

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.



Board of Trustee Action Plans
Santa Maria Joint Union High School District

- **Maximize Student Success**
- **Develop and Maintain a Districtwide Accountability System**
- **Enhance Student Support Services: Facilities, Technology, Safe, Clean, Nurturing Environment; Expand Food Services**
- **Foster Partnerships**
- **Manage Rapid District Growth**

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 12, 2018

**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 challenging 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 & 48919. 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.
- D. Conference with Legal Counsel** – Potential Litigation (Subdivision (a) of Section 54956.9)

III. RECONVENE IN OPEN SESSION

A. Call to Order/Flag Salute

IV. ANNOUNCE CLOSED SESSION ACTIONS – Dr. Richardson

V. REPORTS

A. Superintendent’s Report

1. Recognition of Retirees

The Board recognizes the following retirees for their many years of service to the students in our district.

NAME	TITLE	SITE	YEARS IN DISTRICT
Rosemary Alvara	Guidance Technician	SMHS	27
Dixie Arthur	Teacher (English and Drama)	ERHS	21
Krista Ballard	Project Analyst	DISTRICT	20

B. Board Member Reports

VI. ITEMS SCHEDULED FOR ACTION

A. GENERAL

1. LCAP Public Hearing

Resource Person: Steve Molina, LCFF Director

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 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, 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

2. Approval of MOU for Classified Bargaining Unit regarding the effects of layoff of bargaining unit members for the 2018-19 school year – Appendix C

Resource Person: Joni McDonald, Human Resources Manager

The District and the California School Employees Association (CSEA) have reached settlement agreement regarding the effects of layoff of bargaining unit members for the 2018-19 school year.

The Memorandum of Understanding (MOU) tentatively agreed to on May 8, 2018 will take effect upon approval by both parties. **(See Appendix C)**

*** **IT IS RECOMMENDED THAT** the Board of Education approve the Agreement with the Classified Bargaining Unit as presented.

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

B. BUSINESS

1. Approval of Authorization to Contract for Architectural Services for the Righetti High School Renovation Project

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

Pursuant to the Board adopted Reconfiguration and Facilities Program, the Santa Maria Joint Union High School District (District) is proceeding with the Righetti High School Renovation Project. The project will focus on the 21st century renovation of 57 permanent classrooms located in Buildings C, D, and E and the school's library, along with the removal of portables, and restoration of parking, upon completion of the work.

In April 2018, a Request for Proposals (RFP) for architectural services for the project was sent to the District's pool of seven prequalified architectural firms. Three firms declined to participate in the selection process. Proposals from four firms were received and all were invited for an interview. Thereafter, interviews were held and quality of proposals were evaluated by a District Selection Com-

mittee composed of Yolanda Ortiz, Assistant Superintendent of Business Services, Gary Wuitschick, Director of Support Services, and Reese Thompson, Director of Facilities. After a thorough review of all proposals, and information presented in all of the interviews, Rachlin Partners was the highest ranked firm by the District's Selection Committee.

The District seeks the approval of the Board to authorize District administration to enter into a contract with Rachlin Partners for architectural services for the Righetti High School Renovation Project.

***** IT IS RECOMMENDED THAT** the Board of Education approve District administration to enter into a contract with Rachlin Partners for architectural services for the Righetti High School Renovation Project.

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

2. Adoption of School Facilities Needs Analysis – Level II Fees – Resolution Number 23-2017-2018 – Appendix D

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

Pursuant to Government Code Sections 66995.5 et. seq., the District is required to adopt a School Facilities Needs 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. is presented as Appendix D of this agenda, demonstrates that the District may continue to impose 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 - \$2.33

Proposed Fee

Level II - \$2.51 – effective June 13, 2018 upon approval

Resolution Number 23-2017-2018 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

*** **IT IS RECOMMENDED THAT** the Board of Education approve review, consider, and adopt the findings contained in the School Facilities Needs Analysis and adopt the Level II Fees identified in Resolution No. 23-2017-2018, presented as Appendix D.

Moved _____ **Second** _____

A Roll Call Vote is Required:

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

3. Budget Hearing for Fiscal Year 2018-2019 – Appendix E

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

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 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” – slightly increased the COLA from 2.51% projected in January to 2.71% plus the proposed additional LCFF funding for a total combined increase of 3.00%. The COLA factor is only applied to the base grant, and categorical programs that are outside the LCFF, including special education and child nutrition. Full implementation of the LCFF is two years ahead of schedule. The Governor also provides for additional one-time revenues generated from an increase in the Proposition 98 minimum guarantee. With full implementation of LCFF, the only funding educational agencies will receive will be based on COLA adjustments.

Items of concern continue to be:

- A statutory “hard cap” on allowable reserves for districts. It will not get triggered in the 2018-2019 budget year, but it is still a legal requirement. Efforts continue to repeal the requirement.

- Increases in the costs districts bear for funding PERS and STRS retirement systems. Without some assistance in covering those costs, at full implementation the LCFF model does not meet the commitment to restore purchasing power to districts equal to their 2007-2008 levels.
- While there is additional funding contained in the May Revise for districts, there are concerns about sustainability. The Governor's proposal provides for an increase of \$286 million to the \$1.8 billion in the 1-time discretionary dollars that were proposed in January which equates to a total of \$344 per ADA.

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 "Annual Update" which is a part of the 2018-2019 LCAP plan. The District's budget that is being proposed for adoption for the 2018-2019 year reflects the goals and expenditures contained in that 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 2018-2019 is presented as Appendix E for consideration by the Board of Education. Due to the requirements with LCFF and LCAP, adoption will occur at subsequent meeting.

Resource Person: Yolanda Ortiz, Assistant Superintendent of Business Services

A PUBLIC HEARING IS REQUIRED.

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

VII. 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:

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

A. Approval of Minutes

Regular Board Meeting – May 15, 2018

B. Approval of Warrants for the Month of May 2018

Payroll	\$7,026,070.92
Warrants	<u>3,754,657.44</u>
Total	<u>\$10,780,728.36</u>

C. Attendance Report

Mrs. Yolanda Ortiz, Assistant Superintendent of Business Services, will be available to answer questions regarding the 2017-2018 ninth monthly attendance report presented on the last page of this agenda.

D. Student Matters – Education Code Sections 35146 & 48918

Administrative Recommendation to order expulsion: 350687

Administrative Recommendation for student re-admission from expulsion/suspended order and/or expulsion: 349963

Expelled student(s) who did not meet the terms of their expulsion/suspended order and/ or expulsion agreement: 343333,347566, 348730

E. Facility Report – **Appendix B**

F. Board Policies

The following board policies will be deleted due to changes in state laws and state testing.

Board Policy Number
AR 0000
BP/AR 0520.2
BP 0520.3
BP/AR 5126
E 5131.63
BP 6161.3
BP/AR/E 6162.52

G. Approval and Ratification of Agreement with Dannis Woliver Kelley

The District approves DWK to represent, advise, and counsel it from July 1, 2018, through and including June 30, 2019, and continuing thereafter as approved. Any services performed during the period between the above commencement date and the date of Board action approving this Agreement are hereby ratified by said Board approval.

H. Out of State Travel

PERSON/REASON	PLACE/DATE	FUNDING
Shawnah Van Gronigen Selyn Barette, Kelly Davis, Scott Davis Field Trip to Oregon Shakespeare Festival	Ashland, Oregon August 30, 2018 to Sep- tember 3, 2018	VPA/Drama Funds
Marc Brogoitti Catalyst Software Training	State College, PA September 25, 2018 to September 27, 2018	Energy Educator Budget
David Preston Connective Learning Summit	Boston, MA August 1, 2018 to August 3, 2018	Educator Effectiveness/LCAP

I. New Course Approval

The following courses, for Delta High School, are being presented for approval:

- Intro to Ecology
- Environmental Studies
- Food and Culture
- Strategies for Student Success

- Interpersonal Skills
- Mathematical & Engineering Concepts through Game Design
- Financial Literacy

J. Obsolete Textbooks

The following books are being presented for approval to be obsolete:

TEXTBOOK TITLE	ISBN #	COPYRIGHT	# OF COPIES
Biology: An Ecological Approach	1823002-1825216	2002	424
Discovering French Bleu	978-0-395-87482-0	2004	215
Discovering French Blanc 2	978-0-395-87489-9	2004	137
Realidades 2	0-13-035951-3	2004	455

K. Approval of additional site work for RHS Multilevel Classroom Building Project #15-175

Upon further inspection, both Rachlin Architects and Vernon Edwards Constructors, Inc. agree additional follow-up electrical, ducting, joint expansion, door blind installation, data drops, sink revisions and miscellaneous detail corrections work will need to be performed as a change order to the project. The estimated cost of the work is \$151,275.70.

L. Authorization for Sale of Obsolete Equipment

Education Code §17545 allows the district to sell personal property belonging to the district that is unsatisfactory, no longer necessary (obsolete), or unsuitable for school use. The district administration is requesting authorization to conduct a public auction via the internet by and through its representative RT Auctions, to sell equipment that is obsolete, damaged beyond repair or surplus to the highest responsible bidder. The obsolete equipment to be auctioned is listed below or included herein as Appendix C. Notices of items for sale at auction will be posted in no less than three public places within the District, including the District's website at <http://www.smjuhsd.k12.ca.us/>.

Tag #	Asset Category	Description	Serial #
Veh #267	VEHICLE	1986 Yamaha ATV	#598031238

M. Acceptance of Gifts

Pioneer Valley High School		
<u>Donor</u>	<u>Recipient</u>	<u>Amount</u>
Sabra Rounds	Home Ec Class	\$353.00
Elida's Drinks & Food	AVID 2019	\$100.00
Roy Noel	Girls Wrestling	\$100.00
Vaqueras	SHARe	\$80.00
SBC Farm Bureau	FFA	\$400.00
Total Pioneer Valley High School		<u>\$1,033.00</u>
Delta High School		
<u>Donor</u>	<u>Recipient</u>	<u>Amount</u>
Carol Karamitsos	Grad Nite Account	\$290.00
Jeff Cooper	Grad Nite Account	\$290.00
FBSMV	Grad Nite Account	\$870.00
Esther Prieto-Chavez	Grad Nite Account	\$145.00
Jack Garvin	Grad Nite Account	\$145.00
Amy Lopez	Grad Nite Account	\$290.00
Mark Richardson	Grad Nite Account	\$145.00
Dominick and Pam Palera	Grad Nite Account	\$100.00
Element Church	Grad Nite Account	\$500.00
Total Delta High School		<u>\$2,775.00</u>

VIII. REPORTS FROM EMPLOYEE ORGANIZATIONS

IX. 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.

X. 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.

XI. NEXT MEETING DATE

Unless otherwise announced, the next regular meeting of the Board of Education will be held June 19, 2018. Open session begins at 8:30 a.m. with closed session immediately following. The meeting will be held at the District Support Services Center.

XII. FUTURE REGULAR BOARD MEETINGS FOR 2018

August 7, 2018	November 13, 2018
September 11, 2018	December 11, 2018
October 9, 2018	

XIII. ADJOURN

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT
MONTHLY REPORT OF ATTENDANCE
NINTH MONTH OF 2017-18

March 26, 2018 through April 23, 2018

	Ninth Month 2016-17			Ninth Month 2017-18			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	1953	1864.77	95.3%	1963	1871.00	95.1%		1924.83		1947.84
Special Education	78	75.00	94.8%	82	77.08	94.0%		73.72		80.18
Independent Study	30	15.69	51.4%	43	31.46	75.3%		13.15		20.19
Independent Study 12+	0	0.00	0.0%	0	0.00	---		0.00		0.21
Independent Study Spec Ed	1	1.00	100.0%	---	---	---		0.23		1.64
CTE Program	4	3.69	68.6%	8	6.85	85.6%		4.69		5.47
Home and Hospital-Reg Ed	4	3.38	84.6%	5	3.00	72.2%		2.22		1.72
Home and Hospital-Spec Ed	3	2.08	79.4%	0	0.00	---		1.95		0.37
TOTAL RIGHETTI	2073	1965.61	95.2%	2101	1989.38	95.1%		2020.79		2057.61
SANTA MARIA HIGH										
Regular	2292	2217.62	96.2%	2326	2250.54	96.4%		2268.35		2308.09
Special Education	93	85.77	92.1%	86	79.54	92.5%		88.46		79.18
Independent Study	31	25.38	82.9%	19	12.85	68.2%		19.31		11.98
Independent Study 12+	0	0.00	0.0%	0	0.00	---		0.00		0.00
Independent Study Spec Ed	0	0.00	0.0%	1	1.00	100.0%		0.00		0.90
CTE Program	6	5.46	91.0%	11	6.69	60.8%		6.06		6.32
Home and Hospital-Reg Ed	14	9.46	75.5%	8	6.46	90.3%		6.40		7.07
Home and Hospital-Spec Ed	1	0.69	69.2%	3	1.62	72.4%		1.33		0.14
TOTAL SANTA MARIA	2437	2344.38	96.1%	2454	2358.69	96.3%		2389.91		2413.68
PIONEER VALLEY HIGH										
Regular	2499	2431.85	97.1%	2454	2376.92	96.8%		2474.03		2444.33
Special Education	95	91.85	95.2%	100	95.62	94.8%		95.61		99.09
Independent Study	21	12.08	60.6%	20	12.15	56.8%		7.42		10.23
Independent Study Spec Ed	4	2.92	73.1%	0	0.00	---		1.99		1.00
Home and Hospital-Reg Ed	12	9.54	83.2%	14	9.77	74.3%		7.78		7.52
Home and Hospital-Spec Ed	1	0.85	84.6%	2	1.38	69.2%		1.65		1.11
TOTAL PIONEER VALLEY	2632	2549.09	97.0%	2590	2495.85	96.7%		2588.48		2563.29
DAY TREATMENT @ LINCOLN STREET	4	4.31	86.2%	8	5.38	67.3%		4.40		5.24
DISTRICT SPECIAL ED TRANSITION	25	23.46	93.8%	23	23.00	100.0%		25.62		23.16
DISTRICT SPECIAL ED TRANS/VOC MM	11	11.00	100.0%	21	21.00	100.0%		13.19		21.93
ALTERNATIVE EDUCATION										
Delta Continuation	283	219.42	73.5%	297	222.46	73.2%		245.74		242.10
Delta 12+	1	35.92	92.1%	0	0.00	---		0.25		0.29
Delta Independent Study	22	20.61	84.0%	27	26.54	84.8%		10.00		18.20
Delta Independent Study 12+	2	1.65	82.3%	2	1.10	41.0%		8.15		2.04
Delta Independent Study Spec Ed	0	0.00	0.0%	1	0.96	96.4%		0.00		0.55
DHS Home and Hospital Reg Ed	2	0.96	33.0%	4	3.64	94.7%		0.77		2.18
Reach Program--ERHS	---	---	---	7	1.62	26.6%				
Reach Program--DHS	0	0.00	0.0%	0	0.00	---		0.00		0.00
Reach Program--SMHS	14	8.77	64.0%	9	5.31	64.5%		5.07		3.57
Reach Program--PVHS	17	14.77	82.1%	14	8.31	64.7%		9.50		5.57
Home School @ Library Program	38	33.31	86.6%	45	35.69	78.1%		29.37		29.63
Delta HS I.S. Program P	25	19.76	92.1%	24	23.01	77.3%		17.75		20.44
TOTAL ALTERNATIVE EDUCATION	404	355.17	87.9%	430	328.65	76.4%		326.60		324.57
TOTAL HIGH SCHOOL DISTRICT	7586	7253.02	95.6%	7627	7221.95	94.7%	93.3%	7368.99	93.8%	7409.47

CLASSIFIED PERSONNEL ACTIONS							
Name	Action	Assignment	Site	Effective	Pay Rate	Hours	
	Employ	Custodian	RHS	6/1/18	15/A	8	
	Resign	Accompanist	PVHS	6/8/18	15/B	4/wk	
	Promote	Grounds Maintenance II	PVHS to SMHS	6/11/18	21/D	8	
	Increase Hours	Food Service Worker	RHS to SMHS	5/21/18	9/A	3 to 3.5	
	Out of Class	Attendance Technician	PVHS	5/7/18	20/A	8	
CERTIFICATED PERSONNEL ACTIONS							
Name	Action	Assignment	Site	Effective	Salary	FTE	
	No Column Advance/LOA	English	PVHS	2018-19	13/V	0.8	
	Column Advance	Social Science	SMHS	2018-19	5/V	1.0	
	Perm Change/Prob 1	Counselor	SMHS	2018-19	2, V +5	1.0	
	Perm Change/Prob 1	English	PVHS	2018-19	3/V	1.0	
	Column Advance	English	SMHS	2018-19	14/IV	1.0	
	Stipend	Department Chair/Counseling	RHS	2018-19	1, I 9%	~~	
	Stipend	Department Chair/Social Science	RHS	2018-19	1, I 9.5%	~~	
COACHING PERSONNEL ACTIONS							
Name	Action	Assignment	Site	Effective	District	ASB/Booster	Employee Type
	2 Sport Stipend	Coaching	ERHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	ERHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	ERHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	ERHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	ERHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	ERHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	ERHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	ERHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	ERHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	PVHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	PVHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	PVHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	PVHS	2017-2018	\$500.00		CLASS
	2 Sport Stipend	Coaching	PVHS	2017-2018	\$500.00		CLASS
	2 Sport Stipend	Coaching	PVHS	2017-2018	\$500.00		CLASS
	2 Sport Stipend	Coaching	PVHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	PVHS	2017-2018	\$500.00		CLASS

COACHING PERSONNEL ACTIONS							
Name	Action	Assignment	Site	Effective	District	ASB/Booster	Employee Type
	2 Sport Stipend	Coaching	PVHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CLASS
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CLASS
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CLASS
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CLASS
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CERT
	2 Sport Stipend	Coaching	SMHS	2017-2018	\$500.00		CERT

Appendix B

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT FACILITIES REPORT

May 2018 Activities

1. Santa Maria High School Construction Projects

SMHS Reconstruction – Rachlin Partners

- Design efforts associated with the new construction and modernization components continue. Recent design progress focused on developing a plan to repurpose the old Administration Building into classrooms. Further efforts are ongoing to conduct required City agency reviews and activities associated with review of California Environmental Quality Act (CEQA) requirements. Division of State Architect (DSA) submittal for both the new construction and modernization components of the project is anticipated to occur in November 2018.

2. Ernest Righetti High School Construction Projects

ERHS New 38-Classroom Building – Rachlin Partners

- Preparation for plastering on all sides of the main building is in full progress. Metal lath with plastering is scheduled to begin in June 2018. Final steel framing is concluding. On the interior, drywall taping and finishing is underway. The design work is progressing for adding bridges at the second and third floor exterior walkways. A Change Order #6 is anticipated to be presented to the Board in June 2018 to accommodate changes in scope and contract language.

[\(Photos\)](#)

ERHS Maintenance and Operations Building – Rachlin Partners

- The Architect is preparing cost estimates and updates to original proposals for incorporation into the main Architect and Engineering agreement.

ERHS Phase 2 Improvements – (Architect TBD)

- Four firms submitted proposals in response to the District's Request for Proposals (RFP). Interviews with the four firms were held on May 17, 2018. Rachlin Partners was the highest ranked firm by the District's Selection Committee. A recommendation to select Rachlin Partners as the project architect will be presented to the Board for approval in June 2018.

3. Pioneer Valley High School Construction Projects

PVHS Pool Lighting and Column Repair – WLC Architects

- Preliminary submittal reviews and long lead-time orders continue. Construction is scheduled to occur from June 11 through July 29, 2018.

PVHS Gym Floor Resurfacing – Support Services

- Construction is scheduled to occur June 29 through August 3, 2018.

PVHS Paving Areas A, B, D, E – Flowers and Associates Consulting

- S. Chavez Construction, Inc. was awarded the project at the May 15, 2018 Board Meeting. A Notice of Award was issued May 16, 2018. Construction is scheduled to occur from July 5 to July 30, 2018.

PVHS Proposition 39 Lighting Upgrade – Power and Communications Engineering

- Smith Electric Service was awarded the project at the May 15, 2018 Board meeting. A Notice of Award was issued May 16, 2018. Construction is scheduled to occur from June 11 to July 27, 2018.

4. New Facility

C2004 Career Technical Education (CTE) Center/Ag Farm – PMSM Architects

- Vernon Edwards Constructors was selected by the School Board as the Lease-Leaseback construction services firm for the project. Bidding and GMP negotiation activities are continuing. Significant cost escalations have been noted and are being evaluated for ways to mitigate impacts. CFW and the District prepared and submitted the required 15-day letter response to OPSC for the Agriculture and Natural Resources CTE funding application.

5. District Wide and Support Services Center

District Wide Project Closeout – Support Services

- Review of project closeout: Projects under current review and their status are as follows:
 - Reviews continue to determine prioritization of actions regarding outstanding SMHS and ERHS projects.

SSC New West Parking Area – Flowers and Associates

- The civil engineer requested status of the results from the final package submitted to the City on May 7, 2018. The civil engineer is evaluating the latest required changes to establish an updated cost estimate. Bidding and construction schedules remain on hold until final City approval.

Proposition 39 District Wide Mechanical Upgrades – Pool Heaters – Ravatt-Albrecht Architects

- Equipment submittal reviews are ongoing. Start of site construction is pending the receipt of heating units.

Proposition 39 HVAC Ducting Installation – Ravatt-Albrecht Architects

- Construction is complete. Punch list corrections have been completed and a final walk is to be scheduled the first week in June.

District Wide Security Camera Installation (Phase 2) – Support Services

- Construction at SMHS is complete. Work is underway at the SSC. PVHS installation will begin as soon as school is out for the summer.

Solar Photovoltaic – Support Services

- PVHS, RHS, and DHS are complete and operating. The PG&E inspection of the SSC installation is complete. Final City inspection scheduling is still in process for the SSC system. DSA and other closeout activities are underway.

6. Summer Activities

District Wide Summer Projects Planning

- Reviews and issuance of quotes for proposed small projects will continue throughout June.

Gary Wuitschick
Director – Support Services

Maintenance & Operations

SMHS

- Performed gopher control activities.
- Repaired automated gates 5 and 9.
- Inspected and repaired irrigation sprinklers throughout the campus.
- Groomed the football stadium turf.
- Conducted routine grounds maintenance of ornamental landscape.
- Assembled two new structures for raising small animals in the Agriculture Science Department.
- Fabricated fencing and gates to contain the small animals in their new housing area.
- Installed power for the new stainless steel roll-up door in the cafeteria kitchen.
- Completed lighting repairs in classroom 118, Home Economics Building exterior, Ethel Pope Auditorium, the cafeteria Multi-purpose room, Wilson Gymnasium, and the Learning Center exteriors.
- Installed additional electrical circuits in Ethel Pope Auditorium to improve custodian vacuuming productivity.
- Painted interior and exterior surfaces at the Administration Building, the Broadway Classroom hallways, south campus boys' restroom, Building 800 (Learning Center), Administration Building men's restroom, girls' locker room restroom, Multi-Media Learning Center textbook room, cafeteria kitchen, pool boys' and girls' restrooms, pool custodian room, and the 330 Building Agriculture Science and general classroom exteriors.
- Tested and repaired computer projectors in classrooms 331, 336, 611, 620, and 623.
- Completed HVAC inspection and filter changes.
- Corrected discrepancies on monthly fire extinguisher inspection.
- Serviced custodial cleaning equipment in preparation for summer cleaning.
- Repaired door lock hardware in classrooms 214, 231, 236, 361, 641, pool boys' and girls' restrooms, and the small gymnasium PE office.
- Completed monthly inspections of AEDs.
- Performed monthly elevator and weekly chair lift inspections.
- Inspected and repaired seating in Ethel Pope Auditorium.
- Repaired HVAC in Administration Building as well as classrooms 900 and 910.
- Completed monthly inspection of emergency lighting.
- Completed repairs to the swimming pool heater.
- Replaced lights in classrooms 615, as well as restrooms in the cafeteria and at the Learning Center.
- Performed routine furniture movement/obsolete/repair in classrooms 215, 334, 335, 336, 339, 359, 611, 626, 634, and 643.
- Completed window blind repairs by replacing vertical slats in rooms 233, 905, and 910.
- Setup and restored from school and civic center use events – SISC health screening, Un-Cafecito, SMHS health fair, AP pre-registration, LCAP meeting, M&O Escape training, ELAC, AVID dinner, Earth Day Fair, Taco Tuesday, Link Crew, SMHS band Spring concert, AHC presentations, SMHS baseball, SMHS softball, SMHS boys' volleyball, SMHS boys' & girls' track, SMHS baseball, SMHS softball, SMHS boys' tennis, club soccer, SMBSD track practice, and Adult Soccer League.
- Preventive work order hours - 82
- Routine work order hours – 188
- Total work orders completed – 209
- Event setup hours – 177

REGULAR MEETING
June 12, 2018

PVHS

- Prepared baseball and softball fields for games.
- Set up the stadium for Track and Field meets.
- Painted lines in practice fields for weekend club soccer games.
- Applied rubber mulch to the planter in the north driveway.
- Repaired the gate latch at the pool.
- Inspected and repaired irrigation sprinklers throughout the campus.
- Disassembled the discus cage at the end of track season.
- Fertilized all natural turf on campus.
- Installed a winch in the catwalk of the Performing Arts Center to facilitate hoisting equipment to the high areas of the theater.
- Replaced the siding on the ramp for classroom 609.
- Replaced the batteries in the remote-controlled gate at the north parking lot.
- Investigated HVAC air flow issues at the Performing Arts Center. Made adjustments suggested by the mechanical engineer.
- Replaced a broken sink in one of the boys' restrooms.
- Cleared plumbing blockages in the boys' restrooms.
- Cleared a main sewer line blockage in classroom 433.
- Painted the exterior of the twelve modular classrooms.
- Plumbed the chemical dispenser in laundry room of maintenance shop.
- Installed a new tablet charging station in classroom 355.
- Installed twelve towel hooks outside of showers in the girls' locker room.
- Installed replacement Scensibles® feminine waste disposal boxes in four of the girls' locker room stalls.
- Mounted Performing Arts Center telephones on the wall in the lighting room and classroom 222.
- Replaced the wheels and axle on the stand for the high jump pole bar.
- Replaced the wheels on the lifeguard stand at the pool.
- Repaired the wheelchair lift switch at the Performing Arts Center.
- Replaced the light control motion sensors in classrooms 501 and 502.
- Assembled the back drop for the school play at the Performing Arts Center.
- Installed art work in the Performing Arts Center lobby.
- Diagnosed HVAC problems in classrooms 217, 219, and 364.
- Moved the grand piano from the choir room to the Performing Arts Center stage.
- Setup and restored from school and civic center use events – AHC EPW meeting, Mindful Mondays, SAT Prep Workshop, Panther Forum, AP Exams, Sr. Graduation Assembly, College Signing Day, GLO Club Guest Speaker, Powder Puff Meeting, Cheer Rehearsals, Link Crew Meeting, Future Panther Night Meeting, Dinner Theater in the PAC, Powder Puff Uniform distribution, volleyball games, PVHS track meet, swim team meeting, volleyball banquet, water polo meeting, track & field banquet, and Santa Maria Philharmonic group.
- Preventive work order hours – 13
- Routine work order hours – 367
- Total work orders completed – 155
- Event setup hours – 146

REGULAR MEETING
June 12, 2018

ERHS

- Inspected and repaired irrigation sprinklers at ERHS and DHS.
- Repaired the artificial turf in the courtyard of the 200 Classroom Building.
- Prepared the 100 courtyard for preschool: fencing, grounds, and play structure.
- Groomed the football stadium for soccer.
- Prepared baseball and softball fields for games, including the field at Lakeview Junior High School.
- Performed preventive maintenance on grounds equipment: ride-on mower, push mowers, trimmers, blowers, and weed eaters.
- Installed four hydration stations: in each classroom building courtyard and one in Administration.
- Replaced damaged flooring in the 300 Building boys' restroom.
- Reconfigured the thermostats in the portable classrooms.
- Repainted parking lot curbs, "No Parking" signs, and storm water inlets.
- Reconfigured the piping at the irrigation well pumping station. Switched the system from domestic water to well water following repairs to the well.
- Repaired broken restroom flush valves and cleared plugged drain lines in several restrooms on campus.
- Completed HVAC inspections, heating coil cleaning, and filter change.
- Inspected, lubricated, and adjusted doors in the 100, 200, and 300 classroom buildings, and the cafeteria.
- Lubricated gate padlocks throughout campus.
- Repaired door hardware, locks, gates, hand dryers, and restroom partitions throughout campus.
- Completed monthly inspections: AED, emergency lighting and showers, fire extinguishers.
- Performed monthly fire alarm test.
- Assembled five mobile carts for large screen interactive monitors.
- Pressure washed walkways on campus in preparation for graduation.
- Set up the "Every 15 Minutes" Drunk Driving education demonstration event.
- Installed a new sign at the pool, naming it "Rob Knight Pool".
- Setup and restored from school and civic center use events – counseling department meeting, staff meeting, LCAP, AHC orientation, Fat Friday, College signing day, Every 15 Minutes, FFA, spirit squad, Boosters, staff vs student basketball game, Film Festival, spring assembly, football meeting, volleyball, placement testing, drama performance, SB explorer meetings, UC AWPE testing, Delta High School events: class presentation, testing, model school assembly, and Allan Hancock College workshop.
- Preventive work order hours – 110
- Routine work order hours – 105
- Total work orders completed – 187
- Event setup hours – 135

Transportation

- Eight bus drivers transported elementary school students to the Elks Mini Rodeo.

Graffiti & Vandalism

• DHS	\$	0
• ERHS	\$	210
• SMHS	\$	320
• PVHS	\$	60

Reese Thompson
Director – Facilities and Operations

Photo Gallery – Major Projects



ERHS 38-Classroom Building – Roof-top View: First Phase of Roofing



ERHS 38-Classroom Building – Contractor and District Representatives Discuss Progress



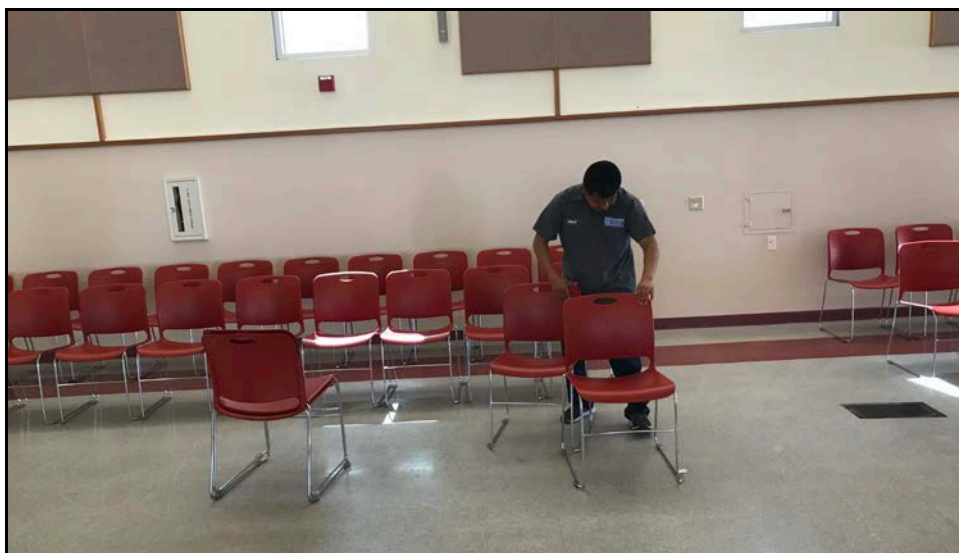
ERHS 38-Classroom Building – Various Stages of Painting, Insulation, and Waterproofing



ERHS 38-Classroom Building – Top and Second Floor of the East Building for Framing Classrooms

Photo Gallery – Maintenance & Operations

This month we are highlighting the contribution of the Night and Weekend Custodians that start work after the students go home to ensure that our schools are clean, secure, and ready for the next school day.



SMHS – Miguel Sanchez-Martinez Sets up the Cafeteria Dining Room for an Evening Meeting



SMHS – Antonio Reyes Spot Mops a Classroom with the New I-Mop

REGULAR MEETING
June 12, 2018



SMHS – Paul Valencia and Raymundo Porraz Attack Student Restrooms



SMHS – Antonio Reyes Preparing a Computer Lab for the Next Day of School



SMHS – Joel Amezcua Finishes Vacuuming a Classroom and is off to Another



PVHS - Jairo Osegura Performs the Daily Classroom Trash Removal Duties



PVHS - Sam Muller Operates the KaiVac Restroom Cleaning Equipment



ERHS – Hector Mariscal Cleans Administration Building Windows and Robert Dahmen Operates the Auto Scrubber to Clean the Gymnasium Tarps

REGULAR MEETING
June 12, 2018



ERHS - Custodians Set up the Annual FFA Awards Night



ERHS - Albert Montanez Pressure Washes the Walkways

REGULAR MEETING
June 12, 2018

APPENDIX C

**Approval of MOU for Classified Bargaining Unit
regarding the effects of layoff of bargaining
unit members for the 2018-19 school year**

MEMORANDUM OF UNDERSTANDING

Between

**Santa Maria Joint Union High School District
And California School Employees Association
And It's Central Coast Chapter #455**

This is to memorialize the mutual understanding between the Santa Maria Joint Union High School District("District") and the California School Employees Association and its Central Coast Chapter #455("CSEA") regarding the effects of layoff of bargaining unit members for the 2018-19 school year. The parties agree as follows:

1. Due to lack of funds, the District will lay off one (1) Migrant School Advisor and reduce the work year for the remaining two (2) Migrant School Advisors FROM 12 months TO 11 months.
2. The Layoffs will be done in accordance with CSEA Collective Bargaining Agreement Article 20 and all applicable provisions in the Education Code in regards to bumping rights and reemployment lists.
3. Employees having their work year reduced from 12-month to 11-month assignments shall have their new work days adjusted in order to allow them to be in paid status at least one day in each month of the calendar year with earnings reported for retirement purposes in every month of the calendar year.
4. Both parties do not anticipate any additional bargaining unit reductions for 2018-19, but acknowledge that should further reductions be considered both parties agree to return to negotiations in order to explore ways to mitigate any additional bargaining unit reductions.

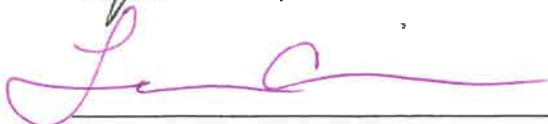
This Agreement is not precedent setting and shall not constitute a past practice This Agreement will remain in place until all employees affected by the layoff have been made whole, or the reemployment list has expired, whichever comes first.



Joni McDonald, Human Resources

5.8.18

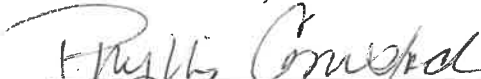
Date



Tami Contreras, CSEA President

5/8/18

Date



Phyllis Comstock, CSEA Labor Relations Representative

5/8/18

Date

**APPENDIX D
2017-2018**

**RESOLUTION NUMBER 23 – 2017-2018
Regarding the Levying and Collection of
Alternative School Facilities Fees
(Level II Fees)**

and

SCHOOL FACILITIES NEEDS ANALYSIS

**(These documents are available to view
at the District Support Services Center.)**

REGULAR MEETING
JUNE 12, 2018

**SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT
RESOLUTION NUMBER 23 - 2017-2018**

**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 **\$2.33** 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 had 57.3% yes votes on Measure H, a \$114 million local bond on November 8, 2016.*
 - b) *The existing capital facility debt is over 15% of the bonding capacity. The bonding capacity is \$177,526,268 and the capital facility debt is \$97,137,189 or 54.72%. The debt consists of GO bonds and COP financings.*

c) 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 131 are portables. This results in a total of 36.8% portables.

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 **\$2.51** 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 12, 2018 at the *Santa Maria Joint Union High School District, 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 **\$2.51** 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 unexpended 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 12th day of June, 2018 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 Drive

Santa Maria, CA 93455

Phone: (805) 922-4573

SCHOOL FACILITIES NEEDS ANALYSIS

Level 2 Developer Fee Study

March 2018

Mark Richardson, Superintendent



Facility Problem Solvers

Prepared by:
SchoolWorks, Inc.
8331 Sierra College Blvd., Suite 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 (2017/18) was 7,949 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 1,750 housing units 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 **\$2.51 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 \$7.66 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 \$3.79 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 24, 2018

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 **3b** (50% yes vote on a local bond), **3c** (over 15% debt) and **3d** (over 20% portables).

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:

(b) The District had 57.3% yes votes on Measure H, a \$114 million local bond on November 8, 2016.

(c) The existing capital facility debt is over 15% of the bonding capacity. The bonding capacity is \$177,526,268 and the capital facility debt is \$97,137,189 or 54.72%. 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 131 are portables. This results in a total of 36.8% 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 2017. 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 2017) 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	0.1764	0.1764

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
 (2017-18 through 2021-22)**

Dwelling Type	<u>5 Year Total</u>
All Types	1,750

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. The average number of housing units projected to be built per year is 350 units.

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 2023**

Grade Level	Student Yields for New Residential Dev.	Enrollment Projections
All Development		1750 Units
9-12	0.1764	309
Total		309

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 7,189 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	4/5	434	0	434
Pioneer Valley High	6	199	0	199
Totals for School Facility Projects:		3,627	70	3,697
Grand Totals		6,975	214	7,189

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. The capacity in this chart includes the new two story 14 classroom building at Santa Maria High (shown as projects 4/5) and the performing arts center at Pioneer Valley High which are currently in line for funding from the State School Building Program.

**Santa Maria Joint Union High
 Unhoused Students from Development Through 2023**

Grade Level	Students From New Housing	Total Enrollment through 2023	Space Needed	Capacity per SB 50	Space Available	Net Unhoused Students
	[1]	[2]	[3]	[4]	[5]	[6]
9-12	297	9,046	8,749	6,975	0	297
SDC	12	377	365	214	0	12
Total	309	9,423	9,114	7,189	0	309

- [1] Projected added enrollment through 2023 based on planned residential development
- [2] Based on SAB 50-01 methodology with 1750 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 2023 due to new housing developments

The "Total Enrollment through 2023" 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 enrollment 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 shown 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 309 new students projected from new developments, there are 309 (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 4.0% 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 special day classes (SDC).

Grant Amounts Projected for Unhoused Students			
<u>Grade Level</u>	<u>Students</u>	<u>Allowance</u>	<u>Grant</u>
9-12	297	\$15,838	\$4,703,886
SDC	12	\$22,189	\$266,268
TOTALS	309		\$4,970,154

The cost per student amounts include State funded allowances for required fire alarm and sprinkler requirements for new school projects as of January 2018.

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			Projected	Equivalent	Site
	<u>Acres</u>	<u>Students</u>	Unhoused	Sites	Acres
			<u>Students</u>	<u>Needed</u>	<u>Needed</u>
High School	40	1500	309	0.21	8.24
				TOTAL	8.24

For purposes of calculating the Level 2 Fee, the District will need 8.24 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 \$2,485,514. The total amount included for 50% of the total site acquisition costs is \$1,242,757.

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. Based on a review of current parcels available for sale within the district boundaries, this is a reasonable assumption for the current cost of land.

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 \$273,060 for high school sites. The total need is for 8.24 acres to be developed at a cost of \$2,250,014. The 50% eligible site development costs that can be included in the Level 2 computation totals \$1,456,538 and includes the allowance for general site development of \$331,530. 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	8.24	\$301,640	\$2,485,514	\$273,060	\$2,250,014	\$4,735,528
Totals	8.24		\$2,485,514		\$2,250,014	\$4,735,528
50% portion:			\$1,242,757		\$1,125,007	

General Site Development

	Acres	Allowance/ Acre	Base Cost	% Allowance	Added Cost	Total Cost
High School	8.24	\$18,827	\$155,134	3.75%	\$176,396	\$331,530
Totals	8.24					\$331,530

Total 50% Site Development Costs: \$1,456,538
Total 50% Land & Development Costs: \$2,699,294

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**
- 6. Debt payments for projects listed above**

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 expansions for the existing schools. A new high school will likely need to be planned to accommodate the increasing enrollments anticipated from new development.

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 \$2.51 per square foot, for residential units.

The average size housing unit built in the District in the past two years has averaged 1,744 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	297	\$15,838	\$4,703,886	\$1,242,757	\$1,456,538	\$2,699,294	\$7,403,180
SDC	12	\$22,189	\$266,268	\$0	\$0	\$0	\$266,268
Totals	309		\$4,970,154	\$1,242,757	\$1,456,538	\$2,699,294	\$7,669,448

New Housing Unit Area

Unit Type	Number of Units	Area per Unit	Total Area	Level 2 Fee \$ /Sq. Ft.
All	1,750	1,744	3,052,000	\$2.51
Totals	1,750		3,052,000	

[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 8.24 acres to be acquired

The grant amounts shown include the amounts allowed by OPSC for fire alarms and sprinklers as of January 2018.

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.

2. Voter Approved Bond Measure

District voters last approved a bond measure in 2016 in the amount of \$114 million to modernize the community's schools and build facilities. The new facilities will assist 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.

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 territory⁸. 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.⁹

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 \$5.03 per square foot, the local one-half share of which is **\$2.51** per square foot. Fees under other statutes apply to commercial and senior housing projects.

⁸ See Calif. Education Code Section 17620 *et. seq.* and Government Code Section 65995, *et seq.*

⁹ 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"¹⁰. Fees may not be used for regular maintenance, routine repair, inspection or removal of asbestos containing materials, or purposes of deferred maintenance, as defined¹¹.

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.

¹⁰ Educ. Code 17620(a)(1)

¹¹ 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 Fees¹².

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

¹² Generally, this requires a specific deed restriction.

spaces. Other funding sources are required to meet existing non-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 Board¹³.

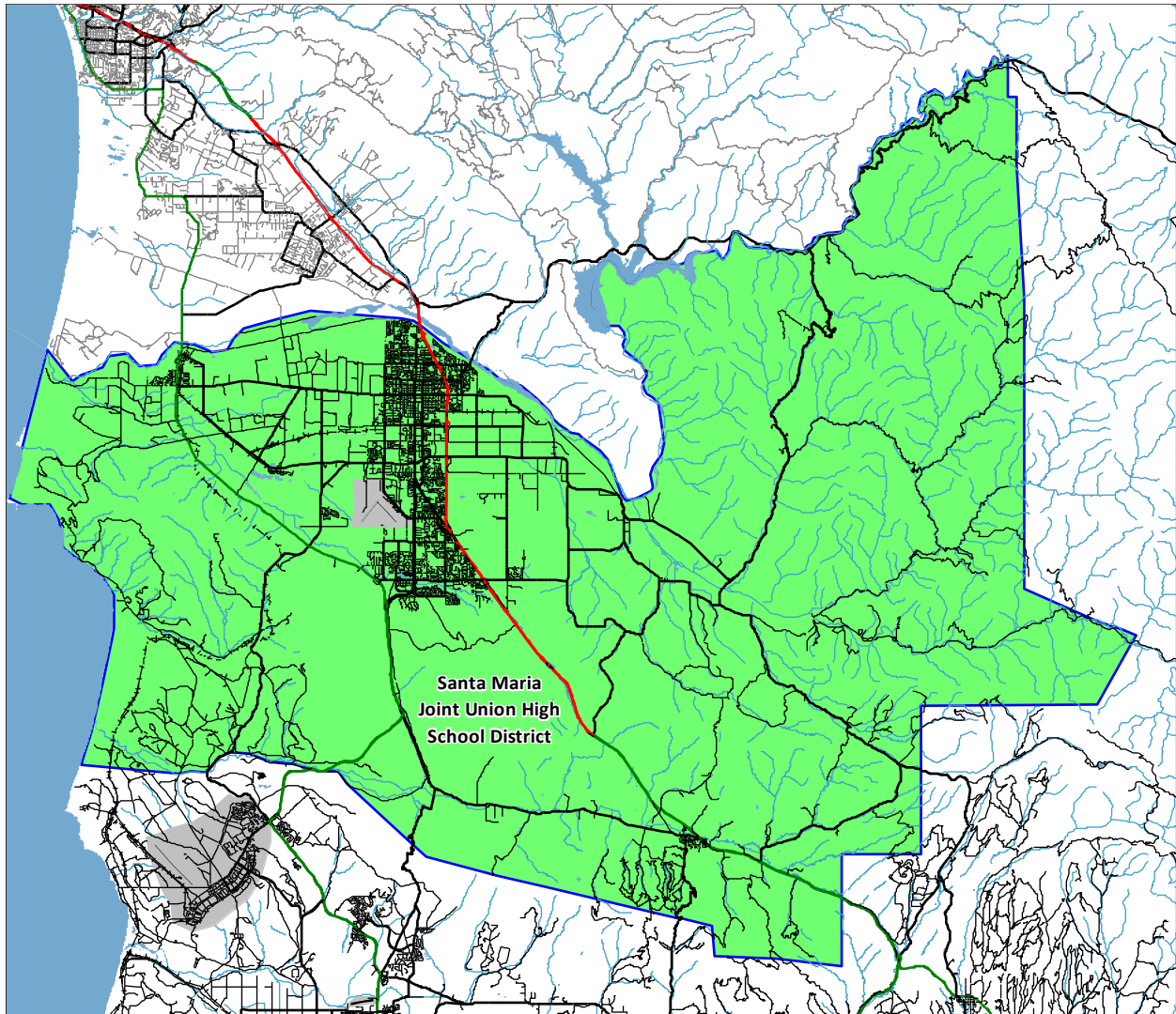
E. Conclusion

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.

¹³ 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):**
 - (b) The District had 57.3% yes votes on Measure H, a \$114 million local bond on November 8, 2016.
 - (c) The existing capital facility debt is over 15% of the bonding capacity.
 - (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.
- 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 \$2.51 per square foot of residential development. This is an increase of \$1.34 above the high school portion of the standard Level 1 Fee (30.77% of \$3.79 = \$1.17 Level 1 Fee)**

Respectfully Submitted,



Ken Reynolds
SchoolWorks, Inc.

Appendices

SCHOOL FACILITY NEEDS ANALYSIS 2018

Santa Maria Joint Union High School District

- *SAB 50-01 Enrollment Certification/Projection*
- *New Construction Eligibility (OPSC)*
- *Annual Adjustment to School Facility Program Grants*
- *Site Development Costs*
- *Assessed Value*
- *Capital Facility Debt*

STATE OF CALIFORNIA
ENROLLMENT CERTIFICATION/PROJECTION

SAB 50-01 (REV 05/09)

STATE ALLOCATION BOARD
 OFFICE OF PUBLIC SCHOOL CONSTRUCTION

SCHOOL DISTRICT	FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory)
COUNTY	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

Special Day Class pupils only - Enrollment/Residency

	Elementary	Secondary	TOTAL
Non-Severe			
Severe			
TOTAL			

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
K	/	/	/	/	/	/	/	/
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
TOTAL								

Part B. Pupils Attending Schools Chartered By Another District

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

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

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

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

	Elementary	Secondary	TOTAL
Non-Severe			
Severe			
TOTAL			

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
/	/	/	/	/	/	/	/

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 _____



Project Main Page

[Return to Search Results](#)

DSA eTracker: [03-116670](#)
 Application: 50/69310-00-007
 County: Santa Barbara
 District: Santa Maria Joint Union High
 Site: RIGHETTI (ERNEST) HIGH
 District Rep: Mr. Mark Richardson

[Details](#) [Fund Releases](#) [Budget Summary](#) [Transaction Detail](#) [Modernization Eligibility](#) [New Construction Eligibility](#)

District Code	Attendance Area	Original SAB Approval Date	Recent SAB Approval		
69310	0	2/27/2002	3/21/2018		
SAB 50-03 New Construction Eligibility Information New Construction Baseline Eligibility					
Grade Level:	K - 6	7 - 8	9 - 12	Non-Severe	Severe
Established Eligibility:	0	0	3648	53	19
SAB Approvals/Adjustments:	0	-1	-629	14	142
Remaining Eligibility:	0	-1	3019	67	161
SAB 50-03 Eligibility Document Status/Dates					
Status:	PM Complete				
Date Signed:	1/3/2001				
Date Received:	1/8/2001				
SAB Approval Date:	2/27/2002				

REPORT OF THE EXECUTIVE OFFICER
State Allocation Board Meeting, January 24, 2018

ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS

PURPOSE OF REPORT

To adopt the annual adjustment in the School Facility Program (SFP) grants based on the change in construction costs pursuant to the Education Code (EC) and SFP Regulations.

DESCRIPTION

This item presents the State Allocation Board (Board) with the annual adjustment to the SFP grants based on the statewide cost index for Class B construction. Each year the Board adjusts the SFP grants to reflect construction cost changes. In January 2016, the Board adopted the RS Means index for 2016 and future years. This item presents the 2018 annual adjustment to SFP grants based on the RS Means index.

AUTHORITY

See Attachment A.

STAFF ANALYSIS/STATEMENTS

At the January 2016 meeting, the Board adopted an increase to the SFP grants using the RS Means Construction Cost Index (CCI) as the statewide cost index for Class B construction.

The current rate of change between 2017 and 2018 for the RS Means Class B CCI is 4.17 percent. The chart below reflects the amounts previously adopted for 2017 compared to the potential amount for the new construction base grants.

			RS Means 4.17%
Grade Level	Regulation Section	Current Adjusted Grant Per Pupil Effective 1-1-17	<i>Potential Grant Per Pupil Effective 1-1-18</i>
Elementary	1859.71	\$11,104	\$11,567
Middle	1859.71	\$11,744	\$12,234
High	1859.71	\$14,944	\$15,567
Special Day Class – Severe	1859.71.1	\$31,202	\$32,503
Special Day Class – Non-Severe	1859.71.1	\$20,867	\$21,737

STAFF ANALYSIS/STATEMENTS (cont.)

The following chart shows the amounts previously adopted compared to the potential amount for the modernization base grants.

			RS Means 4.17%
Grade Level	Regulation Section	Current Adjusted Grant Per Pupil Effective 1-1-17	<i>Potential Grant Per Pupil Effective 1-1-18</i>
Elementary	1859.78	\$4,228	\$4,404
Middle	1859.78	\$4,472	\$4,658
High	1859.78	\$5,855	\$6,099
Special Day Class – Severe	1859.78.3	\$13,475	\$14,037
Special Day Class – Non-Severe	1859.78.3	\$9,015	\$9,391

In addition, the CCI adjustment would increase the threshold amount for Government Code Section 66452.6(a)(2) for the period of one year commencing March 1, 2018. The following chart shows the amount previously adopted for 2017 compared to the resulting threshold amount, upon approval of the proposed 2018 CCI adjustment:

	RS Means Effective 3-1-2017	RS Means Potential 3-1-2018
Resulting Amount	\$279,571	\$291,229

RECOMMENDATION

Adopt the increase of 4.17 percent for the 2018 SFP grants based on the RS Means Construction Cost Index as shown in Attachment B.

ATTACHMENT B

ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS
State Allocation Board Meeting, January 24, 2018

Grant Amount Adjustments

		Regulation Section	Current Adjusted Grant Per Pupil Effective 1-1-17	Current Adjusted Grant Per Pupil Effective 1-1-18
New Construction	Elementary	1859.71	\$11,104	\$11,567
	Middle	1859.71	\$11,744	\$12,234
	High	1859.71	\$14,944	\$15,567
	Special Day Class – Severe	1859.71.1	\$31,202	\$32,503
	Special Day Class – Non-Severe	1859.71.1	\$20,867	\$21,737
	Automatic Fire Detection/Alarm System – Elementary	1859.71.2	\$13	\$14
	Automatic Fire Detection/Alarm System – Middle	1859.71.2	\$18	\$19
	Automatic Fire Detection/Alarm System – High	1859.71.2	\$30	\$31
	Automatic Fire Detection/Alarm System – Special Day Class – Severe	1859.71.2	\$56	\$58
	Automatic Fire Detection/Alarm System – Special Day Class – Non-Severe	1859.71.2	\$39	\$41
	Automatic Sprinkler System – Elementary	1859.71.2	\$186	\$194
	Automatic Sprinkler System – Middle	1859.71.2	\$221	\$230
	Automatic Sprinkler System – High	1859.71.2	\$230	\$240
	Automatic Sprinkler System – Special Day Class – Severe	1859.71.2	\$588	\$613
	Automatic Sprinkler System – Special Day Class – Non-Severe	1859.71.2	\$395	\$411
	Modernization	Elementary	1859.78	\$4,228
Middle		1859.78	\$4,472	\$4,658
High		1859.78	\$5,855	\$6,099
Special Day Class - Severe		1859.78.3	\$13,475	\$14,037
Special Day Class – Non-Severe		1859.78.3	\$9,015	\$9,391
State Special School – Severe		1859.78	\$22,460	\$23,397
Automatic Fire Detection/Alarm System – Elementary		1859.78.4	\$137	\$143
Automatic Fire Detection/Alarm System – Middle		1859.78.4	\$137	\$143
Automatic Fire Detection/Alarm System – High		1859.78.4	\$137	\$143
Automatic Fire Detection/Alarm System – Special Day Class – Severe		1859.78.4	\$378	\$394
Automatic Fire Detection/Alarm System – Special Day Class – Non-Severe		1859.78.4	\$253	\$264
Over 50 Years Old – Elementary		1859.78.6	\$5,874	\$6,119
Over 50 Years Old – Middle		1859.78.6	\$6,212	\$6,471
Over 50 Years Old – High		1859.78.6	\$8,132	\$8,471
Over 50 Years Old – Special Day Class – Severe		1859.78.6	\$18,721	\$19,502
Over 50 Years Old – Special Day Class – Non-Severe		1859.78.6	\$12,519	\$13,041
Over 50 Years Old – State Special School – Severe		1859.78.6	\$31,201	\$32,502

ATTACHMENT B

ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS
January 2018

Grant Amount Adjustments

New Construction / Modernization / Joint-Use	Regulation Section	Current Adjusted Grant Per Pupil Effective 1-1-17	Current Adjusted Grant Per Pupil Effective 1-1-18
Therapy/Multipurpose Room/Other (per square foot)	1859.72 1859.73.2 1859.77.3 1859.82 1859.125 1859.125.1	\$182	\$190
Toilet Facilities (per square foot)	1859.72 1859.73.2 1859.82 1859.125 1859.125.1	\$326	\$340
New Construction Only			
Parking Spaces	1859.76	\$14,120	\$14,709
General Site Grant (per acre for additional acreage being acquired)	1859.76	\$18,073	\$18,827
Project Assistance (for school district with less than 2,500 pupils)	1859.73.1	\$6,791	\$7,074
Modernization Only			
Two-stop Elevator	1859.83	\$112,957	\$117,667
Additional Stop	1859.83	\$20,333	\$21,181
Project Assistance (for school district with less than 2,500 pupils)	1859.78.2	\$3,621	\$3,772
Facility Hardship / Rehabilitation			
Current Replacement Cost - Other (per square foot)	1859.2	\$362	\$377
Current Replacement Cost - Toilets (per square foot)	1859.2	\$653	\$680
Interim Housing – Financial Hardship (per classroom)	1859.81	\$37,231	\$38,784
Charter School Facilities Program - Preliminary Apportionment Amounts			
Charter School Elementary	1859.163.1	\$11,161	\$11,626
Charter School Middle	1859.163.1	\$11,816	\$12,309
Charter School High	1859.163.1	\$14,997	\$15,622
Charter School Special Day Class - Severe	1859.163.1	\$31,351	\$32,658
Charter School Special Day Class - Non-Severe	1859.163.1	\$20,966	\$21,840
Charter School Two-stop Elevator	1859.163.5	\$94,131	\$98,056
Charter School Additional Stop	1859.163.5	\$16,943	\$17,650



Determination of Average State allowed amounts for Site Development Costs

Elementary Schools			Original	Inflation	2009 Adjusted	Project	2009	
District	Project #	Acres	OPSC Site Development	Factor	Site Development	Year	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	2018 Adjustment \$248,896
Middle and High Schools			Original	Inflation	2009 Adjusted	Project	2009	
District	Project #	Acres	OPSC Site Development	Factor	Site Development	Year	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	2018 Adjustment \$234,162
Middle Schools:		260.7			\$49,447,897	Middle	\$189,704	\$234,162
High Schools:		418.6			\$92,610,814	High	\$221,217	\$273,060



SANTA BARBARA COUNTY
SCHOOL DISTRICT BONDING CAPACITY
 Estimated as of July 1, 2017

District	Total Gross Value ¹ (Fiscal year 2017-18)	Multiplier ²	Maximum Bonding Capacity	Principal Outstanding ³ (As of 7/1/17)
Santa Maria Joint Union High	14,202,101,418	1.25%	177,526,268	130,049,254

1 Total Gross Value represents the assessed taxable value for properties located within the County of Santa Barbara after all local exemptions have been applied (Ventura and San Luis Obispo properties are excluded). Total Gross Value = Total Net Taxable Value + Total Homeowner Exemption (include both Secured and Unsecured assessed values)

Source: County of Santa Barbara Auditor's Website - Property Tax Revenues Reporting System: <https://ac.co.santa-barbara.ca.us/loginpw.asp>. Search Property Tax --> Assessed Taxable Value for Fiscal Year 2017-18.

2 Pursuant to California Education Code §15102 & §15106. *Santa Barbara Unified retains percentages per agreement.

3 Principal Outstanding from general obligation bonds.

Source: County of Santa Barbara Property Tax Division. School Bond Tax Levy Summary Report: Bond Principal Outstanding Balances - Actual (Fiscal Year 2017-18)

Important Note: For bond authorizations passed with 55 percent voter approval (Proposition 39) there is an additional rate constraint of \$30 per \$100,000 of net assessed value for elementary and high school districts and \$60 per \$100,000 of net assessed value for unified districts.

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT
 NOTES TO FINANCIAL STATEMENTS, continued
 JUNE 30, 2017

NOTE 8 – LONG-TERM DEBT

A schedule of changes in long-term debt for the year ended June 30, 2017 consisted of the following:

	Balance July 01, 2016	Additions	Deductions	Balance June 30, 2017	Balance Due In One Year
Governmental Activities					
General obligation bonds	\$ 87,549,253	\$ -	\$ 4,500,000	\$ 83,049,253	\$ 4,415,000
Unamortized premium	5,805,957	-	507,489	5,298,468	507,489
Accreted interest	4,833,990	890,679	-	5,724,669	-
Total general obligation bonds	98,189,200	890,679	5,007,489	94,072,390	4,922,489
Certificates of participation	3,403,031	-	338,232	3,064,799	368,468
Early retirement incentive	154,998	-	122,500	32,498	22,500
Compensated absences	508,719	-	47,351	461,368	-
Loans payable	14,482	-	14,482	-	-
Net OPEB obligation	11,028,787	392,015	-	11,420,802	-
Net pension liability	70,557,458	8,385,487	-	78,942,945	-
Total	\$ 183,856,675	\$ 9,668,181	\$ 5,530,054	\$ 187,994,802	\$ 5,313,457

Payments for general obligation bonds are made in the Bond Interest and Redemption Fund.

Payments for certificates of participation are made in the General Fund and Capital Facilities Fund.

Payments for early retirement incentive are made in the General Fund.

Payments for compensated absences are typically liquidated in the General Fund and the Non-Major Governmental Funds.

Payments for loans payable are made in the General Fund.

A. Compensated Absences

Total unpaid employee compensated absences as of amounted to \$461,368. This amount is included as part of long-term liabilities in the government-wide financial statements.

B. Certificates of Participation

The annual requirements to amortize the certificates of participation outstanding at June 30, 2017 are as follows:

Year Ended June 30,	Principal	Interest	Total
2018	\$ 368,468	\$ 96,636	\$ 465,104
2019	393,646	84,458	478,104
2020	413,601	71,504	485,105
2021	444,290	57,814	502,104
2022	479,009	43,095	522,104
2023 - 2024	965,785	38,423	1,004,208
Total	\$ 3,064,799	\$ 391,930	\$ 3,456,729

REGULAR MEETING
June 12, 2018

APPENDIX E
General Fund
2018-19 Adopted Budget

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT 2018-19 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.

The District's Governing Board is 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 2018/19 LCAP plan. The District's budget that is being proposed for adoption for the 2018/19 year reflects the goals and expenditures contained in its LCAP plan. The State Board of Education made some significant revisions for the LCAP plan template for use beginning in the 2017/18 year; one of those is that the plan is now for a static three-year period.

The May Revision is the last revision required under the law for the Governor to propose his budget for the State for the 2018-19 year. In his May Budget, the Governor's revenue forecast through 2018-19 increased by \$8 billion. The calculations for COLA are complete, and it's a modest increase from the 2.51% projected in January, to 2.71% plus the proposed augmentation for a total increase to 3.00% as of the May Revision. The COLA factor is only applied to the LCFF target base grant, and categorical programs that are outside the LCFF, including special education and child nutrition. Full implementation of the LCFF funding is included in the May Revision, two years ahead of schedule.

Several items of concern which have been discussed in previous budget versions remain unaddressed in the May Revision. 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 2017/18 and will not be met in 2018/19. 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 and, to a lesser extent, employees, for funding of PERS and STRS retirement systems in California, with no funding support from the State, either within the LCFF model, or separate from the LCFF. In April, CalSTRS reported that as of its July 1, 2017 actuarial study, the unfunded liability had increased from \$96.7 billion to \$107.2 billion. Year to year changes in the rates that the District pays for contributions to STRS and PERS range from 1.85% for STRS to 2.531% for PERS. Given these increased costs, at full implementation the LCFF model will not meet the commitment to restore purchasing power to districts equal to their 2007/08 levels.

Thirdly, the Governor's May Revision budget proposes another round of "one time" discretionary funding totaling over \$2 billion for school districts, county offices, and charter schools, which amounts to about \$344 per ADA.

Finally, even though there is additional funding in the May Revision, there are concerns about sustainability. The national economy is characterized by change and uncertainty: Inflation rate rises may be on rise as tax cuts and the recently enacted federal budget will increase the federal deficit. Import tariffs on steel and aluminum could result in tariffs on U.S. exports to other countries. Conflict in the middle east could affect the supply of oil. The Cadillac Tax in the

Affordable Care Act has been further delayed until January 2022, and there's still pressure to change and attempts to repeal the act. California's diverse economy and large size are contributing factors in the state's growth last year. The state's General Fund revenue gains are being attributed to short-term personal and corporate income gains due to the 2017 stock market rally and the federal tax cut enacted last December. Despite strong revenues the Governor warns that California may soon face an economic downturn, noting that California's economic recovery has lasted four years longer than average and encourages LEAs to practice fiscal prudence. With LCFF fully funded in FY 18-19, next year's LCFF growth estimates will be limited to discretionary COLA adjustments.

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT 2018-19 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 "2017-18 Estimated Actuals" columns in the District's 2018-19 Adopted Budget.

ENDING FUND BALANCE		Unrestricted	Restricted	Total
A)	As of 2017-18 2nd Interim Revision ("Projected Year Totals")	\$ 3,531,674	\$ 1,497,407	\$ 5,029,081
	CHANGES IN REVENUES:			
	LCFF State Aid - decrease based on P-2 FCMAT Calculator	(1,091,780)		(1,091,780)
	Increase Property Tax Revenue based on P-2 attendance	729,061		729,061
	Adjust CTEIG revenue (reimburse, based on increased exp)		(33,790)	(33,790)
	Adjust CCPT Revenue per actuals, matched with expense		(3,901)	(3,901)
	Adjust AG Career Tech Grant, matched with expense	1,685	6,816	8,501
	Adjust Carl Perkins Grant, matched with expense		18,744	18,744
	Misc individual local grants, matched with expense	32,768	5,413	38,181
	Rebate Clear Result Lighting, matched with expense		3,520	3,520
	Change in Ongoing Major Maint. contributions revenue net of expenses		(105,000)	(105,000)
B)	Total Increases (Decreases) in Revenues	(328,266)	(108,198)	(436,464)
	CHANGES IN EXPENDITURES and TRANSFERS			
	Increased expense for City of Santa Maria and Golden State Water	19,700		19,700
	LCAP Plan decrease per P-2 ADA year-end est. actuals	(90,931)		(90,931)
	Misc individual local grants, matched with revenue	32,768	5,413	38,181
	Rebate Clear Result Lighting, (See revenue above)		3,520	3,520
	Maint. & Ops. / Ongoing Major Maint., adjust based on actuals	(179,705)	(105,000)	(284,705)
	Adjust CTEIG expenses to match revenue		(33,790)	(33,790)
	Adjust CCPT expenses (see revenue above)		(3,901)	(3,901)
	Adjust CCPT capital outlay expenses		(24,412)	(24,412)
	Adjust AG Career Tech Grant expenses (see revenue above)		6,816	6,816
	Adjust Carl Perkins Grant expenses (see revenue above)		18,744	18,744
	Prop 39 Clean Energy adjust for misc services based on actuals		22,557	22,557
C)	Total Increases (Decreases) in Expenditures and Transfers	(218,168)	(110,052)	(328,220)
	As of 2018-19 Budget Adoption ("2017-18 Estimated Actuals")	\$ 3,421,576	\$ 1,499,262	\$ 4,920,838
	(A + B - C)	3,421,576	1,499,262	4,920,838
		(0)	(0)	\$ (0)

The District's 2018-19 Adopted Budget

REVENUES:

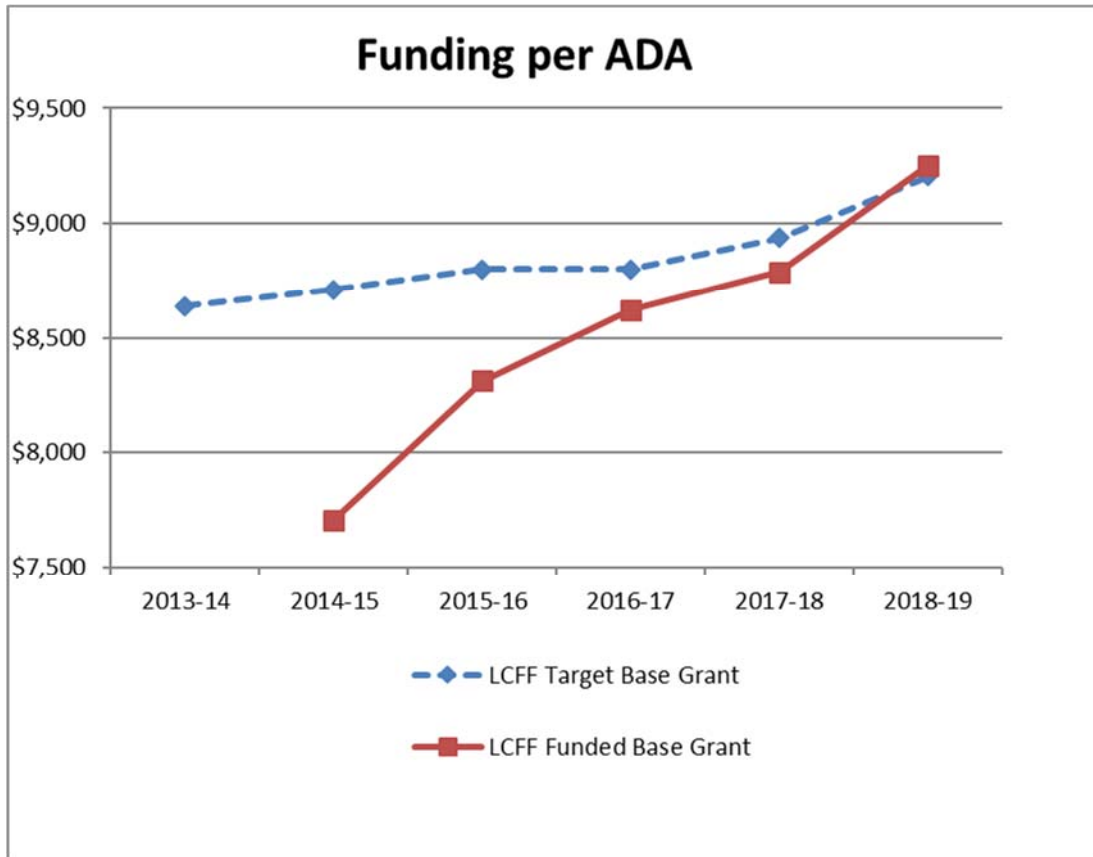
LCFF Sources

For the District's 2018-19 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 2017-18 Estimated Actuals in the components of LCFF revenue is summarized in the table below.

	2017-18 Estimated Actuals	2018-19 Budget	Difference
LCFF State Aid Funding			
Base Grant	\$ 65,608,424	\$ 71,730,468	\$ 6,122,044
Supplemental/Concentration Grant	14,983,947	18,192,183	3,208,236
Total LCFF State Aid	80,592,371	89,922,651	9,330,280
Property Tax Transfer SBCEO for Special Education	1,545,284	1,545,284	-
Total Revenues, LCFF Sources	<u>\$ 82,137,655</u>	<u>\$ 91,467,935</u>	<u>\$ 9,330,280</u>
Funded LCFF <u>Base Grant / ADA:</u>	<u>\$ 8,779</u>	<u>\$ 9,252</u>	<u>\$ 473</u>
Funded ADA	7,473	7,753	

The California Department of Finance provides the data for the factors to use in the LCFF simulator tool. For 2018-19, these include a COLA adjustment to the *target* base grant per ADA for the District's 9-12 grade span of 3.00% for 2018-19, and fully closing of gap funding percentage at 100%. 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 2017-18, the District's percentage was 75.02%. For the 2018-19 budget year, this average is projected to increase to 75.70%. 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, target and funded target, is presented on the following page.



Federal Revenues

Federal revenues are revised to decrease project award amounts or eliminate revenue attributable to prior year unused carryovers.

Year to year changes in Federal revenues are summarized below:

2017-18 Estimated Actuals	\$ 5,050,342
2018-19 Budget Year	
Title I	< 451,629>
Title II	< 35,407>
Title III Immigrant & LEP	< 173,956>
Migrant	< 67,835>
Carl Perkins	< 963>
LEA Medi-Cal Billing	< 200>
Decrease in Federal Revenues for 2018-19	<u>\$ < 729,990></u>
 Total Federal Revenues 2018-19 Budget Year	 <u>\$ 4,320,352</u>

State Revenues

Year to year changes in State revenues are summarized below:

2017-18 Estimated Actuals \$ 9,180,141

2018-19 Budget Year

Increased one-time discretionary funding \$344 / ADA estimated in 2018-19	\$ 2,560,048
CTEIG grant, adjust earned revenue based on eligible expenditures (half of the grant has already been received in cash)	<1,610,097>
Removed 17-18 one-time discretionary funding	<1,520,656>
Eliminate Prop 39 Clean Energy Jobs Act	<446,106>
Eliminate California Career Pathways Trust (CCPT)	<114,009>
Revise Lottery funding	<67,566>
Revise Ag Incentive to remove supplemental grant that occurred in 2017-18	<28,548>
Other State Revenue	<u><23,230></u>

Decrease in State Revenues for 2018-19 \$ <1,250,164>

Total State Revenue 2018-19 Budget Year \$ 7,929,977

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 has been the District's practice to budget local revenue when actually received. Projected changes in Local Revenues from 2017-18 amounts are summarized below:

2017-18 Estimated Actuals:	\$ 3,370,309
2018-19 Budget Year:	
E-Rate reimbursements, report as income (accounting rules requirement), revenues will be net zero after expense	\$ 452,852
Increase interest based on projections	31,300
Adjust for facility use & transportation trip revenues based on prior year actuals	13,364
Remove one-time solar project	<105,000>
Remove misc. grants and donations	<65,698>
Remove CAPP grant revenues	<56,124>
Remove AHC AWET mini-grants	<20,000>
All other changes in local revenues	<23,966>
Remove Clean Energy Jobs Act	< 3,520>
Increase in Local Revenue for 2018-19	<u>\$ 223,208</u>
Total Local Revenue 2018-19 Budget Year	<u>\$ 3,593,517</u>

TOTAL REVENUES HAVE INCREASED BY: \$ 7,573,334

EXPENDITURES:Salaries, Wages, and Benefits

Projected expenditures for salaries, wages, and benefits total \$79.69 million in the 2018-19 budget year. This total amounts to 76% of the District's total expenditures. Of this amount, \$10.09 million is budgeted in the LCAP plan. In total, salaries, wages, and benefits increase by \$2,075,924 from the estimated actuals. Components of this increase, by bargaining unit/employee group, are detailed in the tables following.

CERTIFICATED	FTE	COST
Increased cost for step/column movement including statutory benefits		\$ 621,193
Increased costs due to 1.85 percentage point increase in STRS		667,438
Increased costs due to 2.531 percentage point increase in PERS (15 members of Certificated staff are in the PERS retirement system)		38,339
Savings from decrease in Work Comp rate by 1.014 percentage points		(307,269)
Remove off schedule payment		(389,620)
Changes in extra pay assignments for stipends, department chairs		(5,993)
New staffing:		
Psychologists	3.00	306,280
Teachers	10.60	878,142
Changes associated with non-position pay:		
Ag extra days		5,915
Coaching stipends		(9,663)
Reduce substitutes & hourly		(166,174)
CERTIFICATED total	13.60	1,638,589

CLASSIFIED	FTE	COST
Increased cost for step/column movement including statutory benefits		\$ 274,605
Increased costs associated with vacation and/or longevity increments		\$ 36,245
Increased costs due to 2.531 percentage point increase in PERS		369,397
Increased costs due to 1.85 percentage point increase in STRS		2,925
Savings from decrease in Work Comp rate by 1.014 percentage points		(109,189)
Remove off schedule payment		(153,552)
New staffing:		
LVN Health Assistant	0.80	27,121
Student Data Specialist	1.00	46,873
Translator	1.00	40,898
Changes associated with non-position pay		
ELPAC (previously CELDT) testing (hourly)		(46,226)
Maintenance, operations, transportation overtime/extra hours		(96,472)
CLASSIFIED total	2.80	\$ 392,627

MANAGEMENT/CONF	FTE	COST
Increased cost for step/column movement including statutory benefits		\$ 14,826
Increased costs due to 2.531 percentage point increase in PERS		61,630
Increased costs due to 1.85 percentage point increase in STRS		56,960
Savings from decrease in Work Comp rate by 1.014 percentage points		(44,576)
Remove off schedule payment		(55,749)
New Staffing:		
Facilities Planner	1.00	99,892
Savings from retirements/replacements and projected lower costs		(19,049)
MANAGEMENT/CONF total	1.00	\$ 113,933
OTHER ITEMS	FTE	COST
Retirees:		
Decrease, post-employment retirement benefits		(56,726)
Decrease, early retiree incentive pymts		(12,500)
OTHER ITEMS total	-	\$ (69,226)

Books and Supplies, Services, Capital Outlay

In total, expenditures for Books and Supplies, Services, and Capital Outlay **decrease** by \$1,939,769 from the estimated actuals, as shown in the table below:

SUPPLIES, SERVICES, CAPITAL OUTLAY		
Remove expenditure items in 2017/18 that are non-recurring for 2018/19:		
Expenditures supported by funding from the 2015-16 Discretionary Block Grant including textbooks, technology, equipment, professional development		\$ 1,106,216
Expenditures related to carryover of prior year's unused grants and/or ending balances		4,482,817
Expenditures for specific services, capital outlay purchases, or projects		
RHS Barrier Removal, ADA assessment / ADA improvements		168,688
RHS Well Pump repairs		32,255
All Sites Solar Project		114,423
Bus purchased with 17-18 one-time funds		181,101
MAA Medi-Cal Administrative Activities		152,726
Note: although budgeted in 2017/18, amounts attributable to any of the above items which remain unspent when the District completes its year end closing for the 2017/18 year, will be included in the District's 2018/19 1st Interim Revised Budget.		
Subtotal (decrease) removal of non-recurring expenditures		\$ (6,238,226)
Expenditures in the 2018/19 Adopted Budget		
Increases other than staffing, in support of the 2018-19 LCAP Plan		2,462,244
Carl Perkins CTE Grant		3,380
Prop 39 California Clean Energy projects		(379,738)
Special Education, reduced costs for non-public school student placements (moved to transfer between agencies)		(225,729)
Special Education, cover ongoing increases in contract services		59,224
SISC Property & Liability Insurance increased rates		160,313
Transportation Home to School & Special Education (removed prior year bus purchase)		23,158
Increases to school site budgets based on ADA		137,508
E-RATE core switch replacement (see local revenue)		452,852
Increase IT licensing and maintenance agreements, computer equipment needs		294,950
Capital Outlay with 18-19 one-time discretionary funds		1,310,048
All other departmental adjustments		247
TOTAL CHANGE IN SUPPLIES, SERVICES, CAPITAL OUTLAY		\$ (1,939,769)

Other Outgo (debt service) and Transfers of Indirect Costs **increased** \$155,190

TOTAL EXPENDITURES HAVE INCREASED BY: \$ 291,345

OTHER FINANCING SOURCES/USES The District continues to budget a \$375,000 transfer to the District's Deferred Maintenance Fund.

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

Total Revenues have <i>increased</i> by:	\$ 7,573,334
Total Expenditures have <i>increased</i> by:	291,345
Total Other Financing Uses have neither increased or decreased:	<u>0</u>

Total change of “Increase (Decrease) in Fund Balance”: \$ 7,281,989

The District’s Fund Balance:

- Note that this proposed budget reflects significant decreases in expenditures due to the presence of a large value of non-recurring items in the preceding year “estimated actuals”. Any of these items that remain unspent when the District closes its books for the 2017-18 school year, will be re-budgeted when the District prepares its First Interim Revised budget in the fall.
- After providing for non-spendable components, and the 3% statutory minimum reserve for economic uncertainties, the District’s ending available unappropriated General Fund balance is \$2,008,792. Of this amount \$1,250,000 is one-time monies not budgeted in expenditures.
- 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.
- The next budget event to happen will be the official adoption of the State’s budget for the 2018/19 year, which should occur in mid- to late June. SSC, the organization that many school districts state-wide rely on for the latest information on school finance.

Santa Maria Joint Union High School District			
2018/19 ADOPTED BUDGET- MULTI YEAR PROJECTION - GENERAL FUND			
		2018/19	2019/20
			2020/21
		Total	Total
		Total	Total
	Current year enrollment	8,249	8,452
	Projected Actual ADA	7,722	7,912
	Projected Funded ADA (greater of curr or prior yr)	7,722	7,912
Beginning Balance		4,920,838	6,907,320
Revenues			
	LCFF Sources	91,467,935	96,460,890
	Federal Revenues	4,320,352	4,320,352
	State Revenues	7,929,977	4,727,251
	Local Revenues	3,593,517	3,593,517
Total Revenues		107,311,781	109,102,010
Expenditures			
	1000 Certificated Salaries	40,821,186	41,736,690
	2000 Classified Salaries	16,823,797	17,054,801
	3000 Employee Benefits	22,054,542	23,464,083
	4000 Books & Supplies	6,674,701	8,077,739
	5000 Services and Other Operating	14,232,760	14,696,022
	6000 Capital Outlay	3,389,136	313,300
	Other Outgo, debt service, State Sp. School	1,117,416	726,490
	Direct Support/Indirect Cost	(163,237)	(163,237)
Total Expenditures		104,950,299	105,905,886
Operating Surplus/(Deficit)		2,361,482	3,196,124
	Transfers In	-	-
	Special Rsrv Fd - Facility projects	-	-
	Special Rsrv Fd - Def Maint projects (prev sweep)	-	-
	Transfers Out	(375,000)	(375,000)
Increase (Decrease) in Fund Balance		1,986,482	2,821,124
Ending Fund Balance		6,907,320	9,728,443
Components of Ending Fund Balance			
	Nonspendable (revolving cash, stores, prepaid exp)	239,506	239,506
	Economic uncertainty reserve	3,159,759	3,188,427
	Restricted programs ending balances	1,499,262	1,499,262
Unappropriated amount, General Fund 01		2,008,793	4,801,248
Unappropriated amount, Special Reserve Fund 17		1,232,268	1,238,429
Total available unappropriated amounts		3,241,061	6,039,677

All ongoing sources of Revenues and Expenditures from the 2018/19 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.

	2018-19	2019-20	2020-21
LCFF State Aid Funding			
Base Grant	\$ 71,730,468	\$ 75,361,990	\$ 77,371,453
Supplemental/Concentration Grant	18,192,183	19,553,616	20,077,503
Total LCFF State Aid	89,922,651	94,915,606	97,448,956
Property Tax Transfer SBCEO for Special Education	1,545,284	1,545,284	1,545,284
Total Revenues, LCFF Sources	\$ 91,467,935	\$ 96,460,890	\$ 98,994,240
Funded LCFF <u>Base Grant</u> / ADA:	\$ 9,252	\$ 9,488	\$ 9,741
Funded ADA (includes COE)	7753	7943	7943

- In 2019/20, revenues from LCFF sources **increase** from 2018/19 by \$4,992,955. Of this amount, \$1,361,433 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 \$9,443
- In 2020/21, revenues from LCFF sources **increase** from 2019/20 by \$2,533,350. The amount of the increase attributable to the District’s FRPM/EL population is \$523,887. The estimated funded LCFF base grant per ADA is \$9,696.

Federal Revenues

- As of budget adoption, Federal Revenues amount to \$4,320,352, and are projected to remain unchanged for the next two subsequent years.

State Revenues

- In 2019/20 State Revenues **decrease** by \$3,202,726 from 2018/19, as follows:
 - One Time Revenues \$2,560,048
 - CTEIG Calif. Career Tech Ed grant; the amount of revenue the District can receive is based on qualifying expenditures \$642,678
- In 2020/21 State Revenues remain unchanged from 2019/20.

Local Revenues

- Local Revenues include interest earnings, facility use fees, a transfer of Special Ed appropriations from SELPA, 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.
- For both subsequent years, Local Revenues remain unchanged from 2018/19

EXPENDITURES

Salaries, wages and benefits:

- Step and Longevity increases for all employees of \$1,008,391 for 2019/20 and \$864,544 for 2020/21.
- 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 \$96,749 in 2019/20 and \$83,689 in 2020/21.
- In 2019/20 there is an **increase** of \$419,145 for approximately 7 certificated FTEs in support of increased enrollment. For 2020/21 enrollment remains unchanged from 2019/20.
- Legislation passed in 2016 has resulted in statutory rate increases for the District's contribution to the State Teachers' Retirement System. The rate increases for the subsequent year is 1.85 percentage points in 2019/20 in the amount of \$730,441. There is an increase of \$449,583 in 2020/21 due to a .97% increase in the percentage points.
- 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 2019/20 the increase is 2.74 percentage points, or \$382,988 in expense. For 2020/21 the increase is \$382,988 corresponding to a rate increase of 2.70 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 \$111,834 in 2019/20, and increases by \$132,913 in 2020/21.
- In total, costs for salaries, wages, and benefits **increase** from 2018/19 to 2019/20 by \$2,556,050 and **increase** from 2019/20 to 2020/21 by \$1,746,339. 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 2019/20 or 2020/21, as these are subject to negotiations.

SALARIES, WAGES, AND BENEFITS					
2018/19 balance					\$ 79,699,524
2019/20					
	Step-column costs			1,008,391	
	STRS rate increase 1.85 percentage points			730,441	
	PERS rate increase 2.74 percentage points			382,988	
	Staffing increases due to increased enrollment			419,145	
	Projected change in retiree health pay as you go			111,834	
	Estimated annual retirements 5 FTE's			(96,749)	
Total change from 2018/19 to 2019/20					2,556,050
2019/20 balance					82,255,574
2020/21					
	Step-column costs			864,544	
	STRS rate increase 0.97 percentage points			449,583	
	PERS rate increase 2.70 percentage points			382,988	
	Staffing increases due to increased enrollment			-	
	Projected change in retiree health pay as you go			132,913	
	Estimated annual retirements 5 FTE's			(83,689)	
Total change from 2019/20 to 2020/21					1,746,339
2020/21 balance					\$ 84,001,913

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			
2018/19 balance			\$ 24,296,596
2019/20			
	Provision for increased LCAP expenditures to serve FRPM/EL population, based on projected increase in supplemental/concentration grant	\$ 1,361,433	
	School site allocations based on ADA increase	14,250	
	Elections Expense (occurs every other year in even-numbered years)	(45,000)	
	Actuarial & self insurance study (bi-annual)	(7,500)	
	Adjust projected expenditure in restricted programs subject to available t	(579,993)	
	Eliminate expenditures related to CTEIG	(642,678)	
	Eliminate expenditures related to One Time Block Grant	(1,310,048)	
Total change from 2018/19 to 2019/20			(1,209,536)
2019/20 balance			23,087,060
2020/21			
	Provision for increased LCAP expenditures to serve FRPM/EL population, based on projected increase in supplemental/concentration grant	523,887	
	School site allocations based on ADA increase	-	
	Elections Expense (occurs every other year in even-numbered years)	45,000	
	Actuarial & self insurance study (bi-annual)	7,500	
	Adjust projected expenditure in restricted programs subject to available t	338,349	
Total change from 2019/20 to 2020/21			914,736
2020/21 balance			\$ 24,001,796

Other Outgo

- Included in Other Outgo is the District's required payment for Certificates of Participation ("COPs") debt service, in support of a variety of energy management, conservation, and retrofit projects throughout the District. Amounts projected in accordance with debt service schedules are \$374,412 in 2018/19, \$384,970 in 2019/20 and \$405,620 in 2020/21.
- Also included in Other Outgo are amounts paid to the Santa Barbara County Education Office for services provided under the Districts LCAP plan. These services include support the Cal-Safe program and shared costs for Fitzgerald Community School. The total amount included in the budget year for these services is \$335,000 and it remains unchanged in the two subsequent years.

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.
- 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.

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT			
2018-19 ADOPTED BUDGET			
SB 858 RESERVE REQUIREMENT CALCULATIONS & DISCLOSURE			
	2018-19	2019-20	2020-21
Minimum Reserve Level Required (3%)	\$ 3,159,759	\$ 3,188,427	\$ 3,268,576
Reserve Level in District's budget	\$ 3,159,759	\$ 3,188,427	\$ 3,268,576
Amount in excess of minimum			
General Fund	2,008,793	4,801,248	7,869,673
Fund 17 Special Reserve	1,232,268	1,238,429	1,244,621
Total amount in excess of minimum	\$ 3,241,061	\$ 6,039,677	\$ 9,114,294
<p>In the General Fund, amounts in excess of the minimum reserve level are needed to provide for future possible financial settlements with the District's employee groups. Negotiations are not settled for the budget year; future years are subject to re-openers</p>			
<p>In Fund 17, Special Reserve, amounts in this fund are earmarked for costs associated with opening a new school, that cannot be paid with bond funds. Recommendation is that the Board take action at a future date to commit these funds for that purpose.</p>			