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SANTA  
MARIA  
JOINT  
UNION HIGH  
SCHOOL  
DISTRICT

## RECONFIGURATION AND FACILITIES PROGRAM

**4th Status Report on the Reconfiguration and  
Facilities Program to the Board of Education**

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## SECTION 1

# PROGRAM OVERVIEW

### 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 that will aid in the creation of 21<sup>st</sup> century learning environments and innovative academic initiatives for all students served by the District and its four high schools. The planning and implementation of a 21<sup>st</sup> 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 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 21<sup>st</sup> century learning
- implement new support facilities to complement enhanced educational programming and technology

The Program is designed to transform the District’s four high schools over two project phases following an analysis of the District’s educational vision, facility needs, capital and financing options, essential specifications, and implementation requirements. Phase 1 facility improvements consist of:

- designing and constructing a 38-classroom facility at Righetti High to replace outdated portable classrooms with 21<sup>st</sup> century learning environments
- constructing a Performing Arts Center at Pioneer Valley High for assembly and performance space during school and after school hours for student and community use
- developing a Career Technical Education (CTE) and Agricultural Farm facility on a new District property for capstone classes that transition students from Grade 12 to college and/or high-demand jobs
- creating digitally interactive 21<sup>st</sup> century learning environments for every teacher and student Districtwide and upgrading classroom facilities to integrate infrastructure and mobile devices

Phase 2 facility improvements include:

- reconstruction of the Santa Maria High School campus into a 21<sup>st</sup> 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 High and Righetti High to achieve similar 21<sup>st</sup> century functionality to newly constructed District facilities
- construction of a new practice gymnasium and support facilities at Righetti High School to expand physical education, performance and educational support space
- 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

To assist in coordinating the implementation of the Program, the District selected Caldwell Flores Winters, Inc. (“CFW”) to serve as its Program Manager to guide the District in the procurement of qualified professionals to establish a Program Team and to lead the design and implementation of the overall Program. Regularly, six-month updates are required to be presented to the Board of Education by the Program Team to allow the Board and District administrators to evaluate program progress, determine if revisions to the implementation process are warranted, and document any changes or adjustments from the original Program. The Program Team is composed of District staff, CFW and required professionals. The following six-month report integrates an analysis of the educational program and practices, career and college linked learning opportunities, facility capital and financing strategies, specifications, and implementation requirements. It also presents updates to Master Budgets, Master Schedules, and Expenditures to date required to implement these programs and projects.

## 1.2 REPORT OVERVIEW

All Phase 1 projects reported in the April 2016 semi-annual update continue to move forward. The District is currently in its third year of educational program activities. Design work has resumed on the CTE Center/Ag Farm project, construction on the performing arts center at Pioneer Valley High has continued on schedule, and DSA approval of the Righetti High construction plans is nearing. Phase 2 projects have been more concretely defined per the District’s Master Schools Improvement Program.

A summary of activities for the education program, facilities program, and project funding is provided below:

### 1.2.1 EDUCATION PROGRAM

The District is beginning its third year of educational program implementation activities. This year, the District began to build out the sequence of courses for each of the identified pathways within the ten industry sectors as well as develop partnerships with industry leaders and stronger linkages with Allan Hancock Community College (AHC). The ten industry sectors include: 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.

Over the past six months, the focus has been on developing partnerships with local industry leaders and AHC to determine industry standards for certifications as well as providing administration and teacher professional development for identifying a course sequence for each of the pathways within an industry sector. Support has been provided to the school sites on the development of the programs of study within each of the courses identified to include course content to meet industry certifications and university A-G requirements. Members of the community and school district have also been selected to serve on the CTE Advisory Board, Career Field Advisory Committees and Pathway Design Teams

Pathway development will continue and activities over the next six months will include developing a survey for students to determine desired pathway course selection, finalizing the selection of members to serve on the District Advisory Board and Career Field Advisory Committees, further engaging Career Technical Education teachers in the ongoing development of a program of study for each of the pathways, continuing the development of linkages with industry partners and AHC, and professional development for staff to meet the needs of credential requirements for the new pathway courses selected.

#### 1.2.2 FACILITIES PROGRAM

The design team has received requested corrections from DSA for the Righetti High School construction drawings. The team is currently incorporating all required corrective adjustments to the plans and will initiate the “back-check” phase of final review with DSA.

The District Performing Arts Center project at Pioneer Valley High School remains in the construction phases and has approached 65% completion as of the end of July 2016. Over the last six months, significant progress has been made to the exterior of the facility—structural steel has been fully installed and concrete masonry exterior walls have been erected. The project remains on schedule for completion by the end of 2016 and commissioning in January 2017.

Following the close of escrow on the District’s CTE Center and Ag Farm property and pursuant to District direction to proceed, the project architect was re-engaged and multiple meetings have since been held to review progress achieved up to the prior suspension of activity and resume technical analysis required for the design phase. These meetings were also informed by the resumption of District stakeholder meetings, including feedback provided by the Ag Department chairs as well as the accelerated design of the Ag Pavilion as part of the Phase 1 design work for the site.

In June 2016, the Board adopted a Master Schools Improvement Program which included further developed detail regarding the next phase of improvements planned for Santa Maria High School. Ongoing examination and investigation of the educational program requirements was conducted over the past six months for the site to further refine the educational scope, configuration, and quantity of additional new classrooms required.

### 1.2.3 PROJECT FUNDING AND SEQUENCING

No changes are reported in the District's eligibility for State modernization and new construction grants. As reported in April 2016, the District's current eligibility is projected to be approximately \$46.1 million in new construction grants for Grades 9-12 and approximately \$3.8 million in modernization grants. Modernization eligibility is projected to increase cumulatively to \$16.9 million by 2025.

The California Secretary of State has formally declared that the State's \$9 billion K-14 school bond initiative will appear on the November 2016 ballot as "Proposition 51" and includes \$3 Billion for K-12 New Construction and \$3 billion for K-12 Modernization. The Secretary of State has finalized and published the State's official voter guide, including the official summary, legislative analysis, argument in favor, and legal text of Proposition 51. Passage of the measure by California voters may allow the District to access State matching funds of over \$50 million toward modernization and new construction projects.

In June 2016, the Board adopted a Master Schools Improvement Program (MSIP) which further defined the scope of the next phase of proposed improvements to maintain an equitable educational program offering at all of the District's four high schools. As a corollary to that report, this semi-annual report contains a revised master program budget of approximately \$221.2 million, with a recommendation to combine the Phase 2 budget adopted within the MSIP with the Phase 1 budget adopted at the time of the last semi-annual report.

The proposed timeline of improvements adjusts completion of the Performing Arts Center to December 2016 and the Righetti Classroom Building to May 2018.

### 1.3 RECOMMENDATIONS

Upon review and consideration, it is recommended that the Board of Education:

- Accept and adopt the October 2016 semi-annual Program update as an adjustment to the Reconfiguration and Facilities Program
- Consider the next semi-annual Program update at its regularly scheduled March 2017 meeting

## SECTION 2

# EDUCATION PROGRAM

With the start of the 2016-17 school year, the District begins its third year of educational program implementation activities to meet the District Strategic Plan goals to prepare students for success in college, careers with growth potential, and productive citizenship in an interconnected world. At this time, the District continues to undertake Educational Program activities that support attainment of the District's Strategic Plan goals.

Over the past six months of program implementation, the focus has been on:

- Developing partnerships with local industry leaders and Allan Hancock College to determine industry standards for certifications
- Provide administration and teacher professional development for identifying three or four course sequence for each of the pathways within an industry sector
- Supporting the school sites on the development of the programs of study within each of the courses identified to include course content to meet certifications required by industries and university A-G requirements
- Selecting members of the community and school district to serve on the CTE Advisory Board, Career Field Advisory Committees and Pathway Design Teams

The Reconfiguration and Facilities Program adopted by the Board in August 2014 proposed recommendations that support the District's Strategic Plan, whose primary mandate is to improve student achievement. The District has identified five goals in 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



The planning and implementation of a 21<sup>st</sup> century high school environment in Santa Maria is driven by two programs—an **education program** that outlines academic achievement opportunities at the District level, and a **facilities program** that describes how capital improvements will support the implementation of the education program. To that end, the Reconfiguration and Facilities Program integrates the District’s vision for innovative education initiatives with a facilities plan that supports the implementation of these initiatives.

The District completed its second year of pathway development during the 2015-16 school year, including the inventory and analysis of course content for courses offered at each of the high schools in order to categorize these courses into Industry Sectors and Pathways as defined by the California Department of Education, exploration of joint use opportunities between the District and Allan Hancock College including concurrent enrollment courses, and development of educational specifications for new school facilities.

Articulation agreements with Allan Hancock College have been reviewed, updated and finalized, courses offered to students were placed into one of ten Industry Sectors that best matched the current course content taught, and the District applied for and received the CTE Incentive Grant providing over \$1.1 million dollars to support the implementation of pathways within the ten identified industry sectors. Teams of District teachers have begun to develop programs of study that identify a sequence of courses and a final capstone course for each of the pathways within the identified industry sectors. The goal for the District is to build on existing programs and strengthen existing pathway courses at all four high schools.

## 2.1 DISTRICT PATHWAY PROGRAMS

The District has refined its identified pathways and grouped them under the following industry sectors:

- 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
- Public Services

The District continues its commitment to the development of the pathway programs. To support these efforts, the District hired a “Grant Coordinator” part time to oversee pathway development as well as the implementation of the CTE Incentive Grant. During the spring of 2016, the focus was on developing linkages with the industry leaders in the community and with Allan Hancock Community College (AHC) as this information will form the foundation for the pathway programs. The District has met with industry leaders to determine what students need to know and be able to do to be ready for entry level jobs, what

equipment is required by the industry and what students need to be able to do with the equipment, and what specific technology students need to be able to use to be prepared for a career within the industry. The Grant Coordinator has joined the California Workforce Association and will attend conferences to learn and to share ideas as well as obtain additional information on industry competencies required for student success. The Grant Coordinator also joined Leadership Santa Maria, a group made up of industry leaders who meet monthly, rotating between industries to share information about specific needs and discussing how to support and interface with each industry.

The District continues to meet with AHC and has reached new agreements to connect CTE pathways with AHC programs and certifications and to add concurrent enrollment classes. For example, AHC has a three year waiting list for its Medical Assisting Program because the demand is so great, which the District desires to expand. Discussions with AHC are underway to add a concurrent enrollment class during the day in the District with AHC using the classroom in the evening for expansion of the program. Professional development will be provided to both AHC and District teachers to create a seamless articulation of courses for students that will meet the certifications that industries require. For example, AHC currently has programs that prepare students with the necessary certifications for Petroleum Engineering and for Manufacturing and Robotics. The District will articulate with AHC to provide entry level courses to prepare students for the more advanced courses at the community college level. This will provide students the opportunity to move seamlessly from high school into more advanced programs that prepare them for careers. This entails mapping out curriculum, determining soft skills (attitudes, work habits, follow through, etc.) and hard skills (reading, math, technical skills, etc.) students need to make sure they are successful and prepared for the either a career or college.

In addition, the District continues to work with AHC on the joint use of facilities. The Ag Welding program is an example of a facility on the AHC site that would support the capstone course in welding for District students. Likewise, the planned Ag Farm is a District facility that AHC students could benefit from shared use. In both cases, students will share state of the art facilities with significant cost savings generated for the District.

The District held informational meetings at each school site for teachers and administrators about the development of a course sequence (program of study made up of three or four courses) within each pathway that leads to a certification or more advanced program at the community college level or in an industry. A mini grant (using the CTE Incentive Grant) has been developed and a minimum requirement to apply for the grant funds is a three course sequence within a pathway. Once this is achieved, the teachers in the pathway can apply for the mini grant program. These funds provide for materials and equipment needed for the courses. At this time, the following pathways have developed a three or four course sequence: Visual and Performing Arts, Ag Welding, Ag Mechanics and Ag Construction; Science: Anatomy and Physiology; Digital Media; Business and Finance; and Manufacturing and Robotics.

The District continues to support the school sites on the development of course content to meet industry certification and university A-G requirements. The design of new curriculum requires submittal for approval to the District curriculum council, followed by School Board approval, and finally concluding with

submittal and approval by CDE, which ensures the curriculum meets A-G requirements. The following schools have developed programs of study for select pathways:

- Pioneer Valley High School: Health and Medical Pathway (Medical Assisting); Informational Technology; Business and Finance; Ag Welding, Ag Mechanics; Visual and Performing Arts
- Righetti High School: Engineering and Manufacturing; Ag Mechanics, Ag Welding and Ag Construction; Digital Arts; Animation and Film; Business and Marketing; Science: Engineering; Science: Environmental
- Santa Maria High School: Auto Technologies; Business and Merchandise; Culinary Arts; Ag Welding, Ag Mechanics; Information Technology

The pathway programs will continue to inform the facilities programs as they are developed at each of the schools. For example, Pioneer Valley is working with AHC to expand the Medical Assisting program. The goal is to offer concurrent enrollment courses at Pioneer Valley. Upgrading classroom equipment as well as developing linkages with AHC is a requirement to provide a seamless transition for the students. As the classrooms are modernized at Pioneer Valley, the program requirements are integrated into the overall facilities plan for modernization.

The District continues to work on selecting members of the community and school district to serve on the CTE Advisory Board and Pathway Design Teams. Having the Grant Coordinator become a member of the California Workforce Association and Leadership Santa Maria provides a natural vehicle for these linkages to be developed. The District continues to work with the Chamber of Commerce to select members of the CTE Advisory Board. Individual meetings with select industry leaders have been held. The District will host an information session at the end of August in which industry leaders and other community members are invited to learn about Pathway development in the District and then given the opportunity to volunteer to serve on advisory boards or design teams. AHC has developed CTE Advisory committees (comparable to the District's Career Field Advisory Committees) for their pathways and has offered to share these advisory committees with the District as industry leaders will be serving on both. A Memorandum of Understanding (MOU) will be developed in the near future to formalize this agreement. The goal is to have selected members by November 1 for the District CTE Advisory Board and five of the ten Pathway Design Teams.

Pathway development will continue based on the aforementioned organizational structure and activities over the next six months to include:

- Development of a survey by the school counselors in conjunction with the Grant Coordinator for students to determine their desired pathway course selection. The survey will be given to students while they are in the 8<sup>th</sup> grade as they are planning for their course selection in 9<sup>th</sup> grade, thus requiring agreements with feeder districts for it to be administered. It is highly recommended that prior to students taking a career interest survey, they are provided instruction on the potential careers within each of the pathways so that they may better understand the variety of career options available to them.
- Finalized selection of members to serve on the District Advisory Board and Pathway Design Teams

- Further engagement of the Career Technical Education teachers in the ongoing development of a program of study for each of the pathways selected under the Career Fields. This is an ongoing process that will take several years of development with ongoing adjustments to meet the ever changing industry needs.
- Continued development of linkages with industry partners and AHC to provide information necessary to provide a robust pathway program as well as joint use partnerships.
- Commission professional development for staff to meet the needs of credential requirements for the new pathway courses selected and developed as well as the needs for subject matter specific information related to new courses they will teach.

## 2.2 TECHNOLOGY PROGRAM

In coordination with the District’s Educational Program, the Technology Program has featured an ongoing integration of new tools, capabilities, and innovations into the design and construction of new classroom facilities. Historically, the District’s high school facilities were designed and built primarily on the basis of meeting code and capacity requirements and conforming technology choices to prevailing traditions of classroom orientation and previous building design. That is why even newer classrooms such as those at Pioneer Valley High School, which built prior to the Reconfiguration and Facilities Program, yet completed in the 21st century, feature a basic design and appearance largely similar to 19th and 20th century counterparts, with modern technology and educational programs shoehorned into generally predefined spaces and without consideration for the changes brought about by current educational program needs and the greater freedom from previous technological barriers. To achieve a 21st century classroom environment requires that the traditional design approach be reversed, allowing planning and technology integration to start with the educational program needs and specifications required such that classrooms or school facilities are designed “from the inside-out”, first assuring that all functions and innovations sought by the educational program are achieved, followed by necessary considerations to meet code or other requirements generated by the proposed design.

This approach has been harnessed for the design of Righetti’s new classroom building nearing DSA approval. For example, students and teachers using the new classrooms will be able to utilize learning environments that combine multiple 60” flat-screen AV displays, Microsoft streaming media devices, and District issued Dell Venue mobile computing devices, along concurrently planned classroom enhancements such as floor-to-ceiling, wall-to-wall marker boards, mobile furnishing, and flexible storage.

As similarly tested at the District’s demonstration classroom and new Santa Maria classroom building, this integration of facilities, technology, and education programs will enable teachers to:

- Project videos from their device to one or all displays, using a standard and familiar TV remote control to adjust volume.

- Visually share documents or project images from the textbook, as they would on a document camera, visible by all students on multiple walls of the room at the same time
- Play calming music for students while working on a project
- Experiment with interactive learning applications, virtual field trips, classroom movie-making, along with many other innovative uses of the classroom technology to integrate CCSS curriculum

Conceptually, the possible technology uses are broad and far reaching when effectively combining the District's 1:1 mobile device technology program with the flexible design approach used in new facilities made possible by the Program. The District will continue to provide training and professional development opportunities for this new learning environment using existing facilities as well as new facilities upon their completion.

## SECTION 3

# FACILITIES PROGRAM

The Reconfiguration and Facilities Program established the implementation of proposed improvements in two phases. Phase 1 projects include:

- design and construction of a 38-classroom facility at Righetti High School to replace outdated portable classrooms with modern 21<sup>st</sup> century learning environments
- construction of the District's Performing Arts Center at Pioneer Valley High School for assembly and performance space during school and after-school hours for student and community use
- land acquisition and development of a CTE Center/Ag Farm facility to transition students from Grade 12 classes to college courses and/or high-demand, skilled jobs

Phase 2 projects include:

- reconstruction of the Santa Maria High School campus, including replacement of aging classroom buildings, restoration of the historic Ethel Pope Auditorium, improvements to athletic fields, and 21st century modernization of remaining facilities
- 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 facility for Righetti High School to expand physical education and educational support space, augmented by a performance space to provide functionality for visual and performing arts education and community events comparable to other District facilities
- construction of an Ag Pavilion at the CTE Center/Ag Farm to meet educational requirements for student demonstrations and exhibits

Over the last six months, the District and its team members have continued implementing Phase 1 projects based on the Master Budget set by the Program. Notably, design work has resumed on the CTE Center/Ag Farm project following the close of escrow for the property, and construction on the performing arts center at Pioneer Valley High has continued on schedule. Additionally, Phase 2 projects have been more concretely defined in the District's Master Schools Improvement Program adopted in June 2016, which identifies projects and funding for Phase 2 of the Reconfiguration and Facilities Program.

### 3.1 RIGHETTI HIGH SCHOOL

Phase 1 improvements at Righetti High School primarily consists of a new three-story, 38-classroom building, containing general purpose, pathway, and assessment classrooms. The capacity of the new facility is anticipated to enable the phased replacement of all existing relocatable classrooms on the

campus. The Division of the State Architect has received and nearly completed its review of 100% construction drawings for the project, having provided requested changes to the design team. The team is currently incorporating all required corrective adjustments to the plans and will initiate the “back-check” phase of final review with DSA.

The Phase 2 work program at Righetti High School focuses on the renovation of 59 permanent classrooms in Buildings C, D, and E and construction of a new practice gymnasium and performance space, which the team has begun conceptually investigating based on similar projects elsewhere in the State. Further specific improvements planned for Righetti High School include:

- Removal of all portable classrooms upon occupancy of the new 38-classroom building
- Expansion of the existing parking lot at the east end of the campus to repurpose the space made available by the removal of the portables
- Modernization of classrooms, labs, and the library with improved interior materials consistent with a 21<sup>st</sup> century learning spaces
- Design and construction of an additional indoor athletic practice space
- Design and construction of a performance venue adjoining the practice gym
- Expansion of outdoor courts for tennis and basketball, along with reconfiguration of the turf practice area to support varsity baseball, softball, and soccer
- Upgraded campus IT and safety infrastructure, including data networks and fire alarm systems

These additions will 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 to existing school activities. Once all 59 classrooms and the library have been modernized, all portable buildings will be removed once they have been in service for 20 years and State eligible funding has been applied for and received. Thereafter, the majority of land area occupied by portable facilities will be rebuilt 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.

### 3.2 PERFORMING ARTS CENTER AT PIONEER VALLEY HIGH SCHOOL

Upon completion at the end of 2016, the Performing Arts Center (PAC) at Pioneer Valley High School will add 17,352 square feet of performing arts and support space to the existing 11,831-square-foot Building J containing Pioneer Valley High’s band, choir, and drama programs. The new PAC will be state-of-the-art for high school level and community performance needs, and will include a lobby, a box office and concession area, restrooms, a 208-seat main auditorium, an 86-seat mezzanine, and performance stage with large backstage area. A double-loaded hallway will connect Building J to the new facility and its three classrooms.

The project remains in the construction phase and has approached 65% completion as of the end of July 2016. The project team continues to monitor construction and meets on a weekly basis to review

progress. Over the last six months, significant progress has been made to the exterior of the facility— structural steel has been fully installed and concrete masonry exterior walls have been erected. Efforts to minimize impacts to surrounding uses at the Pioneer Valley High campus and protect the circulation of pedestrians or vehicles around the project site have been successful.



Pioneer Valley High School Performing Arts Center Construction Progress (July 2016)

Additionally, DSA’s June 2016 approval of project modifications to connect the new performing arts facility to Building J allowed the construction team to take advantage of the District’s summer break period to undertake the strategic demolition of walls, piping, and other infrastructure in order to create a hallway between the classrooms of Building J and the backstage/classroom area of the performing arts center. The construction team is on schedule to complete the hallway connection portion of the project by September, thereby minimizing disruption of classes in Building J at the start of the 2016-17 school year.

The construction team anticipates completing the building shell and installation of major utility and service connections (e.g., water, electric, gas) to main feeds on the Pioneer Valley High campus by the end of summer. Over the last few months, all exterior walls and infrastructure have been completed and/or installed and major elements of the interior rooms and spaces have been built (including floor slabs, interior walls, stage rigging and catwalks). Additionally, numerous finishing details have been reviewed and considered, including auditorium seat arm rests, fabric textures, and lighting solutions. The PAC’s main exterior signage has also been designed and is in final review by the District. The facility remains on schedule for completion by the end of 2016 and for commissioning in January 2017.

### 3.3 CTE CENTER/AGRICULTURAL FARM

The District’s CTE Center and Ag Farm has been envisioned as a 21<sup>st</sup> century environment for “hands-on” and mentored learning within capstone classes for a number of the District’s pathway programs. These classes would focus on various subjects that directly relate to high-demand careers in agricultural science and horticulture with the aim to improve students’ job skills and enhance students’ ability to transition from high school to the labor force or college.

Following the formal acquisition of the property and pursuant to District direction to proceed in June 2016, the project architect was re-engaged and multiple meetings have since been held to review progress achieved up to the prior suspension of activity and resume technical analysis required for the design phase. These meetings were also informed by the resumption of District stakeholder meetings, including



feedback provided by the Ag Department chairs as well as the accelerated design of the Ag Pavilion as part of the Phase 1 design work for the site.

The reinitialized design effort has provided the design team members and sub-consultants with additional direction on the project parameters, requirements, and budget, with schematic design and design development milestones anticipated by September 2016. To date, the team has completed a land survey, including underground utilities and pipes, in order to accurately create construction drawings following the design development stage, with remaining survey work completed in July. Consequently, the design team will be in a position to achieve completed construction drawings for a DSA submittal goal of this fall.

### 3.4 SANTA MARIA HIGH SCHOOL

The proposed improvements for Santa Maria High School represent the largest group of facilities projects under the District's Reconfiguration and Facilities Program. They address a number of educational and facilities goals that combine to create a landmark campus worthy of the District's oldest school. The Board's vision for Santa Maria High is to rebuild the campus in a manner that uses space more efficiently and incorporates an environmental design that honors Santa Maria High's heritage while providing 21st century learning environments for today's teachers and students.

Having completed Phase 1 work on a new 14 classroom facility facing South Broadway, attention now turns to planned Phase 2 improvements at the school. Proposed Phase 2 improvements are sequenced to eliminate the need for additional interim facilities and to reduce the impact of construction on the ongoing educational program. That said, there will be a need to relocate classrooms, teachers and students during construction. A master site planning effort, known as the Master Schools Improvement Program, was adopted by the Board in June 2016 and details the ongoing examination and investigation of the educational program requirements for Santa Maria High School, including a review of the adopted reconstruction program, study of the school site plan, consideration of the school's master schedule to determine the number 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.

Over the next six months, the District and its program team will assemble a planning and design effort that upon review of project criteria, including the Board approved Education Specifications, will develop a conceptual site plan, floor plans, elevations and renderings for District review and approval. In addition, the team will meet with designated stakeholders at regular intervals to identify additional criteria for the facility and site and review potential responses to meet the criteria as outlined. The effort will also entail research of Santa Maria High School traditions, heritage and architectural styles of the community for potential incorporation into the design.

## SECTION 4

# PROJECT FUNDING AND SEQUENCING

### 4.1 OVERVIEW

The Board-adopted April 2016 update to the Reconfiguration and Facilities Program specified a two-phase implementation with an integrated capital improvement budget of approximately \$216.3 million. Each semi-annual Program update contains a master program budget and schedule that are adjusted in accordance with financial or policy decisions undertaken by the District. The master project budget and master schedule in the present Program update have been developed in this fashion, incorporating activities undertaken in the prior six months and activities proposed for the next six months.

State grants for facility improvements are a major component of Program funding. The use of these grants leverage the use of local inputs (e.g., general obligation bonds) in funding the new construction or modernization of facilities. In June 2016, the Board adopted a Master Schools Improvement Program which further refined and detailed the required changes to Phase 2 improvements. A revised master budget is presented that combines the adopted Phase 1 budget from April 2016 with the adjustments made in June 2016 for Phase 2.

### 4.2 ADOPTED MASTER BUDGET

In April 2016, the Board adopted a master program budget of approximately \$216.3 million relying on various sources, including proceeds from prior and proposed bond authorizations, State grant reimbursements for completed projects, developer fees, and existing District funds. At that time, the funding sources and uses associated with the District's classroom technology program was distinguished as unique pursuant to the Board approved Local Control Accountability Plan (LCAP) and was therefore removed from the adopted budget to be thereafter tracked independently by the District.

The budgeted uses also updated the total construction amount for the Performing Arts Center to include costs of a connection between existing and new portions of the campus, and revised Phase 2 cost estimates for the Santa Maria High project, given an increase in the total number of classrooms proposed to accommodate the proposed educational program and new projections for the level of cost escalation.

Phase 1 projects will be substantially funded from the District's Building Fund and developer fees. Phase 2 projects are contingent on local voter approval of a bond authorization that will be placed before voters in November 2016, as well as State grant reimbursements for Phase 1 or Phase 2 projects, and developer fees.

The April 2016 budget included a program reserve of approximately \$3.3 million in Phase 1 and \$18.9 million in Phase 2, for a total reserve of \$22.2 million over the course of the program. Approximately \$194 million in total project budget was estimated to be required for both phases. For purposes of designing a program master budget, the total project budget is inclusive of both “hard” costs and “soft” costs. Hard costs directly relate to construction itself (e.g., materials and labor). Soft costs consist of expense items that are integral to the building process but are not direct construction costs. They include architectural, engineering, financing, and legal fees, and other pre- and post-construction expenses.

**Table 1: Adopted Master Budget, FY 2015-23 (from April 2016 Program Update)**

Sources	Phase 1	Phase 2	Total
Existing Bond Authorization (Measure C, 2004)			
2015	\$ 28,996,159	\$ -	\$ 28,996,159
New Bond Authorization			
Series A	\$ -	\$ 45,127,786	\$ 45,127,786
Series B	\$ -	\$ 37,851,331	\$ 37,851,331
Series C	\$ -	\$ 30,702,261	\$ 30,702,261
Existing Building Fund Balance	\$ 14,149,095	\$ -	\$ 14,149,095
Existing State Aid Reimbursements	\$ 3,748,840	\$ -	\$ 3,748,840
Existing Deferred Maintenance	\$ -	\$ -	\$ -
Estimated Projected State Aid Receipts	\$ -	\$ 47,419,534	\$ 47,419,534
Estimated Projected Developer Fee Receipts	\$ 3,602,586	\$ 4,684,000	\$ 8,286,585
<b>Estimated Total Funds</b>	<b>\$ 50,496,680</b>	<b>\$ 165,784,911</b>	<b>\$ 216,281,591</b>
Uses	Phase 1	Phase 2	Total
Righetti High	\$ 21,847,503	\$ 35,771,706	\$ 57,619,209
Pioneer Valley High	\$ 10,969,130	\$ 8,649,336	\$ 19,618,466
Santa Maria High	\$ 420,000	\$ 70,466,034	\$ 70,886,034
Delta High	\$ 138,105	\$ -	\$ 138,105
CTE/Ag Farm	\$ 13,838,851	\$ 2,763,238	\$ 16,602,089
Additional Classrooms	\$ -	\$ 29,204,684	\$ 29,204,684
<b>Subtotal</b>	<b>\$ 47,213,589</b>	<b>\$ 146,854,999</b>	<b>\$ 194,068,588</b>
<b>Program Reserve</b>	<b>\$ 3,283,091</b>	<b>\$ 18,929,912</b>	<b>\$ 22,213,003</b>
<b>Estimated Total Uses</b>	<b>\$ 50,496,680</b>	<b>\$ 165,784,911</b>	<b>\$ 216,281,591</b>

Source: CFW, Inc.

#### 4.3 REVISED MASTER BUDGET

In June 2016, the Board adopted a Master Schools Improvement Program which built upon the first phase of improvements of the Reconfiguration and Facilities Program and integrated proposed modifications to the educational and facilities programs into the next phase of proposed improvements to maintain an equitable educational program offering at all of the District’s four high schools. Table 2 provides a revised master program budget of approximately \$221.2 million for Board consideration as part of this semi-

annual Program update which integrates the Phase 2 budget adopted in June 2016 with the Phase 1 budget adopted in April 2016.

**Table 2: Revised Master Budget, FY 2015-23**

Sources	Phase 1	Phase 2	Total
New G.O. Bond Authorization			
Series A	\$ -	\$ 45,127,786	\$ 45,127,786
Series B	\$ -	\$ 37,851,331	\$ 37,851,331
Series C	\$ -	\$ 30,702,261	\$ 30,702,261
Existing Building Fund Balance (incl. bond proceeds)	\$ 43,145,254	\$ -	\$ 43,145,254
Existing State Aid Reimbursements *	\$ 3,748,840	\$ 28,464,579	\$ 32,213,419
Existing Deferred Maintenance	\$ -	\$ -	\$ -
Estimated Projected State Aid Receipts *	\$ -	\$ 24,185,364	\$ 24,185,364
Estimated Projected Developer Fee Receipts	\$ 3,602,586	\$ 4,384,000	\$ 7,986,585
<b>Estimated Total Funds</b>	<b>\$ 50,496,680</b>	<b>\$ 170,715,320</b>	<b>\$ 221,212,000</b>
Uses	Phase 1	Phase 2	Total
Righetti High	\$ 21,672,533	\$ 31,593,477	\$ 53,266,010
Pioneer Valley High	\$ 10,759,082	\$ 8,028,428	\$ 18,787,511
Santa Maria High	\$ -	\$ 70,466,034	\$ 70,466,034
Delta High	\$ 138,105	\$ -	\$ 138,105
CTE/Ag Farm	\$ 14,271,424	\$ 3,441,086	\$ 17,712,509
Districtwide			
Master Site Planning	\$ 320,000	\$ -	\$ 320,000
Additional Classrooms	\$ -	\$ 34,003,821	\$ 34,003,821
<b>Subtotal</b>	<b>\$ 47,161,144</b>	<b>\$ 147,532,846</b>	<b>\$ 194,693,990</b>
<b>Program Reserve</b>	<b>\$ 3,335,536</b>	<b>\$ 23,182,474</b>	<b>\$ 26,518,010</b>
<b>Estimated Total Uses</b>	<b>\$ 50,496,680</b>	<b>\$ 170,715,320</b>	<b>\$ 221,212,000</b>

\*State Aid contingent on passage of Proposition 51 by California voters in November 2016; See Tables 8 and 10.

Source: CFW, Inc.

When compared to the April 2016 adopted master budget, Phase 1 funding sources remain unchanged, though the Existing Building Fund Balance now includes the remainder of bond proceeds issued from the District’s Measure C-2004 authorization, previously listed separately. The proposed Phase 1 uses have been adjusted in three areas:

- First, pursuant to District direction to curtail Phase 2 planning and conceptual design efforts, inclusive of facility and educational program planning, at Righetti and Santa Maria high schools, additional planning work (e.g. conceptual design, site studies, environmental review, etc.) has

been deferred until the outcome of anticipated local and State bond elections are known. The budgets for Righetti and Santa Maria high schools have been reduced accordingly, and the budgeted planning costs are now listed on a Districtwide basis.

- Second, the total Phase 1 budget for Pioneer Valley has been reduced by \$210,048, pursuant to direction from the District, to reflect the known costs for design and construction of the Performing Art Center connection to Building J. Though reduced, the budget maintains a Board approved amendment to the project's GMP of \$50,000 for miscellaneous design and construction changes, and also includes a recommended additional \$50,000 for any further modifications, errors, or omissions that may be encountered through the end of construction. Further reductions or savings may be realized as the District nears completion of the project and the budget is reconciled with known expenditures for certain project costs (e.g. construction testing, legal fees, furniture, fixtures, and equipment).
- Third, the total Phase 1 budget for the CTE/Ag Farm facility has been increased by \$432,573, incorporating the District's approved architectural design fee for the Phase 2 Ag Pavilion that will be prepared for DSA submittal concurrent with Phase 1 design work and accommodating limited adjustments to cost given the one-year postponement in the start of project design due to the additional time required to close escrow on the acquisition of the property.

Given the above Phase 1 adjustments, the proposed total uses associated with Phase 1 have decreased by \$52,445, with a corresponding increase to the Program Reserve in that amount compared to the April 2016 budget.

Proposed uses in Phase 2 have been adjusted from the April 2016 report to coincide with the identified uses planned and adopted by the Master Schools Improvement Program in June 2016. Decreases in the projected cost of planned improvements for Righetti and Pioneer Valley high schools, an increased allowance for additional classrooms districtwide to accommodate future growth, and increased additional anticipated cost for the Ag Pavilion facility were noted as adjustments to the Phase 2 program within the June 2016 report, and are once again proposed herein.

At this time, an additional adjustment to the Ag Pavilion facility at the CTE/Ag Farm site is proposed as a response to District direction to provide an enlarged covered outdoor presentation and event area as part of the facility. This enlarged covered structure is anticipated to require an addition to the Phase 2 CTE/Ag Farm budget of approximately \$483,514. That amount, less Phase 2 design fees that will be incurred during Phase 1, yields a change in the Phase 2 CTE/Ag Farm budget of \$262,515 over the June report.

With the exception of aforementioned CTE/Ag Farm adjustments, the remainder of the Phase 2 proposed uses are unchanged from the adopted June 2016 Master Schools Improvement Program budget. Estimated funding sources have increased by approximately \$4.9 million primarily due to increased projected State Aid receipts, allowing for a comparable increase to the Program Reserve during Phase 2. Phase 2 existing state aid reimbursements and projected state aid receipts are contingent on the passage of Proposition 51.

4.4 MASTER SCHEDULE

The revised Master Program Schedule is presented in Table 3. As reported in April 2016, the Master Schedule extended the Phase 1 CTE Center/Ag Farm project schedule in order to accommodate the delayed land acquisition and anticipated resumption of the design work, DSA review, and subsequent construction. The end date for the Performing Arts Center at Pioneer Valley has been adjusted to more accurately reflect the projected completion date of December 2016 and the Righetti High New Classroom Facility schedule has been adjusted to provide a projected completion date of May 2018. All remaining project schedules continue to be unchanged as reported in April 2016.

**Table 3: Master Program Schedule**

PHASE 1					
School	Project	Cost	Scheduled		Est. Total Months
			Start	End	
Righetti High	New Classroom Facility	\$21,672,533	8/2014	5/2018	46
Pioneer Valley High	New Performing Arts Center Addition to Bldg. J	\$10,759,082	8/2014	12/2016	29
Delta High	Classroom, Site Infrastructure, and Maint. Imprvs.	\$138,105	8/2014	4/2017	33
CTE/Ag Farm	Land Acquisition and Construction of Facilities	\$14,271,424	8/2014	7/2018	48
Districtwide	Master Site Planning	\$320,000	9/2015	11/2016	15
	<b>Phase 1 Subtotal</b>	<b>\$47,161,144</b>			
	<b>Program Reserve</b>	<b>\$3,335,536</b>			
	<b>Phase 1 Total</b>	<b>\$50,496,680</b>			
PHASE 2					
School	Project	Cost	Scheduled		Est. Total Months
			Start	End	
Righetti High	Classroom, Site Infrastructure, and Maint. Imprvs.	\$15,603,180	1/2017	1/2022	61
	New Practice Gym / Performance Space	\$15,990,297	1/2017	1/2022	61
	<b>Subtotal</b>	<b>\$31,593,477</b>			
Pioneer Valley High	Classroom, Site Infrastructure, and Maint. Imprvs.	\$8,028,428	7/2017	7/2022	61
Santa Maria High	New Classrooms, Athletic, and Support Facilities	\$58,236,654	7/2017	10/2020	40
	Auditorium Renovation	\$12,229,379	7/2019	10/2022	40
	<b>Subtotal</b>	<b>\$70,466,034</b>			
CTE/Ag Farm	Construction of Ag Pavillion	\$3,441,086	7/2017	6/2019	24
Districtwide	District Enrollment Capacity Improvement	\$34,003,821	7/2022	6/2025	36
	<b>Phase 2 Subtotal</b>	<b>\$147,532,846</b>			
	<b>Program Reserve</b>	<b>\$23,182,474</b>			
	<b>Phase 2 Total</b>	<b>\$170,715,320</b>			
	<b>Phase 1 &amp; 2 Total</b>	<b>\$221,212,000</b>			

Source: CFW, Inc.

## 4.5 PROGRAM EXPENDITURES

As a part of its program management services, the Program Team established a budget and expenditures tracking protocol for Phase 1 projects under implementation. As of the April 2016 Program update, the total Phase 1 budget was approximately \$50.5 million, inclusive of the Program Reserve. These amounts have been updated to include all expenditures to date through June 2016 and any changes to anticipated commitments. As needed, the Program Reserve and estimated ending fund balance will be utilized to accommodate unforeseen budget adjustments.

Table 4 provides a summary of expenditures made for the Program during the period of July 1, 2014 through June 30, 2016. The balance presented in Table 4 reflects the Adopted Budget approved by the Board for the Reconfiguration and Facilities Program as of July 2014, plus any adjustments in April 2016, less expenditures through June 30, 2016. The information is also presented by fiscal year to match the District's financial accounting system and includes expenditures from July 1, 2010 through June 30, 2014 relating to the Pioneer Valley High Performing Arts Center project and the CTE Center/Ag Farm land acquisition, which commenced prior to the development of the Program. Expenditures made after this reporting period will be accounted for in the next semi-annual update. Once the recommended budget adjustments are approved as part of this current update, subsequent expenditure reports will reflect the revised budget value.

**Table 4: Phase 1 Expenditures as of June 30, 2016**

Project	Program Expenditures (as of 6/30/16)				Total	Balance
	Adopted Budget	7/1/10 - 6/30/14	7/1/14 - 6/30/15	7/1/15 - 6/30/16		
<b>Righetti High School</b>						
New Classroom Facility	\$21,672,533	\$0	\$683,458	\$994,200	\$1,677,658	\$19,994,874
<b>Pioneer Valley High School</b>						
New Performing Arts Center Addition to Bldg J.	\$10,969,130	\$737,084	\$173,726	\$2,111,726	\$3,022,536	\$7,946,594
<b>Delta High School</b>						
Classroom, Site Infrastructure, and Maintenance Improvements	\$138,105	\$0	\$2,299	\$2,328	\$4,627	\$133,478
<b>CTE/Ag Farm</b>						
Land Acquisition & Construction of Facilities	\$13,838,851	\$145,542	\$344,921	\$3,883,906	\$4,374,368	\$9,464,483
<b>Phase 2 Planning</b>						
Righetti High School	\$174,970	\$0	\$0	\$0	\$0	\$174,970
Santa Maria High School	\$420,000	\$0	\$0	\$0	\$0	\$420,000
<b>Project Total</b>	<b>\$47,213,589</b>	<b>\$882,626</b>	<b>\$1,204,404</b>	<b>\$6,992,160</b>	<b>\$9,079,190</b>	<b>\$38,134,399</b>
<b>Program Reserve</b>	\$3,283,091					\$3,283,091
<b>TOTAL</b>	<b>\$50,496,680</b>					<b>\$41,417,490</b>

Notes:

1. Total expenditures for the period July 1, 2014 - June 30, 2016 was \$17,785,649:

This amount includes \$8,196,564 in Reconfiguration & Facilities Program expenditures plus \$9,589,085 in other District facility related improvements outside of the Reconfiguration & Facilities Program

Source: Santa Maria Joint Union High School District

For the period of July 1, 2014 through June 30, 2016, approximately \$8.2 million has been expended on projects identified within the Reconfiguration and Facilities Program. Detailed expenditure reports, broken down into subcategories of spending have been prepared and submitted to District staff, and are available for review by the Board and Citizens Oversight Committee.

#### 4.6 STATE AID

As more fully described in the original Reconfiguration and Facilities Program report, the State maintains a School Facility Program (SFP) administered by the Office of Public School Construction (OPSC) that distributes funds for costs relating to the modernization or new construction of school facilities. Funding is based on a per-pupil grant amount established by the State Allocation Board, assuming 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.

Historically, project funding by the State has been supported through the periodic approval of State bonds for school improvements by California voters. The California Secretary of State has formally declared that the State's \$9 billion K-14 school bond initiative will appear on the November 2016 ballot as "Proposition 51" and includes \$3 Billion for K-12 New Construction and \$3 billion for K-12 Modernization. The Secretary of State has finalized and published the State's official voter guide, including the official summary, legislative analysis, argument in favor, and legal text of Proposition 51.

Under the current program, which is anticipated to be renewed and replicated should voters approve Proposition 51, 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. No changes in funding eligibility are reported since the April 2016 update. These programs, and the District's current and projected eligibility and participation for program funding, are summarized below.

##### 4.6.1 MODERNIZATION ELIGIBILITY

The SFP modernization program provides funds on a 60/40 State and local sharing basis for improvements that modernize or upgrade existing school facilities that are 25 years or older since original construction or last modernization. Tables 5 and 6 provide a summary of estimated modernization eligibility over time from the District's existing permanent and portable classrooms over time. As reported in April 2016, future permanent classroom modernization eligibility is estimated at approximately \$18.5 million in 2025, cumulatively increasing to approximately \$34.5 million by 2035. For portable classrooms, the District has approximately 26 portable classrooms as of fiscal year 2016 that are eligible for modernization grant



funding of approximately \$3.8 million, increasing cumulatively to \$16.9 million by 2025. All modernization projects require a local match to be provided by the District.

**Table 5: 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
<b>Total</b>	<b>228</b>	<b>0</b>	<b>\$0</b>	<b>125</b>	<b>\$18,923,625</b>	<b>92</b>	<b>\$13,927,788</b>	<b>11</b>	<b>\$1,665,279</b>	<b>\$34,516,692</b>
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 6: 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
<b>Total</b>	<b>26</b>	<b>\$3,936,114</b>	<b>4</b>	<b>\$605,556</b>	<b>19</b>	<b>\$2,876,391</b>	<b>14</b>	<b>\$2,119,446</b>	<b>13</b>	<b>\$1,968,057</b>
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
<b>Total</b>	<b>7</b>	<b>\$1,059,723</b>	<b>4</b>	<b>\$605,556</b>	<b>12</b>	<b>\$1,816,668</b>	<b>1</b>	<b>\$151,389</b>	<b>12</b>	<b>\$1,816,668</b>
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

#### 4.6.2 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 7 provides a summary of the District's anticipated new construction grant eligibility. As reported in April 2016, the District currently qualifies for approximately \$40.1 million in State new construction funding. This does not include an available

allowance, if deemed needed by the State, for 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.

**Table 7: 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		<b>2,634</b>	<b>\$40,084,656</b>	<b>\$40,084,656</b>	<b>\$80,169,312</b>
Est. Site Service (15%)			\$6,012,698	\$6,012,698	\$12,025,397
Grand Total		<b>2,634</b>	<b>\$46,097,354</b>	<b>\$46,097,354</b>	<b>\$92,194,709</b>

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

As provided in the Master Schools Improvement Program, Table 8 on the following page 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 8: 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%)
<b>Total Pupil Eligibility</b>	<b>2634</b>		<b>2634</b>	<b>\$14,311-\$29,881</b>	<b>\$ 40,084,656</b>	<b>\$ -</b>	<b>\$ 40,084,656</b>	<b>\$ 40,084,656</b>	<b>\$80,169,312</b>
<b>Project</b>									
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
<b>Total</b>	<b>1782</b>	<b>207</b>	<b>1989</b>	<b>\$ 14,311</b>	<b>\$ 25,502,202</b>	<b>\$ 2,962,377</b>	<b>\$ 28,464,579</b>	<b>\$ 28,464,579</b>	<b>\$56,929,158</b>
<b>Total Grants Remaining</b>			<b>645</b>	<b>\$14,311-\$29,881</b>	<b>\$ 11,620,077</b>	<b>\$ -</b>	<b>\$ 11,620,077</b>	<b>\$ 11,620,077</b>	<b>\$23,240,154</b>

\*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 9. 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 9: 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
<b>Total</b>	<b>645</b>	<b>0</b>	<b>645</b>	<b>\$14,311-\$29,881</b>	<b>\$ 11,620,077</b>	<b>\$ -</b>	<b>\$ 11,620,077</b>	<b>\$ 11,620,077</b>	<b>\$23,240,154</b>
<b>Total Grants Remaining</b>			<b>0</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

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

#### 4.6.3 COMBINED STATE GRANT ELIGIBILITY

As stated earlier, the District has remaining State eligibility for modernization and new construction grants. Table 10 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 10: 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
<b>Subtotal</b>	<b>645</b>	<b>645</b>		<b>\$ 11,620,077</b>	<b>\$ 11,620,077</b>	<b>\$ 23,240,154</b>

  

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
<b>Subtotal</b>	<b>83</b>	<b>2241</b>		<b>\$ 12,565,287</b>	<b>\$ 8,376,858</b>	<b>\$ 20,942,145</b>
<b>Total</b>				<b>\$24,185,364</b>	<b>\$19,996,935</b>	<b>\$44,182,299</b>

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

## SECTION 5

# RECOMMENDATIONS

It is recommended that the Board of Education:

- Approve and adopt this semi-annual Program update, including the master Program budget and master Program schedule, to officially guide the Reconfiguration and Facilities Program's continued implementation
- Consider the next semi-annual Program update at its regularly scheduled March 2017 meeting