February 2024

SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT

FACILITIES IMPLEMENTATION PLAN 2024

Report to the Board of Trustees on Analysis, Recommendations, and Financing of Proposed School Facility Improvements

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SECTION 1

EXECUTIVE SUMMARY

Caldwell Flores Winters, Inc. (CFW) is pleased to present the 2024 Facilities Implementation Plan to the Santa Maria Joint Union High School District (District) Board of Trustees (Board). This report reviews the integration of the District's vision for educational initiatives with the ongoing educational and facilities program and includes an analysis of existing and proposed programs and facilities to enhance the scope of the District's improvement and construction program. The plan prioritizes 21st Century learning environments at school sites, addresses the need for a new comprehensive high school, and presents results for Board consideration of improvements by school, type of improvement, estimated cost, and proposed phasing.

There are three comprehensive high schools in the district: Ernest Righetti, Pioneer Valley, and Santa Maria High Schools, along with one continuation high school, Delta. Additionally, there is a CTE Center and an Ag Farm site offering courses in five pathways, available to all district students who meet the course requirements. The three comprehensive high schools have exceeded their planned capacity to house students in permanent classroom facilities, requiring a significant number of portable classrooms to have been added in the interim to each site. Based on the number of permanent classrooms and support facilities that have been constructed at each site, the district aims to maintain a maximum enrollment of no more than 2,000 students at each school.

The District has made significant progress in building new permanent classrooms, modernizing older classrooms into 21st Century learning spaces and incorporating modern technology into the overall instruction program. Based on an assessment of the general condition of facilities at each site, their capacity to accommodate the current and projected enrollment, and the need for improvements to adequately house the educational program, the following improvement program is proposed. The program would construct a new additional comprehensive high school to reduce overall overcrowding, modernize existing permanent classrooms and replace interim portable facilities remaining at Pioneer Valley and Santa Maria High with modern 21st Century learning environments, and complete the remaining support facilities required at Righetti High.

A new 1,500 student comprehensive high school is proposed that will feature general purpose classrooms, and specialized spaces for instruction of science, math, career and college pathway instruction, music, digital and visual arts comparable to those at our newer facilities. The school will feature a full-service gymnasium and athletic fields with locker rooms and restrooms, and adequate parking for faculty, staff, students, and guests. New administration facilities will include a reception and visitor waiting area, parent/faculty conference rooms, a nurse and student health office with a dedicated restroom, and offices for the principal, counselors, psychologist, and other staff. The school will be provided with a modern library with a career center, a work room, a student store, office space, restrooms, breakout rooms, and

additional spaces for storage and technology use. A multipurpose cafeteria space will feature a cooking kitchen, an assembly and indoor eating area, performance space as well as equipment storage, dry storage for the kitchen, and restrooms. Additional sports facilities will be provided to include a football facility, baseball/softball fields, and tennis courts with appropriately sized bleachers, track, and associated facilities.

The existing high schools will receive remaining improvements to accommodate modern and equitable 21st Century learning environments at each school site. Existing permanent classrooms will be modernized and remaining portable facilities will be replaced at Pioneer Valley and Santa Maria High with modern 21st Century learning environments. In addition, Ethel Pope Auditorium will be modernized and upgraded to meet the new campus needs. To complete the major transformation of Righetti, new support facilities will be completed. A cost estimate is provided in Appendix A.

Overall, a $285.9 million plan of improvement is proposed to be implemented over two phases. Multiple sources of funds have been identified to spread the cost of improvements over existing fund balances, state reimbursements and grants, developer fees, and additional local funding, including the passage of a local general obligation bond to provide the local match for state grants and the construction of additional school facilities at each site. Priority is proposed to be given to reduce the current overcrowding at each of the school sites through the immediate construction of the proposed new high school. Thereafter, improvements are proposed to be undertaken at each of the remaining high school sites as provided for above. Recommendations are provided for specifications to be adopted for the design of the required school facilities, proposed improvements, the method of finance, and for the periodic review of the proposed facilities implementation plan.

SECTION 2

EDUCATIONAL PROGRAM

This plan builds upon the 2014 Reconfiguration and Facilities Program (Plan) adopted by the Board and the subsequent Master Schools Improvement Plan update in 2016 to the Plan. The Plan addresses the District goals as well as the educational vision and programs. The District has implemented pathways at each of the school sites with capstone courses offered at the new Mark Richardson CTE and Ag Farm Center. The District desires to have classrooms that continue to support the pathway programs as well as core instructional programs. These learning environments provide students the opportunity to actively participate in learning through hands on activities and creating projects that demonstrate mastery of the curriculum. The goal of these learning environments is for students to have a place in which they collaborate with others to solve problems, create solutions for the problems, and then construct projects related to the standards they are learning.

In the adopted 2014 Reconfiguration and Facilities Program, the District standardized specifications for the design and construction of 21st Century Learning Environments for all schools. These learning environments foster creativity, problem solving, communication and collaboration and provide the flexibility and mobility required to promote 21st Century instructional strategies such as collaboration, creativity, communications, and problem solving. These 21st Century improvements need to be expanded to the remaining schools and classrooms to provide equity in classroom environments for all teachers to have the tools to provide the instructional shifts necessary to improve the instructional core in the classroom which is the educational focus of the District. When used to the fullest potential, the provision of 21st Century Learning Environments provide a setting for teachers to become the facilitators of learning, guiding students to learning mastery and providing opportunities for students to engage with other students in projects that require application of knowledge and skills, seek out answers to questions and problems, and create projects that demonstrate mastery of the standards thereby becoming masters of their own learning.

2.1 DISTRICT GOALS

The District's vision is "Every student succeeds and is prepared for college, career and life". The mission of the District is to "Prepare all learners to be productive citizens and college/career ready by providing challenging learning experiences and establishing high achievement expectations". The three Guiding Principles for the District are 1) Safety of students and staff, 2) Student learning and well-being, 3) Equitable access to quality education.

There are three comprehensive high schools in the district: Ernest Righetti, Pioneer Valley, and Santa Maria High Schools, along with one continuation high school, Delta. Additionally, there is a CTE Center and an Ag Farm site offering courses in five pathways, available to all district students who meet the course requirements. The comprehensive high schools are large, with Righetti being the smallest, enrolling approximately 2,400 students, and both Pioneer Valley and Maria High School with about 3,100 students. Originally designed for 2,000 students, these schools have expanded significantly in size causing support spaces to no longer be large enough to accommodate the needs of the students. To meet the immediate classroom housing needs, significant numbers of portable classrooms have been added to each site. The core facilities, administration building, gymnasium, library and MPR, are too small for the schools with over 2,000 students. The district aims to maintain a maximum enrollment of no more than 2,000 students at each school.

2.2 EDUCATIONAL PROGRAM

The District is committed to planning and implementing a 21st Century high school environment, driven by two key programs. The first is an education program outlining academic achievement opportunities at the district level, and the second, a facilities program describing how capital improvements will support the implementation of the education program. To this end, the update to the 2014 Reconfiguration and Facilities Program integrates the District's vision and goals for innovative educational initiatives with a facilities plan that supports these initiatives.

The 2014 Reconfiguration and Facilities Program defined a vision for 21st Century learning environments in the District providing learning environments that foster creativity, problem solving, communication and collaboration. These environments need to provide the flexibility and mobility required for learning environments to promote 21st Century instructional strategies such as collaboration, creativity, communications, and problem solving. The District has built new classrooms at Righetti and Santa Maria High Schools that have 21st Century Learning Environments and desires for those classrooms to be the standard for the District. These 21st Century improvements need to be expanded to classrooms at all schools to provide equity in classroom environments for all teachers to have the tools to provide the instructional shifts necessary to affect the implementation of the standards aligned with the curriculum and improve the instructional core in the classroom which is the educational focus of the District. When used to the fullest potential, the provision of 21st Century Learning Environments provide a setting for teachers to become the facilitators of learning, guiding students to learning mastery and providing opportunities for students to engage with other students in projects that require application of knowledge and skills, seek out answers to questions and problems, and create projects that demonstrate mastery of the standards thereby becoming masters of their own learning.

The District has made significant progress in building new permanent classrooms, modernizing older classrooms into 21st Century learning spaces and incorporating modern technology into the instruction program. New 21st Century classrooms have been constructed at Righetti and Santa Mara High Schools. In addition, the older permanent classrooms at Righetti have all received 21st Century modernization. All

these classrooms have the 21st Century standard amenities the District adopted in the 2014 Plan. In the newly built and modernized classrooms, for example, teachers use the 21st Century amenities as instructional tools; English and social studies teachers use the multiple monitors in the room with the math teachers using the interactive monitors the most. All students in the District have their own computing device.

Over the last few years, the District has increased the number of Advance Placement (AP) courses available for students to take, increased the percentage of students meeting the a-g course requirements and acceptance to a four-year university, and increased the number of concurrent enrollment courses with Allan Hancock College. The District strives to continue to increase the number of students who complete the a-g requirements, are accepted to a four-year university, and ultimately choose to attend such a university. The District continues the process of alignment of the educational program with the pathways and with the dual enrollment courses to offer students a clear pathway to either a better job or enrollment in an institute of higher education.

The Mark Richardson CTE Center and Agricultural Farm has been constructed and opened in 2021. Both concentrator and completer courses for students in six pathways are offered at the Center: Agriscience and Ag Farming, Food Service and Hospitality (Culinary Arts), Networking and Cybersecurity, Systems Diagnostics, Service and Repair (Diesel Mechanics), Machining and Forming Technologies, and Residential and Commercial Construction. Classes offered at the center are available to any student in the District who is a junior or senior in high school. Each course is offered for two periods for the entire school year.

The District secured additional funds through the CTE Facilities Program to update the Auto Shop and Ag Mechanics Shop at Santa Maria High School, as well as the Ag Mechanics Shop and two Ag Science Labs at Righetti High School. New ventilation systems and electrical infrastructure needed for industry-standard welding, construction, and mechanical equipment are now available in these shops. These improvements are currently underway, and when finished, will strengthen the CTE pathways at each of the school sites. In addition, two classrooms were modernized and updated for Ag Biology and Ag Chemistry labs at Righetti High School.

Delta Continuation High School offers a program for students who need a modified school schedule and/or program. Currently, alternative education programs are offered at a District site that is across the street from Santa Maria High School in the “Annex”. This site has all portable classrooms and one modular classroom building. The District would like to expand the offering at the site and include a Family Resource Center that offers parent education programs, community health options, as well as a Teen Parenting program, a program for students with emotional challenges (Therapeutic Learning Center or TLC), Transition Programs for special education students that are 18-22 years of age, independent study programs, community day programs, and an assessment center.

The high schools are large with enrollment ranging from approximately 2,400 students at Righetti to 3,100 students at Pioneer Valley and Santa Maria High School. Several years ago, the Board determined that a high school should not have over 2,000 students enrolled, and it is the desire of the current Board and

administration to reduce the size of the high schools to provide a better educational program and experience to the students. Given the current demands on district resources, an interim goal is to provide high schools with not more than 2,500 students at existing schools.

2.3 DISTRICT PROGRAMS

The District continues to improve and make modifications to the pathway programs at each of the high schools with the long-term goal of institutionalization of the programs into a two or three sequence of courses aligned with the State CTE standards and program of study course codes. Because the State is now measuring the number of students who have completed a pathway sequence, the District has realigned their courses into pathways, added new courses as required for a pathway and began placing students into the pathway during their freshman and sophomore high school years to ensure that more students will complete capstone courses and the pathway program of study with a certification. Due to the alignment of the courses with the pathways as outlined by the state CDE CTE division, some of the industry sectors were eliminated from some of the high schools and other industry sectors were added. Therefore, not every pathway is offered at every high school. This is in part due to student interest, teacher credentialing, facilities and/or equipment needed for the pathway. For example, the Transportation Industry Sector (Systems Diagnostics and Service, Automobile) is only offered at Santa Maria High School as this is the only site to have an auto shop facility that is needed for this program.

Every high school has strong pathways in the Agriculture and Natural Resources Industry Sector (Ag Mechanics, Ag Science, Plant and Soil Science, Ag Business, and Ornamental Horticulture) with the CTE Center and Ag Farm housing some of the capstone course for these pathways. Likewise, each high school has courses in the Arts, Media, and Entertainment Industry Sector to include Design, Visual and Media Arts, Drama, Visual Arts, Music programs, and Graphic Design. Each high school has a Culinary Arts program that feeds into the Culinary Arts commercial kitchen at the CTE Center as well as courses in the Business and Finance Industry Sector (Financial Services Pathway). Information and Communication Technologies Industry Sector (Information Support and Service and Software and Systems Development Pathway) are offered at each high school with the capstone course available at the CTE Center. Pioneer Valley is the only school that has a Health Science and Medical Technology Industry Sector and offers a Patient Care Pathway. Santa Maria and Pioneer Valley both offer Engineering Technology pathway courses.

The District is in the process of refining and articulating the courses offered at each of the high schools into high quality pathways that are aligned to courses at institutions of higher education. The District has expanded its dual enrollment courses with Allan Hancock College and desires to align these courses more fully with the pathway programs. In addition, the District would like to collaborate with Allan Hancock College to offer an Early College program to support students as they graduate high school and move onto other educational pursuits.

SECTION 3

DISTRICT SCHOOL SITES AND REQUIRED CLASSROOMS

This section provides an overview and background on available school sites within the District and available student classrooms to house students. Student enrollment impacts a district's capacity to house students and inform local policy decisions for school site specifications, classroom loading standards, and required resources. School site enrollment, capacity, and age of facilities serve as a basis for determining the level of eligibility for State funding assistance when establishing the level of need for additional or modernized school facility improvements. The estimated capacity of a district to house its students is provided by comparing the total student enrollment with the number of classrooms available at each school site based on the standards used to load or populate classrooms.

3.1 DISTRICT OVERVIEW

The Santa Maria Joint Union High School District (District) was established in 1891 and is located in the coastal communities of Santa Maria within Santa Barbara county and a small portion of San Luis Obispo County. Covering approximately 626 square miles, the District serves the cities of Santa Maria and Guadalupe. The District operates three comprehensive high schools and one continuation high school, and alternative educational programs.

Table 1 provides a listing of the District's existing school sites. The District had a total enrollment of 8,985 students for the FY2023-24 school year across its schools. The District's permanent school facilities have been built over different generations and reflect the design principles and standards of their time. In 2021, the District completed its new Career Technical Education (CTE) Center/Ag Farm site and facility to provide CTE opportunities for all students within the District. At the District's oldest school, Santa Maria High School, a new 50 classroom building was recently constructed transforming the campus and allowing the ability to demolish older classroom facilities. At the Righetti High School site, a new 38 classroom building was also recently constructed along with other modernization upgrades to existing facilities transforming the site into a 21st Century campus.

In the past, the District has received State grant funding in 2001 under the State's School Facility Program (SFP) modernization program for improvements to Santa Maria High and Righetti High School. More recently in 2022, the District received additional modernization grant funding for further upgrades to Santa Maria High and Righetti High under the State's Career Technical Education (CTE) Facilities grant program. Given their dates of construction, the District's newer school sites, Delta High and Pioneer Valley High have

not been yet modernized, but upgrades are needed to maintain parity with the 21st Century upgrades recently provided at the other schools.

As demonstrated in Table 1, the District's enrollment far exceeds its goal to limit student enrollment at this time to 2,000 students per comprehensive school site. This is especially true at Pioneer Valley and Santa Maria High. Based on the demand for school resources, it is recommended that an interim goal of maintaining a 2,500-student enrollment at each comprehensive school site be instituted. As more resources become available, the District will continue to work toward the goal of having each high school enrollment at approximately 2,000 students.

Table 1: Existing School Sites

	School	2023-24 Enrollment[1]	Site Acreage	Year Built[2]	Last Modernized[3]
1	Delta High	338	3.2	2008	
2	Ernest Righetti High	2,424	37.7	1961, 2008, 2016	2001, 2022
3	Pioneer Valley High	3,112	53	2002, 2004, 2014	
4	Santa Maria High	3,111	36.4	1988, 1999, 2002, 2004, 2005, 2013, 2020	2001, 2022
	Total Grade 9-12	**8,985**			

Notes:

1. 2023-24 enrollment is not certified

2. Includes Division of State Architect approval dates

3. Includes dates of when last SFP + CTE modernization funding received from the State

3.2 REQUIRED CLASSROOMS

The capacity of a district to house its students is determined by comparing the total student enrollment with the number of classrooms available at each school site based on the standards used to load or populate classrooms. This information is useful in determining the impact of such standards and the need for additional school facilities to house all enrolled students effectively and efficiently. There are two broad categories of loading standards to consider. The first is State standards and the second is local standards.

State standards are primarily used to qualify for grant funding from the state. The state utilizes a uniform loading standard for each high school classroom of 27 students for each permanently constructed classroom. Physical education, core facilities and local specialized classroom uses are not included in this calculation, nor does the State generally consider portable classrooms as being available to permanently

house students. When a school has a greater number of students than what the State deems that school can house (the State loading standard multiplied by the number of permanent classrooms), the State considers the remaining students as "unhoused" or in need of additional permanent facilities.

Districts are not required to follow these targets for operations and commonly set their own "local" loading standards. District loading standards more accurately reflect current funding levels for the operational expenses of each active classroom, while State standards are utilized to calculate the construction costs of new classroom buildings. Moreover, local loading standards can include portable classrooms to calculate its capacity to house students. The District's current maximum loading standard is 36 students per classroom. However, at the high school level, classroom instruction is provided by periods which can vary the average number of students per classroom due to the competing subject areas, students that qualify for Advanced Placement (AP) courses, and specific programs that generally have smaller class sizes. In this case, the lower State loading standard of 27 students per classroom may "best" be assumed as more accurately reflecting the need for permanent school classrooms at the district's comprehensive high schools. Delta High School, however, operates under an alternative schedule with part of the student population attending classes in the "AM" and part in the "PM" which results in a higher assumed loading standard of 30 students per classroom.

As presented in Table 2, the District has approximately 311 permanent classrooms at its school sites. Every available classroom is assumed to be loaded at the maximum rate and does not take into consideration the need for classrooms to house dedicated programs, programs that may be required to operate at a lower loading standard, and teacher preparation periods. As shown in Table 2, the District is over capacity to house its students in permanent facilities and has had to rely on portable classrooms to meet enrollment needs. Assuming every classroom was used every day every period at full capacity, a total of 33 additional classrooms will be needed and made available through the use of portables. When taking teacher preparation periods into account, the District needs 449 total classrooms for the three comprehensive high schools. The District has 299 permanent classrooms at the three comprehensive high schools, therefore in need of 150 more permanent classrooms than currently available. To meet this shortfall, the District has had to rely heavily on portable classrooms that have reached their lifetime expectancy of twenty years.

Table 2: District Required Classrooms

School	2023-24 Enroll[1]	Loading	Perm. CRs	Capacity	(Over)/Under Capacity	Additional Portables Required
Delta High	338	30	12	360	22	0
Ernest Righetti High	2,424	27	100	2,700	276	0
Pioneer Valley High	3,112	27	89	2,403	(709)	27
Santa Maria High	3,111	27	110	2,970	(141)	6
Total	**8,985**		**311**	**8,433**	**(552)**	**33**

Note:
1. 2023-24 enrollment is not certified

Sources: Santa Maria Joint Union High School District, CFW

SECTION 4

SITE REVIEWS AND PROPOSED IMPROVEMENTS

The District wishes to update the Board adopted 2014 Reconfiguration and Facilities Plan and the updated 2016 Master Schools Improvement Plan. An on-site assessment of all facilities was conducted to investigate District needs and educational programs desired. Areas of interest included the completion of projects identified in the prior Plans as well as new projects needed to support the District educational program. After the site assessments, discussions were held with the District to review observations, areas of need, and areas of potential interest for further consideration.

It should be noted that substantial facilities improvements have been made throughout the District during the intervening years as these plans were implemented. For example, Righetti has had new state of the art 21st Century classrooms constructed and modernized or retrofitted equivalent improvements to its older existing classrooms leaving select support facilities to be constructed. At Santa Maria High, the older, 100-year-old classrooms have been replaced and the remaining eligible classrooms and support facilities are scheduled for modernization and further improvement. A new state of the art career technical facility has been constructed allowing students to be more career and college ready upon graduation. The remaining Pioneer Valley High, built in 2004, is now ready to make equivalent strides towards a more robust 21st Century learning environment for all its students.

This section provides an overview of the current state of school facilities, identifies projects completed, projects remaining to be done, and projects needed to support the educational vision of the District. The general condition of facilities, their ability to meet the current and envisioned educational program and the need for improvements to be made to house and educate its students were taken into consideration. The District has reviewed its educational program, State, and local requirements for housing its students, and proposed educational specifications by which to evaluate existing facilities and plan for future facilities and improvements.

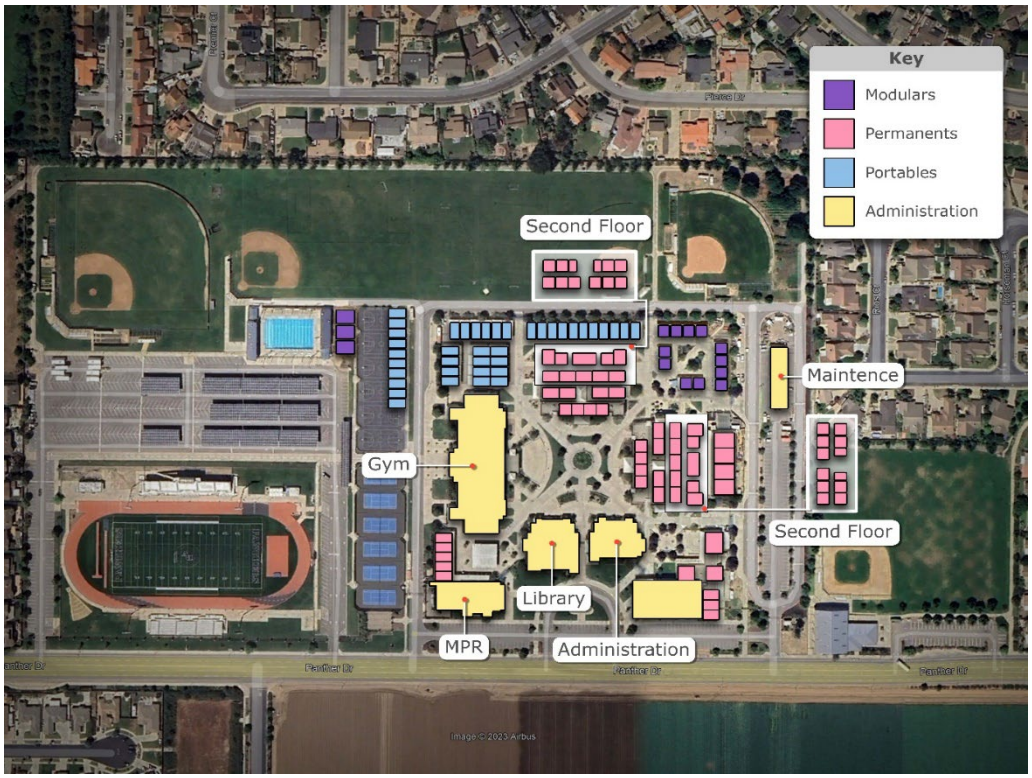
4.1 PIONEER VALLEY HIGH SCHOOL

Pioneer Valley High School is located at 675 Panther Drive in Santa Maria. The school was built in 2004 and sits on a 53-acre plot. The school serves students in grades 9 through 12 with a designed capacity of 2000 students that is now serving a current enrollment of 3,112 students. The school is surrounded by cul-de-sac residential neighborhoods with Sierra Vista Park, a city park, to the north. As the school was built on the eastern edge of the city, the areas to the east and south of the school are mostly for agricultural use.

4.1.1 EXISTING CONDITIONS

There are two main classroom buildings that contain 60 permanent classrooms with an industrial art building that contains three shops and one agricultural science lab, a performing arts building (constructed in 2017) that contains three classrooms with additional three classrooms located in close proximity, and a fifth building that contains five classrooms with one of the rooms converted into a teacher's lounge. The site also contains a library, gym, administration facility, performing arts theater, and a cafeteria (MPR). In 2006, 12 modular classrooms were added as permanent classrooms increasing the total number of permanent classrooms to 86. In 2008, a swimming complex was installed. This year, three modular classrooms were constructed near the pool.

Figure 1: Pioneer Valley Existing Conditions



In addition, 29 general-purpose portable classrooms have been added to the site overtime to accommodate the additional increase in enrollment. Another 10 general-purpose portable classrooms were relocated from another high school site to Pioneer this year to accommodate the latest continued increase in students. In total, 39 portable classrooms are at the site to accommodate the interim increase in student enrollment since the school was originally constructed for 2,000 students in 2004.

The general conditions of the classrooms described in the District Reconfiguration and Facilities Program adopted by the Board in 2014 and in the update to the Plan in the 2016 Master Schools Improvement Program still generally apply to the site. Nonetheless, on October 3, 2023, CFW staff conducted a subsequent walkthrough of the campus to confirm these findings, recognizing the facility has continued

to grow in enrollment during this period. Based on these observations, the campus continues to be in generally good condition and the descriptions in the original Plan and subsequent update continue to accurately describe the campus, the use, and the conditions of the classrooms and support facilities. Nonetheless, the school lacks some of the more modern technology, furnishings, fixtures and equipment that have become available in the District as the older schools have been modernized, reconstructed or replaced during this period.

Given its more recent construction in 2004, the design of classroom buildings at Pioneer Valley reflects a stronger awareness for the support functions and interdepartmental collaboration activities required in a modern teaching and learning space. This makes the structural and built environment more ready and conducive to the District's overall educational program and configuration goals. As such, required and proposed improvements are thus more targeted to enhancing the existing configuration and upgrading of classroom interiors, removal of older interim facilities, and technology infrastructure to District and adopted 21st Century specifications and selected pathways programs reflective of the improvements already in place.

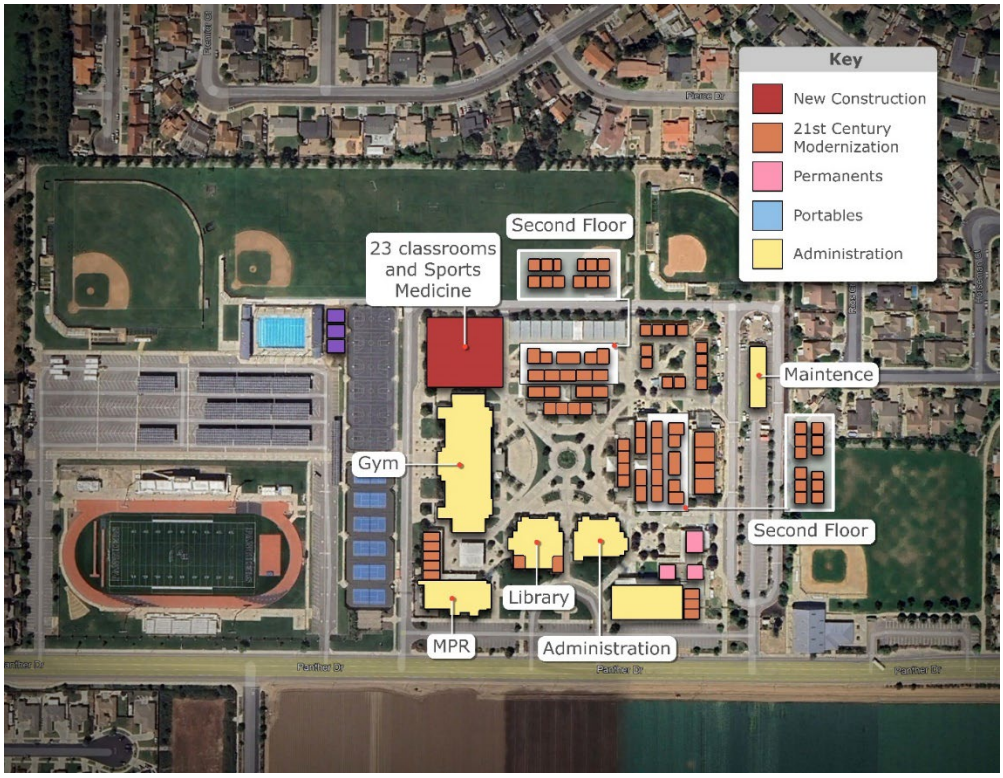
The school is generally organized by departments; all the science labs are in one building, specialty classrooms located in another building, and core classes such as math, English, social studies, and international language are generally located near each other. As with other District schools that have recently been improved to meet this standard, this arrangement supports interdepartmental collaboration and focused learning. With a few exceptions, most of the classrooms are proposed to remain in their current location, with only one classroom appearing to need to be rebuilt and the existing classroom repurposed to meet more current and overall career program needs. Future improvements are proposed to provide the campus with upgraded classroom furnishings, additional technology equipment, and infrastructure improvements. Classrooms used for specific elective classes in pathway programs need upgrades to meet current educational and program requirements, including Room 325 that houses the Culinary Arts program. The Sports Medicine and Kinesiology program is in need of a more purpose-built room with the materials and equipment needed for the program. Room 205, Woodshop and Room 207, Agriculture Welding do not have enough electricity capacity for the equipment or ventilation.

4.1.2 PROPOSED PIONEER VALLEY IMPROVEMENTS

Of the planned improvements proposed in the initial 2014 Plan or in the 2016 update, the performing arts building with three classrooms has been constructed and is in use today for both drama and a variety of music classes. The remaining projects have been waiting for State aid modernization eligibility which is anticipated in 2029 to assist funding most of the proposed improvements. The planned improvements include the modernization and 21st Century upgrades to 86 permanent classrooms, labs and shops specified in the original and updated plans. The wood shop and metal shop will receive additional electrical upgrades and ventilation systems. Twenty-three new classrooms and a Sports Medicine classroom are proposed to be constructed to replace the remaining older and aging portable interim classrooms. These classrooms are proposed to support the core academic program and the CTE pathway

programs as well as special education classes and support spaces these programs require. At the end of the program, the goal is for all students to be housed in 21st Century permanent classrooms and facilities comparable to the newer and modernized schools.

Figure 2: Pioneer Valley Proposed Improvements



Summary of Planned Improvements

- Modernize 86 permanent classrooms, including 12 modular classrooms
- Upgrades to welding shop and wood shop to include electrical and ventilation systems
- Construct 23 permanent classrooms and a Sports Medicine classroom
- Remove 22 old and aging portable classrooms and those required to accommodate the new 23 permanent classroom and Sports Medicine classroom wing

4.2 RIGHETTI HIGH SCHOOL

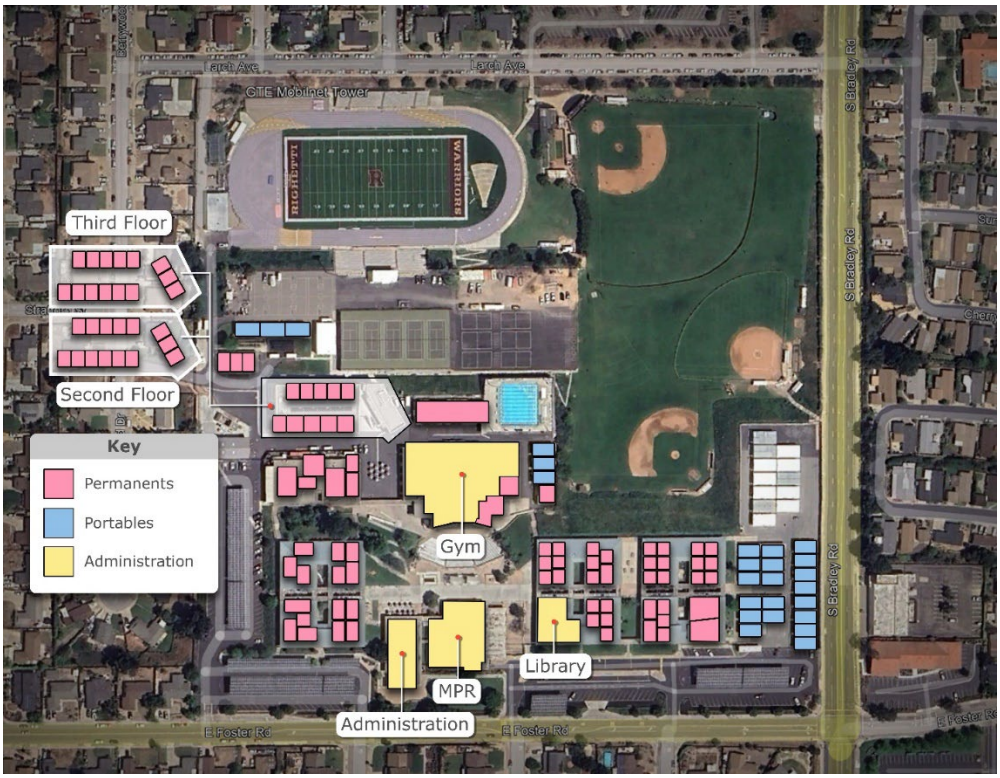
Ernest Righetti High School, located at 941 Foster Road in Orcutt, is the southernmost comprehensive high school in the District. The school's 37.7-acre rectilinear site is situated in the middle of an extensive residential district that extends from Orcutt Road on the west to Highway 101 on the east. Righetti High is bounded by Larch Avenue to the north, Foster Road on the south, Berrywood Drive on the west (buffered by a row of single-family housing), and Bradley Road on the east. Chain-link fencing marks the site perimeter on the north, east, and west. There are approximately 2,500 students in grades 9 through

12 at the site. The original high school was built between 1960 and 1964 with a new three story 38 classroom building constructed in 2019 to replace aging portable facilities.

4.2.1 EXISTING CONDITIONS

The school is comprised of eight main buildings that include four main classroom buildings, a shop building, a gymnasium, MPR, library media center, and an administration building. In addition, there is an agricultural building that has three classrooms and a weightroom near the tennis courts.

Figure 3: Righetti High Existing Conditions



There are 100 permanent classrooms and 25 portable classrooms at the school. Classrooms are grouped in separate buildings according to their space and infrastructure requirements. For example, all industrial arts classrooms and workshops are in their own facility on the west side of campus, all lab rooms are contained in Building C to the south of the industrial arts building, and general-purpose classrooms are largely found in Buildings D, E and K. Of the 25 portable classrooms, 19 occupy an area on the southeast corner of the campus formerly used for parking.

Most of the school's buildings and parking lots are in the southern half of the site, with the northern half containing the football stadium and track, basketball courts, tennis courts, and ball fields. This arrangement is partly a consequence of topography; the site is unique among District schools in that the southern third of the site is at a notably higher elevation than the northern two-thirds. This has provided

challenges to maintaining ADA-accessible paths of travel. For instance, getting from the cafeteria (higher elevation) to the gym (lower elevation) in a wheelchair requires the use of a winding concrete path that more than doubles the straight-line distance and time required between the two buildings.

The construction of the stadium was completed in the late 1980s, with artificial turf and an all-weather track installed in 2006. The swimming pool facility was constructed in 2009 as part of the 2004 Measure "C" bond program. A modernization of all campus buildings, except the administration building, was carried out in 2000, involving interior furnishing and equipment upgrades. Modernization of the administration building was done in 2011. As part of the 2014 Plan and its 2016 update, the upgrade of the remaining 59 permanent classrooms was completed in 2023 for all classrooms to receive 21st Century upgrades to include mobile and flexible furniture, sliding markerboards and wall mounted monitors with upgrades to the technology in all classrooms. The library media center also received 21st Century upgrades that include mobile and flexible furnishings, soft seating and breakout rooms with glass front walls. The Ag Mechanics and Ag Welding Shops are currently receiving electrical and ventilation upgrades as well as updated equipment needed for each of these programs.

As reported in the Plan update, the school gym is reported to be insufficient for accommodating the full demand for court time from the multiple varsity and junior varsity teams as well as other users, some of which practice as late as nine in the evening. The gym is in good condition, with the roof having been replaced in 2015. Generous space is provided for the boys and girls locker rooms, however, its single basketball court for athletic events can accommodate no more than two practice courts during non-competitive play, a significant limitation – in comparison especially to the three-court design of the gym at Pioneer Valley High – that is best met through the construction of additional practice space on campus. A practice gym with designated performance is proposed in the 2016 Plan update. The facility needs to be located near the existing gym, and provide complimentary support space, team rooms, and locker facilities for both boys and girls athletic programs.

Unlike Pioneer and Santa Maria High, the Righetti campus also lacks dedicated performance space. The drama class is in a converted shop room in the Industrial Arts Building adjacent to the current welding shop. While this space is larger than a regular classroom, it does not meet the needs for student performances for drama, choir, or band. The choir and band have sufficient classrooms but lack a venue for student performances or concerts. The 2016 updated Plan recommended providing performance space as part of the proposed new gym facility.

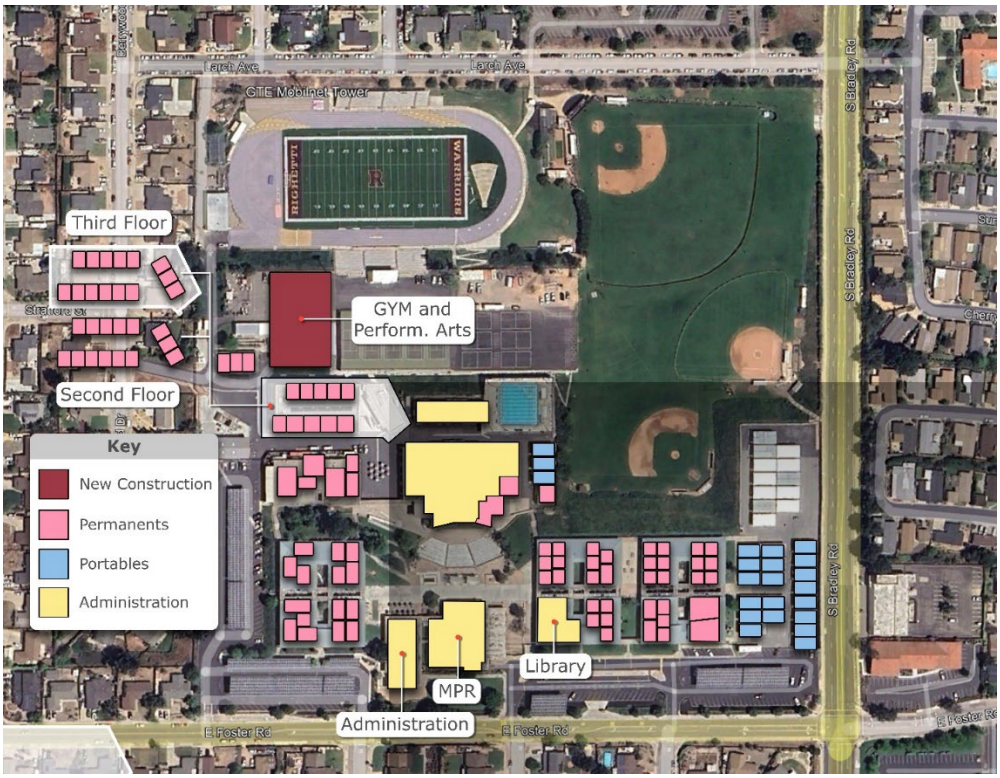
Twelve portable classrooms were removed from the site as part of the most recent upgrades to the site. The removal of the 12 portable classrooms has restored some of the site's needed parking capacity by reclaiming that space as a parking lot. The 25 portable classrooms that remain have outlasted their useful life and are now becoming expensive and inefficient to maintain. They are proposed to be relocated or removed from the site.

4.2.2 PROPOSED RIGHETTI IMPROVMENTS

As indicated, Figure 4 identifies the proposed location of the proposed improvements to the north of the new 38-classroom building. This location was recommended by the Architect of Record assigned to the 38-classroom building. It provides pedestrian access to the facility from other related academic and athletic uses on the campus. It also provides district staff and emergency vehicle access to and around the perimeter of the proposed building as well as the location and availability of existing on-site utilities including water, electrical, sewer, and data.

Construction in this location will require the demolition of several portable classroom buildings, along with the existing 2,200 square foot weight room. The building is proposed to provide the new practice gym with performance space and a new replacement weight room area.

Figure 4: Righetti High Proposed Improvements



Summary of Planned Improvements

- Remove three portable classrooms and weight room
- Construct new practice gym to include a stage for performing arts and a weight room
- Remove remaining portable classrooms and reclaim parking

4.3 SANTA MARIA HIGH SCHOOL

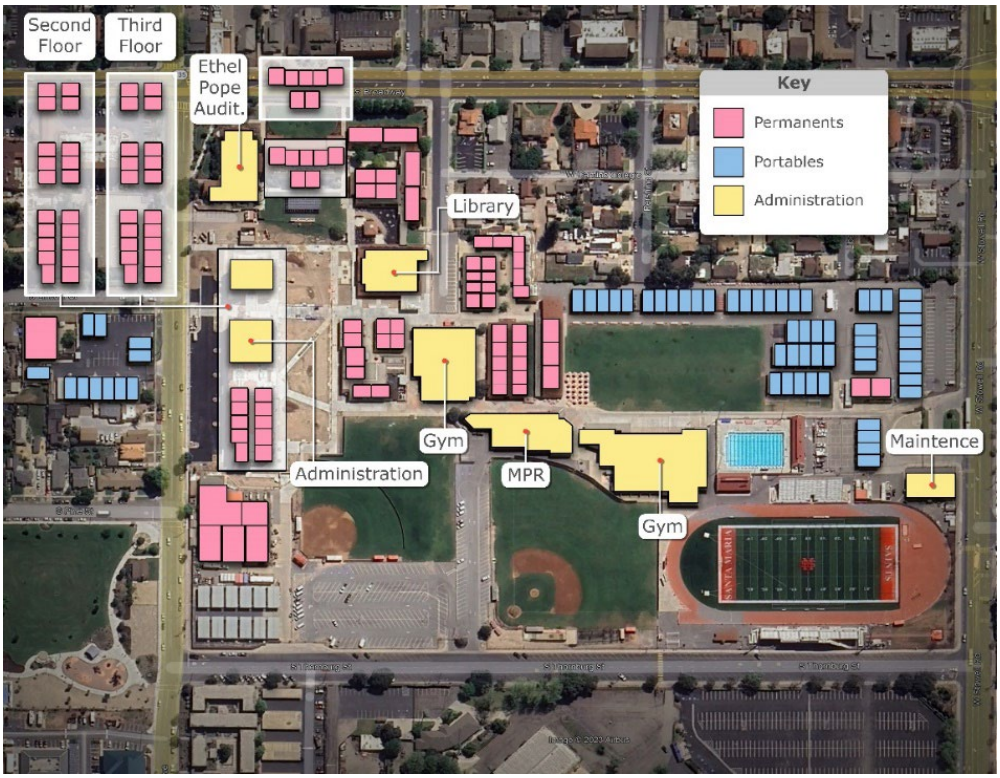
Santa Maria High School was the oldest high school in the District, founded in 1891, and developed in parallel with the nearby downtown of Santa Maria. The school presently enrolls nearly 3,200 pupils in grades 9 through 12 on a 36.4-acre site, drawing its student enrollment from the center of the Santa Maria Valley. The campus is bounded by Broadway to the east, Thornburg to the west, Stowell Road to the south, and Morrison Avenue to the north, with residential and retail uses occupying a portion of the eastern side of the campus, south of Camino Colegio and extending approximately 450 feet west of Broadway toward the campus interior.

4.3.1 EXISTING CONDITIONS

In August 2015 the school's "Broadway Classroom Building," a 26,000-square-foot, 12-classroom facility located next to the Ethel Pope Auditorium and the old administration building was opened. This building contains a band room, choir room, and 10 general-purpose classrooms. A new 50 classroom three story replacement building with new administration areas located off Morrison Avenue was opened in 2023 consistent with the updated 2016 Plan. This building replaced the oldest facilities on the site, some of which were built in 1920. The new building includes five science lab rooms along with five adjoining science classrooms to provide for general sciences (e.g., biology, chemistry, and physics). There is a culinary arts room on the first floor. The remaining general-purpose classrooms primarily house English and social studies classes. As part of the Plan, the existing Ag Welding and Ag Mechanics shops as well as the Auto shop are currently undergoing modernization upgrades to include updated electrical and ventilation systems as well as updated equipment to meet industry standards.

Design plans to reconfigure the old administration building into eight classrooms are currently in DSA for approval were also part of the 2016 update. It is anticipated that they will be available for occupancy in 2025 and will be used primarily by the visual arts, business, and communications departments. When the eight reconfigured classrooms are available, there will be a total of 112 permanent classrooms and 46 portable classrooms on the site.

Figure 5: Santa Maria Existing Conditions



All the planned improvements as outlined in the 2016 updated Plan have been completed or are underway with the exception of the modernization of the remaining 34 permanent classrooms in Buildings 200 and 300 and the modernization of Ethel Pope Auditorium. The Plan also called for the eventual removal of all portables to free up space for academic and athletic uses and reconfiguration of the existing campus to improve pedestrian circulation, support functions and interdepartmental collaboration activities required in a modern teaching and learning environment. Twelve portable classrooms have been removed to reclaim the parking lot on the northwest side of the campus. There are 46 portable classroom buildings remaining on the site, 16 of these are in use by the independent study program. They are proposed to be removed upon completion of the proposed program.

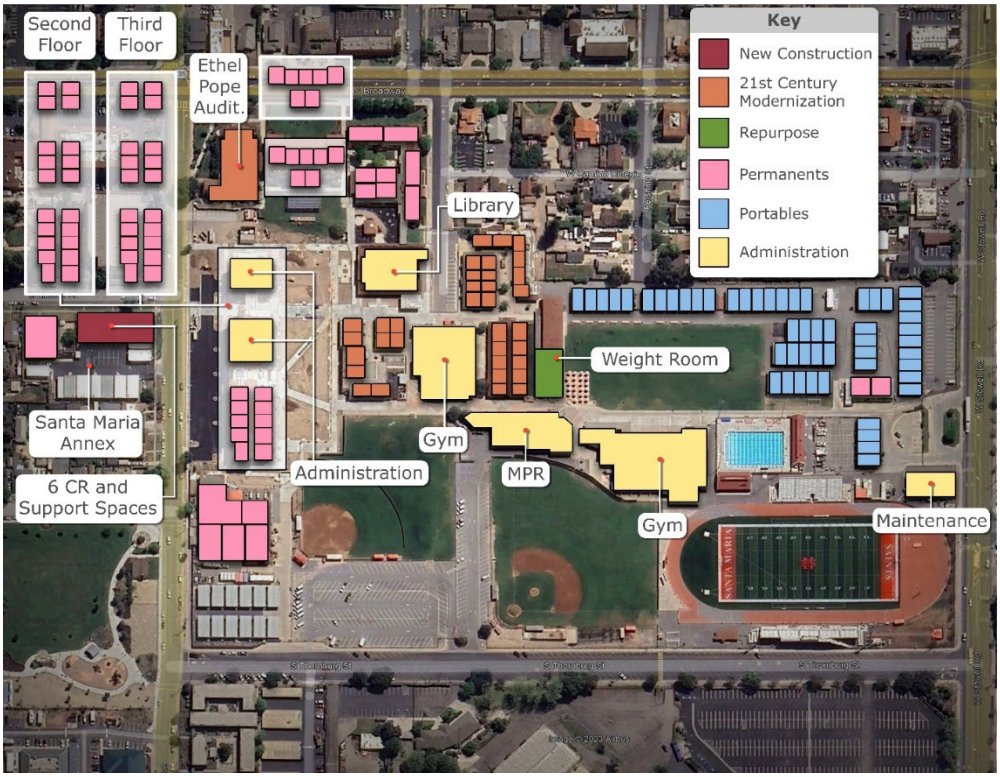
In addition, the weight room is currently located in a building under the bleachers at the stadium. Three old science labs will be reconfigured into a new weight room. Upon completion of the program, there will be a total of 110 permanent classrooms on the site.

4.3.2 PROPOSED SANTA MARIA IMPROVEMENTS

Planned improvements include the modernization of 34 permanent classrooms in Buildings 200 and 300 when they become eligible for modernization funds. Modernization will include 21st Century classroom amenities as noted in the 2014 Reconfiguration and Facilities Program report adopted by the Board to include new wall finishes, lighting (where needed), flooring, electrical upgrades, HVAC upgrades or

replacement (where needed), window upgrades (where needed), upgrades to electrical systems and plumbing systems. It also includes ADA upgrades to meet current code requirements. Three old science labs, Rooms 360-362, will be reconfigured into a weight room. The current weight room equipment would be used to furnish the reconfigured facility. In addition, Ethel Pope remains to be modernized. Upon completion of the proposed improvements, all portable classrooms are to be removed.

Figure 6: Santa Maria Proposed Improvements



Summary of proposed Improvements

- Modernize Ethel Pope Auditorium
- Modernize 34 remaining permanent classrooms
- Reconfigure science labs, Rooms 360-362, into a new weight room
- Remove all portables upon completion of the proposed improvements

4.3.3 SANTA MARIA HIGH SCHOOL ANNEX

Across Morrison Street from Santa Maria High School is a District owned parcel of land that is approximately 50,000 square feet. There is one modular facility with a courtyard on the site that occupies 11,000 square feet of space, 10 portable classrooms and a parking lot. This site houses the program for severely emotionally disturbed (TLC) students, the Special Education Transition program for students 18-21 years of age, the Teen Parenting Program for the District, the Independent Study program and offices

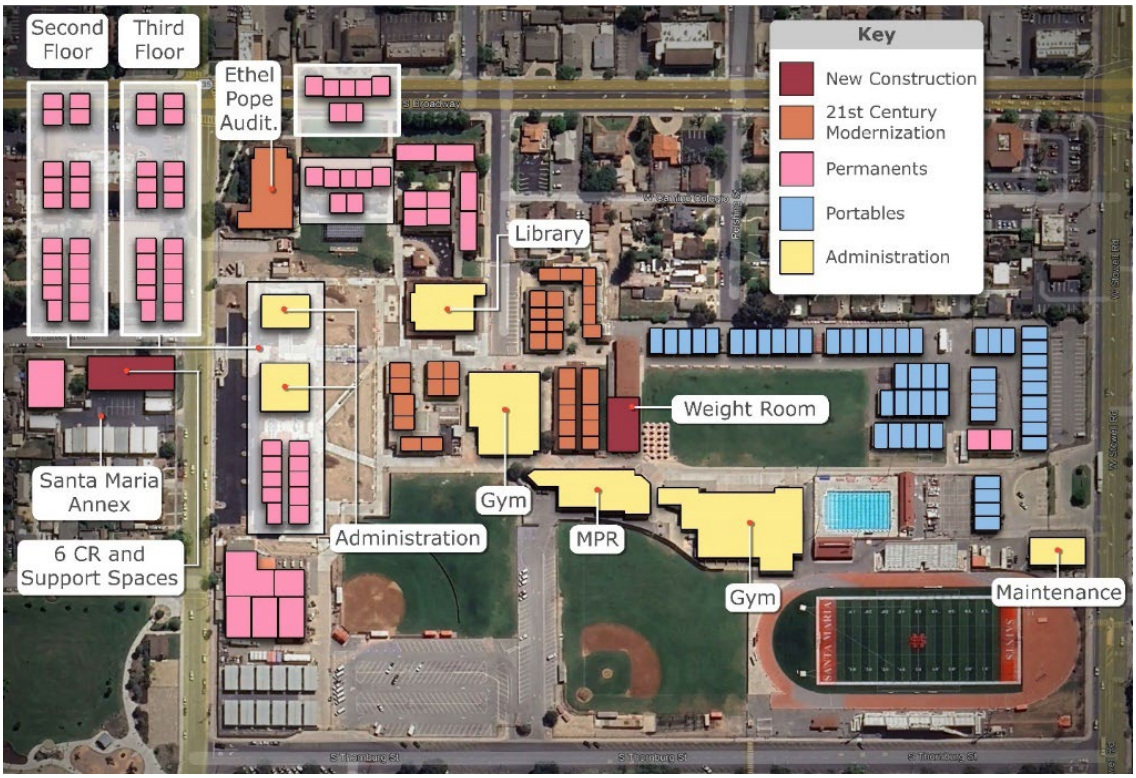
in support of these programs as well as for Migrant and Multi-lingual programs. The District desires to have a permanent structure for these programs. In addition, a Family Resource Center and a Districtwide Parent Meeting room are desired to further engage the community with the schools and meet some of the unmet needs of the families.

Figure 7: Existing Santa Maria High School Annex Existing Conditions

4.3.4 SANTA MARIA HIGH SCHOOL ANNEX PROPOSED IMPROVEMENTS

A new 11,610 square foot two story facility is proposed to be constructed. It includes two classrooms for the TLC program, two classrooms for the Special Education Transition Program, one classroom for the Teen Parenting Program, and one classroom for Independent Study. In addition, a 2,000 square foot Family Resource Center and a 2,500 square foot Parent Meeting room are also proposed to be constructed. In addition, 600 square feet of support office and restroom space is proposed. Upon completion, all the portable classrooms are proposed to have been removed. Parking will remain on the site as well as the existing modular building.

Figure 8: Santa Maria High School Annex Proposed Improvements



4.4 DELTA HIGH SCHOOL

Delta High School is located at 4893 Bethany Lane in Orcutt. The campus covers 3.2 acres on a rectangular property within an extensive residential neighborhood and is fenced around the perimeter. Delta is the alternative and continuation high school for the District with an approximate enrollment of 340 regular, independent study, and continuing education pupils in Grades 9 through 12, all of whom must be at least 16 years old.

4.4.1 OVERVIEW AND EXISTING CONDITIONS

Completed in 2010 from 2004 Measure "C" bond funds, the school is a compactly built facility with 10 classrooms in the south and west wings, an office, and administrative rooms in the east wing and one classroom and MPR on the north wing. The four wings enclose a courtyard used by students and teachers to move between classrooms. Delta High has 11 classrooms, a computer lab, a multipurpose room, a career center, a playfield, and a basketball court.

Figure 9: Delta High School Overview/Site Plan

The buildings and grounds of Delta High School are in good condition and have been well maintained. Classrooms can accommodate desks and chairs for up to 28 students. The site's offices and workrooms are efficiently used. The registrar and support secretary share a compact space that also serves as a front office and waiting area for the high number of students accessing the academic advisor's office. Despite the high utilization of facilities, all are in good condition. The multipurpose field on the north side of the building is used recreationally and for assemblies. The grounds on the south side of the building are less frequently used but are well maintained and irrigated. There are no new improvements recommended for Delta High School at this time.

4.5 MARK RICHARDSON CTE CENTER AND AGRICULTURAL FARM

The District acquired a 25.3-acre agricultural parcel on the east side of the city to develop a Career Technical Education (CTE) center and agricultural teaching farm. The CTE center was designed and built in 2021 and supports the following CTE pathway programs: Agriscience, Plant and Soil Science, Food Service and Hospitality (Culinary Arts), Networking and Cybersecurity, Systems Diagnostics, Service and Repair (Diesel Mechanics), Machining and Forming Technologies, and Residential and Commercial Construction.

Figure 10: CTE Center Existing Conditions

Four large shops were constructed to house the Diesel Mechanics, Machining and Forming Technologies, Residential and Commercial Construction, and Ag Mechanics (Ag Farming classes) pathways. A commercial kitchen was built to support the Culinary Arts program. In addition to the kitchen, two classrooms and an administration area were constructed. Students from any of the high schools in the District may take courses offered at the Mark Richardson CTE Center and Ag Farm site. The District applied for and received funding from the CTE Facilities grant program that reimbursed the cost of three of the shops and the commercial kitchen. In addition, the CTE Facilities grant program paid for most of the materials and equipment in three of the shops and the commercial kitchen. This is a new facility and meets the needs of the program. No new improvements are recommended at this time.

4.6 NEW HIGH SCHOOL CAMPUS

Pursuant to the adopted Plan and update, the Board has adopted a specification that all its schools should have no more than 2,000 students, as they believe smaller student populations lead to better educational outcomes. However, current high school enrollments greatly exceed this number. Righetti High School has approximately 2,400 students, with both Pioneer Valley and Santa Maria High School having approximately 3,100 students. These numbers are significantly higher than the Board's recommendation, leading to overcrowded schools and insufficient support spaces. The District has relied heavily on portable classrooms to meet the housing needs for the high schools. The substantial discrepancy between the

recommended and actual student enrollment underscores the urgent need for a new high school in the district to better accommodate the current student population. Given the substantial impact on District resources and the lack of sufficient state resources to offset the full cost of new high school facilities at this time, it is recommended that the Board modify its specification for the size of high school facilities to not exceed 2,500 students until such time as sufficient resources are once again available to meet this goal.

In response to the significant overcrowding in its current high schools, the Santa Maria Joint Union High School District is currently planning the construction of a proposed new high school of approximately 155,000 square feet of space. The new proposed high school is designed with a core capacity to serve 2,000 students and sufficient classrooms to accommodate an initial capacity of 1,500 students as shown in Table 3. The school is proposed to feature 47 general-purpose classrooms, dedicated to subjects such as English, social science, math, foreign language, and SDCs. In addition, the school is proposed to include specialized larger spaces such as an Art classroom, a Digital Arts Lab, six Science Labs, a Culinary Arts classroom, two Ag Science Labs, and three Pathway rooms (subject area to be determined) with each of these rooms occupying additional storage space. Additional spaces include a Wood Shop, Welding Shop, a Band Room, Choral Room and a Drama Room, based on the proposed specifications in Table 3.

Support facilities are proposed to be constructed to support a larger classroom capacity, if needed in the future. A gymnasium is proposed to include locker rooms, restrooms, a weight room, and Wrestling/Aerobics room with the main gymnasium capacity to support two floor playing areas. A new administration building is proposed to include a reception area, waiting area, conference rooms, a health office, a nurse's office with a dedicated restroom, faculty lounge, and principal office and six staff offices for administration and counselors. The school's library is proposed to accommodate a lobby, a career center, work room, student store, two offices, two restrooms, three breakout rooms, and additional spaces for storage and technology. The Multipurpose Room/Cafeteria (MPR) is suggested to be constructed with sufficient space for student dining, a cooking kitchen, an MPR area, and additional facilities including an equipment storage room, and dry and kitchen storage areas. In addition to the buildings, a football facility, baseball/softball fields, and tennis courts are proposed to be constructed with appropriately sized bleachers, track, and associated facilities. A maintenance shop is proposed for the site.

The proposed new high school is recommended to be built in one phase. The core facilities, administration building, gym, MPR and library are of sufficient size to accommodate up to 2,000 students. Additional classrooms, science labs and shops may be added in the future to accommodate the additional 500 students who could then be enrolled at the school.

Table 3: Educational Specifications for a New High School

Santa Maria JUHSD Proposed Specifications for a HS School Site with 1,500 Students

Description	Qty	Area per Unit sq.ft.	Total Area sq.ft.
CLASSROOM AREAS			
Art Classroom	1	1,200	1,200
Art Classroom storage room	1	200	200
English General Purpose	18	960	17,280
Social Science General Purpose	10	960	9,600
Math General Purpose	10	960	9,600
Foreign Language General Purpose	5	960	4,800
SDC	4	960	3,840
SDC SH	2	1,250	2,500
SDC SH toilet	2	150	300
RSP CLASSROOM	4	480	1,920
Pathway Room TBD	3	1,200	3,600
Pathwy Rooom Storage	3	100	300
CONTROL	1	189	189
ELECTRICAL	3	83	250
ELECTRICAL	1	291	291
EQUIPMENT	1	85	85
Culinary Arts	1	1,500	1,500
Digital Arts Lab	1	1,200	1,200
Digital Arts Storage	1	200	200
Staff TOILET	2	88	176
Circulation	1	10,000	10,000
JANITOR	3	83	250
JANITOR	1	200	200
	53	**Total**	**69,481**
CLASSROOMS/SHOPS			
Ag Mechanics Welding Shop	1	1,500	1,500
Ag Mechanics Welding Storage	1	300	300
Ag Construction Wood Shop	1	1,500	1,500
Ag Construction Wood Storage	1	300	300
	2	**Total**	**3,600**
CLASSROOMS/SCIENCE LABS			
CIRCULATION	1	7,600	7,600
ROOF ACCESS	1	20	20
SCIENCE LAB	6	1,200	7,200
SCIENCE LAB PREP/STORAGE	6	100	600
Ag SCIENCE LAB	2	1,200	2,400
Ag SCIENCE LAB PREP/STORAGE	2	100	200
Staff TOILET	2	88	176
	8	**Total**	**18,196**
BAND/CHORAL/DRAMA			
BAND ROOM	1	1,875	1,875
CHORAL ROOM	1	1,500	1,500
DRAMA ROOM	1	1,500	1,500
ELECTRICAL	1	93	93
INSTRUMENT STORAGE	1	578	578
MUSIC	1	140	140
OFFICES	1	303	303
ROBE STORAGE	1	184	184
UNIFORM STORAGE	1	285	285
		Total	**6,458**

GYMNASIUM			
ACCESS DOOR	1	137	137
BOILER ROOM	2	75	150
BOYS LOCKER ROOM	1	1,350	1,350
BOYS RESTROOM locker room	1	250	250
BOYS RESTROOM public	1	150	150
BOYS SHOWER	1	360	360
CIRCULATION	1	2,489	2,489
CONCESSION	1	150	150
ELECTRICAL ROOM	1	200	200
FACULTY TOILET	1	160	160
FACULTY TOILET	1	128	128
GIRLS LOCKER ROOM	1	1,350	1,350
GIRLS RESTROOM locker room	1	250	250
GIRLS RESTROOM public	1	150	150
GIRLS SHOWERS	1	360	360
GYMNASUM	2	5,880	11,760
JANITOR	2	150	300
M / W RESTROOM	2	75	150
Coach's OFFICE	2	250	500
RESTROOM	2	75	150
STORAGE ROOM	2	750	1,500
STORAGE ROOM	2	150	300
TEAM LOCKERS	2	750	1,500
TICKET ROOM	1	147	147
TRAINER ROOM	2	506	1,013
WEIGHT ROOM	1	2,002	2,002
WRESTLING / AEROBICS	1	3,134	3,134
		Total	**30,088**
ADMINISTRATIVE AREAS			
CIRCULATION	1	1,095	1,095
Reception area & CLERICAL	1	450	450
CONFERENCE	1	436	436
CONFERENCE	1	210	210
ELECTRICAL	1	250	250
HEALTH OFFICE	1	200	200
JANITORIAL	1	88	88
MAIL CENTER	1	242	242
NURSE'S OFFICE	1	250	250
Restroom Nurse's office	1	80	80
OFFICE	6	150	900
PRINCIPAL OFFICE	1	283	283
RECORD STORAGE	1	250	250
RESTROOM	2	150	300
SECURITY office	1	95	95
WAITING	1	286	286
WORK AREA and Teacher's lounge	1	500	500
		Total	**5,915**

LIBRARY MEDIA CENTER			
Tech STORAGE	1	450	450
CAREER CENTER	1	480	480
CIRCULATION	1	800	800
CLERICAL	1	150	150
Breakout Room	3	120	360
ELECTRICAL	1	88	88
LIBRARIAN OFFICE	1	150	150
LOBBY;READING, STACKING	1	1,500	1,500
OFFICE	2	150	300
RESTROOM	2	150	300
STORAGE	1	180	180
STUDENT STORE	1	500	500
TEXT BOOK DISTRIBUTION	1	200	200
TEXT BOOK STORAGE	1	200	200
WORK ROOM	1	200	200
		Total	**5,858**
CAFETERIA/MPR			
ADULT DINNING	1	842	842
Equipment storage ROOM	1	700	700
CIRCULATION	1	321	321
CONCESSION	1	145	145
DRY STORAGE	1	288	288
ELECTRICAL	1	81	81
JANITOR	1	95	95
KITCHEN	1	2,554	2,554
MULTIPURPOSE ROOM	1	4,661	4,661
OFFICE	1	80	80
RESTROOM	2	300	600
SERVING	1	1,183	1,183
STORAGE	1	246	246
		Total	**11,797**
LUNCH SHELTER			
Lunch Shelter	1	3,600	3,600
		Total	**3,600**
BUILDING SUBTOTALS			
Classroom Areas			69,481
Classrooms/Shops			3,600
Classrooms/Science Labs			18,196
Band/Choral/Drama			6,458
Gymnasium			30,088
Administrative Areas			5,915
Library Media Center			5,858
Cafeteria/MPR			11,797
Lunch Shelter			3,600
TOTAL AREA (SQ FT)			**154,993**

4.7 SUMMARY OF PROPOSED IMPROVEMENTS

The estimated costs for the proposed improvements are estimated to be approximately $161.7 million for a new high school, $34.9 million for Pioneer Valley modernization and new construction projects, $17.9 for the new practice gym/performance space at Righetti High School, and $33.9 million for the modernization of remaining permanent classrooms and new construction projects remaining at Santa Maria High. The total of all the proposed improvements is estimated to be approximately $248.6 million, plus a 15 percent reserve for escalation in costs, unforeseen contingencies, or regulatory agency approval requests for a combined total of approximately $285.9 million.

Table 4: Estimated Cost of Proposed Improvements

Project	Total
New High School	$161,745,124
Pioneer Valley High	$34,970,218
Righetti High	$17,927,527
Santa Maria High	$33,944,101
Total Projects	**$248,586,970**
Program Reserve (15%)	$37,288,045
Total Uses	**$285,875,015**

SECTION 5

PROPOSED FUNDING & PHASING

In California, school facility improvements are generally funded by a combination of sources which need to be identified, integrated, and ultimately sequenced in order to maximize their use. In almost all cases, the need for improvements exceeds the general availability of funding at any one time, requiring the prioritizing, sequencing, and phasing of improvements. Successful outcomes often rely on establishing an educational vision and specification for desired facilities, assessing existing facilities through that lens, integrating those components with available identified sources of funding and curating those outcomes within a facilities improvement plan that is ultimately presented to the Board for adoption and implementation.

This section reviews the identified sources of funds for proposed improvements. An assessment of the District's eligibility for state grants under the School Facility Program (SFP) is provided, including an assessment of the amounts that may be received by school site over time and suggested methods to optimize and use such funding. These funds generally require a local match. An analysis of potential local funding sources available to the District to meet its match requirements is provided including a review of estimated local developer fees. In addition, the use of a local general obligation bond program is reviewed, including the District's assessed valuation, bonding limit, and projected rates by which funds may be made available over time to meet the District's match and facility improvement requirements.

In combination, a proposed phasing program of proposed improvements is presented. It takes into consideration the needs of the educational program, the status of existing school facilities, and proposed improvements. Further consideration is presented as to the required sequencing, and the ability to leverage projected State matching grants with local funds and proposed bond proceeds. A phased program is presented that takes into consideration the maximizing of benefits to the District yet minimizes the impact during construction to the sites and to the ongoing educational program. To assist, a proposed sources and uses of available funds is presented linked to a proposed phasing schedule that integrates the proposed improvements by school site, phase, and amount over time.

5.1 STATE AID AND ELIGIBLITY

Through the Office of Public School Construction (OPSC), the State of California (State) provides funding assistance to eligible school districts through the SFP. OPSC administers various programs pursuant to State law and provides projects to be considered by the State Allocation Board (SAB) for funding. Funding for OPSC programs is provided periodically by voter approved state-wide ballot measures and/or by direct

general fund appropriations as authorized by the legislature and approved by the governor. The disbursement of funds is allocated to school districts in the form of per-pupil grants, with supplemental grants for site development, site acquisition, and other project-specific costs. Individual pupil grant amounts are periodically reviewed for adjustment by the SAB. To receive State grants, a district is required to match the grant portion from available district funds. Under certain specific conditions, a district may qualify and apply for a release of its local match requirement through a financial hardship review (Financial Hardship) and approval by the OPSC and the SAB, subject to additional constraints and requirements.

At this time, the OPSC has reported that all authorized funds for new construction and modernization applications under the SFP have been fully allocated. Received applications after September 12, 2018, for new construction and after March 1, 2019, for modernization are being placed on an "Applications Received Beyond Bond Authority" waiting list in the order of date received, which is presented to the SAB for acknowledgement, but not approval, and are slated for review once additional funds are made available to the program. To qualify for this waiting list for State funds, districts are required to adopt a Board resolution acknowledging the shortfall and the application's inclusion under the "Applications Received Beyond Bond Authority List."

In May 2022, Governor Newsom released the May Revision of the 2022-23 State of California (State) budget for K-12 education allocating additional funds to the SFP from the State General Fund. The State's historic revenue surplus presented an opportunity for the State to further support K-12 education through one-time funding for programs and services. The May Revision included approximately $4 billion in one-time General Fund monies for the SFP allocating $2.2 billion in 2021-22, $1.2 billion in 2023-24, and $625 million in 2024-25 to support new construction and modernization projects. The May Revision also included approximately $1.8 billion in one-time funds for deferred maintenance, HVAC, and energy improvements. In January 2024, due to the budget deficit, the Governor revised the projected budget for the SFP. The projected budget for 2024-25 has now been reduced to $375 million. From previous budget surpluses, the OPSC is currently operating under a $1.9 billion allotment to continue to process applications ("Workload List" and "Applications Received Beyond Bond Authority List") that are currently in line for funding.

The following provides an overview of applicable State aid programs and estimated District eligibility for the modernization of existing facilities and the new construction of permanent classrooms under the SFP. Opportunities for special program grants are also presented. Jointly, they are used to project the total amount of grant funding available and any local match of district funds that may be required.

5.1.1 STATE AID MODERNIZATION

An analysis indicates the District may be eligible for grant funding under the State's modernization program for existing school facilities. The SFP Modernization Program provides funds on a 60-40 State and local sharing basis for improvements that extend the life of existing school facilities. Eligible projects include but are not limited to modification or improvements such as HVAC, roofing, plumbing, lighting, and electrical systems. Applications are submitted to the OPSC in two stages:

1. **Eligibility:** Modernization eligibility is established separately for each school site and requires that permanent facilities be at least 25 years old and portable facilities be at least 20 years old. Students must be enrolled in those facilities based on State classroom loading standards of 27 per classroom for high school grades. Once established, site eligibility is not subject to annual review.

2. **Funding:** A district with modernization eligibility may request funding on a 60-40 State grant/local match basis. The 2023 pupil grant amount is currently $8,427 for high school grades. A higher per-pupil grant amount of $11,705 is provided for high school classrooms that are in buildings 50 years or older. Eligible costs include design, construction, educational technology, testing, inspection, furniture, and equipment. Limited supplemental funding is available for excessive costs such as fire safety and accessibility improvements. Grant levels are periodically reviewed by the State. Program funding is subject to project performance and certification at the completion of construction.

Modernization eligibility requires that the enrollment per site support the estimated number of students that may be housed in eligible classrooms for modernization. For example, if all classrooms at a school site are deemed eligible, the site would need to have a corresponding enrollment to support the use of all classrooms towards the eligibility assuming the State general classroom loading standard discussed above. If enrollment is less than the total State loading of all eligible classrooms, the total eligible enrollment grant amount would be reduced on a per-pupil basis to the number of students required to fill the eligible classrooms, resulting in less eligibility under this example. If enrollment is higher, the total State loading from all eligible classrooms would be used to fully fund the maximum number of eligible classrooms. Eligibility is evaluated annually and adjusted for changes in enrollment, the growing age of eligible classrooms, and the deduction for any pupil grants that have been applied to that school since it was last built or modernized under the program. Absent a finding of financial hardship as defined later in this report, a local match of district funds is required.

Table 5 presents an analysis of the estimated eligibility over the next ten years from permanent and portable classrooms based on enrollment, their age, and the projected pupil grants eligible pursuant to state loading standards less any pupil grants previously utilized towards prior OPSC approved modernization grants for those classrooms. Table 5 presents an estimated modernization eligibility of approximately $39.3 million in total over successive periods beginning in 2025 through 2031, requiring $26.4 million in District matching funds under the SFP. It includes an additional 5 percent adjustment for estimated supplemental grants above the base pupil grant for site development or other eligible improvements (e.g., fire sprinklers). The analysis assumes enrollment is updated annually but remains constant during the period as the District's existing classrooms continue to age annually until their next respective 20/25-year term of eligibility is reached. However, should enrollment significantly decrease, the amount of eligible grants receipts may be substantially reduced. Thus, each school site would need to have sufficient enrollment based on state loading standards to fill all the qualifying classrooms at the time of eligibility.

Table 5: Estimated Modernization Eligibility (2025 – 2031)

				2025	2026	2029	2031	Combined
		FY2022-23	Pupil	Total State	Total State	Total State	Total State	Total State
	School	Enroll	Grant	Grant (60%)	Grant (60%)	Grant (60%)	Grant (60%)	Grant (60%)
1	Delta High	341	$8,427	$0	$0	$0	$0	$0
2	Ernest Righetti High	2494	$8,427	$0	$12,369,993	$0	$0	$12,369,993
3	Pioneer Valley High	3220	$8,427	$2,627,960	$4,300,298	$17,201,192	$2,866,865	$26,996,316
4	Santa Maria High	3196	$8,427	$0	$10,715,157	$0	$0	$10,715,157
	Total	**9,251**		**$2,627,960**	**$27,385,448**	**$17,201,192**	**$2,866,865**	**$50,081,466**

Notes:

1. If 2022/23 enrollment is less than eligible pupils, assumes the lesser enrollment number as eligible pupils

2. Prior pupils used for OPSC funded applications less than 20/25 years

The above analysis includes an alternate method utilized by the District's 2001 consultants for establishing modernization eligibility for Santa Maria High School. In 2001, the District utilized an alternative method to determining eligibility at Santa Maria High through a square footage calculation of eligible classrooms, referred to as "Option B" in the State's eligibility Form 50-03. This option calculates modernization eligibility by determining the total square footage of portable and permanent classrooms that are over 20/25 years at a school site divided by the total square footage of the portable and permanent classrooms available at that time. That percentage is then multiplied by the current enrollment at the site to determine the pupil grant eligibility. Assuming a standard square footage of 960 square feet per classroom and 2022-23 enrollment, Table 6 provides an estimated update under Option B for Santa Maria High totaling approximately $10.7 million in estimated modernization eligibility in 2026 with a consequent local estimated match requirement of $7,143,438. An application for funding would require an updated review at the time of application based on then enrollment and on the actual square footages for each identified space.

Table 6: Estimated Santa Maria High Eligibility Based on Square Footage (2026)

Classrooms 20/25 Years+ (as of 2026)		**Assumed Sq. Ft**	**Total Sq. Ft**
Portables	36	960	34,560
Permanents	38	960	36,480
Total	**74**		**71,040**
Classrooms Less than 20/25 Years (as of 2026)		**Assumed Sq. Ft**	**Total Sq. Ft**
Portables	40	960	38,400
Permanents	72	960	69,120
Total	**112**		**107,520**
Total	**186**		**178,560**
	Percentage	**39.78%**	
	2022-23 Enroll	**3,196**	
	Modernization Eligibility	**1,272**	
	Per Pupil Grant	**$8,427**	
		$10,715,157	

There are some additional issues related to the funding of modernization applications to be considered. Under Senate Bill 50 (SB 50), the State provides the option of a "Like for Like" approach towards utilizing available modernization eligibility towards new construction. The "Like for Like" approach allows school districts to utilize modernization funding for new construction projects, if the new construction is

replacing a facility with a similar facility that requires modernization. These funds do not affect a district's new construction pupil grant eligibility and are in addition to any available new construction funding. Funds allocated under "Like for Like" would be based on the modernization grant eligibility on a site-by-site basis. Like for Like funding is proposed to be utilized where possible to fund proposed improvements.

Moreover, Prop. 51 funding of the SFP program sets a minimum limit of 101 pupil grants for each modernization application to be submitted for consideration. This may severely restrict applications to be submitted for districts that have designed their modernization projects and much smaller increments of improvement. This may also cause delays, if the required minimum threshold requires the delay of applications until enough smaller projects can perhaps be bundled together to meet the threshold requirement.

Under the SFP match program, the District must design the proposed project and receive Division of State Architect (DSA) and California Department of Education (CDE) project approval prior to the submittal of an application for modernization funding of a facility. This requires district to upfront all of the costs and risks associated with the design and ultimate approval of a project prior to its consideration for funding by the SAB. The only exception is for projects that can be qualified under the Financial Hardship program which is described later in this section. For those districts that can demonstrate by financial audit and program requirements that they do not have the ability to provide the local match, applications may be filed prior to receipt of DSA and CDE project approval if an application is requesting an advance of the funds required to design the project. Upon approval of such plans, the district may then apply separately for actual construction funding under this two-step approach to the construction of facilities.

5.1.2 STATE AID NEW CONSTRUCTION

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

1. **Eligibility:** Eligibility for new construction funding is not site specific and is determined by the gap between a district's projected enrollment and its existing permanent classroom capacity. Classroom capacity is based on State loading standards of 27 students per classroom for high school grades. Historical and projected student enrollment, plus approved, but not yet built residential units, are utilized to estimate the gap between the number of future students and the current ability to house students in permanent facilities. Portable classrooms are not counted by the State as being permanently available to house pupils. Until approved for construction, eligibility is subject to annual review of eligibility.

2. **Funding:** Once eligibility is approved, a district may apply for funding on a 50/50 State grant/local match basis. The 2023 pupil grant is currently $21,509 for high school grades and

is counted based on each student found to exceed a district's permanent capacity to house students. Eligible costs include design, construction, testing, inspection, furniture and equipment, and other costs closely related to the actual construction of school buildings. Supplemental grants are available for site acquisition, utilities, on/off-site and general site development, and other excessive costs. Grant levels are periodically reviewed and adjusted by the State.

The OPSC uses a formula that involves current and historical enrollment data to project enrollment five years or ten years into the future to determine eligibility for new construction funding. This is known as the "Cohort Survival Method" which allows Districts to use the most advantageous outcome of either the five-year or ten-year enrollment projection to assist in establishing eligibility. For the five year projection, however, the state also allows districts to take into consideration the number of approved, but not yet built residential units that have been recorded by the local planning agency within the boundaries of a school district regardless of grade level to augment enrollment eligibility. This can be quite beneficial in districts experiencing rapid residential development. As of the District's February 2023 School Facilities Needs Analysis, 1,940 new residential units have been identified within the District's boundaries that are anticipated to be built over the next five years.

Pursuant to this model and data, Table 7 provides a summary of the District's estimated new construction eligibility based on a five year projection of enrollment and existing tract map information. As shown, the District may be eligible for approximately $24.6 million in new construction funding or reimbursement for eligible facilities recently constructed without the use of state aid grants. The State requires an annual assessment of outstanding eligibility thus the District's eligibility may vary annually, based on the rate of enrollment and anticipated residential development increase or decline. This requires continuous annual review of the District's new construction eligibility and should thus be assessed accordingly.

Table 7: Estimated New Construction Eligibility by Capacity and 5 Year OPSC Enrollment Projection

	Fifth Year Enrollment Projection (2027-28)							
	A	B	A - B	C	(A - B) - C			
Grade	Projected Fifth-Year Enroll [1]	Existing Facility Capacity[2]	Eligibility	Pupils Used[3]	Estimated Remaining Eligibility	2023 Pupil Grant	50% Est. Total Grant	50% Required Match
9-12	9,165	3,492	5,673	4,679	994	$21,509	$21,379,946	$21,379,946
Total	**9,165**	**3,492**	**5,673**	**4,679**	**994**		**$21,379,946**	**$21,379,946**
					Estimated Site Development Grants (15%)		*$3,206,992*	*$3,206,992*
					Total Estimated New Construction Grants		**$24,586,938**	**$24,586,938**

Notes:

1. Projected Fifth-Year Enrollment as presented per the District's February 2023 School Facilities Needs Analysis

2. Existing Facility Capacity as presented per the District's February 2023 School Facilities Needs Analysis

3. New construction pupils as presented per the District's February 2023 School Facilities Needs Analysis

In April 2023, a new construction application was submitted to the OPSC for reimbursement of the new classroom building recently constructed at Santa Maria High utilizing the equivalent of 783 pupil grants, which may result in approximately $16.8 million in current base pupil grant amounts plus an additional $2.5 million (15 percent) for supplemental site development grants totaling an estimated $19.4 million.

This application is currently on the State's "Applications Received Beyond Bond Authority List" awaiting review. Upon State review of the application, an update to the District's new construction eligibility would be required.

5.1.3 CAREER TECHNICAL EDUCATION FACILITIES PROGRAM

An additional program offered by the State includes the Career Technical Education Facilities Program (CTEFP). The program provides grant funds to aid districts to reconfigure, construct, or modernize career technical education facilities, and/or purchase equipment for career technical education (CTE) programs. Funding for the program is currently exhausted.

Applications require a two-stage process, with applicants first submitting a grant application to CDE for a passing score of 105 or above. Upon receipt of a passing score, the applicant may submit a funding application to the OPSC. The CDE application process is highly competitive, and applicants must demonstrate strong pupil outcome measures in cooperation with local business and industry groups along with an active CTE Advisory Committee. The maximum grant for a new construction project is $3 million per project, per school site, inclusive of equipment. The maximum grant for a modernization project is $1.5 million per project, per school site, inclusive of equipment. A 50 percent District match is required for both new construction and modernization applications. The program does not require the use of modernization or new construction pupil grant eligibility for funding. However, any modernization or new construction grants previously utilized for a project would be deducted from the CTEFP grant, should a district wish to apply for CTEFP funds for the same facility. The District successfully received approximately $7.1 million in CTEFP new construction and modernization grant funds in 2022 for improvements related to the CTE Center, Righetti High, and Santa Maria High.

5.1.4 FINANCIAL HARDSHIP FUNDING FOR MODERNIZATION OR NEW CONSTRUCTION

The State provides the Financial Hardship Program to assist districts that cannot provide all or part of their local match for an approved modernization or new construction project based on their financial position. In Financial Hardship, the State funds its normal grant amount, and if a district is found to be eligible, provides an additional grant amount equal to the portion of the match that would have been required to be funded by a district. This in effect increases the amount of grant funding a district would otherwise receive. To qualify, a district must be charging the maximum developer fee allowed by the State and have a bonded indebtedness of 60 percent or greater, or a total bonding capacity of less than $5 million. Under the current Financial Hardship Program, a district must have exhausted all unencumbered capital fund balances available for modernization or new construction at the time of application. In addition, any funds that become available during the time the District is in Financial Hardship will reduce the amount of the State's grant in lieu of the District's match, proportionally. Audits of available capital facilities funding (e.g., Funds 21, 25, 35) are required throughout the project period that a district is in Hardship funding and at "close out", or completion of the project. Until approved for construction, eligibility is subject to review every 6 months. A district can apply for Financial Hardship for site acquisition, planning and DSA submittals, and construction costs.

Except for land acquisition and some site service costs, 100 percent hardship grant funding does not typically equate to 100 percent of the total development costs associated with the design and construction of an eligible project. Often projects must be phased, alternate methods of construction (e.g., modular) must be employed to achieve the desired space requirement for housing students or additional bond funding must be provided thereafter to complete a hardship project. Moreover, the Hardship period begins on the date of application, regardless of the date it is reviewed by OPSC or approved by the SAB. This requires that the District sequence projects proposed for Financial Hardship after all anticipated and available capital funds are encumbered. Based on an analysis of the District's General Obligation bond debt in Section 6.3.2 of this report, the District currently does meet the threshold requirements to qualify for Financial Hardship consideration. This assessment must be conducted every six-month period that a district participates in the Financial Hardship Program.

5.1.5 SUMMARY

The District has previously benefited from the State's School Facility (SFP) Program from the receipt of prior modernization, new construction, and CTE grants. By 2031, the District may be eligible for up to $50.1 million in modernization grant funds requiring $33.4 million in a local match from the District, assuming enrollment remains constant and sufficient to support the eligibility requirements. Using the State eligibility projection for enrollment and capacity to house students, the District is projected to be eligible for approximately $24.6 million in additional new construction eligibility. The latter may vary annually, based on the rate of enrollment and new residential increase or decline. The District was not found to be eligible for Financial Hardship funding based on an analysis of the District's General Obligation debt.

Table 8 provides a summary of estimated State aid grants from the SFP program through 2031. Collectively, there is the potential for approximately $132.6 million of District projects to be vetted, designed, and constructed at a cost of approximately $74.7 million from the State and $57.9 million in required local match dollars from the District. Should enrollment or residential development significantly decrease, the amount of eligible grants receipts may be substantially reduced. Moreover, some projects may also need to be constructed sooner than otherwise eligible to meet enrollment and capacity needs.

Table 8: Summary of Estimated State Aid Grants

Program	State Grant	District Match	Total
New Construction	$24,586,938	$24,586,938	**$49,173,876**
Subtotal	**$24,586,938**	**$24,586,938**	**$49,173,876**
2025-2031 Modernization	$50,081,466	$33,387,644	**$83,469,110**
Subtotal	**$50,081,466**	**$33,387,644**	**$83,469,110**
Total	**$74,668,404**	**$57,974,582**	**$132,642,986**

5.2 DEVELOPER FEES

Developer fees levied on new residential and commercial construction in a school district attendance area are permissible under State Education Code, Section 17620 and may be used to meet a district's match

requirement for eligible SFP projects. The purpose of these fees is to mitigate the student enrollment impact that would be generated by new development. Fees may be used to fund the construction of new school facilities, the modernization of existing facilities, or the reopening of closed facilities. The regulations also permit an inflation-based increase in developer fees every two years based on changes in the Class B construction index. There are three levels of developer fees that can be assessed:

- **Level 1** fees are established by statute and adjusted by the State Allocation Board and are currently $4.79 per square foot of residential development and $0.78 per square foot of commercial and industrial development
- **Level 2** fees constitute up to 50 percent of the State allowed cost for construction and sites, if the school district meets specified eligibility tests and assumes that the will State pay for the other 50 percent of cost through the SFP
- **Level 3** fees are the same as Level 2, but include the State's 50 percent share as well, but only when the State declares it is out of funds for new construction

A Developer Fee justification study must be completed in order to levy Level 1 or Level 2 fees and in the event that the State declares that it is out of new construction state grant funds, the same report may allow the District to levy Level 3 fees.

A February 2023 School Facilities Needs Analysis, prepared by SchoolWorks, Inc. established the justification for the District to levy Level 2 fees of $2.96 per square foot for new future residential units built within the District's boundaries. The study projected that the District could experience the construction of 1,940 new residential units over the next five years with a total of 3,301,850 square feet. Based on the estimated square footage of these 1,940 units, at the Level 2 fee of $2.96 per square foot, the District could collect approximately $9.8 million over a five-year period. This amount would mitigate under state law the pro-rata impact of new development on the demand for high school facilities. To maintain collection, the District is required to complete a biennial update to a Level 1 Study to continue collecting Level 1 fees for the next two years. Similarly, the District is also required to complete an annual update to continue to collect Level 2 fees.

5.3 GENERAL OBLIGATION BONDS

General obligation (G.O.) bonds are the most widely used and efficient method of financing local school facility improvements in California. More than 600 California school districts, including the Santa Maria Joint Union High School District and other K-14 educational districts in Santa Barbara County have issued G.O. bonds to finance necessary improvements. These bonds are secured by an annual levy on all taxable parcels within the boundaries of a school district. The levy is based on the assessed value of a parcel as determined by the county, pursuant to Proposition (Prop.) 13. Traditionally, G.O. bonds carry lower interest and issuance costs than other financing options. Buyers of most California school bonds receive an exemption from state and federal taxes on the interest portion of the bonds purchased, allowing for a lower rate of interest to a district to finance improvements over time. The District has used G.O. bonds

previously to fund school facility improvements and has been successful in making use of public financing options and garnering community support to improve school facilities.

5.3.1 EXISTING G.O. BOND AUTHORIZATIONS & PAST ISSUANCES

The District successfully passed local G.O. bond authorizations in 2000, 2004, and 2016. The 2000 authorization (Measure "C-2000") was approved by voters and authorized the sale of $30 million in G.O. bonds. To date, all $30 million in bonds have been sold, leaving no remaining authorization from Measure "C-2000". The 2000 Election was approved pursuant to Proposition 46 which required a 2/3 majority of voters to pass without a legal tax rate limit imposed for the purposes of issuing bonds from this authorization.

The 2004 authorization (Measure "C-2004") was approved by voters and authorized the sale of $79 million in G.O. bonds. To date, all bonds have been sold, leaving no remaining authorization from the measure. The 2004 Election was approved pursuant to Proposition 39 which set a maximum annual tax rate of $30 per $100,000 assessed valuation for the purposes of issuing any bond series from this authorization.

The 2016 authorization (Measure "H") was approved by voters and authorized the sale of $114 million in G.O. bonds. To date, all bonds have been sold, leaving no remaining authorization. The 2004 Election was approved also pursuant to Proposition 39 which set a maximum annual tax rate of $30 per $100,000 assessed valuation for the purposes of issuing any series of bonds from this authorization.

Subsequent to the initial sale of the above bonds, the District has issued five series refunding bonds between 2006 and 2021 to refinance outstanding G.O. bonds at lower interest rates, generating debt service savings for District taxpayers. Table 9 summarizes the District's past G.O. bond issuances and provides data for each issuance's sale date, original principal, current outstanding principal, original repayment ratio, and remaining term.

The District's outstanding bonds account for approximately $166 million in outstanding principal. All outstanding bonds are scheduled to be repaid by fiscal year (FY) 2046-47. Assuming a 4 percent increase in annual assessed valuation, Figure 11 indicates that the tax rate required to pay the principal and interest on the District's outstanding bonds is projected to remain stable until FY2036-37, decrease in FY2037-38, and then be eliminated in FY2045-46 following the final scheduled payment. The tax rate on the District's outstanding bonds is projected to average approximately $36 per $100,000 AV until final maturity in FY2046-47 based on the above assumptions.

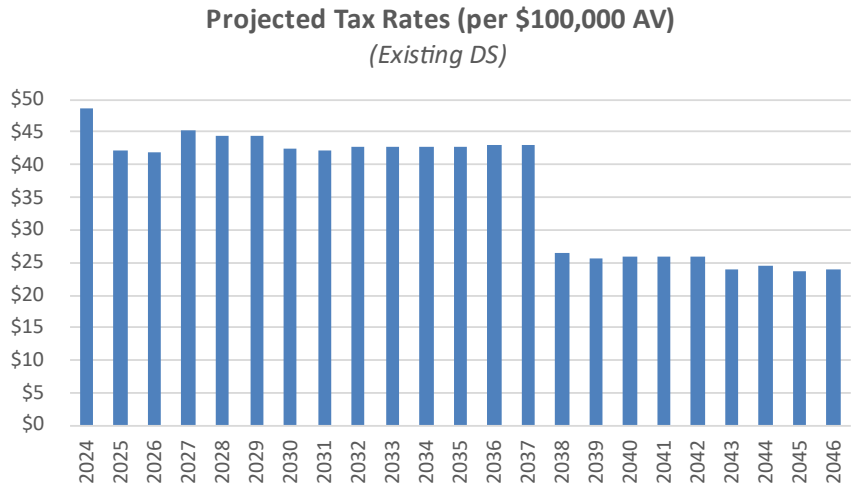
Table 9: Summary of District G.O. Bond Authorizations and Past Issuances

Series	Type	Date	Principal Amount	Principal Outstanding	Repayment Ratio[(1)]	Years Remaining	Comments
2000 Election Measure "C"			**Authorization:**	**$30,000,000**	**Remaining Authorization:**		**$0**
New Money Issues							
2001	Tax-Exempt GO Bond	3/1/2001	$18,000,000	$0	1.87	0	
2003B	Tax-Exempt GO Bond	3/1/2003	$12,000,000	$810,000	1.91	1	
2023-24 Tax Rate: $0.09		Subtotal	$30,000,000	$810,000	1.89	1	
2004 Election Measure "C"			**Authorization:**	**$79,000,000**	**Remaining Authorization:**		**$0**
New Money Issues							
2005	Tax-Exempt GO Bond	2/23/2005	$34,998,222	$3,678,222	1.93	7	
2013	Tax-Exempt GO Bond	4/23/2013	$14,999,873	$0	2.21	6	
2014	Tax-Exempt GO Bond	12/16/2014	$2,660,000	$340,000	1.77	1	
2023-24 Tax Rate: 25.57		Subtotal	$52,658,095	$4,018,222	2.00	7	
2016 Election Measure "H"			**Authorization:**	**$114,000,000**	**Remaining Authorization:**		**$0**
New Money Issues							
2017	Tax-Exempt GO Bond	8/22/2017	$47,000,000	$37,080,000	1.59	19	
2021	Tax-Exempt GO Bond	12/14/2021	$67,000,000	$67,000,000	1.56	23	
2023-24 Tax Rate: $22.96		Subtotal	$114,000,000	$104,080,000	1.57	23	
District Refunding Issues							
2006	Tax-Exempt GO Bond	5/17/2006	$25,452,728	$0	1.41	0	2001, 2003B
2013	Tax-Exempt GO Bond	4/23/2013	$26,820,000	$0	1.40	0	2001, 2003B, 2005
2015	Tax-Exempt GO Bond	12/1/2015	$860,000	$0	1.05	0	2006 Ref
2016	Tax-Exempt GO Bond	5/5/2016	$10,065,000	$0	1.05	0	2006 Ref
2021	Taxable GO Bond	12/14/2021	$58,135,620	$57,095,620	1.29	14	2013, 2013 Ref, 2014
		Subtotal	$121,333,348	$57,095,620	1.32	14	
2023-24 Tax Rate: $48.62		Total	$196,658,095	$166,003,842	1.73	23	

**Repayment ratio upon issuance of Bonds*

Sources: Electronic Municipal Market Access (EMMA), Thomson Reuters, County

Figure 11: Projected Tax Rates per $100,000 AV on Existing Debt Assuming 4.00% Annual AV Growth



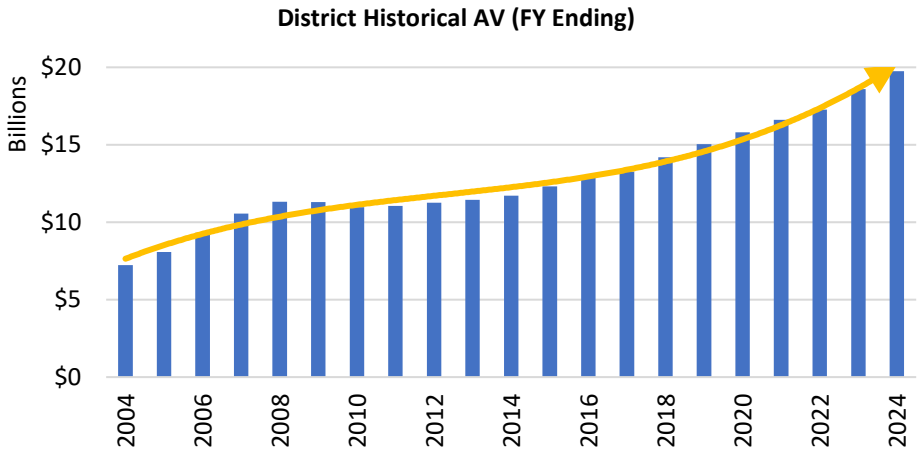
5.3.2 DISTRICT HISTORICAL ASSESSED VALUE & BONDING CAPACITY

Table 10 demonstrates the current assessed valuation for the District and the historical pattern of growth since 2004. The District experienced substantial annual increases in assessed valuation (AV) between 2004 and 2008 with an average annual AV growth of approximately 12 percent during that period. The District's AV then experienced slight declines in 2009 and 2010 attributable to the Great Recession and has since stabilized with an average annual growth of 5.37 percent over the last ten years. The District has averaged 5.15 percent annual growth over the 20-year period since 2004. County data shows the District's assessed valuation increased by approximately $1.17 billion in fiscal year 2023-24, a 6.31 percent increase from the prior year.

Table 10: Historic District Total Assessed Valuation

Historical Assessed Valuation		
FYE	Total	% Change
2004	$7,232,731,738	9.26%
2005	$8,083,327,238	11.76%
2006	$9,322,627,058	15.33%
2007	$10,549,246,604	13.16%
2008	$11,327,913,388	7.38%
2009	$11,301,842,676	-0.23%
2010	$10,971,708,827	-2.92%
2011	$11,055,236,700	0.76%
2012	$11,257,304,344	1.83%
2013	$11,453,441,156	1.74%
2014	$11,713,432,612	2.27%
2015	$12,309,305,008	5.09%
2016	$12,949,471,442	5.20%
2017	$13,270,719,001	2.48%
2018	$14,202,475,396	7.02%
2019	$15,044,234,794	5.93%
2020	$15,795,477,337	4.99%
2021	$16,615,730,716	5.19%
2022	$17,279,946,241	4.00%
2023	$18,587,270,467	7.57%
2024	$19,759,903,120	6.31%
5-Year Annualized Average		**5.60%**
10-Year Annualized Average		**5.37%**
20-Year Annualized Average		**5.15%**

Figure 12: Historic District Total Assessed Valuation Since 2004



Education Code 15102 limits the amount of outstanding principal bonded indebtedness a school district may have outstanding when considering the sale of additional G.O. bonds. For a high school district, bonded indebtedness cannot exceed 1.25 percent of the District's total assessed valuation at the time bonds are to be sold. This is known as a district's Statutory Debt Limit. As calculated in Table 11, using the District's current total assessed value and Statutory Debt Limit, the District has a gross bonding capacity of approximately $247 million. Table 11 indicates that the District has approximately $166 million in total outstanding G.O. bonded indebtedness as of November 2024, and the net bonding capacity of approximately $81 million. This net bonding capacity is anticipated to increase to approximately $95 million during FY 2024-25, due to increases in assessed value and paying down of outstanding debt. However, a future potential G.O. bond authorization may exceed the District's statutory bonding capacity and may therefore have to obtain an Education Code Section 15102 debt limit waiver from the State Board of Education to issue additional bonds from a new authorization.

Table 11: District's Bonding Capacity

BONDING CAPACITY ANALYSIS

Fiscal Year 2023-24	
ASSESSED VALUATION	
Secured Assessed Valuation	$18,682,304,816
Unsecured Assessed Valuation	$1,077,598,304
DEBT LIMITATION	
Total Assessed Valuation	$19,759,903,120
Applicable Bond Debt Limit	1.25%
Overall Bonding Capacity	$246,998,789
Outstanding Bonded Indebtedness	$166,003,842
NET BONDING CAPACITY	**$80,994,947**
% of Capacity Currently Used	67.2%

In order to qualify for Financial Hardship status with regards to the local match requirement to receive State funding from the SFP, the District must be utilizing more than 60 percent of its statutory bonding capacity. As of 2023-24, the District's indebtedness is above the 60 percent threshold. The District's bonding capacity utilization may increase with additional debt or a decrease in assessed valuation. For purposes of Financial Hardship eligibility, this calculation is performed at the time of an application's review.

Additional bonding capacity requires an increase in the assessed valuation of the District over time and/or the repayment of the scheduled outstanding principal on bonds. For example, Table 12 demonstrates the scheduled repayment of outstanding principal for the District's G.O. bonds and the effect of principal repayment and assessed valuation growth on the percent of projected bonding capacity available over time, assuming no future bond issuances. When no assessed valuation growth is modeled, the District's bonding capacity is projected to increase as scheduled principal is repaid. When a sustained increase in annual assessed valuation growth of 4.0 percent is modeled, the District's bonding capacity is projected to accelerate over time. Alternatively, the District's bonding capacity could be increased at any time through a formal request for an additional waiver of the District's bonding capacity by the State Board of Education, which is reviewed and granted on a case-by-case basis

Table 12: Remaining G.O. Bond Principal Outstanding Over Time

		Assuming No (0.0%) Annual AV Growth		Assuming 4.0% Annual AV Growth	
FYE	Outstanding Principal	Projected AV	Est. Bonding Capacity	Projected AV	Est. Bonding Capacity
2024	$166,003,842	$19,759,903,120	67.21%	$19,759,903,120	67.21%
2025	$161,823,842	$19,759,903,120	65.52%	$20,550,299,245	63.00%
2026	$157,713,842	$19,759,903,120	63.85%	$21,372,311,215	59.03%
2027	$153,238,842	$19,759,903,120	62.04%	$22,227,203,663	55.15%
2028	$151,039,804	$19,759,903,120	61.15%	$23,116,291,810	52.27%
2029	$148,731,790	$19,759,903,120	60.22%	$24,040,943,482	49.49%
2030	$146,287,389	$19,759,903,120	59.23%	$25,002,581,221	46.81%
2031	$142,295,000	$19,759,903,120	57.61%	$26,002,684,470	43.78%
2032	$135,480,000	$19,759,903,120	54.85%	$27,042,791,849	40.08%
2033	$127,910,000	$19,759,903,120	51.79%	$28,124,503,523	36.38%
2034	$119,640,000	$19,759,903,120	48.44%	$29,249,483,664	32.72%
2035	$110,650,000	$19,759,903,120	44.80%	$30,419,463,010	29.10%
2036	$100,890,000	$19,759,903,120	40.85%	$31,636,241,531	25.51%
2037	$90,305,000	$19,759,903,120	36.56%	$32,901,691,192	21.96%
2038	$78,855,000	$19,759,903,120	31.93%	$34,217,758,840	18.44%
2039	$72,095,000	$19,759,903,120	29.19%	$35,586,469,193	16.21%
2040	$65,040,000	$19,759,903,120	26.33%	$37,009,927,961	14.06%
2041	$57,350,000	$19,759,903,120	23.22%	$38,490,325,080	11.92%
2042	$49,015,000	$19,759,903,120	19.84%	$40,029,938,083	9.80%
2043	$40,000,000	$19,759,903,120	16.19%	$41,631,135,606	7.69%
2044	$31,000,000	$19,759,903,120	12.55%	$43,296,381,030	5.73%
2045	$21,150,000	$19,759,903,120	8.56%	$45,028,236,272	3.76%
2046	$11,000,000	$19,759,903,120	4.45%	$46,829,365,722	1.88%
2047	$0	$19,759,903,120	0.00%	$48,702,540,351	0.00%

5.3.3 ADDITIONAL G.O. BOND SALES

The District has sold the combined amount of its previous bond authorizations, so there is no remaining authorization for the issuance of new bonds. A new election would be required to approve additional authorization in order to issue additional G.O. bonded indebtedness.

5.3.4 ADDITIONAL G.O. BOND AUTHORITY

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

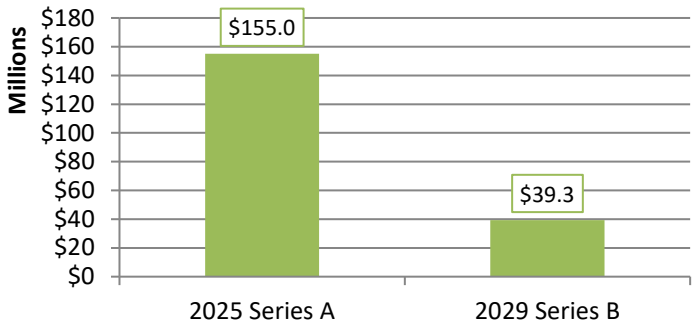
A new Proposition 39 general obligation bond program is proposed to be structured at a projected tax rate of $30 per $100,000 of AV to serve as the primary source of funding for the construction of a new high school campus and to provide the match for the District's existing and anticipated modernization and new construction funding applications that may be eligible to be submitted to the State. It is estimated that the program would require approximately $194.3 million in bond proceeds over time to fund identified projects for District consideration. The proposed program consists of two bond series issued four years apart with a first series consisting of approximately $155 million and a second series of approximately $39.4 million. The program assumes an average annual AV growth rate of 4.0 percent over the life of the bonds and an average interest rate of 4.42 percent for these bonds. The 4.42 percent interest rate represents the average yield for 30 year term, AA rated general obligation bonds as computed by the Municipal Market Data yield curve since 1992. The District's general obligation bonds are currently rated AA and it is assumed that the District would maintain its rating at the time of each bond sale. The actual rate of interest may vary depending on the actual market conditions at the time of sale for each bond series.

The bond series are structured to allow projected assessed valuation growth between bond issuances so the projected tax rates for bonds stay within the estimated Proposition 39 rate of $30 per $100,000 of assessed valuation. Recognizing that prevailing law and market conditions may change over time, the actual timing and sizing of the bond sales may be tailored to meet the District's needs. Additional bond proceeds can be generated by including additional series of bonds in the authorization, if desired. Once approved by voters, a general obligation bond authorization does not expire. It is also assumed that the District maintains its current general obligation bond rating of AA.

The next anticipated opportunity to call a Proposition 39 election will be in either March 2024 or November 2024. Figure 13 illustrates a possible Proposition 39 bond program over time, assuming the

District's assessed valuation continues to grow at an annual average of 4.0 percent. In this example, the tax levied for the new bond program would begin in FY2024-25.

Figure 13: Estimated Timing and Sizing of New Election Bond Issuances



5.4 PROPOSED SOURCES & USES

A proposed sources and uses statement for facilities improvements has been developed and is presented in Tables 13 and 14 based on the estimated cost of identified projects and sources of projected revenues available. A total of $285.9 million in project improvements is proposed to be implemented over two phases which includes a fifteen percent reserve fund for each project. The program reserve can be used to address potential regulatory code compliance issues or unanticipated conditions that arise during design and construction as well as provide contingency for inflation in future construction costs.

Table 13 summarizes the estimated sources of funding that are projected to be available based on the analysis conducted above. Approximately $47.2 million is estimated in State aid modernization funding along with $24.6 million in State aid new construction. The lesser estimated amount for State aid modernization grants is based on the need for some projects to be constructed sooner than otherwise eligible to meet pending enrollment and capacity needs.

Total Developer Fee collections are projected to total $9.8 million over the next 5 years along with the use of $10 million of existing District capital funds. A new $194.3 million General Obligation (G.O.) bond authorization is proposed to fund the balance of the proposed cost of improvements and provide the local match required to match SFP grants from the State. The actual amount of bond proceeds may vary depending on factors including timing, structure, and prevailing interest rates at the time of the actual bond approval consideration by voters and subsequent sale of bonds. In total, approximately $285.9 million is projected to be available through 2029, the expected projected term for implementation of the of the program.

Table 13: Estimated Sources of Funding

Sources	Total	
Projected GO Bond Proceeds		
Series A	$155,000,000	
Series B	$39,300,000	
	Subtotal	**$194,300,000**
Available District Funds	$10,000,000	
	Subtotal	**$10,000,000**
Projected State Aid Modernization Grants		
Pioneer Valley High	$24,129,450	
Righetti High	$12,369,993	
Santa Maria High	$10,715,157	
	Subtotal	**$47,214,601**
Estimated State Aid New Construction Grants		
Santa Maria HS Reimbursement	$19,367,779	
Estimated New Construction Eligibility	$5,219,159	
	Subtotal	**$24,586,938**
Projected Developer Fees	$9,773,476	
	Subtotal	**$9,773,476**
Total Sources		**$285,875,015**

Table 14 presents an estimated use of projected funding for proposed projects based on their estimated costs summarized in this report and more detailed in Appendix "A". In total, approximately $285.9 million in proposed projects are proposed to be needed to construct a new high school, and provide the local match to modernize and provide new facilities at Pioneer Valley High, and complete remaining improvements needed at Righetti High and Santa Maria High. It is based on an assessment of the general condition of facilities, their capacity to accommodate the current and envisioned educational program, and the need for improvements to be made to house and educate district students.

In preparation, the proposed improvements have taken into consideration the district's educational program, State and local requirements for housing its students, and a set of proposed educational specifications by which to evaluate existing facilities and plan for future improvements. It represents a concerted effort to meet the District's desire to accommodate as many teaching stations as possible in dedicated permanent school facilities and to provide 21st Century Learning Environments throughout the District, where feasible.

Table 14: Estimated Uses of Funds

Uses	Total	
Estimated New High School Expense	$161,745,124	
	Subtotal	**$161,745,124**
Proposed Pioneer Valley High Improvements		
Classroom & Shop Modernizations	$13,602,842	
23 New Classrooms, New Restroom, Sports Medicine, Shops	$21,367,377	
	Subtotal	**$34,970,218**
Remaining Righetti High Improvements		
New Gymnasium/Performance Area	$17,927,527	
	Subtotal	**$17,927,527**
Projected Santa Maria High Modernization and Remaining Improvements		
Modernize 34 Classrooms	$11,118,426	
Modernize Pope Auditorium	$8,579,868	
Construct Weight Room and Girls Locker Room	$3,741,785	
Construct 6 Classroom/Community Services Building	$10,504,021	
	Subtotal	**$33,944,101**
Total Projects		**$248,586,970**
Program Reserve (15%)		**$37,288,045**
Total Uses		**$285,875,015**

5.5 PROPOSED PHASING

Table 15 summarizes the estimated sources of funding that are projected to be available by phase. Phase 1 includes $186 million in estimated funding sources. Approximately $155 million is estimated from the first issuance of GO bonds, $10 million from existing District capital funds, and the receipt of an estimated $19.4 million in SFP new construction grant reimbursement funds for previously completed improvements at Santa Maria High School. In addition, $2.4 million in developer fees is projected to be available during Phase 1.

Phase 2 concludes the program with $99.9 million in estimated funding sources. Phase 2 includes $804,254 in projected ending balances from Phase 1, the second GO bond issuance of $39.4 million, $47.2 million in State aid modernization grants, $5.2 million in estimated new SFP construction grant eligibility, and $7.3 million in projected developer fees. In total, $285.9 million is projected over time, consisting of $248.6 million in anticipated project costs and a program reserve of $37.3 million.

As further presented in Table 15, the proposed improvements are suggested to be implemented over two funding phases beginning in FY2024-25. The projected phasing has taken into consideration the amount of existing funds, projected SFP grant funding, projected future G.O. bonds that may become available, and the required District matching funds for receiving SFP grants. Phase 1 provides the completion of the new high school. Commencing in Phase 2 modernizes and provides new facilities at Pioneer Valley High, and completes remaining improvements at Righetti High and Santa Maria High.

Table 15: Proposed Phasing of Improvements

Sources	Total		Phase 1 (2025)	Phase 2 (2029)
Beginning Balance			$0	$804,256
Projected GO Bond Proceeds				
Series A	$155,000,000		$155,000,000	
Series B	$39,300,000			$39,300,000
	Subtotal	**$194,300,000**		
Available District Funds	$10,000,000		$10,000,000	
	Subtotal	**$10,000,000**		
Projected State Aid Modernization Grants				
Pioneer Valley High	$24,129,450			$24,129,450
Righetti High	$12,369,993			$12,369,993
Santa Maria High	$10,715,157			$10,715,157
	Subtotal	**$47,214,601**		
Estimated State Aid New Construction Grants				
Santa Maria HS Reimbursement	$19,367,779		$19,367,779	
Estimated New Construction Eligibility	$5,219,159			$5,219,159
	Subtotal	**$24,586,938**		
Projected Developer Fees	$9,773,476		$2,443,369	$7,330,107
	Subtotal	**$9,773,476**		
Total Sources		**$285,875,015**	**$186,811,148**	**$99,868,122**

Uses	Total		Phase 1 (2025)	Phase 2 (2029)
Estimated New High School Expense	$161,745,124		$161,745,124	
	Subtotal	**$161,745,124**		
Proposed Pioneer Valley High Improvements				
Classroom & Shop Modernizations	$13,602,842			$13,602,842
23 New Classrooms, New Restroom, Sports Medicine, Shops	$21,367,377			$21,367,377
	Subtotal	**$34,970,218**		
Remaining Righetti High Improvements				
New Gymnasium/Performance Area	$17,927,527			$17,927,527
	Subtotal	**$17,927,527**		
Projected Santa Maria High Modernization and Remaining Improvements				
Modernize 34 Classrooms	$11,118,426			$11,118,426
Modernize Pope Auditorium	$8,579,868			$8,579,868
Construct Weight Room and Girls Locker Room	$3,741,785			$3,741,785
Construct 6 Classroom/Community Services Building	$10,504,021			$10,504,021
	Subtotal	**$33,944,101**		
Total Projects		**$248,586,970**	**$161,745,124**	**$86,841,846**
Program Reserve (15%)		**$37,288,045**	**$24,261,769**	**$13,026,277**
Total Uses		**$285,875,015**	**$186,006,892**	**$99,868,122**

SECTION 6

RECOMMENDATIONS

6.1 CONCLUSION & RECOMMENDATIONS

It is proposed that the Governing Board of the Santa Maria Joint Union High School District:

- Review and adopt the proposed specifications, improvement projects, method of funding and phasing for those facilities to be funded
- Direct the preparation of proposed State grant funding applications for review and approval by the Board for submission to the State when eligible
- Undertake necessary steps to further consider the implementation of the plan

APPENDIX A – COST ESTIMATES

STONE CREEK ENGINEERING

CONSTRUCTION PROJECT CONTROLS

Project:

Santa Maria Joint Union High School District

Program Budget

Budget
Cost Estimate

Estimate Date:

November 21, 2023

Prepared for:

Caldwell Flores Winters, Inc.
2163 Harbor Bay Parkway
Alameda, CA 94502

Prepared by:

Stone Creek Engineering, Inc.
1187 Vanderbilt Circle, Unit 6
Manteca, CA 95337

408-489-8853
jeff.threet@stonecreekengineering.com

Stone Creek Engineering, Inc.
Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Program Budgets for Implementation Plan
Location: Santa Maria, CA
Designed by: N/A
Program Cost Summary
Date: November 21, 2023

School Name	Pope Auditorium	Classroom Modernizations	New Buildings	New Community Building	Total
High Schools					
Santa Maria High School	$8,579,868	$11,118,426	$3,741,785	$10,504,021	$33,944,101
Pioneer Valley High School	$0	$13,602,842	$21,367,377	$0	$34,970,218
Righetti High School	$0	$0	$17,927,527	$0	$17,927,527
New High School	$0	$0	$161,745,124		$161,745,124
Project Subtotal:	**$8,579,868**	**$24,721,268**	**$204,781,812**	**$10,504,021**	**$248,586,970**
Program Reserve (15%)	$1,286,980	$3,708,190	$30,717,272	$1,575,603	$37,288,045
Project Total:	**$9,866,848**	**$28,429,458**	**$235,499,084**	**$12,079,624**	**$285,875,015**

Stone Creek Engineering, Inc.
Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
Tab Name: SM Project Cost Summary
Date: November 21, 2023

	Santa Maria High School				
Description	**Pope Auditorium**	**Classroom Modernizations**	**SM New Buildings**	**SM New Community Building**	**Total**
Construction Cost (See next page for detail)	$6,425,455	$7,499,515	$2,832,375	$7,966,555	$24,723,900
Soft Costs:					
Architect/Designer (AOR)	$706,800	$674,956	$254,914	$716,990	$2,353,660
Surveying	$0	$0	$14,162	$39,833	$53,995
CEQA Consultant	$0	$0	$0	$0	$0
Geotechnical Engineer (Design Phase)	$0	$0	$16,994	$47,799	$64,794
Geotechnical Engineer (Construction Phase)	$0	$0	$16,994	$47,799	$64,794
Preconstruction Services	$96,382	$112,493	$42,486	$119,498	$370,858
Construction Manager	$433,718	$506,217	$191,185	$537,742	$1,668,863
DSA Plan Check Fees	$64,255	$74,995	$28,324	$79,666	$247,239
CDE Plan Check Fees	$16,064	$18,749	$7,081	$19,916	$61,810
Construction Inspection (IOR)	$77,105	$89,994	$33,988	$130,936	$332,024
Special Testing and Inspection	$12,851	$14,999	$5,665	$15,933	$49,448
State Aid Fee	$195,816	$224,798	$86,104	$243,067	$749,785
Program Management Implementation Fee	$401,422	$460,836	$176,514	$498,287	$1,537,058
Furniture, Furnishings, and Equipment (FF&E)	$150,000	$1,440,874	$35,000	$40,000	$1,665,874
Total PROJECT Cost	**$8,579,868**	**$11,118,426**	**$3,741,785**	**$10,504,021**	**$33,944,101**
Program Reserve (15%)	$1,286,980	$1,667,764	$561,268	$1,575,603	$5,091,615
Total PROGRAM Cost	**$9,866,848**	**$12,786,190**	**$4,303,053**	**$12,079,624**	**$39,035,716**

Stone Creek Engineering, Inc.

Prepared for: Caldwell Flores Winters, Inc.

Project Owner: Santa Maria Joint Union High School District

Project: Program Budget

Tab Name: SM Construction Cost Summary

Date: November 21, 2023

CSI	Description	Tab Name:	SM Pope Auditorium	SM Classroom Modernizations	SM New Buildings	SM New Community Building	Total
		New Construction:	*0 sf*	*0 sf*	*4,110 sf*	*11,610 sf*	*15,720 sf*
		Renovation:	*0 sf*	*32,640 sf*	*0 sf*	*0 sf*	*32,640 sf*
		Total GSF:	*0 sf*	*32,640 sf*	*4,110 sf*	*11,610 sf*	*48,360 sf*
2	Existing Conditions		$197,678	$346,894	$0	$0	$544,572
3	Concrete		$197,678	$69,379	$0	$0	$267,057
4	Masonry		$0	$0	$0	$0	$0
5	Metals		$82,366	$0	$0	$0	$82,366
6	Wood, Plastics & Composites		$850,230	$353,398	$0	$0	$1,203,628
7	Thermal & Moisture Protection		$213,946	$225,047	$0	$0	$438,993
8	Openings		$107,129	$742,613	$0	$0	$849,742
9	Finishes		$525,495	$656,410	$0	$0	$1,181,905
10	Specialties		$515,683	$829,329	$0	$0	$1,345,012
11	Equipment		$200,000	$0	$0	$0	$200,000
12	Furnishings		$0	$0	$0	$0	$0
13	Building Construction		$0	$0	$1,512,840	$3,708,815	$5,221,654
14	Conveying Systems		$0	$0	$0	$0	$0
21	Fire Suppression		$156,495	$0	$0	$0	$156,495
22	Plumbing		$296,518	$86,723	$0	$0	$383,241
23	HVAC		$741,294	$816,000	$0	$0	$1,557,294
26	Electrical		$774,241	$901,924	$0	$0	$1,676,164
27	Communications		$19,855	$642,693	$0	$0	$662,548
28	Electronic Safety and Security		$65,893	$100,599	$0	$0	$166,492
31	Substructure and Earthwork		$0	$0	$0	$0	$0
32	Exterior Improvements		$0	$0	$666,722	$2,421,590	$3,088,312
33	Infrastructure		$0	$0	$0	$0	$0
34	Other		$0	$0	$0	$0	$0
	Subtotal		**$4,944,501**	**$5,771,009**	**$2,179,562**	**$6,130,405**	**$19,025,477**
Mark-ups	General Conditions	9.00%	$445,005	$519,391	$196,161	$551,736	$1,712,293
	General Contractor Markup	5.50%	$296,423	$345,972	$130,665	$367,518	$1,140,578
	General Contractor Bond & Insurance	2.50%	$142,148	$165,909	$62,660	$176,241	$546,958
	Design Contingency	5.00%	$291,404	$340,114	$128,452	$361,295	$1,121,265
	GC's Construction Contingency and E&O	5.00%	$305,974	$357,120	$134,875	$379,360	$1,177,329
	Construction Cost -- November 2023		**$6,425,455**	**$7,499,515**	**$2,832,375**	**$7,966,555**	**$24,723,900**

Stone Creek Engineering, Inc.
Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
Tab Name: SM Pope Auditorium
Date: November 21, 2023

Design Level: Budget

Total: 15,500 sf

TRADE	DESCRIPTION	QTY	UNIT	UNIT COST	TOTAL COST - SUB
02 41 00	**SITE DEMOLITION**				
02 41 00	Interior Demolition	15,500	sf	$8.50	$131,786
02 41 00					
02 41 00	**SITE DEMOLITION**			**$8.50**	**$131,786**
02 70 00	**FACILITY REMEDIATION**				
02 70 00	Hazardous Materials Demoliton (Building)	15,500	sf	$4.25	$65,893
02 70 00					
02 70 00	**FACILITY REMEDIATION**				**$65,893**
03 30 00	**FOUNDATION CONCRETE**				
03 30 00	Foundation Upgrades	15,500	sf	$10.63	$164,732
03 30 00					
03 30 00	**FOUNDATION CONCRETE**			**$10.63**	**$164,732**
03 30 00	**SLAB ON GRADE CONCRETE**				
03 30 00	Repair (E) Concrete	15,500	sf	$2.13	$32,946
03 30 00					
03 30 00	**SLAB ON GRADE CONCRETE**			**$2.13**	**$32,946**
05 50 00	**MISC. METALS**				
05 50 00	Miscellaneous Connectors, Brackets and Buckets	15,500	sf	$5.31	$82,366
05 50 00					
05 50 00	**MISC. METALS**			**$5.31**	**$82,366**
06 10 00	**ROUGH CARPENTRY**				
06 10 00	Rough Carpentry - Structural Upgrades	15,500	sf	$53.14	$823,660
06 10 00					
06 10 00	**ROUGH CARPENTRY**			**$53.14**	**$823,660**
06 41 00	**CASEWORK**				
06 41 00	Casework	1	ea	$26,569.68	$26,570
06 41 00					
06 41 00	**CASEWORK**			**$1.71**	**$26,570**
07 21 00	**INSULATION - INTERIOR**				
07 21 00	Interior Wall Insulation	7,750	sf	$1.49	$11,531
07 21 00					
07 21 00	**INSULATION - INTERIOR**			**$0.74**	**$11,531**
07 24 00	**EXTERIOR WALL SYSTEMS AND INSULATION**				
07 24 00	Exterior Wall Insulation	13,175	sf	$1.86	$24,504
07 24 00	Roof Insulation	15,500	sf	$2.66	$41,183
07 24 00					
07 24 00	**EXTERIOR WALL SYSTEMS AND INSULATION**			**$4.24**	**$65,687**
07 31 00	**ROOFING AND SHEET METAL**				
07 31 00	Roofing Repairs	15,500		$8.50	$131,786
07 31 00					
07 31 00	**ROOFING AND SHEET METAL**			**$8.50**	**$131,786**
07 92 00	**SEALANTS**				
07 92 00	Sealants	15,500	sf	$0.32	$4,942
07 92 00					
07 92 00	**SEALANTS**			**$0.32**	**$4,942**
08 12 00	**DOORS / FRAMES / HRDWR - EXTERIOR**				
08 12 00	Exterior Doors	8	ea	$3,028.94	$24,232
08 12 00					
08 12 00	**DOORS / FRAMES / HRDWR - EXTERIOR**			**$1.56**	**$24,232**
08 51 13	**WINDOW SYSTEMS, GLASS & GLAZING - EXTERIOR**				
08 51 13	Upgrade (E) Windows	600	sf	$138.16	$82,897
08 51 13					
08 51 13	**WINDOW SYSTEMS, GLASS & GLAZING - EXTERIOR**			**$5.35**	**$82,897**
09 20 00	**LATH & PLASTER - EXTERIOR**				
09 20 00	Exterior Cement Plaster Repairs	13,175	sf	$4.25	$56,009
09 20 00					
09 20 00	**LATH & PLASTER - EXTERIOR**			**$3.61**	**$56,009**
09 20 00	**DRYWALL**				
09 20 00	Drywall Repairs	11,625	sf	$8.50	$98,839

09 20 00				
09 20 00	**DRYWALL**		**$6.38**	**$98,839**
09 51 00	**ACOUSTICAL SYSTEMS**			
09 51 00	Acoustic Ceiling System - Repairs	15,500 sf	$8.50	$131,786
09 51 00				
09 51 00	**ACOUSTICAL SYSTEMS**		**$8.50**	**$131,786**
09 64 00	**FLOORING AND BASE**			
09 64 00	Flooring	15,500 sf	$9.57	$148,259
09 64 00				
09 64 00	**FLOORING AND BASE**		**$9.57**	**$148,259**
09 90 00	**PAINTING AND WALLCOVERING**			
09 90 00	Interior Painting	19,375 sf	$2.13	$41,183
09 90 00	Exterior Painting	15,500 sf	$3.19	$49,420
09 90 00				
09 90 00	**PAINTING AND WALLCOVERING**		**$5.85**	**$90,603**
10 20 00	**INTERIOR SPECIALTIES**			
10 20 00	Theater Specialties	1 ea	$150,000.00	$150,000
10 20 00	Theater Seating	812 ea	$375.00	$304,500
10 20 00	Building Specialties	15,500 ea	$2.66	$41,183
10 20 00	Exterior Signage	1 ea	$20,000.00	$20,000
10 20 00				
10 20 00	**INTERIOR SPECIALTIES**		**$33.27**	**$515,683**
11 50 00	**EQUIPMENT**			
11 50 00	Theater Equipment	1 ls	$200,000.00	$200,000
11 50 00				
11 50 00	**EQUIPMENT**		**$12.90**	**$200,000**
21 10 00	**FIRE SUPPRESSION SYSTEMS**			
21 10 00	Fire Suppression System - Complete	15,500 sf	$10.10	$156,495
21 10 00				
21 10 00	**FIRE SUPPRESSION SYSTEMS**		**$10.10**	**$156,495**
22 10 00	**PLUMBING**			
22 10 00	Plumbing System	15,500 sf	$19.13	$296,518
22 10 00				
22 10 00	**PLUMBING**		**$19.13**	**$296,518**
23 30 00	**HVAC**			
23 30 00	HVAC System - Replacement	15,500 sf	$47.83	$741,294
23 30 00				
23 30 00	**HVAC**		**$47.83**	**$741,294**
26 00 00	**BUILDING POWER**			
26 00 00	Building Power Modifications	15,500 sf	$26.57	$411,830
26 00 00				
26 00 00	**BUILDING POWER**		**$26.57**	**$411,830**
26 50 00	**LIGHTING & LIGHTING DISTRIBUTION**			
26 50 00	Light Fixtures	15,500 sf	$23.38	$362,410
26 50 00				
26 50 00	**LIGHTING & LIGHTING DISTRIBUTION**		**$23.38**	**$362,410**
27 30 00	**VOICE AND DATA COMMUNICATIONS**			
27 30 00	Data/Communications System - Modifications	15,500 sf	$0.80	$12,355
27 30 00				
27 30 00	**VOICE AND DATA COMMUNICATIONS**		**$0.80**	**$12,355**
27 40 00	**AUDIO-VIDEO COMMUNICATIONS**			
27 40 00	A/V System - Raceways and Boxes Only (Cabling and Equipment are included in Soft Costs)	1 ea	$7,500.00	$7,500
27 40 00				
27 40 00	**AUDIO-VIDEO COMMUNICATIONS**		**$0.48**	**$7,500**
28 30 00	**FIRE ALARM SYSTEM**			
28 30 00	Fire Alarm System - Modifications	15,500 sf	$4.25	$65,893
28 30 00				
28 00 00	**FIRE ALARM SYSTEM**		**$4.25**	**$65,893**
Total	**Subtotal subcontractor cost**		**$319.00**	**$4,944,501**
	General Conditions	9.00%	$28.71	$445,005
	General Contractor Markup	5.50%	$19.12	$296,423
	General Contractor Bond & Insurance	2.50%	$9.17	$142,148
	Design Contingency	5.00%	$18.80	$291,404
	GC's Construction Contingency and E&O	5.00%	$19.74	$305,974
	Current Construction Cost		**$414.55**	**$6,425,455**

Stone Creek Engineering, Inc.
Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
Tab Name: SM Classroom Modernizations
Date: November 21, 2023

Design Level: Budget

Total: 32,640 sf

TRADE	DESCRIPTION	QTY	UNIT	UNIT COST	TOTAL COST - SUB
02 41 00	**SITE DEMOLITION**				
02 41 00	Interior Demolition	32,640	sf	$10.63	$346,894
02 41 00					
02 41 00	**SITE DEMOLITION**			**$10.63**	**$346,894**
03 30 00	**SLAB ON GRADE CONCRETE**				
03 30 00	Repair (E) Concrete	32,640	sf	$2.13	$69,379
03 30 00					
03 30 00	**SLAB ON GRADE CONCRETE**			**$2.13**	**$69,379**
06 10 00	**ROUGH CARPENTRY**				
06 10 00	Rough Carpentry	32,640	sf	$5.85	$190,792
06 10 00					
06 10 00	**ROUGH CARPENTRY**			**$5.85**	**$190,792**
06 41 00	**CASEWORK**				
06 41 00	Casework	34	ea	$4,782.54	$162,606
06 41 00					
06 41 00	**CASEWORK**			**$4.98**	**$162,606**
07 21 00	**INSULATION - INTERIOR**				
07 21 00	Interior Wall Insulation	16,320	sf	$1.49	$24,283
07 21 00					
07 21 00	**INSULATION - INTERIOR**			**$0.74**	**$24,283**
07 24 00	**EXTERIOR WALL SYSTEMS AND INSULATION**				
07 24 00	Exterior Wall Insulation	27,744	sf	$1.86	$51,600
07 24 00	Roof Insulation	32,640	sf	$2.66	$86,723
07 24 00					
07 24 00	**EXTERIOR WALL SYSTEMS AND INSULATION**			**$4.24**	**$138,324**
07 31 00	**ROOFING AND SHEET METAL**				
07 31 00	Roofing Repairs	32,640	sf	$1.59	$52,034
07 31 00					
07 31 00	**ROOFING AND SHEET METAL**			**$1.59**	**$52,034**
07 92 00	**SEALANTS**				
07 92 00	Sealants	32,640	sf	$0.32	$10,407
07 92 00					
07 92 00	**SEALANTS**			**$0.32**	**$10,407**
08 12 00	**DOORS / FRAMES / HRDWR - EXTERIOR**				
08 12 00	Exterior Doors	68	ea	$3,028.94	$205,968
08 12 00					
08 12 00	**DOORS / FRAMES / HRDWR - EXTERIOR**			**$6.31**	**$205,968**
08 51 13	**WINDOW SYSTEMS, GLASS & GLAZING - EXTERIOR**				
08 51 13	Upgrade (E) Windows	3,884	sf	$138.16	$536,645
08 51 13					
08 51 13	**WINDOW SYSTEMS, GLASS & GLAZING - EXTERIOR**			**$16.44**	**$536,645**
09 20 00	**LATH & PLASTER - EXTERIOR**				
09 20 00	Exterior Cement Plaster Repairs (see Sitewide Projects)	27,744	sf	$1.33	$36,857
09 20 00					
09 20 00	**LATH & PLASTER - EXTERIOR**			**$1.13**	**$36,857**
09 20 00	**DRYWALL**				
09 20 00	Drywall Repairs	35,251	sf	$4.78	$168,590
09 20 00					
09 20 00	**DRYWALL**			**$5.17**	**$168,590**
09 51 00	**ACOUSTICAL SYSTEMS**				
09 51 00	2x4 Acoustic Ceiling System - Repairs	32,640	sf	$3.19	$104,068
09 51 00					
09 51 00	**ACOUSTICAL SYSTEMS**			**$3.19**	**$104,068**
09 64 00	**FLOORING AND BASE**				
09 64 00	Flooring	32,640	sf	$7.97	$260,170
09 64 00					
09 64 00	**FLOORING AND BASE**			**$7.97**	**$260,170**
09 90 00	**PAINTING AND WALLCOVERING**				
09 90 00	Interior Painting	40,800	sf	$2.13	$86,723

09 90 00				
09 90 00	**PAINTING AND WALLCOVERING**		**$2.66**	**$86,723**
10 20 00	**INTERIOR SPECIALTIES**			
10 20 00	White Boards - Wall Mounted	102 ea	$3,719.76	$379,415
10 20 00	White Boards - Sliding	32 ea	$13,284.84	$429,100
10 20 00	Interior Specialties	32,640 sf	$0.64	$20,814
10 20 00				
10 20 00	**INTERIOR SPECIALTIES**		**$25.41**	**$829,329**
22 10 00	**PLUMBING**			
22 10 00	Plumbing Modifications	32,640 sf	$2.66	$86,723
22 10 00				
22 10 00	**PLUMBING**		**$2.66**	**$86,723**
23 30 00	**HVAC**			
23 30 00	HVAC - Equipment Repairs	32,640 sf	$25.00	$816,000
23 30 00				
23 30 00	**HVAC**		**$25.00**	**$816,000**
26 00 00	**BUILDING POWER**			
26 00 00	Building Power Modifications	32,640 sf	$8.50	$277,515
26 00 00				
26 00 00	**BUILDING POWER**		**$8.50**	**$277,515**
26 50 00	**LIGHTING & LIGHTING DISTRIBUTION**			
26 50 00	Light Fixtures	32,640 sf	$19.13	$624,409
26 50 00				
26 50 00	**LIGHTING & LIGHTING DISTRIBUTION**		**$19.13**	**$624,409**
27 30 00	**VOICE AND DATA COMMUNICATIONS**			
27 30 00	Data/Communications System - Modifications	32,640 sf	$1.70	$55,503
27 30 00				
27 30 00	**VOICE AND DATA COMMUNICATIONS**		**$1.70**	**$55,503**
27 40 00	**AUDIO-VIDEO COMMUNICATIONS**			
27 40 00	A/V System - Raceways and Boxes Only (Cabling and Equipment are included in Soft Costs)	34 ea	$2,656.97	$90,337
27 40 00	A/V System - Monitors/Brackets	85 ea	$5,845.33	$496,853
27 40 00				
27 40 00	**AUDIO-VIDEO COMMUNICATIONS**		**$17.99**	**$587,190**
28 30 00	**FIRE ALARM SYSTEM**			
28 30 00	Fire Alarm System - Modifications	32,640 sf	$3.08	$100,599
28 30 00				
28 00 00	**FIRE ALARM SYSTEM**		**$3.08**	**$100,599**
Total	**Subtotal subcontractor cost**		**$176.81**	**$5,771,009**
	General Conditions	9.00%	$15.91	$519,391
	General Contractor Markup	5.50%	$10.60	$345,972
	General Contractor Bond & Insurance	2.50%	$5.08	$165,909
	Design Contingency	5.00%	$10.42	$340,114
	GC's Construction Contingency and E&O	5.00%	$10.94	$357,120
	Current Construction Cost		**$229.76**	**$7,499,515**

Stone Creek Engineering, Inc.
Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
Tab Name: SM New Buildings
Date: November 21, 2023

Design Level: Budget

Total: 4,110 sf

TRADE	DESCRIPTION	QTY	UNIT	UNIT COST	TOTAL COST - SUB
13 30 00	**BUILDING CONSTRUCTION**				
13 30 00	Construct (N) Modular Weight Room	2,000	sf	$315.00	$630,000
13 30 00	Construction (N) Modular Girls' Locker Room	2,110	sf	$400.00	$844,000
13 30 00	Modular Design & Engineering Costs	4,110	sf	$9.45	$38,840
13 30 00					
13 30 00	**BUILDING CONSTRUCTION**				**$1,512,840**
32 00 00	**GENERAL SITE IMPROVEMENTS**				
32 00 00	Demolish Existing Building	10,800	sf	$15.00	$162,000
32 00 00	Demolish Existing Site Paving	1,620	sf	$6.00	$9,720
32 00 00	Rough Grade Site	12,420	sf	$1.10	$13,662
32 00 00	Site Paving (Concrete Walkways)	2,055	sf	$35.00	$71,925
32 00 00	Domestic and Fire Water	1	ea	$25,000.00	$25,000
32 00 00	Storm System Modifications	1	ea	$20,000.00	$20,000
32 00 00	Sanitary Sewer System	1	ea	$20,000.00	$20,000
32 00 00	Electrical and Communications System	1	ea	$30,000.00	$30,000
32 00 00	Modular Foundation System	4,110	sf	$40.00	$164,400
32 00 00	Modular C/B/PA and Fire Alarm	4,110	sf	$15.00	$61,650
32 00 00	Fire Suppression	4,110	sf	$4.50	$18,495
32 00 00	Renewable Energy Requirements	4,110	sf	$17.00	$69,870
32 00 00					
32 00 00	**GENERAL SITE IMPROVEMENTS**				**$666,722**
Total	**Subtotal Subcontractor Cost**				**$2,179,562**
	General Conditions	9.00%			$196,161
	General Contractor Markup	5.50%			$130,665
	General Contractor Bond & Insurance	2.50%			$62,660
	Design Contingency	5.00%			$128,452
	GC's Construction Contingency and E&O	5.00%			$134,875
	Current Construction Cost				**$2,832,375**

Stone Creek Engineering, Inc.
Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
Tab Name: SM New Community Building
Date: November 21, 2023

Design Level: Budget

Total: 11,610 sf

TRADE	DESCRIPTION	QTY	UNIT	UNIT COST	TOTAL COST - SUB
13 30 00	**BUILDING CONSTRUCTION**				
13 30 00	Construct (N) Modular 2-Story Classroom/Community Services Building	11,610	sf	$310.00	$3,599,100
13 30 00	Modular Design & Engineering Costs	11,610	sf	$9.45	$109,715
13 30 00					
13 30 00	**BUILDING CONSTRUCTION**				**$3,708,815**
32 00 00	**GENERAL SITE IMPROVEMENTS**				
32 00 00	Demolish Existing Building	0	sf	$0.00	$0
32 00 00	Demolish Existing Site Paving	36,000	sf	$6.00	$216,000
32 00 00	Rough Grade Site	36,000	sf	$1.10	$39,600
32 00 00	Site Paving (Concrete Walkways)	27,795	sf	$35.00	$972,825
32 00 00	Fencing/Gates	1	ls	$50,000.00	$50,000
32 00 00	Domestic and Fire Water	1	ea	$75,000.00	$75,000
32 00 00	Storm System Modifications	1	ea	$130,000.00	$130,000
32 00 00	Sanitary Sewer System	1	ea	$20,000.00	$20,000
32 00 00	Electrical and Communications System	1	ea	$30,000.00	$30,000
32 00 00	Modular Foundation System	11,610	sf	$40.00	$464,400
32 00 00	Modular C/B/PA and Fire Alarm	11,610	sf	$15.00	$174,150
32 00 00	Fire Suppression	11,610	sf	$4.50	$52,245
32 00 00	Renewable Energy Requirements	11,610	sf	$17.00	$197,370
32 00 00					
32 00 00	**GENERAL SITE IMPROVEMENTS**				**$2,421,590**
Total	**Subtotal Subcontractor Cost**				**$6,130,405**
	General Conditions	9.00%			$551,736
	General Contractor Markup	5.50%			$367,518
	General Contractor Bond & Insurance	2.50%			$176,241
	Design Contingency	5.00%			$361,295
	GC's Construction Contingency and E&O	5.00%			$379,360
	Current Construction Cost				**$7,966,555**

Stone Creek Engineering, Inc.

Prepared for: Caldwell Flores Winters, Inc.

Project Owner: Santa Maria Joint Union High School District

Project: Program Budget

Tab Name: PV Project Cost Summary

Date: November 21, 2023

	Pioneer Valley High School			
Description	**PV Classroom Modernizations**	**PV Shop Modernizations**	**PV New Buildings**	**Total**
Construction Cost (See next page for detail)	$6,273,856	$1,554,961	$15,575,498	$23,404,315
Soft Costs:				
Architect/Designer (AOR)	$564,647	$139,947	$1,401,795	$2,106,388
Surveying	$0	$0	$62,302	$62,302
CEQA Consultant	$0	$0	$25,000	$25,000
Geotechnical Engineer (Design Phase)	$0	$0	$54,514	$54,514
Geotechnical Engineer (Construction Phase)	$0	$0	$54,514	$54,514
Preconstruction Services	$94,108	$23,324	$233,632	$351,065
Construction Manager	$423,485	$104,960	$1,054,236	$1,582,681
DSA Plan Check Fees	$62,739	$15,550	$155,755	$234,043
CDE Plan Check Fees	$15,685	$3,887	$38,939	$58,511
Construction Inspection (IOR)	$75,286	$18,660	$186,906	$280,852
Special Testing and Inspection	$12,548	$3,110	$31,151	$46,809
State Aid Fee	$188,059	$46,610	$471,856	$706,525
Program Management Implementation Fee	$385,521	$95,550	$967,305	$1,448,376
Furniture, Furnishings, and Equipment (FF&E)	$3,334,338	$166,012	$1,053,973	$4,554,324
Total PROJECT Cost	**$11,430,271**	**$2,172,571**	**$21,367,377**	**$34,970,218**
Program Reserve (15%)	$1,714,541	$325,886	$3,205,106	$5,245,533
Total PROGRAM Cost	**$13,144,811**	**$2,498,457**	**$24,572,483**	**$40,215,751**

Stone Creek Engineering, Inc.

Prepared for: Caldwell Flores Winters, Inc.

Project Owner: Santa Maria Joint Union High School District

Project: Program Budget

Tab Name: PV Constr Cost Summary

Date: November 21, 2023

CSI	Pioneer Valley High School	Tab Name:	PV Classroom Modernizations	PV Shop Modernizations	PV New Buildings	Total
		New Construction:	*0 sf*	*0 sf*	*0 sf*	*0 sf*
		Renovation:	*79,680 sf*	*6,600 sf*	*27,960 sf*	*114,240 sf*
		Total GSF:	*79,680 sf*	*6,600 sf*	*27,960 sf*	*114,240 sf*
2	Existing Conditions		$169,366	$105,216	$0	$274,582
3	Concrete		$0	$10,522	$0	$10,522
4	Masonry		$0	$0	$0	$0
5	Metals		$0	$0	$0	$0
6	Wood, Plastics & Composites		$435,764	$116,375	$0	$552,139
7	Thermal & Moisture Protection		$25,405	$50,328	$0	$75,733
8	Openings		$0	$272,286	$0	$272,286
9	Finishes		$880,914	$204,708	$0	$1,085,622
10	Specialties		$2,079,671	$35,072	$0	$2,114,743
11	Equipment		$0	$0	$0	$0
12	Furnishings		$0	$0	$0	$0
13	Building Construction		$0	$0	$9,284,160	$9,284,160
14	Conveying Systems		$0	$0	$0	$0
21	Fire Suppression		$0	$0	$0	$0
22	Plumbing		$0	$17,536	$0	$17,536
23	HVAC		$423,414	$105,216	$0	$528,630
26	Electrical		$254,049	$210,432	$0	$464,481
27	Communications		$559,260	$60,111	$0	$619,371
28	Electronic Safety and Security		$0	$8,768	$0	$8,768
31	Substructure and Earthwork		$0	$0	$0	$0
32	Exterior Improvements		$0	$0	$2,701,460	$2,701,460
33	Infrastructure		$0	$0	$0	$0
34	Other		$0	$0	$0	$0
	Subtotal		**$4,827,843**	**$1,196,570**	**$11,985,620**	**$18,010,033**
Mark-ups	General Conditions	9.00%	$434,506	$107,691	$1,078,706	$1,620,903
	General Contractor Markup	5.50%	$289,429	$71,734	$718,538	$1,079,701
	General Contractor Bond & Insurance	2.50%	$138,794	$34,400	$344,572	$517,766
	Design Contingency	5.00%	$284,529	$70,520	$706,372	$1,061,421
	GC's Construction Contingency and E&O	5.00%	$298,755	$74,046	$741,690	$1,114,491
	Construction Cost -- November 2023		**$6,273,856**	**$1,554,961**	**$15,575,498**	**$23,404,315**

Stone Creek Engineering, Inc.
Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
Tab Name: PV Classroom Modernizations
Date: November 21, 2023

Design Level: Budget

Total: 79,680 sf

TRADE	DESCRIPTION	QTY	UNIT	UNIT COST	TOTAL COST - SUB
02 41 00	**SITE DEMOLITION**				
02 41 00	Interior Demolition	79,680	sf	$2.13	$169,366
02 41 00					
02 41 00	**SITE DEMOLITION**			**$2.13**	**$169,366**
06 10 00	**ROUGH CARPENTRY**				
06 10 00	Rough Carpentry	79,680	sf	$1.59	$127,024
06 10 00					
06 10 00	**ROUGH CARPENTRY**			**$1.59**	**$127,024**
06 41 00	**CASEWORK**				
06 41 00	Casework	83	ea	$3,719.76	$308,740
06 41 00					
06 41 00	**CASEWORK**			**$3.87**	**$308,740**
07 92 00	**SEALANTS**				
07 92 00	Sealants	79,680	sf	$0.32	$25,405
07 92 00					
07 92 00	**SEALANTS**			**$0.32**	**$25,405**
09 20 00	**DRYWALL**				
09 20 00	Drywall Repairs	99,600	sf	$1.33	$132,317
09 20 00					
09 20 00	**DRYWALL**			**$1.66**	**$132,317**
09 64 00	**FLOORING AND BASE**				
09 64 00	Flooring	79,680	sf	$7.44	$592,780
09 64 00					
09 64 00	**FLOORING AND BASE**			**$7.44**	**$592,780**
09 90 00	**PAINTING AND WALLCOVERING**				
09 90 00	Painting - Interior	91,632	sf	$1.70	$155,817
09 90 00					
09 90 00	**PAINTING AND WALLCOVERING**			**$1.96**	**$155,817**
10 20 00	**INTERIOR SPECIALTIES**				
10 20 00	White Boards - Wall Mounted	249	ea	$3,719.76	$926,219
10 20 00	White Boards - Sliding	83	ea	$13,284.84	$1,102,642
10 20 00	Interior Specialties	79,680	sf	$0.64	$50,810
10 20 00					
10 20 00	**INTERIOR SPECIALTIES**			**$26.10**	**$2,079,671**
23 30 00	**HVAC**				
23 30 00	HVAC - Repairs	79,680	sf	$5.31	$423,414
23 30 00					
23 30 00	**HVAC**			**$5.31**	**$423,414**
26 00 00	**BUILDING POWER**				
26 00 00	Building Power Repairs	79,680	sf	$2.13	$169,366
26 00 00					
26 00 00	**BUILDING POWER**			**$2.13**	**$169,366**
26 50 00	**LIGHTING & LIGHTING DISTRIBUTION**				
26 50 00	Light Fixtures - Repair	79,680	sf	$1.06	$84,683
26 50 00					
26 50 00	**LIGHTING & LIGHTING DISTRIBUTION**			**$1.06**	**$84,683**
27 30 00	**VOICE AND DATA COMMUNICATIONS**				
27 30 00	Data/Communications System - Modifications	79,680	sf	$0.27	$21,171
27 30 00					
27 30 00	**VOICE AND DATA COMMUNICATIONS**			**$0.27**	**$21,171**
27 40 00	**AUDIO-VIDEO COMMUNICATIONS**				
27 40 00	A/V System - Raceways and Boxes Only (Cabling and Equipment are included in Soft Costs)	83	ea	$2,656.97	$220,528
27 40 00	A/V System - Monitor Brackets	249	ea	$1,275.34	$317,561
27 40 00					
27 40 00	**AUDIO-VIDEO COMMUNICATIONS**			**$6.75**	**$538,089**
Total	**Subtotal subcontractor cost**			**$60.59**	**$4,827,843**
	General Conditions	9.00%		$5.45	$434,506
	General Contractor Markup	5.50%		$3.63	$289,429

	General Contractor Bond & Insurance	2.50%	$1.74	$138,794
	Design Contingency	5.00%	$3.57	$284,529
	GC's Construction Contingency and E&O	5.00%	$3.75	$298,755
	Current Construction Cost		**$78.74**	**$6,273,856**

Stone Creek Engineering, Inc.
Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
Tab Name: PV Shop Modernizations
Date: November 21, 2023

Design Level: Budget

Total: 6,600 sf

TRADE	DESCRIPTION	QTY	UNIT	UNIT COST	TOTAL COST - SUB
02 41 00	**SITE DEMOLITION**				
02 41 00	Interior Demolition	6,600	sf	$15.94	$105,216
02 41 00					
02 41 00	**SITE DEMOLITION**			**$15.94**	**$105,216**
03 30 00	**SLAB ON GRADE CONCRETE**				
03 30 00	Repair (E) Concrete	6,600	sf	$1.59	$10,522
03 30 00					
03 30 00	**SLAB ON GRADE CONCRETE**			**$1.59**	**$10,522**
06 10 00	**ROUGH CARPENTRY**				
06 10 00	Rough Carpentry	6,600	sf	$7.97	$52,608
06 10 00					
06 10 00	**ROUGH CARPENTRY**			**$7.97**	**$52,608**
06 41 00	**CASEWORK**				
06 41 00	Casework	4	ea	$15,941.81	$63,767
06 41 00					
06 41 00	**CASEWORK**			**$9.66**	**$63,767**
07 21 00	**INSULATION - INTERIOR**				
07 21 00	Interior Wall Insulation	3,300	sf	$1.59	$5,261
07 21 00					
07 21 00	**INSULATION - INTERIOR**			**$0.80**	**$5,261**
07 24 00	**EXTERIOR WALL SYSTEMS AND INSULATION**				
07 24 00	Exterior Wall Insulation	8,250	sf	$2.66	$21,920
07 24 00	Roof Insulation	6,600	sf	$3.19	$21,043
07 24 00					
07 24 00	**EXTERIOR WALL SYSTEMS AND INSULATION**			**$6.51**	**$42,963**
07 92 00	**SEALANTS**				
07 92 00	Sealants	6,600	sf	$0.32	$2,104
07 92 00					
07 92 00	**SEALANTS**			**$0.32**	**$2,104**
08 12 00	**DOORS / FRAMES / HRDWR - EXTERIOR**				
08 12 00	Exterior Doors	12	ea	$5,154.52	$61,854
08 12 00					
08 12 00	**DOORS / FRAMES / HRDWR - EXTERIOR**			**$9.37**	**$61,854**
08 51 13	**WINDOW SYSTEMS, GLASS & GLAZING - EXTERIOR**				
08 51 13	Upgrade (E) Windows	1,238	sf	$170.05	$210,432
08 51 13					
08 51 13	**WINDOW SYSTEMS, GLASS & GLAZING - EXTERIOR**			**$31.88**	**$210,432**
09 20 00	**LATH & PLASTER - EXTERIOR**				
09 20 00	Exterior Cement Plaster Repairs	5,808	sf	$1.65	$9,568
09 20 00					
09 20 00	**LATH & PLASTER - EXTERIOR**			**$1.45**	**$9,568**
09 20 00	**DRYWALL**				
09 20 00	Drywall Repairs	8,250	sf	$12.75	$105,216
09 20 00					
09 20 00	**DRYWALL**			**$15.94**	**$105,216**
09 64 00	**FLOORING AND BASE**				
09 64 00	Flooring	6,600	sf	$9.57	$63,130
09 64 00					
09 64 00	**FLOORING AND BASE**			**$9.57**	**$63,130**
09 90 00	**PAINTING AND WALLCOVERING**				
09 90 00	Painting - Interior	7,590	sf	$1.70	$12,906
09 90 00	Painting - Exterior	5,808	sf	$2.39	$13,889
09 90 00					
09 90 00	**PAINTING AND WALLCOVERING**			**$4.06**	**$26,795**
10 20 00	**INTERIOR SPECIALTIES**				
10 20 00	Interior Specialties - Shop	6,600	sf	$5.31	$35,072
10 20 00					
10 20 00	**INTERIOR SPECIALTIES**			**$5.31**	**$35,072**
22 10 00	**PLUMBING**				

22 10 00	Plumbing Modifications	6,600 sf	$2.66	$17,536
22 10 00				
22 10 00	**PLUMBING**		**$2.66**	**$17,536**
23 30 00	**HVAC**			
23 30 00	HVAC - Repairs	6,600 sf	$15.94	$105,216
23 30 00				
23 30 00	**HVAC**		**$15.94**	**$105,216**
26 00 00	**BUILDING POWER**			
26 00 00	Building Power Repairs	6,600 sf	$12.75	$84,173
26 00 00				
26 00 00	**BUILDING POWER**		**$12.75**	**$84,173**
26 50 00	**LIGHTING & LIGHTING DISTRIBUTION**			
26 50 00	Light Fixtures	6,600 sf	$19.13	$126,259
26 50 00				
26 50 00	**LIGHTING & LIGHTING DISTRIBUTION**		**$19.13**	**$126,259**
27 30 00	**VOICE AND DATA COMMUNICATIONS**			
27 30 00	Data/Communications System - Modifications	6,600 sf	$1.70	$11,223
27 30 00				
27 30 00	**VOICE AND DATA COMMUNICATIONS**		**$1.70**	**$11,223**
27 40 00	**AUDIO-VIDEO COMMUNICATIONS**			
27 40 00	A/V System - Raceways and Boxes Only (Cabling and Equipment are included in Soft Costs)	4 ea	$2,656.97	$10,628
27 40 00	A/V System - Monitor Brackets	12 ea	$3,188.36	$38,260
27 40 00				
27 40 00	**AUDIO-VIDEO COMMUNICATIONS**		**$7.41**	**$48,888**
28 30 00	**FIRE ALARM SYSTEM**			
28 30 00	Fire Alarm System - Repairs	6,600 sf	$1.33	$8,768
28 30 00				
28 00 00	**FIRE ALARM SYSTEM**		**$1.33**	**$8,768**
Total	**Subtotal subcontractor cost**		**$181.30**	**$1,196,570**
	General Conditions	9.00%	$16.32	$107,691
	General Contractor Markup	5.50%	$10.87	$71,734
	General Contractor Bond & Insurance	2.50%	$5.21	$34,400
	Design Contingency	5.00%	$10.68	$70,520
	GC's Construction Contingency and E&O	5.00%	$11.22	$74,046
	Current Construction Cost		**$235.60**	**$1,554,961**

Stone Creek Engineering, Inc.
Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
Tab Name: PV New Buildings
Date: November 21, 2023

Design Level: Budget

Total: 27,960 sf

TRADE	DESCRIPTION	QTY	UNIT	UNIT COST	TOTAL COST - SUB
13 30 00	**BUILDING CONSTRUCTION**				
13 30 00	Construct (23) New Modular Classrooms	22,080	sf	$290.00	$6,403,200
13 30 00	Construct (1) New Modular Restroom Building	480	sf	$620.00	$297,600
13 30 00	Construct (1) New Modular Sports Medicine Building	2,400	sf	$325.00	$780,000
13 30 00	Construct (2) New Site Built Shop Classrooms (Welding & Wood)	3,000	sf	$520.00	$1,560,000
13 30 00	Modular Design & Engineering Costs	24,960	sf	$9.75	$243,360
13 30 00					
13 30 00	**BUILDING CONSTRUCTION**				**$9,284,160**
32 00 00	**GENERAL SITE IMPROVEMENTS**				
32 00 00	Demolish Existing Site Paving	31,200	sf	$6.00	$187,200
32 00 00	Rough Grade Site	31,200	sf	$1.10	$34,320
32 00 00	Site Paving (Concrete Walkways)	6,240	sf	$25.00	$156,000
32 00 00	Fencing/Gates	1	ls	$40,000.00	$40,000
32 00 00	Domestic and Fire Water	2	ea	$25,000.00	$50,000
32 00 00	Storm System Modifications	2	ea	$50,000.00	$100,000
32 00 00	Sanitary Sewer System	2	ea	$35,000.00	$70,000
32 00 00	Electrical and Communications System	2	ea	$45,000.00	$90,000
32 00 00	Modular Foundation System	24,960	sf	$40.00	$998,400
32 00 00	Modular C/B/PA and Fire Alarm	24,960	sf	$15.00	$374,400
32 00 00	Fire Suppression	27,960	sf	$4.50	$125,820
32 00 00	Renewable Energy Requirements	27,960	sf	$17.00	$475,320
32 00 00					
32 00 00	**GENERAL SITE IMPROVEMENTS**				**$2,701,460**
Total	**Subtotal Subcontractor Cost**				**$11,985,620**
	General Conditions	9.00%			$1,078,706
	General Contractor Markup	5.50%			$718,538
	General Contractor Bond & Insurance	2.50%			$344,572
	Design Contingency	5.00%			$706,372
	GC's Construction Contingency and E&O	5.00%			$741,690
	Current Construction Cost				**$15,575,498**

Stone Creek Engineering, Inc.

Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
#REF!
Date: November 21, 2023

	Righetti High School	
Description	**RHS New Buildings**	**Total**
Construction Cost (See next page for detail)	$13,555,180	$13,555,180
Soft Costs:		
Architect/Designer (AOR)	$1,219,966	$1,219,966
Surveying	$67,776	$67,776
CEQA Consultant	$0	$0
Geotechnical Engineer (Design Phase)	$81,331	$81,331
Geotechnical Engineer (Construction Phase)	$81,331	$81,331
Preconstruction Services	$203,328	$203,328
Construction Manager	$949,903	$949,903
DSA Plan Check Fees	$135,552	$135,552
CDE Plan Check Fees	$33,888	$33,888
Construction Inspection (IOR)	$162,662	$162,662
Special Testing and Inspection	$27,110	$27,110
State Aid Fee	$412,951	$412,951
Program Management Implementation Fee	$846,549	$846,549
Furniture, Furnishings, and Equipment (FF&E)	$150,000	$150,000
Total PROJECT Cost	**$17,927,527**	**$17,927,527**
Program Reserve (15%)	$2,689,129	$2,689,129
Total PROGRAM Cost	**$20,616,656**	**$20,616,656**

Stone Creek Engineering, Inc.

Prepared for: Caldwell Flores Winters, Inc.

Project Owner: Santa Maria Joint Union High School District

Project: Program Budget

Tab Name: RHS Constr Cost Summary

Date: November 21, 2023

CSI	Description		Tab Name:	RHS New Buildings	Total
			New Construction:	*14,000 sf*	*14,000 sf*
			Renovation:	*0 sf*	*0 sf*
			Total GSF:	*14,000 sf*	*14,000 sf*
2	Existing Conditions			$0	$0
3	Concrete			$0	$0
4	Masonry			$0	$0
5	Metals			$0	$0
6	Wood, Plastics & Composites			$0	$0
7	Thermal & Moisture Protection			$0	$0
8	Openings			$0	$0
9	Finishes			$0	$0
10	Specialties			$0	$0
11	Equipment			$0	$0
12	Furnishings			$0	$0
13	Building Construction			$9,100,000	$9,100,000
14	Conveying Systems			$0	$0
21	Fire Suppression			$0	$0
22	Plumbing			$0	$0
23	HVAC			$0	$0
26	Electrical			$0	$0
27	Communications			$0	$0
28	Electronic Safety and Security			$0	$0
31	Substructure and Earthwork			$0	$0
32	Exterior Improvements			$1,330,950	$1,330,950
33	Infrastructure			$0	$0
34	Other			$0	$0
	Subtotal			**$10,430,950**	**$10,430,950**
Mark-ups	General Conditions	9.00%		$938,786	$938,786
	General Contractor Markup	5.50%		$625,335	$625,335
	General Contractor Bond & Insurance	2.50%		$299,877	$299,877
	Design Contingency	5.00%		$614,747	$614,747
	GC's Construction Contingency and E&O	5.00%		$645,485	$645,485
	Construction Cost -- November 2023			**$13,555,180**	**$13,555,180**

Stone Creek Engineering, Inc.
Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
Tab Name: RHS New Buildings
Date: November 21, 2023

Design Level: Budget

Total: 14,000 sf

TRADE	DESCRIPTION	QTY	UNIT	UNIT COST	TOTAL COST - SUB
13 30 00	**BUILDING CONSTRUCTION**				
13 30 00	Construct New Site Built Multipurpose Building/Practice Gym	14,000	sf	$650.00	$9,100,000
13 30 00					
13 30 00	**BUILDING CONSTRUCTION**				**$9,100,000**
32 00 00	**GENERAL SITE IMPROVEMENTS**				
32 00 00	Demolish Existing Site Paving/Landscaping	24,500	sf	$6.00	$147,000
32 00 00	Rough Grade Site	24,500	sf	$1.10	$26,950
32 00 00	Site Paving (Concrete Walkways)	10,500	sf	$40.00	$420,000
32 00 00	Fencing/Gates	1	ls	$100,000.00	$100,000
32 00 00	Domestic and Fire Water	1	ea	$60,000.00	$60,000
32 00 00	Storm System Modifications	1	ea	$150,000.00	$150,000
32 00 00	Sanitary Sewer System	1	ea	$25,000.00	$25,000
32 00 00	Electrical and Communications System	1	ea	$150,000.00	$150,000
32 00 00	Renewable Energy Requirements	14,000	sf	$18.00	$252,000
32 00 00					
32 00 00	**GENERAL SITE IMPROVEMENTS**				**$1,330,950**
Total	**Subtotal Subcontractor Cost**				**$10,430,950**
	General Conditions	9.00%			$938,786
	General Contractor Markup	5.50%			$625,335
	General Contractor Bond & Insurance	2.50%			$299,877
	Design Contingency	5.00%			$614,747
	GC's Construction Contingency and E&O	5.00%			$645,485
	Current Construction Cost				**$13,555,180**

Stone Creek Engineering, Inc.
Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
#REF!
Date: November 21, 2023

	New High School	
Description	**HS New Buildings**	**Total**
Construction Cost (See next page for detail)	$129,193,277	$129,193,277
Soft Costs:		
Architect/Designer (AOR)		$11,627,395
Surveying		$60,000
CEQA Consultant		$25,000
Geotechnical Engineer (Design Phase)		$75,000
Geotechnical Engineer (Construction Phase)		$150,000
Preconstruction Services		$250,000
Construction Manager		$4,564,321
DSA Plan Check Fees		$752,817
CDE Plan Check Fees		$150,563
Construction Inspection (IOR)		$500,000
Special Testing and Inspection		$150,000
State Aid Fee		$3,687,459
Program Management Implementation Fee		$7,559,292
Furniture, Furnishings, and Equipment (FF&E)		$3,000,000
Total PROJECT Cost		**$161,745,124**
Program Reserve (15%)		$24,261,769
Total PROGRAM Cost		**$186,006,892**

Stone Creek Engineering, Inc.

Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
Tab Name: HS Constr Cost Summary
Date: November 21, 2023

CSI	Description	Tab Name:		HS New Buildings	Total
		New Construction:		*149,810 sf*	*149,810 sf*
		Renovation:		*0 sf*	*0 sf*
		Total GSF:		*149,810 sf*	*149,810 sf*
2	Existing Conditions			$0	$0
3	Concrete			$0	$0
4	Masonry			$0	$0
5	Metals			$0	$0
6	Wood, Plastics & Composites			$0	$0
7	Thermal & Moisture Protection			$0	$0
8	Openings			$0	$0
9	Finishes			$0	$0
10	Specialties			$0	$0
11	Equipment			$0	$0
12	Furnishings			$0	$0
13	Building Construction			$88,799,520	$88,799,520
14	Conveying Systems			$0	$0
21	Fire Suppression			$0	$0
22	Plumbing			$0	$0
23	HVAC			$0	$0
26	Electrical			$0	$0
27	Communications			$0	$0
28	Electronic Safety and Security			$0	$0
31	Substructure and Earthwork			$0	$0
32	Exterior Improvements			$18,750,000	$18,750,000
33	Infrastructure			$0	$0
34	Other			$0	$0
	Subtotal			**$107,549,520**	**$107,549,520**
Mark-ups	General Conditions		7.00%	$7,528,466	$7,528,466
	General Contractor Markup		4.25%	$4,890,814	$4,890,814
	General Contractor Bond & Insurance		2.50%	$2,999,220	$2,999,220
	Design Contingency		2.50%	$3,074,201	$3,074,201
	GC's Construction Contingency and E&O		2.50%	$3,151,056	$3,151,056
	Construction Cost -- November 2023			**$129,193,277**	**$129,193,277**

Stone Creek Engineering, Inc.
Prepared for: Caldwell Flores Winters, Inc.
Project Owner: Santa Maria Joint Union High School District
Project: Program Budget
Tab Name: HS New Buildings
Date: November 21, 2023

Design Level: Budget

Total: 149,810 sf

TRADE	DESCRIPTION	QTY	UNIT	UNIT COST	TOTAL COST - SUB
13 30 00	**BUILDING CONSTRUCTION**				
13 30 00	Construct (N) Building - General Purpose Classrooms	69,481	sf	$560.00	$38,909,360
13 30 00	Construct (N) Building - CTE (Wood Shop and Welding Shop)	3,600	sf	$520.00	$1,872,000
13 30 00	Construct (N) Building - Band Classroom	1,875	sf	$565.00	$1,059,375
13 30 00	Construct (N) Building - Drama Classroom	1,500	sf	$565.00	$847,500
13 30 00	Construct (N) Building - Choral Classroom	1,500	sf	$565.00	$847,500
13 30 00	Construct (N) Building - Science Lab Classrooms	18,196	sf	$600.00	$10,917,600
13 30 00	Construct (N) Building - Gymnasium	30,088	sf	$605.00	$18,203,240
13 30 00	Construct (N) Building - Administration	5,915	sf	$560.00	$3,312,400
13 30 00	Construct (N) Building - Library	5,858	sf	$560.00	$3,280,480
13 30 00	Construct (N) Building - Cafeteria/MPR	11,797	sf	$600.00	$7,078,200
13 30 00	Photo Voltaic Panels	375	kW	$3,500.00	$1,310,838
13 30 00	Inverters (Micro or String)	375	kW	$750.00	$280,894
13 30 00	Racking System	375	kW	$400.00	$149,810
13 30 00	Energy Storage Devices (Battery Array or Equivalent)	487	kWh	$1,500.00	$730,324
13 30 00					
13 30 00	**BUILDING CONSTRUCTION**				**$88,799,520**
32 00 00	**GENERAL SITE IMPROVEMENTS**				
32 00 00	Demolition	1	ls	$100,000	$100,000
32 00 00	Earthwork	1	ls	$500,000	$500,000
32 00 00	Paving	1	ls	$5,000,000	$5,000,000
32 00 00	Fencing/Gates	1	ls	$600,000	$600,000
32 00 00	Baseball/Softball	1	ls	$2,000,000	$2,000,000
32 00 00	Tennis Courts	1	ls	$1,250,000	$1,250,000
32 00 00	Football Field	1	ls	$7,050,000	$7,050,000
32 00 00	Site Furnishings	1	ls	$250,000	$250,000
32 00 00	Electrical and Communications System	1	ls	$30,000	$30,000
32 00 00	Miscellaneous Site Requirements	1	ls	$250,000	$250,000
32 00 00					
32 00 00	**GENERAL SITE IMPROVEMENTS**				**$18,750,000**
Total	**Subtotal Subcontractor Cost**				**$107,549,520**
	General Conditions	7.00%			$7,528,466
	General Contractor Markup	4.25%			$4,890,814
	General Contractor Bond & Insurance	2.50%			$2,999,220
	Design Contingency	2.50%			$3,074,201
	GC's Construction Contingency and E&O	2.50%			$3,151,056
	Current Construction Cost				**$129,193,277**