, and as-built specifications of Pioneer Valley facilities. For orientation purposes, Figure 11 presents a summary of topical characteristics demarcated in the accompanying legend “A-D” categories. The school’s classroom facilities include two permanent main classroom buildings and several additional permanent classrooms “A” totaling 84 permanent teaching stations. Major support facilities “B” include the gymnasium, library, cafeteria and administration buildings. A performing arts facility “C” with three additional classrooms is under construction that will bring Pioneer Valley High’s total permanent classroom count to 87. Twenty-nine general purpose portable classrooms “D” have been added to the site since its opening to increase overall capacity are arranged along the western perimeter of the school site.

Upgrades in recent years include modular classrooms added in 2006, occupying the northwest corner of the site, and a pool complex installed in 2008.



The new District Performing Arts Center under construction, as viewed from the exterior (left) and interior (right)

Figure 11



2.5.2 EDUCATIONAL RECONFIGURATION

As a newer school, the design of classroom buildings at Pioneer Valley reflects a stronger awareness for the support functions and interdepartmental collaboration activities required in a modern teaching and learning space. This built environment is already more conducive to the District's configuration goals, and planned improvements are thus more targeted to enhancing the existing configuration and upgrading classroom interiors, facilities and technology infrastructure to District specifications and selected pathways programs.

The school is generally organized by departments; all of the science labs are located in one building, specialty classrooms located in another building, and core classes such as math, English, social studies, and international language are mostly located near each other. As with other District schools, this arrangement supports interdepartmental collaboration. With a few exceptions, most of the classroom are to remain in their current location, with only 1 classroom needing to be repurposed to meet program needs. Future improvements should provide the campus with upgraded classroom furnishings, additional technology equipment, and infrastructure improvements.

However, classrooms used for specific elective classes in pathway programs will need additional specific upgrades. Room 311 is proposed to be repurposed from its current art classroom use into a state of the art video production room with technical instruction in lighting and sound. This classroom and the attached room was originally designed for video broadcasting classes and with its adjacency to the new Performing Arts Center, it provides an ideal location in support of drama production activities.

Rooms 204 and 205, house classes for Information and Communication Technologies and Room 322 houses the digital media arts program of the school. These rooms require additional furnishings and equipment (e.g. robotics) to meet industry standards and requirements. By upgrading the furniture, fixtures and equipment to meet industry standards, student will be better prepared for college or careers instruction in both Information and Communication Technologies and Arts, Media and Entertainment Pathways.

Room 324 is used for a course in kinesiology and sports medicine and requires additional equipment to provide for the educational requirements of the program. The design of the classroom with a small adjoining room with hospital beds is sufficient and requires additional equipment for the sports medicine program (e.g. a soaking tub for an ice bath).

2.5.3 PLANNED IMPROVEMENTS

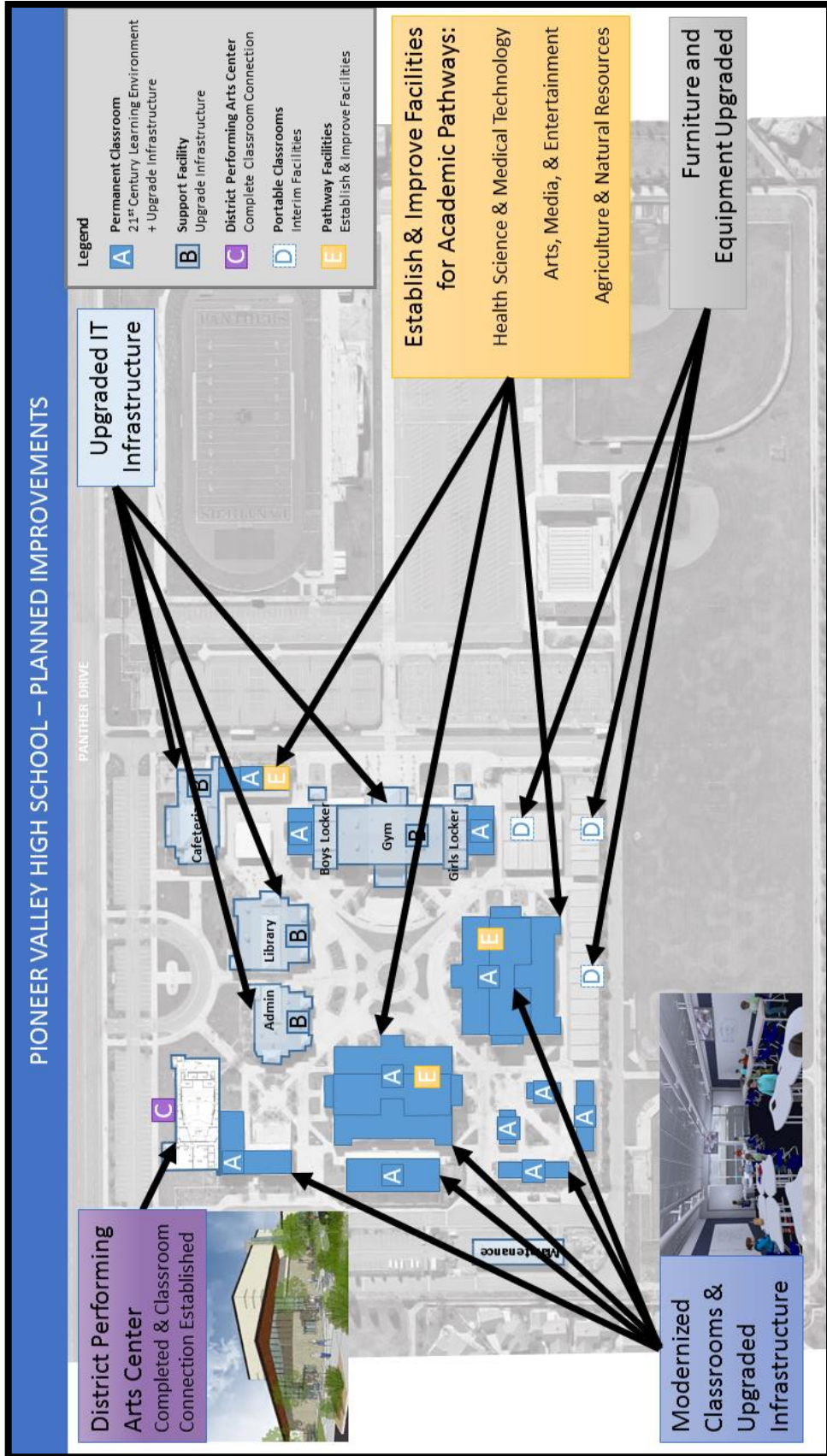
Table 7 summarizes the planned improvements for Pioneer Valley High. The major focus is on providing 21st century furnishings, fixtures and equipment improvements to the 83 classrooms and labs. Additional improvements are proposed for the identified pathway facilities that require additional improvements. Technology infrastructure improvements are proposed throughout the campus to accommodate modern classroom connectivity and instruction.

Improvements are proposed to be undertaken in phases to minimize disruption to the educational program while maintaining a sufficient economy of scale. Phase 1 of the upgrades will begin with improvements to Buildings E and G with additional improvements to Rooms 324, 311, 322, 204 and 205 to support the ongoing development of the pathway programs. Upgrades to the remainder of the school will occur over two additional phases to coincide with the years in which modernization dollars become available, including modernization funding for portable classrooms. The remaining permanent classrooms will be updated with Building H in Phase 2 and modular buildings in Phase 3. This work can be accomplished over the summer so no interim housing will be required. For the handful of classrooms in which the work was not completed by the time school resumed, the five empty rooms in the Building 500 could be used on an interim basis.

Table 7: Pioneer Valley High School – Planned Improvements

Pioneer Valley High		
Proj. Category	Description	Estimated Cost
NEW FACILITIES	Pathway Facility Improvements - Certified Nurse Assistant (CNA) lab - Kinesiology and sports therapy lab equipped with ice bath	\$ 249,142
MODERNIZATION	21st Century Improvements to General Purpose Classrooms - Modular and reconfigurable tables and chairs at 83 classrooms - High-definition video displays - Sliding markerboards that conceal windows or storage closets	\$ 5,615,451
MODERNIZATION	IT Infrastructure Integration - Integration of next generation data & communications backbone - Wireless network expansion, including coverage in outdoor spaces	\$ 2,163,835
Total		\$ 8,028,428

Figure 12

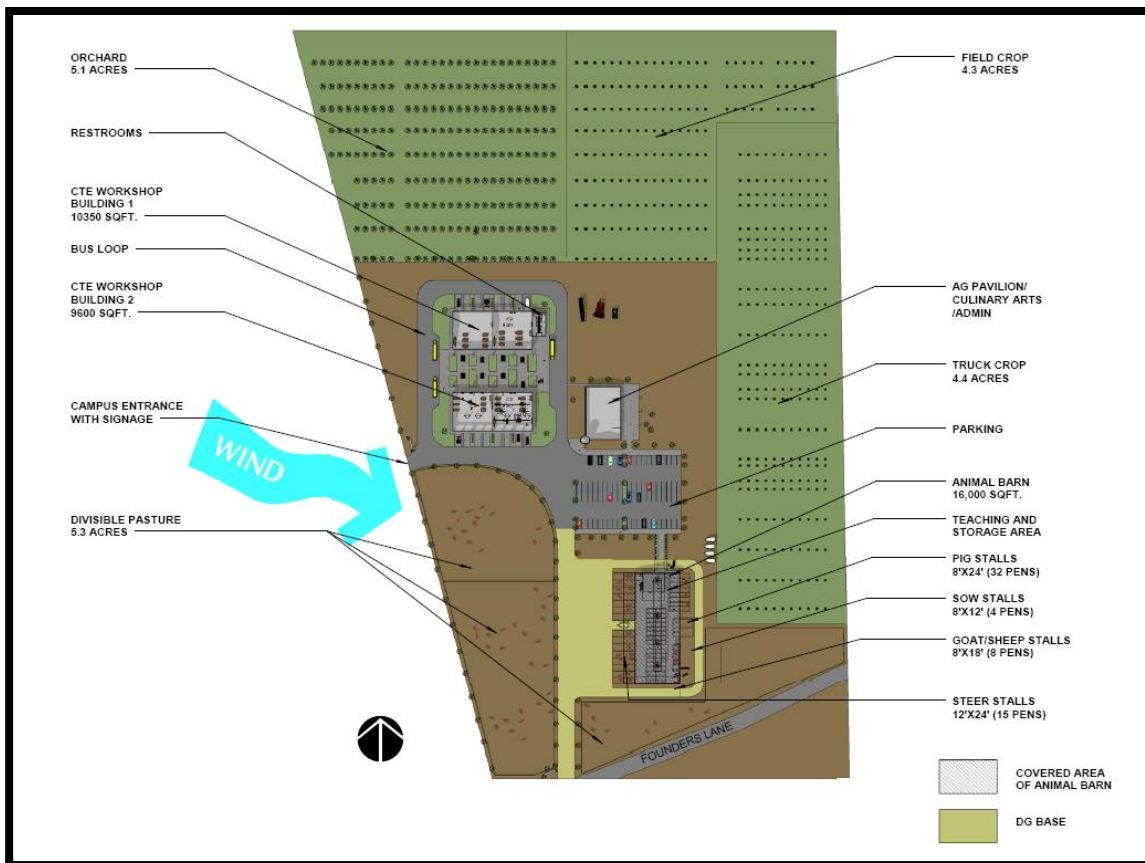


2.6 CTE CENTER/AGRICULTURAL FARM

The District has acquired a site for the development of a CTE Center and Ag Farm, envisioned as a 21st century environment for “hands-on” and mentored learning to provide capstone educational classes that support all of the District’s pathway programs and house the District’s Ag Farm facility. The goal for use of the new facility is to provide capstone level pathway classes in various subjects that directly relate to high-demand careers in the Santa Maria vicinity in order to improve students’ job skills and enhance students’ ability to transition from high school to the labor force or college. The capstone courses will be available for any student in the District to attend regardless of their school of enrollment. The project is undergoing development, with construction of initial barn and classroom facilities as part of Phase I to be followed by a proposed Ag Pavilion to be completed as part of the proposed MSIP. Table 8 below indicates the planned improvements and their approximate cost as attributable to the MSIP.

Table 8: CTE Center/Ag Farm – Planned Improvements

CTE Center/Ag Farm		
Proj. Category	Description	Estimated Cost
NEW FACILITIES	Ag Pavilion - 4,000-sq.-ft. facility with prep and serving kitchen, eating area, restrooms, etc. - 1,000-sq.-ft. facility with reception area, offices, staff workspaces, and storage - Staff and student restrooms	\$ 3,178,571
Total		\$ 3,178,571





Conceptual designs of CTE Workshops. Source: PMSM Architects

SECTION 3

PROGRAM FUNDING AND ANALYSIS

3.1 OVERVIEW

The District has been proceeding with the implementation of a Reconfiguration and Facilities Program to aid in the creation of 21st century learning environments and innovative academic initiatives for all students served by the District and its four high schools. The planning and implementation of the Program is driven by a two-phase implementation approach with a revised combined capital improvement budget of approximately \$222 million.

At present, the first phase of implementation is underway and includes construction of a 38 classroom facility at Righetti High School to replace outdated portable classrooms with modern 21st century learning environments, construction of a performing arts facility at Pioneer Valley High School for assembly and performance use, development of a Career Technical Education and Agricultural Farm facility to better transition all district students into improved career and college opportunities, and establishment of 21st century digitally interactive learning environments with mobile devices for every teacher and student. First phase improvements have been fully funded through a combination of remaining general obligation bond proceeds from the District's 2004 Measure "C" authorization, State Aid reimbursements, developer fees and LCAP funding.

The next phase of implementation improvements has been prepared as part of the Master Schools Improvement Program and includes:

- reconstruction of the Santa Maria High School campus into a modern 21st century learning facility reflective of the its heritage, including restoration of the Ethel Pope Auditorium, and the establishment of modern facilities available at companion high schools
- renovation of existing permanent classrooms at Pioneer Valley and Righetti High Schools to achieve similar 21st century modern facilities along with removal of Righetti portable facilities and expansion of parking and circulation
- construction of a new practice gymnasium and performance venues at Righetti High School to expand physical education, performance and educational support space
- construction of an Ag Pavilion at the CTE/Ag Farm to meet educational requirements for student demonstrations and exhibits in support of the District's career and college programs
- additional classroom space that may be required to accommodate future increases in overall enrollment

A comprehensive funding program for MSIP improvements is presented below for further consideration by the Board and District. Three traditional sources are considered: State School Facilities Program grants,

local developer fees, and a proposed new general obligation bond program to supplement the balance required.

3.2 STATE AID

State grants for facility improvements are a major component of funding for school district facility improvements. These grants leverage the use of local funds (e.g. developer fees) in funding the new construction or modernization of facilities. The State of California provides assistance to eligible school districts in the modernization and new construction of public schools through the School Facilities Program operated by the Office of Public School Construction (OPSC). The program is primarily financed by periodic voter approved State bonds to fund eligible K-12 school facility improvement projects.

District receipt of funding is based on a per-pupil grant amount established by the State Allocation Board (SAB), based on a general loading standard of 27 high school students per eligible classroom to be modernized or constructed. Eligibility for modernization funding is established separately for each school site, while eligibility for new construction is determined by the gap between a district's projected enrollment and its existing permanent classroom capacity. For purposes of State new construction grant eligibility, student housing capacity does not include relocatable classrooms.

Under the current program, school districts must apply and qualify for specific grant amounts, pursuant to various regulations and requirements. The amount, type, and process for securing grant funds is subject to periodic adjustment; therefore, the District has elected to maintain an active role in seeking and navigating the overall process. Currently, the District participates in SFP programs for facility modernization and new construction. These programs, and the District's current and projected eligibility and participation for program funding, are summarized below.

At this time, the program is allocating remaining funds from previous voter approved bonds on a limited and priority basis for matching modernization and new construction projects. All remaining bond authority has been exhausted and the program is in need of replenishment funding. Nonetheless, the State is still processing applications, acknowledging their receipt and placing them in order of receipt for consideration by the State Allocation Board, once funding is available.

A 2016 State bond proposition proposed by the Californians for Quality Schools (CQS) Initiative has qualified for the November 2016 ballot. This initiative proposes the placement of a \$9 billion State School Bond on the November 2016 ballot, with \$7 billion for K-12 schools and \$2 billion for community colleges. A CQS initiative or similar legislative action would produce a statewide bond in 2016 for voter consideration, and if passed replenish the SFP program.

3.2.1 MODERNIZATION ELIGIBILITY

The SFP modernization program provides funds on a 60/40 State and local sharing basis for improvements that modernize or upgrade permanent school facilities that are 25 years or older or portable facilities that are 20 years or older or since last modernized. In the past, the District has been an active participant in the State modernization program. Table 9 shows the District's estimated remaining amount of

modernization eligibility based on the total number of permanent classrooms that meet the 25-year requirement. Future eligibility for the modernization of permanent classrooms of approximately \$18.9 million is anticipated in 2025, increasing thereafter to \$32.9 million in 2029 as newer or previously improved District facilities age into eligibility.

Table 9: Districtwide Permanent Classroom Modernization Eligibility*

Site	Total CRs	CRs	FY 2014-24	CRs	FY 2025	CRs	FY 2029	CRs	FY 2035	Total
Delta HS	11	0	\$0	0	\$0	0	\$0	11	\$1,665,279	\$1,665,279
Righetti HS	59	0	\$0	59	\$8,931,951	0	\$0	0	\$0	\$8,931,951
Pioneer Valley HS	84	0	\$0	0	\$0	84	\$12,716,676	0	\$0	\$12,716,676
Santa Maria HS	74	0	\$0	66	\$9,991,674	8	\$1,211,112	0	\$0	\$11,202,786
Total	228	0	\$0	125	\$18,923,625	92	\$13,927,788	11	\$1,665,279	\$34,516,692
Cumulative CRs				125		217		228		
Cumulative Total				\$18,923,625		\$32,851,413		\$34,516,692		

*In current dollars. Sources: Santa Maria Joint Union High School District, OPSC

Table 10: Districtwide Portable Classroom Modernization Eligibility*

Site	CRs	FY 2016	CRs	FY 2017	CRs	FY 2019	CRs	FY 2020	CRs	FY 2021
Delta HS	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0
Righetti HS	16	\$2,422,224	4	\$605,556	1	\$151,389	6	\$908,334	2	\$302,778
Pioneer Valley HS	1	\$151,389	0	\$0	10	\$1,513,890	2	\$302,778	0	\$0
Santa Maria HS	9	\$1,362,501	0	\$0	8	\$1,211,112	6	\$908,334	11	\$1,665,279
Total	26	\$3,936,114	4	\$605,556	19	\$2,876,391	14	\$2,119,446	13	\$1,968,057
Cumulative CRs			30		49		63		76	
Cumulative Total			\$4,541,670		\$7,418,061		\$9,537,507		\$11,505,564	

Site	CRs	FY 2022	CRs	FY 2024	CRs	FY 2025	CRs	FY 2024	CRs	FY 2025
Delta HS	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0
Righetti HS	7	\$1,059,723	4	\$605,556	0	\$0	1	\$151,389	0	\$0
Pioneer Valley HS	0	\$0	0	\$0	12	\$1,816,668	0	\$0	0	\$0
Santa Maria HS	0	\$0	0	\$0	0	\$0	0	\$0	12	\$1,816,668
Total	7	\$1,059,723	4	\$605,556	12	\$1,816,668	1	\$151,389	12	\$1,816,668
Cumulative CRs	83		87		99		100		112	
Cumulative Total		\$12,565,287		\$13,170,843		\$14,987,511		\$15,138,900		\$16,955,568

*In current dollars. Sources: Santa Maria Joint Union High School District, OPSC

The State also provides modernization grants for portable classroom facilities. Correspondingly, the District has approximately 26 portable classrooms as of fiscal year 2016 that are eligible for modernization grant funding of approximately \$3.9 million, increasing cumulatively to \$12.5 million by 2022 and periodically thereafter as indicated in Table 10. These amounts should be available to assist in the proposed modernization of 21st century classroom improvements of existing classrooms at Righetti, Pioneer Valley, and Santa Maria high schools. It is estimated that the District will be able to garner

approximately \$12.6 million in portable classroom modernization eligibility through 2022, increasing thereafter to \$16.9 million by 2025.

3.2.2 NEW CONSTRUCTION ELIGIBILITY

The SFP new construction program provides State grants on a 50/50 State and local sharing basis for eligible projects that add student housing capacity to a school district. New construction grants may be used by the District at any existing or new school site. Table 11 shows the estimated amount in new construction grant funding for which the District is currently eligible. The total number of pupil grants is estimated at 2,634 at the latest base per-pupil grant amount of \$14,311, as recently adjusted by the SAB. Additional grant increases are also available for severe and non-severe special day classrooms.

Based on a combined 2,634 pupil grants, the District currently qualifies for approximately \$40.1 million in State new construction funding. This does not include any available allowance, if deemed needed by the State, for additional site development expenditures to accommodate required classroom improvements; an amount generally assumed to equal around 15% of the State grant amount. If applied to all grants, this amount would yield an additional allocation of approximately \$6 million, increasing the projected total to approximately \$46.1 million. This amount would be subject to a dollar-for-dollar match from the District of approximately \$46.1 million. However, new construction grants, like modernization grants, do not fund their proportional amount of ultimate total project costs, but only a portion the State’s established grant level. Therefore, districts are required to fund any remaining and outstanding portion above the State match, often at a substantially greater amount than the local match requirement.

Table 11: District’s Estimated New Construction Eligibility*

Grade Level	SFP Per-Pupil Grant	Est. Eligible Pupils	Est. State Grant (50%)	Est. Local Match (50%)	Project Total (100%)
9-12	\$14,311	2,389	\$34,188,979	\$34,188,979	\$68,377,958
Non-severe	\$19,984	144	\$2,877,696	\$2,877,696	\$5,755,392
Severe	\$29,881	101	\$3,017,981	\$3,017,981	\$6,035,962
Subtotal		2,634	\$40,084,656	\$40,084,656	\$80,169,312
Est. Site Service (15%)			\$6,012,698	\$6,012,698	\$12,025,397
Grand Total		2,634	\$46,097,354	\$46,097,354	\$92,194,709

* In current dollars. Sources: Santa Maria Joint Union High School District, OPSC

Table 12 shows anticipated State aid applications for eligible Phase 1 improvement projects already underway. The District has already applied for the use of 378 pupil grants for reimbursement of costs associated with the newly constructed 14-classroom building at Santa Maria High. A separate application to use an additional 56 pupil grants has been prepared and submitted to increase the available reimbursement to approximately \$6.2 million. A similar approach would yield approximately \$2.8 million for the Pioneer Valley Performing Arts Center. Adding 60 more pupil grants to the CTE/Ag Farm project

would increase funding to approximately \$4.7 million. The Righetti 38-classroom building is proposed to be submitted for 1026 base pupil grants for approximately \$14.7 million. In total, approximately 1989 pupil grants are proposed to be used for this purpose, leaving a balance of approximately 645 pupil grants for additional new construction improvements given the district’s current enrollment. These amounts do not consider the additional eligibility for site service work that may be required at each site for which the State is willing to reimburse and which is estimated to be approximately \$6 million in additional reimbursements, if approved.

Table 12: Summary of State New Construction Applications

	Base Grants	Additional Grants	Total Grants	Per-Pupil Grant Effective 01-16	Est. State Base Grant	Est. Add'l. State Grant	Est. Total State Grant (50%)	Est. Local Match (50%)	Project Total (100%)
Total Pupil Eligibility	2634		2634	\$14,311-\$29,881	\$ 40,084,656	\$ -	\$ 40,084,656	\$ 40,084,656	\$80,169,312
Project									
14-Classroom Building, Santa Maria High*	378	56	434	\$ 14,311	\$ 5,409,558	\$ 801,416	\$ 6,210,974	\$ 6,210,974	\$12,421,948
Performing Arts Center, Pioneer Valley High **	108	91	199	\$ 14,311	\$ 1,545,588	\$ 1,302,301	\$ 2,847,889	\$ 2,847,889	\$ 5,695,778
38 Classroom Building, Righetti High ***	1026	0	1026	\$ 14,311	\$ 14,683,086	\$ -	\$ 14,683,086	\$ 14,683,086	\$29,366,172
CTE Center/ Ag Farm***	270	60	330	\$ 14,311	\$ 3,863,970	\$ 858,660	\$ 4,722,630	\$ 4,722,630	\$ 9,445,260
Total	1782	207	1989	\$ 14,311	\$ 25,502,202	\$ 2,962,377	\$ 28,464,579	\$ 28,464,579	\$56,929,158
Total Grants Remaining			645	\$14,311-\$29,881	\$ 11,620,077	\$ -	\$ 11,620,077	\$ 11,620,077	\$23,240,154

*In current dollars. Sources: Santa Maria Joint Union High School District, OPSC

Based on the current status of the State aid program funding, the district has elected to construct eligible projects from available local funds and to seek reimbursement for such projects as additional funding for State grants becomes available. Once all applications are submitted, processed and funded, it is anticipated that the District would receive State funding on a lump sum, per-project reimbursement basis. As demonstrated above, it is anticipated the District would be eligible to receive approximately \$28.5 million in State reimbursements which could be applied to fund outstanding projects.

The remaining 645 new construction, per-pupil grants are estimated to garner \$9.2 million in State base grants, plus an additional \$2.4 million for special day class pupils for a total of \$11.6 million. These grants are proposed to be applied towards the reconstruction of the Santa Maria High school campus improvements as shown in Table 13. Coupled with anticipated State grant reimbursements of approximately \$28.5 million, an anticipated total of \$40.1 million in new construction grant funding is projected to be available for next phase improvements. These funds, however, require a local match in order to be secured.

Table 13: Remaining State New Construction Eligibility

Project	Base Grants	Additional Grants	Total Grants	Per-Pupil Grant Effective 01-16	Est. State Base Grant	Est. Add'l. State Grant	Est. Total State Grant (50%)	Est. Local Match (50%)	Project Total (100%)
Santa Maria High	645	0	645	\$14,311-\$29,881	\$ 11,620,077	\$ -	\$ 11,620,077	\$ 11,620,077	\$23,240,154
Total	645	0	645	\$14,311-\$29,881	\$ 11,620,077	\$ -	\$ 11,620,077	\$ 11,620,077	\$23,240,154
Total Grants Remaining			0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

3.2.3 COMBINED STATE GRANT ELIGIBILITY

As stated earlier, the District has remaining State eligibility for modernization and new construction grants. Table 14 provides a summary of the combined eligibility for modernization and new construction. In total, approximately \$24.2 million in State aid grants has been identified. The majority, \$12.6 million, is from State modernization grants for portable facilities that will reach their 20 year eligibility during the term of the next phase improvements and are currently in place at Righetti (36), Pioneer Valley (13) and Santa Maria (34) high schools. To receive these funds, the District will need to provide a local match of approximately \$8.4 million. The balance in eligibility is for new construction grants of approximately \$11.6 million which will require an equal local match amount from the district. Matching State grants will require local sources such as developer fees and general obligation bonds to provide the local match requirement of approximately \$20.0 million.

Table 14: Combined Remaining State Eligibility for Modernization and New Construction

New Construction						
Project	Pupil Grants	Total Grants	Per-Pupil Grant Effective 01-16	Est. Total State Grant (50%)	Est. Local Match (50%)	Project Total (100%)
Santa Maria High	645	645	\$14,311-\$29,881	\$ 11,620,077	\$ 11,620,077	\$ 23,240,154
Subtotal	645	645		\$ 11,620,077	\$ 11,620,077	\$ 23,240,154

Modernization						
Project	# of Portable Classrooms	Total Grants	Per-Pupil Grant Effective 01-16	Est. Total State Grant (60%)	Est. Local Match (40%)	Project Total (100%)
Righetti High	36	972	\$5,607	\$5,450,004	\$3,633,336	\$9,083,340
Pinoneer Valley High	13	351	\$5,607	\$1,968,057	\$1,312,038	\$3,280,095
Santa Maria High	34	918	\$5,607	\$5,147,226	\$3,431,484	\$8,578,710
Subtotal	83	2241		\$ 12,565,287	\$ 8,376,858	\$ 20,942,145
Total				\$24,185,364	\$19,996,935	\$44,182,299

3.4 LOCAL DEVELOPER FEES

Developer fees levied on new residential and commercial construction in a school district attendance area are permissible under the state Education Code, Section 17620. The purpose of these fees is to offset the student enrollment impact that would be generated by new development. Fees may be used to fund the construction of new school facilities, the modernization of existing facilities, or the reopening of closed facilities. The code also permits an inflation-based increase in developer fees every two years based on changes in the Class B construction index. There are three levels of Developer Fees that can be assessed:

- Level 1 fees are established by statute and adjusted by the State Allocation Board and is currently \$3.48 per square foot of residential development and \$0.56 per square foot of commercial and industrial development
- Level 2 fees constitute up to 50% of the State allowed cost for construction and sites, if the school district meets specified eligibility tests and assumes that the will State pay for the other 50% of cost through the SFP
- Level 3 fees are the same as Level 2, but include the State's 50% share as well, but only when the State declares it is out of funds for new construction

A district justification study must be completed in order to levy Level 1 or Level 2 fees and in the event that the State declares that it is out of new construction state grant funds, Level 2 fees will automatically adjust to Level 3. In March 2016, the District adopted a School Facilities Needs Analysis prepared by SchoolWorks, Inc. that established the justification for collecting Level 1 fees at the adjusted level of \$3.48 per square foot of residential construction and \$0.56 per square foot of commercial or industrial construction. However, the District is permitted to claim only a portion of the total allowable fee, equal to their share of grade levels served. As a high school district, Santa Maria JUHSD can claim the 4/13ths of the total fees, with the remainder distributed to feeder elementary school districts. Hence, for each square foot of new residential construction, the District may claim \$1.07.

However, in April 2016, the District adopted a School Facilities Needs Analysis, also prepared by SchoolWorks, Inc., which established the District's ability to levy Level 2 fees at a rate of \$2.23 for its share of projected impact from new residential development. In the event that a new State bond authorization for the SFP fails to garner sufficient support and the State enacts Level 3 fees, the District's Level 2 fee would increase to \$4.46 per square foot.

Using available County and local data, the Study estimates that an additional 1,580 residential homes at an average of 1,890 square feet will be built in the District over the next 5 years. The study asserts that 296 new high-school aged students will be generated in this time frame, using the student generation factor of 0.1876 pupils per house.

From this data, SchoolWorks calculated the anticipated revenue from developer fees for these 1,580 units from 2016 through 2021: At 1,890 square feet each, total residential development in the District would equal 2,986,200 square feet. Multiplied by \$2.23 (the current Level 2 developer fee per square foot), this amounts to \$6,659,226 in developer fees by 2021. The District is required to complete an annual update to the Level 2 Study in order to continue collecting Level 2 fees during this period.

At the beginning of Phase 1 of the Program (July 1, 2014), the District had a fund balance in its Developer account of \$964,500. To date the District has received \$2.4 million in Developer Fees, totaling approximately \$3.3 million of the \$3.6 million in developer fees anticipated for use in Phase 1 with two months of receipts remaining. Considering the overlapping timeframe of the annual updates to the Level 2 Study, it would be appropriate to debit the fees collected to date against the \$6.7 million in projected Developer Fee revenues. This would leave approximately \$4.3 million to be allocated to next phase of the proposed Program improvements.

The \$4.3 million in anticipated developer fee revenue is much less than the required \$17.6 million local match required to secure the identified State matching grants for modernization and new construction and is not sufficient enough to fund the next phase of proposed projects. Another source of local funding must be identified to meet the match requirement and fully implement the Program.

3.5 GENERAL OBLIGATION BONDS

In order to make up the identified shortfall from available State grants and developer fees, the District may consider the use of general obligation bonds. General obligation bonds are the most widely used and efficient method of financing school facility improvements in California. More than 600 school districts in the state have issued G.O. bonds to finance necessary improvements. These 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 of a parcel as determined by the county, pursuant to Proposition 13. 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 to a district to finance improvements over time.

The District has used G.O. bonds previously to fund major school facility improvements and has been successful in making use of public financing options and garnering community support to improve school facilities. To date, the District has issued all of its authorized bonds and has no remaining bond authorization from its previous bond programs.

3.5.1 ASSESSED VALUATION

The establishment of a G.O. bond program is highly dependent on the assessed valuation of a school district and State requirements. Assessed valuation serves as the basis for the District's ability to issue and repay G.O. bonds through the levy of an annual tax on all taxable property. Total assessed valuation and its rate of growth in combination with market conditions typically determine the structure of a G.O. bond program and influences the size and timing of bond sales. The District's assessed valuation is determined each year by the County Assessor and equalized by the County Auditor-Controller. Table 15 demonstrates the existing assessed valuation for the District and the historical pattern of growth since 2002. During this period, the District received substantial annual increases in assessed valuation up until 2008, resulting in total assessed valuation nearly doubling from fiscal year 2002.

Beginning in 2009, assessed value growth slowed, actually declined by approximately 3.14% overall from fiscal year 2009 through 2010, and began to increase thereafter in fiscal year 2011. The District's 10-year and 15-year annual growth in assessed valuation averaged 3.43% and 5.56%, respectively and 3.23% over the last 5-year period. Prior to the Great Recession, the District's average annual growth rate was 10.68% from fiscal 2001 through 2008. County data shows the District's assessed valuation increased by approximately \$640 million in FY 2015-16, a 5.20% increase from the prior year.

Table 15: Historical Assessed Value

Year	Total	% Change
2001-02	\$6,175,466,301	
2002-03	\$6,619,512,564	7.19%
2003-04	\$7,232,731,738	9.26%
2004-05	\$8,083,327,238	11.76%
2005-06	\$9,322,627,058	15.33%
2006-07	\$10,549,246,604	13.16%
2007-08	\$11,327,913,388	7.38%
2008-09	\$11,301,842,676	-0.23%
2009-10	\$10,971,708,827	-2.92%
2010-11	\$11,055,236,700	0.76%
2011-12	\$11,257,304,344	1.83%
2012-13	\$11,453,441,156	1.74%
2013-14	\$11,713,432,612	2.27%
2014-15	\$12,309,305,008	5.09%
2015-16	\$12,949,471,442	5.20%
5-yr Avg. Annual Growth		3.23%
10-yr Avg. Annual Growth		3.43%
15-yr Avg. Annual Growth		5.56%

* Sources: California Municipal Statistics, Santa Barbara Count, San Luis Obispo County

3.5.2 DISTRICT DEBT LIMIT

Education Code 15102, limits the amount of outstanding principal bonded indebtedness a school district may have outstanding when considering the sale of additional G.O. bonds. For a high school district, bonded indebtedness cannot exceed 1.25% of the District’s total assessed valuation at the time bonds are to be sold. School districts can petition the State Board of Education to increase this limit on a case by cases basis.

Table 16 shows the District’s bonding capacity based on the assessed valuation for fiscal year 2015-16. The District’s gross bonding capacity is calculated to be approximately \$161.9 million. There is approximately \$87.5 million at this time in outstanding bond principal, equal to approximately 54.09% of the District’s total bonding capacity. This leaves a net bonding capacity for additional debt at this time of approximately \$74.3 million that could be issued immediately, if available.

The District’s net bonding capacity is expected to grow as assessed values in the District increase and as outstanding principal from the District’s previous outstanding bonds is repaid annually. Should the District opt for a new bond authorization from voters, estimated bond sales would occur overtime, based on projected growth in Districtwide assessed value. Issuing bonds over time allows growth in assessed value between bond issuances so that bond repayments can be maintained at a more affordable level. It also

provides for the repayment of outstanding bond principal. In combination, this also allows for the District’s net bonding capacity to continue to increase over time.

Table 16: Bonding Capacity Analysis

Debt Limitation	
Total Assessed Valuation	\$12,949,471,442
Applicable Bond Debt Limit	1.25%
Bonding Capacity	\$161,868,393
Outstanding Bonded Indebtedness	\$87,549,254
Net Bonding Capacity	\$74,319,139
Percent of Capacity Currently Used	54.09%

* Sources: California Municipal Statistics, Santa Maria Joint Union High School District, EMMA

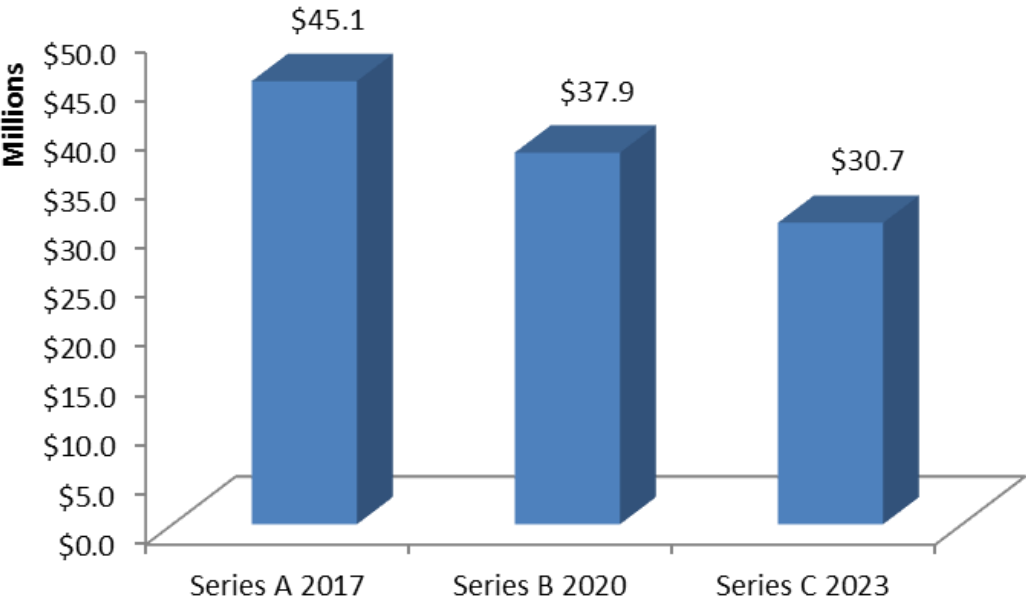
3.5.3 ESTIMATED ADDITIONAL BOND PROCEEDS REQUIRED

Proposition 39 authorizes school districts to issue new bonds upon a 55% affirmative vote by the local electorate in a regularly scheduled election. For a high school district, the maximum tax rate to be levied at the time bonds are sold must not exceed \$30 per \$100,000 of assessed value. In addition, districts must agree to be subject to certain conditions, including the establishment of a project list, an independent citizens’ oversight committee, and annual performance and financial audits. The District has a history of conducting Proposition 39 elections and issuing bonds consistent with these requirements.

Based on the proposed next phase improvements, there is a need to issue approximately \$113.7 million in general obligation bonds to meet the local match requirement for State facility grants, fund the net shortfall from developer fee revenue and meet the total amount required for proposed improvements. Should the Board elect to proceed with a new Proposition 39 bond measure, Figure 13 demonstrates a projected bond sales program over time. Assuming that the District’s assessed valuation grows at an annual average of 4% and that the District implements the maximum tax rate of \$30 per \$100,000 of assessed value allowed by Proposition 39, the District could generate approximately \$113.7 million in bond proceeds over time at prevailing market rates and conditions assuming a 25 year term per bond.

In the projection below, bond series are structured to allow projected assessed valuation growth between bond issuances so that required tax rates for bond repayments stay within the estimated Proposition 39 rate of \$30 per \$100,000 of assessed valuation. Recognizing that prevailing law and market conditions may change over time, the first bond series is estimated to generate approximately \$45.1 million with a second bond series to be issued in 2020 for a projected total of \$83.0 million during the first 5 year period. The following series is expected to be available for funding in 2023 or as needed thereafter to fund required project improvements.

Figure 13: Estimated Bond Proceeds



Source: CFW, Inc.

SECTION 4

MASTER BUDGET & SCHEDULE

The proposed MSIP improvements are proposed to be finance through a combination of State and local resources. State reimbursements from prior completed improvement projects and remaining eligibility for new construction and modernization pupil grants have been identified and applications submitted where possible. Anticipated collections from local developer fees have been considered. The impact of local residential and commercial development continues to be monitored by the District and required developer have been levied pursuant to State law and are projected to be collected on an ongoing basis. Additional voter approval is required to meet the local match requirements for State modernization and new construction grants beyond those provided by local developer fees and to provide for the balance of proposed improvements.

A Master Program Budget has been prepared based on anticipated project costs, including both hard and soft costs. Hard costs are the direct costs of construction, including materials, equipment, and labor. Soft costs consist of all non-construction costs that support or guide the construction work; these include professional fees, permits, consulting services, and administrative costs, among many others. For the purpose of designing a master budget, an “all-in” tally of costs has been prepared.

The following section provides a Proposed Sources and Uses Statement of anticipated funds and a Master Budget and Schedule of proposed improvements for consideration of the Board. As is the practice of the District, it is anticipated that these elements will be reviewed on an ongoing basis by staff and subject to a six month review by the Board to evaluate progress and to make adjustments as may be deemed necessary.

4.1 SUMMARY OF PROPOSED SOURCES AND USES

Table 17 shows the projected Sources and Uses of Funds to implement next phase improvements. It is anticipated that the District will require, approximately \$170.7 million to complete the proposed projects. These improvements include the reconstruction of Santa Maria High, the construction of a new practice gym and performance facility at Righetti High, the upgrade of all district permanent classrooms into 21st century facilities, removal of all portable classrooms at the district’s older sites, and an allowance for additional classrooms should enrollment increase significantly in the years ahead. A Program Reserve is also funded to provide for changes in the scope of the Program and as a contingency for unforeseen conditions and project requirements, particularly given the age and composition of the district’s older campuses.

As contemplated, it is anticipated that the District will receive approximately \$28.5 million in State reimbursements from the completion of projects currently underway and an additional \$24.2 million in

further new construction and modernization matching grants for a total of \$52.7 million from the SFP. Another \$4.3 million in Developer Fees is projected to be available from collection of local developer fees during the timeframe of construction. A new general obligation bond is recommended to meet the anticipated shortfall of approximately \$113.7 million to be issued over time as required by the construction schedule and available financial and economic market conditions. If for any reason the State School Facilities Program is not replenished or the SFP is changed in such a way that the District is unable to utilize its existing eligibility, the proposed bond program would allow the District to complete a majority of the proposed projects from local funds as determined by the Board.

Table 17: Summary of Proposed Sources and Uses Statement

Sources	
New G.O. Bond Authorization	
Series A	\$ 45,127,786
Series B	\$ 37,851,331
Series C	\$ 30,702,261
Subtotal of G.O. Bonds	\$ 113,681,377
Existing Building Fund Balance	\$ -
Existing State Aid Reimbursements	\$ 28,464,579
Existing Deferred Maintenance	\$ -
Estimated Projected State Aid Receipts	\$ 24,185,364
Estimated Projected Developer Fee Receipts	\$ 4,384,000
Subtotal of Other Sources	\$ 57,033,943
Estimated Total Funds	\$ 170,715,320
Uses	
Righetti High	\$ 31,593,477
Pioneer Valley High	\$ 8,028,428
Santa Maria High	\$ 70,466,034
Delta High	\$ -
CTE/Ag Farm	\$ 3,178,571
Additional Classrooms	\$ 34,003,822
Subtotal of Proposed Improvements	\$ 147,270,332
Program Reserve (15%)	\$ 23,444,988
Estimated Total Uses	\$ 170,715,320

Source: CFW, Inc.

4.2 PROPOSED MASTER BUDGET AND SCHEDULE

Table 18 provides the next phase Master Budget and Schedule of proposed improvements that are currently scheduled to begin in early 2017 and to continue through 2024. Because all high school sites are required to remain in full operation during the period of improvement, almost all school site improvements will need to be undertaken and completed in a phased manner. Efforts will be undertaken to minimize the cost of interim facilities by utilizing available portable and permanent classrooms to house students until such time as the proposed facilities are completed. The goal is to provide capacity and minimize the amount of disruption required while staying on budget and schedule.

The reconfiguration and reconstruction of the Santa Maria High campus is anticipated to begin in fiscal year 2017 with design and conclude all phase construction by the end of 2024. The initial focus is to relocate impacted uses and construct a new 48 classroom building with the realignment of the Morrison Street entrance and required main area parking. Partial field and parking improvements are also planned for the eastern portion of the site. As capacity is made available from the construction of new classrooms and remaining portable classrooms, repurposing and modernization of remaining buildings will be undertaken, including Pope Auditorium. Once these are completed, remaining portables will be removed and field and support facilities completed.

Once the new Righetti 38 classroom facility is completed, additional available space will have been created to initiate the phased upgrading and modernization of existing permanent classrooms at the Righetti High School site. It is anticipated that classroom and library upgrades will be done in phases until completion at which time the remaining portable classrooms will be removed and the existing parking area expanded. New construction projects associated with the new practice gym and performance space are proposed to follow. All phases will end with the planned improvements to the existing and proposed play areas and fields. Overall a 5 year implementation horizon is anticipated once design begins.

Pioneer Valley improvements are proposed to be undertaken on a similar timeline and center on providing upgrades to existing digital infrastructure and existing interior classroom areas. Given its more recent construction, these improvements are anticipated to be less intrusive to the academic environment than planned work at the other sites. Therefore, it is anticipated that this work can be accommodated by taking advantage of available space (e.g. the 5 classrooms in the 500 building) and additional periods when the academic program is not in session.

Efforts will be made to integrate the remaining CTE/Ag Farm improvements to the work already underway or to add them to the existing schedule of work with an expected date of completion of fiscal year 2019. Additional classroom construction is anticipated to be undertaken as needed and as enrollment increases in the future.

The report is made possible through collaboration with the District, its staff and the various individuals involved in the assessment and compilation of this report. More importantly, the report is the result of numerous workshops with the Board of Trustees that provided invaluable input and direction.

Table 18: Master Budget and Schedule

**Santa Maria
(2017-2022)**

Reconfiguration & New Construction	
Construct 48 Classroom Building / Admin	
Construct Morrison Ave. Entrance / Main Parking Lot	
Reconfigure and Upgrade Field / Plaza	
Modernization & Upgrade	
Reconfigure & Modernize Classrooms	
Modernize Pope Auditorium	
Remove Portables	
Reconfigure & Upgrade Play Areas & Fields	
Subtotal:	\$ 70,466,034

**Righetti
(2017-2022)**

Modernization & Upgrade	
Modernize Existing Classrooms / Library	
Upgrade Playfields	
Remove Portables / Expand Parking	
New Construction	
Construct Practice Gym	
Construct Performance Space	
Upgrade Play Areas & Fields	
Subtotal:	\$ 31,593,477

**Pioneer Valley
(2017-2022)**

Modernization & Upgrade	
Modernize Classrooms	
Upgrade IT Infrastructure	
Subtotal:	\$ 8,028,428

**CTE / Ag Farm
(2017-2019)**

New Construction	
Construct Ag Pavilion	
Subtotal:	\$ 3,178,571

**Future Capacity
(2022-2025)**

New Construction	
Construct Additional Classroom Building (As Needed)	
Subtotal:	\$ 34,003,822

Total:	\$ 147,270,332
Program Reserve:	\$ 23,444,988
Grand Total:	\$ 170,715,320

Source: CFW, Inc.

In summary, approximately \$170.7 million in proposed improvements are anticipated to be implemented over a 7 year period. Coupled with Phase 1 improvements currently underway, the next phase improvements should complete the district's vision of providing 21st century learning environments to accommodate the District's academic initiatives to increase academic achievement and better provide career and college opportunities for all students served by the District and its four high schools.

SECTION 5

RECOMMENDATIONS

5.1 OVERVIEW

It is recommended that the Board:

- Accept and adopt this report
- Take all actions to implement the proposed program

ATHLETICS AND EXTRACURRICULAR ACTIVITIES

Santa Maria Joint Union High School District ATHLETIC/EXTRA-CURRICULAR CODE AND CONTRACT

PHILOSOPHY

The development of a well-rounded student is a major goal of all educational institutions, and the Santa Maria Joint Union High School District encourages all students to participate in a varied extra-curricular activity's program. It is the belief of the District that a strong extra-curricular program creates and maintains positive school spirit and fosters student responsibility.

Participation in extra-curricular activities is a privilege, not a basic right of all students. The school has the authority to revoke this privilege. Certain rules have been established for all students who become involved in the extra-curricular program. The Athletic/Extra-curricular Code and Contract sets forth these expectations.

PLEASE NOTE: All students are eligible for membership in any Pioneer Valley High School Club or Organization. Pioneer Valley High School clubs and organizations may not exclude any person from membership regardless of sex, sexual orientation, national origin, religion, color, or mental or physical disability.

ELIGIBILITY

Students must have a 2.0 grade point average and pass 20 credits at each grading period to participate in extra-curricular activities. An ineligible student is expected to attend the athletic conditioning physical education class and may practice during his/her period of ineligibility. An ineligible student may not compete or travel with the team at any home, away, neutral site, or tournament game unless he/she qualifies and exercises their one-time waiver (Please see next section for waiver eligibility).

ACADEMIC WAIVER FOR ACADEMIC ELIGIBILITY

All students entering a Santa Maria Joint Union High School District school may use an academic waiver one time in their high school career at any of the schools in the district. This waiver may only be used for 1 academic grading period and students must meet the following criteria to receive an academic waiver:

- The participant must have at least a 1.5 G.P.A. for the last recorded grading period used to determine eligibility.
- The participant must be on a varsity level team.
- The Athletic Director, the coach, the parent/s and/or guardian/s of the participant must all agree on the use of the academic waiver.
- The participant must utilize one of the interventions on a weekly basis to continue on the waiver. This may include but not be limited to before/after school tutoring, student study teams, weekend/Saturday classes, or department tutoring.

- The participant must meet all other C.I.F., district, school, and team requirements during the waiver period.

P.E. CREDIT FOR ATHLETICS

All students who enroll in an athletic physical education course will receive a grade of credit or no-credit.

BEHAVIOR

All extra-curricular participants are expected to display reasonable behavior, respect the rights of others and abide by school rules. All rules and consequences in the Santa Maria Joint Union High School District Discipline Handbook apply before, during, and after all extra-curricular school events. Suspension from school will carry additional consequence(s) or removal from extra-curricular activities, including practice, for the period of suspension and/or may result in removal from the activities beyond the period of suspension. Any inappropriate behavior will carry an additional consequence of possible suspension from school and/or activity. All extra-curricular participants should not be in the presence of another or others where illegal use of alcoholic beverages and/or drugs is taking place.

ANY CONDUCT DETRIMENTAL TO THE REPUTATION OF THE ATHLETIC DEPARTMENT

Any documented incident involving the actions listed below will result in the additional disciplinary actions taken by the high school administrative staff under **FIRST OFFENSE/SECOND OFFENSE**. This includes **ANY SOCIAL MEDIA SITES** which document activities prohibited in this code. “I was there but I didn’t do anything” will not be considered a valid excuse.

- Proximity of illegal activity
- Conduct that results in legal consequences
- Severe violations such as vandalism, theft, possession of weapon, harassment, hate crime, verbal abuse of other students or adults, mutual combat, unprovoked assault.
- Documented substance abuse, possession of alcohol or any other intoxicant or mind altering chemical or substance or paraphernalia on or off campus at any time during the school year, including summer.
- Possession or use of tobacco.

Disciplinary Action

- **FIRST OFFENSE**: Student will be suspended from extra-curricular participation for a period of thirty calendar days from notification date to the administration of the documented incident. The suspension **MUST** also include (2) weeks of athletic contests. During the suspension, the student **MUST** attend a minimum of four (4) counseling sessions with an agency set forth in

the parent conference. Failure to attend the counseling sessions will result in moving to the second level (*SECOND OFFENSE*).

- ***SECOND OFFENSE***: Student will be suspended from extra-curricular participation for a period of one calendar year from the notification date of the documented incident. A program of counseling for the individual will be established during a parent conference.

ATTENDANCE

Participants must attend 4 out of 6 normal schedule classes (excluding athletic P.E. classes) during the school day of the extra-curricular event. Any exception must have prior approval from the principal or administrator in charge of the extra-curricular activity. Truancy/cuts will result in disciplinary action that suspends participation in forthcoming events.

Disciplinary Action

- ***FIRST OFFENSE***: Student will be suspended from extra-curricular participation for a period of 10% of the scheduled season from the notification date of the documented incident. The suspension **MUST** also include at least (1) week of athletic contests.
- ***SECOND OFFENSE***: Student will be suspended from extra-curricular participation for a period of thirty calendar days from notification date of the documented incident. The suspension **MUST** also include (2) weeks of athletic contests.

TRANSPORTATION

Participants must travel to and from contests in transportation provided for or arranged by the school. Exceptions require prior written arrangement between participant's parent/guardian and either the coach or athletic director one day prior to the event. Students may be released to their parent or guardians following any contest, however, under no circumstances are athletes to be released to any other parent without prior written arrangement one day in advance. No student shall drive themselves or others to or from any off campus extra-curricular event. An exception to allow a student to drive himself/herself to an off-campus event may be granted by the principal or athletic director through an authorized administrative, parent and student signed waiver.

FINANCIAL RESPONSIBILITY

All participants are financially responsible for all equipment checked out to them. Failure to return equipment in reasonable condition may result in an incomplete grade, the withholding of transcripts, senior activities, prom, and registration for the following semester and/or of the privilege to continue in the program until the debt is cleared.

I understand that fund raising is a voluntary, and integral part, of any successful athletic program. I give permission for my student-athlete to participate in any and all fundraisers that have been approved by the PVHS ASB and PVHS Athletic Department. I also understand that some fund raisers require student-athletes to accept (signature required) merchandise (tickets, etc.) for advance sale. ALL monies for sold items and any unsold items must be returned to the business office or the student-athlete and legal guardians will be financially liable/responsible for said amount.

DROPPING AN ACTIVITY

No participant may drop one activity and become involved in another without the mutual consent of all parties involved prior to the official ending of dropped activity.

EXTRA-CURRICULAR ELIGIBILITY APPEALS COMMITTEE

An extra-curricular appeals committee composed of no less than three appropriate staff or faculty members, will review all appeals regarding eligibility and violations of this Code and Contract.

PARENT BEHAVIOR

As the under signed parent of a PVHS student-athlete I understand that parents should be positive role models when attending sporting events. If I cannot support the coaches, officials, and members of the team in a positive manner I understand that I may be asked to leave and it could jeopardize my opportunity to attend games in the future.

I understand and agree to abide by the terms of the Athletic/Extra-curricular Contract for the PERIOD OF ONE CALENDAR YEAR FROM DATE SIGNED.

_____	_____	_____
(Print Student Name)	(Student Signature)	(Date)
_____	_____	_____
(Print Parent Name)	(Parent Signature)	(Date)

Santa Maria Joint Union High School District

Request for Athletic/Extra-curricular Waiver 2.0 GPA

I _____ am requesting an athletic/Extra-curricular
(Student Name)

waiver to allow me to compete for the 1st 2nd 3rd 4th 5th 6th grade period, of year
_____.

The report card period below a 2.0 GPA is the 1st 2nd 3rd 4th 5th 6th grade period, year
_____.

I understand that I'm eligible for 1 (one) waiver throughout my high school career and am choosing to take it for the grading period listed.

Grade: _____ Sport: _____

Interventions for academic improvement to be utilized:

- Department Tutoring _____
- Tutoring Before/After School _____
- Student Study Teams _____
- Weekend/Saturday Classes _____

*** I understand that I must turn in a weekly progress report for all classes I am enrolled in to the Athletic Director every Friday by 2:45 PM to continue on this waiver.**

_____	_____	_____
(Print Student Name)	(Student Signature)	(Date)

_____	_____	_____
(Print Parent Name)	(Parent Signature)	(Date)

_____	_____
(Coach Signature)	(Date)

_____	_____
(Athletic Director Signature)	(Date)