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SANTA
MARIA
JOINT UNION
HIGH SCHOOL
DISTRICT

RECONFIGURATION AND FACILITIES PROGRAM

**2nd Status Report on the Reconfiguration and Facilities
Program to the Board of Education**

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SECTION 1:

PROGRAM OVERVIEW

1.1 INTRODUCTION

In August 2014, the Board of Education for the Santa Maria Joint Union High School District (“District”) adopted a Reconfiguration and Facilities Program (“Program”) to serve as a blueprint for future improvements that will aid in the creation of 21st century learning environments and innovative academic initiatives for all students served by the District and its four high schools. The planning and implementation of a 21st century high school environment is driven by two programs – an **education program** that outlines academic achievement opportunities at the District level, and a **facilities program** that implements capital improvements in support of educational program initiatives. Combined, the Program formalizes an educational, capital and financing strategy that matches the District’s vision and goals, and establishes the specifications and parameters of future programs and capital facilities.

The focus of the Program is to:

- enhance career pathway educational programs and develop new career technical facilities
- improve digitally interactive learning environments for every teacher and student district wide and upgrade classroom facilities to integrate infrastructure and mobile devices
- construct new classrooms to replace aging portables and renovate existing classrooms to support modern 21st century learning
- implement new support facilities to complement enhanced educational programming and technology

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

- design and construction of a 38 classroom facility at Righetti High School to replace outdated portable classrooms with modern 21st century learning environments
- construction of a Performing Arts Center at Pioneer Valley High School for assembly and performance space during school and after school hours for student and community use
- land acquisition and development of a Career Technical Education and Agricultural Farm facility for capstone classes that transition students from Grade 12 to college courses and/or jobs
- improvements to support digitally interactive 21st century learning environments for every teacher and student district wide and upgrades to classroom facilities to integrate infrastructure and mobile devices

Phase 2 facility improvements include:

- reconstruction of the Santa Maria High School campus into a modern 21st century learning facility reflective of the its heritage, including restoration of the Ethel Pope Auditorium, and the facilities available at companion high schools
- renovation of existing permanent classrooms at Pioneer Valley and Righetti High Schools to achieve similar 21st century functionality to newly constructed District facilities
- construction of a new practice gymnasium and support facilities for Righetti High School to expand physical education, performance and educational support space
- construction of an Ag Pavilion at the CTE/Ag Farm to meet educational requirements for student demonstrations and exhibits in support of the District’s Pathways programs

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

1.2 REPORT OVERVIEW

All Phase 1 efforts are currently in progress and have been fully funded from a combination of existing funds and sale of remaining Measure C-2004 bonds (Measure “C”). Educational programming is underway and on track for integration with required existing and new construction of planned facilities. Specifications, demonstrations and selection of improved classroom furniture, fixtures, equipment, and digitally interactive technologies have been undertaken. A major step toward establishing digitally interactive learning environments was the development of specifications and design standards for future facilities that take into account the District moving forward in the second half of the 2014-15 school year to supply mobile computing devices for all students and teachers

A detailed plan of finance for Phase 2 improvements is proposed for presentation to the District as part of the next six-month update. State grant reimbursement applications for Phase 1 improvements have been provided for all projects approved by the Division of the State Architect (DSA) to date for planned receipt in support of Phase 2 improvements. Additional submittals will continue as designs for approved projects are completed and further DSA approvals are obtained. The goal is to integrate Phase 2 improvements with Phase 1 accomplishments to optimize efficiencies, reduce costs and maximize opportunities for the local community to support additional proposed improvements.

1.2.1 EDUCATION PROGRAM

- Over the past six months of Program implementation, the focus has been on academic pathway implementation for Career Technical Education and laying the foundation for enhanced academic pathway programs, providing teacher training on the instructional use of 21st century demonstration classrooms, and implementing an integrated technology strategy to enhance the delivery and use of digital educational content.
- A District CTE advisory structure is being developed to help guide the District's CTE/pathways programs, comprised of a CTE Advisory Board, Career Field Advisory Committees and Pathway Design Teams. Each Career Field Advisory Committee will use the 2015-16 school year to develop a pathway sequence of courses at each high school. Pathway Design Teams will develop programs of study and course content for each of the pathway courses. The District CTE Advisory Board will work with local and regional partners to formalize joint-use facility partnerships and provide guidance in program development. Jointly, these committees will assist in implementing the Board's vision and direction of CTE/pathway programs that will enable District students to transition from Grade 12 to college classes and/or jobs with local businesses.
- The upgrade of classroom facilities and low voltage infrastructure standards and specifications necessary to support the digitally interactive, collaborative, and flexible teaching and learning approaches of 21st century learning environments were demonstrated as part of the completion of the District's 14-classroom addition to the Santa Maria High campus. The development and use of this digitally interactive classroom approach takes into account the District's effort to move forward with a mobile device program that provides every student and teacher with tablets to use during the school year. The District supplied tablets in mid-May to students at Santa Maria High, Righetti High, and Pioneer Valley High. The effort followed on the success of an earlier distribution to all District teachers and Delta High students and involved distributing more than 8,200 Dell Venue Pro tablets (installed with Microsoft Windows 8.1) to students.
- Training sessions on 21st century learning environments that integrate flexible furnishings, modern technology, and Common Core teaching and learning methods were provided at the Righetti High School Demonstration Classroom during January and February 2015. Scheduled events were attended by over 140 teachers representing each of the District's comprehensive high schools as well as by administrators and staff. Furniture vendors each supplied a classroom set of furnishings at no cost to the District for use in the days before, during, and after training events that also allowed students to take part in the evaluation of a 21st century learning space as part of their regular instruction. Procurement options were evaluated for permanent classroom furnishings in March and extended to include the new 14-classroom building at Santa Maria High School.
- A training and commissioning program was launched at Santa Maria High School upon completion of the 14-classroom building in August 2015. Its intent was to introduce the new

classroom teachers to the 21st century design elements – such as HDTV monitors, floor-to-ceiling sliding markerboards, and flexible furnishings – that were incorporated into all classrooms during the final stages of construction. This was based on the positive feedback from training events at the Righetti Demonstration Classroom. Demonstrations of equipment, furnishings and readily available technologies to assist in further engaging students and educational initiatives will continue to be provided in the months ahead.

1.2.2 FACILITIES PROGRAM

- The planned construction of the 38 classroom building at Righetti High School to replace existing portable classrooms and to assist in the reconfiguration of educational spaces to support 21st century learning environments has undergone conceptual, schematic, and design development stages. The new building will accommodate the Math and English Departments, a health classroom, four new labs to support expanded pathway programs and five assessment labs for student testing. The assessment labs are designed with retracting wall systems that also provide approximately 4,800 square feet of much needed flex space for added athletic, performance and assembly space during school and after school hours for student and community use. DSA submittal is anticipated in fall 2015.
- Construction of the new Righetti classrooms in Phase 1 provides the “swing” space for the reconstruction and the adaptation of the existing 59 permanent classroom spaces into comparable 21st century facilities in Phase 2. The space is organized about a more collaborative spatial environment for staff by department and in support of the District’s strategic plan and pathways programs.
- The articulation of the District’s CTE and Ag Center continues review and support from the CTE and Ag farm communities, teachers and staff. Designed as a 21st century environment for “hands-on” and mentored learning with capstone educational classes that support all of the District’s pathways programs at each high school site, the facility is scheduled for submittal for DSA review in early 2016 following acquisition of the site. Schematic designs for the project await the close of escrow.
- The Board approved the District’s purchase of the required CTE/Ag Farm property in March 2014 and due diligence efforts to conclude escrow requirements have proceeded over the last 6 months. Specific land acquisition activities included completion of a mitigated negative declaration pursuant to the California Environmental Quality Act, required documentation and review by local and State agencies, including Santa Barbara County, the State Department of Toxic Substances Control (DTSC), California Department of Transportation (Caltrans), California Department of Education (CDE), and the Office of Public School Construction (OPSC). Approvals for land acquisition by the District from third parties are completed.
- DSA approved the Performing Arts Center project at Pioneer Valley High School in December 2014. Since then a lease-leaseback method of construction was activated for the construction of the facility. A groundbreaking ceremony for construction of the site took place on June 1, 2015, attended by District administrators, teachers, students, city officials, and local news

media. The Board approved the construction team and a Guaranteed Maximum Price contract at its August 2015 meeting, with the project scheduled to start construction in September.

- A competitive prequalification process has been established and adopted by the Board for all project professionals, including architects, preconstruction and construction contractors, and professional services firms in land surveying, geotechnical and soils analysis, hazardous materials testing, and project inspection. This process will continue as the basis to select and engage necessary professionals in the design and construction of future school facilities.

1.2.3 PROJECT FUNDING AND SEQUENCING

- At the end of December 2014, the District issued its third and final series of Measure “C” bonds at a principal amount of \$28,996,159. These proceeds were placed into the District’s Building Fund and will be used for Phase 1 school facility projects, including the construction of the new 38-classroom facility at Righetti High, the Performing Arts Center at Pioneer Valley High and the acquisition and construction of the CTE/Ag Farm.
- An annual review of the District’s eligibility for State Modernization and New Construction grants based on 2014-15 enrollment was conducted in February 2015. Eligibility for the number of State pupil grant remains unchanged from the 2014 Reconfiguration and Facilities Program review. However, the amount per grant was increased by 4.3 percent by the State Allocation Board (SAB), effective January 1, 2015. At this time, the District’s eligibility is projected to be approximately \$44.8 million in new construction grants for grades 9-12 and approximately \$3.8 million in modernization grants. The latter is expected to grow as the District’s existing facilities continue to age. Nonetheless, the State School Construction Fund (SCF) continues to be funded at minimal levels, pending the outcome of a potential 2016 voter approved bond measure. Meanwhile, the State continues to accept applications which the District continues to submit to secure its place in line and to compete for available levels of funding that may become obtainable in the interim.
- Under the State School Construction Fund, districts may apply for additional funding for a project if they are willing to commit additional pupil grants above the amount required by the State. This additional “use of grants” approach is being utilized to augment State reimbursement of the 14-classroom building at Santa Maria High. The original new construction grant application for the 14-classroom project was submitted in October 2013 and the supplemental use of grants application was submitted to OPSC in August 2015. Following a meeting with OPSC, both applications are now moving forward together to provide a projected net increase of approximately \$0.8 million in future reimbursements.
- The use-of-grants approach is also being utilized with OPSC for the Performing Arts Center (PAC) at Pioneer Valley High, as a means to generate additional State grant reimbursements for the District. OPSC allows additional grants toward the funding of Minimum Essential Facilities on a square footage grant basis. OPSC has confirmed that the square footage method for additional grants is an acceptable means to increase the classroom component of the proposed PAC by an

additional 91 total pupil grants or approximately \$1.27 million. A New Construction grant application to OPSC that incorporates the use of grants mechanism has been prepared and was submitted by the District in September.

- The Program's Master Budget and Master Schedule have been modified to accommodate changes in implementation, including availability of funding, time constraints for third-party approvals, and required design and construction schedules. This includes initiating the early stages of master planning and design work for the Santa Maria High campus renovation, the reconfiguration and renovation of existing classrooms at Righetti High, and the anticipated Ag Pavilion at the CTE/Ag Farm property — all Phase 2 projects. The goal is to integrate Phase 2 improvements with Phase 1 accomplishments to optimize efficiencies, reduce costs and maximize opportunities for the local community to support additional proposed improvements.

1.3 RECOMMENDATIONS

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

- Accept and adopt the October 2015 semi-annual Program update as an adjustment to the Reconfiguration and Facilities Program.
- Consider the next semi-annual Program update at its regularly scheduled February 2016 meeting.

SECTION 2:

EDUCATION PROGRAM

The District is now prepared to begin its second year of educational program implementation activities in support of the Program. Efforts were undertaken in the first year to analyze course content and collect baseline data on courses offered throughout the District in order to categorize these courses into Career Field clusters. Joint use opportunities between District school sites and Allan Hancock College were explored, educational specifications for new school facilities were developed, and demonstration 21st century classrooms to expose teachers and students to modern classroom learning experiences were completed.

Over the past six months, the focus on Education Program development has included:

- laying the foundation for implementation of the academic pathway program, especially at existing and proposed Career Technical Education facilities
- providing teacher training on the instructional use of 21st century learning environments and technology
- implementing an integrated technology strategy to enhance the delivery and use of digital educational content on teacher and student mobile devices

2.1 ACADEMIC PATHWAYS AND CAREER FIELDS

The seven following pathway sequences were identified in 2014 as part of the adopted Program by the Board for development at one or more District schools:

- Agriculture and Natural Resources
- Health Science and Medical Technology
- Education, Child Development, Family Science, and Public Service
- Arts, Media, and Entertainment
- Business, Marketing, and Information Technology
- Engineering, Construction, Energy, Manufacturing, and Transportation
- Fashion/Interior Design, Hospitality, Tourism, and Recreation

During the last six months, the District continued its commitment to the development of the pathway programs. The administration continues to complete the gathering of baseline information related to the classes currently taught at each of the high school sites and determine which classes would be best categorized within a particular pathway program at each site. Previous pathway sequences have been further refined and consolidated into the Career Fields identified below with numerous pathways that fit within these categories. Each Career Field will have one or more pathway programs. A pathway

program is a specific sequence of courses in a career field that leads to a final culminating course. A capstone course is the final course in the sequence and often leads to a final certification or prepares the student for higher educational opportunities. Under this approach, every career field will be available at each of the high schools with the capstone courses offered at the new CTE/Ag Farm site. Identified Career Fields are as follows:

- Agriculture and Natural Resources
- Health Science Technology
- Education and Public Service
- Skills and Technology Sciences
- Arts, Media and Entertainment
- Business & Technology, Hospitality & Tourism

As part of a consortium of high schools within Santa Barbara County and Alan Hancock Community College, the District recently applied for a Pathways Trust grant. The District continues to work with teachers to apply for California Department of Education Carl Perkins funding. During these efforts, the District engaged in significant planning and laid the foundation for the future implementation of pathway programs at each high school consistent with new State requirements for Career Technical Education programs.

A structure to oversee and further develop the pathways program is being developed. A CTE Advisory Board, Career Field Advisory Committees and Pathway Design Teams are being created. Career Field Advisory Committees for each pathway support Pathway Design Teams that develop programs of study and course content for each of the pathway courses of Career Fields. The CTE Advisory Board will oversee the Career Field Advisory Committees, to be comprised of members from each of the Career Field Advisory Committees as well as members from local non-profit and for-profit groups, business partners and community members to provide broad-based community representation. The District's Board sets the overall vision and direction for the CTE pathway committees and programs. The goal over the next six months is for the District to complete the staffing of these groups and coordinate committee workshops on a regular basis. By early 2016, the Career Field Advisory Committees and Pathway Design Teams may be prepared to assign a full sequence of classes to one or more pathway programs at each high school.

The District's three comprehensive high schools have strong agriculture pathway programs that are being integrated with the development of the CTE Center/Ag Farm facility. In many ways, this career field has been utilized as a working approach from which many of the advisory committee concepts have been created. The District's Ag Department staff, instructors and community support groups have continued to work cooperatively in the research, design and articulation of the current program and in the manifestation of new CTE Center/Ag Farm site. Based on the Board's vision, research, field visits and dialogue within the department, suggestions for program content and physical resources have been incorporated into the new CTE/Ag Farm facility. By working in this manner and anticipation of the acquisition of the site, a CTE Center/Ag Farm program and site plan was presented by staff to the

District's Ag Advisory Committee meeting in March 2015. After review and dialogue, the Ag Advisory Committee stated that the plans met the educational needs of the Vocational and CTE Ag Program consistent with Education Code Sections 51224, 51225.3 (b), 51228 (b), and 52336.1. It also expressed satisfaction with the approach the District was taking to develop specialized CTE facilities for its students.

It was also determined that the CTE classrooms/labs/shops be constructed generically at first, but with all of the electrical and water needed for any one of the potential capstone classes that might be housed at the CTE site as they are further developed in the future. The furnishings, fixtures and equipment necessary for the training in a specific industry cluster will define the specific area requirements in support of the capstone course taught. These learning spaces are being designed in such a manner to allow the District maximum flexibility in the placement of the programs at the site initially and over time. As CTE capstone classes change to reflect changes in industry and job growth requirements, the highly flexible learning spaces will be able to accommodate the District's needs for years to come.

Overall activities to be undertaken over the next six months include:

- develop CTE District Pathway Advisory Board and Career Field Advisory Committees and engage the Career Technical Education teachers in the development of a Program of Study for each of the pathways selected under the Career Fields
- integrate the development of the pathways programs at each site and necessary capstone courses to be developed at the CTE Center/Ag Farm facility
- commission professional development for staff and provide ongoing training to teachers who will be teaching in the new 21st Century classrooms at Righetti and Santa Maria High School, prior to the completion of the remaining classroom improvements
- research additional resources in support of the pathway program

2.2 ONGOING USE OF THE 21ST CENTURY DEMONSTRATION CLASSROOM

There is a need to maintain an ongoing Demonstration Classroom within the District to:

- provide opportunities for teachers and students to experience the type of room that would be created through the completion of Phase 1 and 2 improvements
- display and evaluate the latest and evolving classroom products from top vendors and manufacturers in education
- enable staff training and professional development activities relating to the use of next-generation classrooms
- demonstrate technology integration between student and teacher mobile devices and classroom digital and HDTV displays

For example, a vendor demonstration period was facilitated between December 2014 and February 2015, providing District students, teachers, and staff an opportunity to consider competing strengths of 21st century classroom concepts from four leading furniture manufacturers. At the same time, four Righetti High teachers accepted the District's invitation to teach their classes in the Demonstration

Classroom instead of their regular rooms. A Grade 10 science class occupied the room for one week in the latter half of January, followed by special education and AVID classes. Detailed feedback was gathered from these teachers and their students about the functionality, comfort, and quality of furniture and equipment.

In total, eight training and professional development sessions were conducted in the Demonstration Classroom since publication of the last six-month update. These sessions explored working in a more agile classroom environment, utilizing the District's tablet devices to wirelessly connect to HDTV displays, and taking advantage of classroom features to implement Common Core State Standards and develop lessons plans that engage creativity, collaboration, critical thinking, and communication. Teachers participating in these sessions were able to evaluate classroom versatility and ease of use. Options for student grouping were discussed, as were ideas for promoting inclusiveness among students and further classroom enhancements. A common response noted a change in attitudes compared to traditional classroom spaces, with students expressing a sense that they had arrived at a better school and/or college environment and feeling important.

Nearly 400 evaluation forms were filled out by students, teachers and staff following over a dozen open houses, seminars, and official demonstrations. An estimated 40% of all teachers participated in at least one presentation. These activities also attracted the attention of local media, with the Demonstration Classroom featured in local television news coverage as an example of the District's commitment to providing state-of-the-art school facilities. Having accomplished its goal of exposing students, teachers, and staff to the qualities of the 21st century classroom, training sessions are proposed to take place throughout the 2015-16 school year, including sessions that further integrate digital educational content and the use of 1:1 devices in instruction.

2.3 TECHNOLOGY PROGRAM

The Technology program continues to move forward. Implementation of the Program includes upgrading of classroom facilities and low voltage infrastructure necessary to support the digitally interactive, collaborative, and flexible teaching and learning approaches of 21st century learning environments. The effort seeks to establish standards and specifications to establish digitally interactive classroom environments, integrate mobile devices that the District has supplied to every student and teacher, and engage in commissioning activities to demonstrate and utilize technology for improved instruction as well as expanded student, parent, and teacher collaboration

The District has now moved forward with a mobile device program that provides every student and teacher with tablets to use during the school year. The District supplied mobile devices in mid-May to students at Santa Maria High, Righetti High, and Pioneer Valley High. This followed an earlier distribution to all District teachers and Delta High students, and involved providing more than 7,500 Dell Venue Pro tablets (installed with Microsoft Windows 8.1) to students. A best practices approach was used to create a District self-insurance pool, which has been established to provide a low-cost option for protecting each student device against theft or accidental damage.

In order to realize classroom environments that fully utilize the District’s mobile devices and expand options for interactivity and collaboration, the development and evaluation of the Righetti Demonstration Classroom has been adapted to the 14-classroom project at Santa Maria High School during the final stages of construction. These classrooms are fitted with flat-screen HDTV displays that are part of a wireless connection within the classroom to view enlarged applications, documents, videos, and learning exercises while interacting with stationary and hand held devices. Multiple devices can be accessed simultaneously and displayed as desired by the instructor. Flexible furnishings and multiple whiteboard surfaces provide a multimedia environment to engage and demonstrate learning opportunities.

Over the next six months, the Program Team will continue to assess technology and classroom integration issues and consider short and long-term solutions. The look forward includes implementation of a “digital citizenship” program that will help ensure that students use the devices to enhance their digital-ready education in appropriate and safe ways. The deployment also increased attention to integrating all devices into the academic program and improving the utilization of the District’s systems via the District “portal” as well as access to productivity software through the District’s Microsoft Office 365 program.

While these goals are common of many technology programs and simple in concept, the programming and digital security for such integration requires substantial effort. Items to be considered include the development of tools that provide access to attendance data, grades, homework assignments, or learning materials. Transparency and ease of access to these important metrics is improved when data are consolidated into a student “dashboard” that provides a quick review of a student’s performance. As such, the team will explore options that best position the District to take advantage of these tools using an approach that looks at cost, staff resources, efficiency and security.

SECTION 3:

FACILITIES PROGRAM

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

- design and construction of a 38 classroom facility at Righetti High School to replace outdated portable classrooms with modern 21st century learning environments
- construction of a Performing Arts Center at Pioneer Valley High School for assembly and performance space during school and after school hours for student and community use
- land acquisition and development of a Career Technical Education and Agricultural farm facility to transition students from Grade 12 classes to college courses and/or jobs

Phase 2 projects include:

- reconstruction of the Santa Maria High School campus, including restoration of the Ethel Pope Auditorium, into a modern 21st century learning facility reflective of its heritage and that of its companion high schools
- renovation of existing permanent classrooms at Pioneer Valley and Righetti High Schools to achieve similar 21st century functionality to newly constructed District facilities
- Construction of a new practice gymnasium facility for Righetti High School to expand physical education and educational support space
- construction of an Ag Pavilion at the CTE/Ag Farm to meet educational requirements for student demonstrations and exhibits

Over the last six month period, efforts have been focused on Phase 1 projects. Progress on each of the Phase 1 projects required the development of a comprehensive system to manage selection and procurement of required professionals across multiple fields of expertise and the simultaneous implementation of Phase 1 projects within a set Master Budget. Projects themselves are based on the Board's vision for educational programs and required specifications for facilities to meet educational goals. Project design and construction is also required to meet a "build to budget" approach due to the fact that there are simultaneous projects to be built within a time period that has a fixed amount of capital funds to meet the Board's requirements.

Once teams were selected, projects were then placed in design, approval and construction schedules. Based on these principles, all Phase 1 projects have demonstrated substantial progress over the last six month period.

3.1 TEAM PROCUREMENT PROCESS

A method for procurement of required professional Team members was initiated to include architects and construction firms as well as several professional services firms such as surveyors, geotechnical analysts, and project inspectors. In general, the procurement system was established to first prequalify consultants for District-required services and then competitively assign each project to an appropriate prequalified firm. This two-stage process was designed to produce a better match between consultant and project.

Architects were required to be prequalified, beginning with a Request for Qualifications process that resulted in the Board-approved empanelment of five architecture firms with a demonstrated capability and history of similar District projects that were designed and completed on budget and on schedule. The empanelled firms were then asked to participate in responses to design services for each major project that was assigned to Phase 1, including the Righetti High School and the CTE Center/Ag Farm projects. Upon review and selection, firms were asked to execute standardized architectural agreements prepared by District legal counsel. Thereafter, they were authorized to proceed as required by each project.

In general, the process for procuring construction firms utilized a similar process, except that each was first required to meet mandated State Department of Industrial Relations (DIR) qualifying criteria. From this pool, a request for qualifications process was enacted and selected firms were then empanelled. Each firm was then invited to respond to a selection package for each proposed project. Selected firms were then requested to execute standardized agreements prepared by District legal counsel for selected services and projects. Once these were in place, firms received an authorization to proceed to provide services.

Other specialized professional services such as surveying, geotechnical testing, and inspection were required to participate in a request for qualification process. Firm responses were reviewed and empanelled based on the service to be provided. As specific needs arise per project, these firms are requested to provide a proposal for consideration. Once selected, they are required to perform the required work based on the fee proposal presented.

3.2 RIGHETTI HIGH SCHOOL

Righetti High School improvements have been conceptualized and planned based on the Board's educational vision for the school, the eventual reconfigured academic program for the entire site, review of existing conditions, current classroom usage, expected student growth, and the sequenced replacement of relocatable facilities. A 38 classroom building is to be constructed in Phase 1 consisting of general purpose, pathway and assessment classrooms; the latter designed to be flexible enough to accommodate future enrollment, if necessary. Among the new classrooms, 29 have been designed for general purpose academic uses within standardized 960 square learning spaces serving the math and English departments and one health class. Four additional classrooms have been designed as larger 1200 square foot pathway classrooms to meet the needs of different pathway courses. The remaining

five rooms are designated as Assessment Flex Rooms and are strategically situated to allow adjoining rooms to be combined with a retractable center wall that enables individual 960 square foot rooms to combine for up to 4,800 square feet of flexible space for testing or other general assembly functions. Phase 2 requires the reconfiguration and renovation of the existing 59 permanent classrooms into 21st century learning environments to meet the new academic requirements for the school and the construction of a practice gym, field improvements and parking for school and community use.

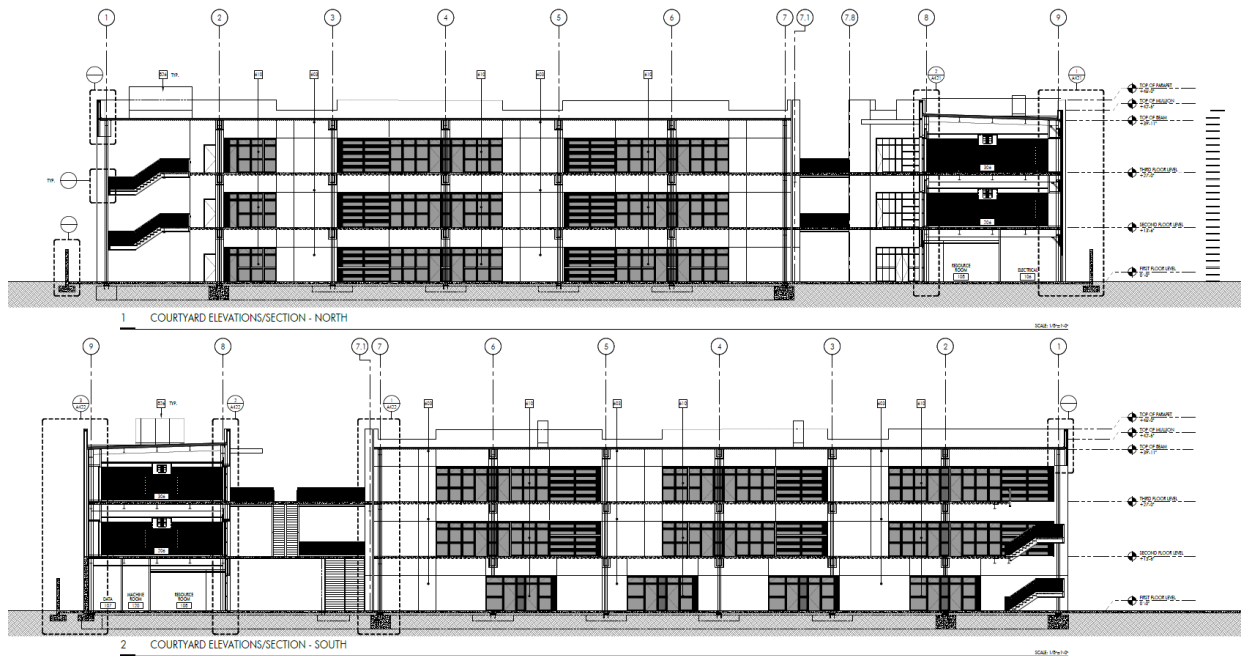
To achieve these components, the following site considerations and factors must be incorporated into the master planning of the proposed Righetti reconfiguration program:

- All of the site's 37 relocatable buildings are to be replaced with permanent, 21st century classroom facilities
- A sequencing plan must coordinate the construction of new classrooms and the renovation of existing permanent classrooms in a reconfiguration of the campus that organizes students and staff by major departments.
- New facilities must accommodate the District's pathways and capstone educational programs and allow for the placement of a new practice gym and additional parking
- An interim facilities approach must be provided that utilizes existing relocatables as "swing" space to house classes on a temporary basis as permanent classrooms are under construction or renovation
- A phasing plan must be used that optimizes the receipt of State grants in support of Phase 2 funding from State new construction and modernization programs for permanent and portable facilities
- Elimination of relocatables pursuant to the completion of permanent classroom modifications and completion of final sitework to expand parking and playfields

On this basis, the architect and construction team were selected pursuant to the District's procurement program as were necessary professionals for survey, geotechnical, environmental review and similar services. The Board has had an opportunity to review conceptual site plans as well as a digital "fly-over" of the proposed design. As a team member, the architect has proceeded with schematic and design development drawings. The preconstruction consultant has continued to apply cost estimates and value engineering at each phase of the project to maintain the design integrity and budget. The environmental review for proposed Phase 1 improvements is expected to conclude in the fall. Submittal of construction drawings will occur in two stages to DSA, with an August 2015 pre-intake meeting followed by a final submittal to DSA for review, upon Board direction, in the fall. The DSA review process is expected to run approximately six months, during which time DSA may request changes or additional information from the architect and a back-check will be scheduled with DSA to achieve approved, construction-ready documents. At this point, construction is expected to begin in mid-2016.

Given that Phase 1 has established the footprint, size, specification and location of proposed facilities, the District is now in a position to consider the next steps in the reconfiguration of Righetti High School. As pointed out above, master planning and construction of Phase 1 and Phase 2 improvements must be

choreographed in such a way as to maximize the use of existing classrooms to allow for Phase 1 construction and as “swing” space to minimize the cost of interim facilities while expediting the reconfiguration of the educational program. The required master planning and initial design of the remaining permanent classrooms and support facilities should be undertaken at this time to match the need for their design approval and construction once the 38 classroom facility is completed.



Proposed 38-Classroom Facility at Righetti High School. Source: Rachlin Partners

It is proposed that the Board adopt a recommendation to allocate an additional budget of \$174,970 to be funded from the Phase 1 program reserve fund balance to allow for a work program to proceed for the master planning and preliminary design of the proposed Phase 2 work program, including renovation of the remaining 59 permanent classrooms, new practice gymnasium, and site improvements that include expanded athletic and parking areas. It is also suggested that the District consider establishing the feasibility of adding performance space in combination with the practice gym at Righetti, consistent with the minimal amount available at the District’s other schools. As in the previous efforts, the Board will have the opportunity to receive updates on the initial work program, view proposed options and feasibility analyses, request modifications, and approve the final plan of action and necessary steps and construction budgets.

3.3 DISTRICT PERFORMING ARTS CENTER AT PIONEER VALLEY HIGH SCHOOL

The District Performing Arts Center at Pioneer Valley High School consists of the addition of 17,352 square feet of performing arts and support spaces to the existing 11,831 square foot Building J, containing Pioneer Valley High’s band, choir, and drama classes. Upon completion of construction, a double-loaded hallway will connect Building J to the new facility’s backstage area and three classrooms. In addition to these uses, the new facility’s interior elements will include a lobby, a box office and

concession area, restrooms, a 208-seat main auditorium, an 86-seat mezzanine, and performance stage. Construction drawings received DSA approval at the end of December 2014.

Preconstruction services have been underway since DSA approval, including the review of design documents for constructability, completeness, clarity and value engineering opportunities to reduce the cost of construction. More recently, activities included developing a Guaranteed Maximum Price (GMP) proposal for constructing the building pursuant to the approved plans. At its August 2015 meeting, the Board approved a GMP contract to construct the project, clearing the way for construction activities to begin in September. The budget for the performing arts center at Pioneer Valley High was increased to \$10,469,130 to reflect an increase of approximately \$869,130 in construction costs since the project was first submitted to DSA in 2013.



Rendering of Performing Arts Center at Pioneer Valley High School. Source: BCA Architects

A ceremonial groundbreaking event by the District was held on June 1. The ceremony was produced by District staff and Board members and attended by District administrators, teachers, students, community members and city officials. Local media outlets covered the event, including local CBS and FOX news affiliates, the Santa Maria Sun, and the Santa Maria Times.



Groundbreaking ceremony for the PVHS performing arts center, June 1, 2015. Source: CFW

Looking ahead to the next six months, the construction process will start with site clearing and grubbing and underground utility relocation. The site will then be rough graded and the building pad built and certified. Installation of under-slab utilities, such as electrical and plumbing, will follow. Once these utilities are placed, the footings and slab area will be formed and poured and exterior structural steel and concrete masonry installation will commence. The facility is expected to be completed by the end of 2016.

3.4 CTE CENTER/AGRICULTURAL FARM

The articulation of the District's CTE Center and Ag Farm continues review and support from the CTE and Ag Farm communities, teachers and staff. Designed as a 21st century environment for "hands-on" and mentored learning, the facility will provide capstone educational classes that support all of the District's pathway programs and house the District's Ag Farm facility. The goal is to provide capstone level pathway classes in various subjects that directly relate to high-demand careers in the Santa Maria vicinity in order to improve students' job skills and enhance students' abilities to transition from high school to the labor force or college.

A conceptual site plan has been presented to the Board and a design and construction team has been selected to start work upon the close of escrow of the property. The Board approved the District's purchase of the required CTE/Ag Farm property in March 2014 and due diligence efforts to conclude escrow requirements have proceeded over the last 6 months. Specific land acquisition activities during this period included completion of a mitigated negative declaration pursuant to the California Environmental Quality Act, required documentation and review by local and State agencies, including Santa Barbara County, the State Department of Toxic Substances Control (DTSC), California Department of Transportation (Caltrans), California Department of Education (CDE), and the Office of Public School Construction (OPSC). Approvals for land acquisition by the District from third parties are completed.

As contemplated for Phase 1, the facility accommodates 750 square feet of restrooms and four workshops of approximately 4800 square feet each within two buildings. Each building has direct access

to paved outdoor areas and driveways with floor to ceiling roll-up doors and dedicated indoor teaching spaces opening into a common area to promote student and teacher interaction and common access to bus pick-up/drop-off areas. A semi-enclosed pole barn (approximately 16,000 square feet) will contain teaching stations and demonstration areas while also providing livestock pens for steers, goats, sheep, pigs, and sows in various quantities. The workshop areas, each approximately 60' x 80' in size with adjacent restrooms, will be utilized for a wide range of CTE teaching stations. Additionally, the site will contain a paved parking area and a bus loop around the CTE workshop buildings. The agricultural farm component of the site will feature cultivated land for row and tree crops, and grapevines, plus pastures and paddocks for livestock.



Conceptual designs of CTE Workshops. Source: PMSM Architects

In order to maximize State grant reimbursements, there is a need to expand the amount of off-site and on-site improvement costs to be associated with Phase 1 improvements. There is a need for the land acquisition budget to reflect prior professional services costs and close of escrow costs to maximize State grant reimbursements which will take into account all District expenditures related to the land purchase. These expenditures total \$454,480 and are funded from the Phase 1 program reserve fund balance. Upon the close of escrow, schematic and design development plans will be provided for review with working drawings to be submitted to DSA within 180 days thereafter. Upon approval of DSA, the project is expected to complete construction in April 2017.

The proposed Phase 2 improvements for Santa Maria High School weave together a number of goals that combine to create a landmark campus worthy of the District's oldest school. The Board's vision for Santa Maria High is to rebuild the campus in a manner that uses space more efficiently and incorporates an environmental design that honors Santa Maria High's heritage while providing 21st century learning environments for today's teachers and students.

Under the adopted Program, specific improvements include:

- A reoriented main campus entrance on Morrison Avenue, with visitor parking, pedestrian access, student services/administration and classroom buildings all anchored by a bell tower - a direct evocation of the bell tower that once existed by Ethel Pope Auditorium
- Approximately 80,000 square feet of new classroom facilities to replace nine aging structures and divided among a series of two-story buildings built to high energy efficiency and sustainability standards that architecturally fit with the Spanish colonial style evident in many of the school's existing buildings
- New learning spaces anticipated to consist of 20 regular classrooms, 10 science/flex labs, and 10 specialty classrooms capable of accommodating the needs of pathway classes proposed for the school as well as extensive interior modernization to 34 existing permanent classroom facilities and the existing administration building that may be reutilized for an additional 10 classrooms
- Rehabilitation and modernization of the Ethel Pope Auditorium
- Improved outdoor athletic facilities for baseball, softball, tennis, and basketball as well as the addition of several all-purpose practice fields
- Eventual removal of all portables to free up space for academic and athletic uses and reconfiguration of the existing campus to improve pedestrian circulation, unify the campus architecturally, and increase the school site's curb appeal
- Grouping more like uses in the same space to facilitate student and teacher collaboration
- Shaded courtyards between buildings to provide outdoor learning opportunities
- Expanded parking for visitors, staff, and students at the main campus entrance and mid-campus athletic facilities

In the interim, the District completed the new construction of a 14-classroom facility at Santa Maria High in August 2015 to provide additional permanent classroom capacity. A grand opening for the facility was held on August 29 with full support from staff, students, parents, community members, and elected officials. The development of this project preceded the Board's adoption of the Reconfiguration and Facilities Program; however, its design and use have been integrated into the proposed redesign of the overall site. Design modifications were made to the project prior to its completion to apply additional 21st century classroom improvements, furniture, fixtures and equipment. Capacity was added for anticipated power and data requirements, including required conduit and receptacles for wall-mounted HDTV monitors, as well as soffit framing to enable sliding floor-to-ceiling markerboards and flexible storage for each room.



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

These improvements are consistent with those identified at the Righetti Demonstration Classroom and in the design of the new 38 classroom project. By providing these modifications, the District accelerated the adoption and deployment of 21st century learning environment specifications and facilities at the District's oldest site. Staff commissioning of the new classroom facility was completed on August 17, 2015 and included a demonstration of wireless HDTV technology, integration with the latest deployment of 1:1 mobile devices, and options for instructors to reconfigure the learning space based on the specifications incorporated to accommodate the latest in furniture, fixtures, and equipment.

Since the adoption of the original Program, the implementation of all Phase 1 projects has continued to proceed. Lessons learned since then suggest that a master site planning effort be further expanded at Santa Maria High similar to that at Righetti to accommodate the need to provide:

- A sequencing plan to coordinate the construction of new classrooms and the renovation or demolition of existing permanent classrooms in a reconfiguration of the campus that organizes students and staff by major departments
- A facilities plan that accommodates the District's pathways and capstone educational programs and allows for the placement of new athletic uses and parking
- An interim facilities approach that utilizes existing relocatables and facilities to be demolished as "swing" space to house classes on a temporary basis as permanent classrooms are under construction or renovation
- A phasing plan that optimizes the receipt of State grants in support of Phase 2 and from reimbursements from State new construction and modernization programs for permanent and portable facilities under Phase 1

As with the Righetti High School work program, the Board is now being requested to consider the next step in the process for Santa Maria High School. It is proposed that the Board adopt a recommendation to allocate a budget of \$420,000 to be funded from the Phase 1 program reserve fund balance to allow

for the initial work program identified above. As in the previous Phase 1 efforts, the Board will have the opportunity to receive updates on the initial work program, view proposed options, request modifications, and approve the final plan of action and necessary steps and construction budgets.

SECTION 4:

PROJECT FUNDING AND SEQUENCING

4.1 OVERVIEW

The adopted January 2015 update to the Reconfiguration and Facilities Program was specified to be implemented over two phases with a combined total capital improvement budget of approximately \$199.8 million. Every six months, a semi-annual Program update provides adjustments to the Master Budget and Master Schedule based on financial or policy decisions undertaken by the District. A revised Master Project Budget and Master Schedule have been prepared for consideration by the Board based on activities undertaken in the prior six months and proposed activities recommended to be undertaken in the next six month period.

State grants for facility improvements are a major component for the funding of the overall Program. The use of these grants maximizes the use of local funds to construct required Program improvements. Since the last Program update, grant levels have been increased by the State Allocation Board to reflect estimated construction cost increases. An updated analysis of projected State aid eligibility for the District is provided for Board consideration.

4.2 ADOPTED MASTER BUDGET

As of February, the Adopted Master Budget established project funding of approximately \$199.8 million as indicated in Table 1 from various sources over time, including proceeds from prior and proposed bond authorizations, State grant reimbursements for completed projects, developer fees, and existing District fund balances. Phase 1 projects are substantially funded from the issuance of remaining bond authorization under Measure “C”, available proceeds from the District’s Building Fund, and anticipated developer fees. Phase 2 projects are to be funded primarily from a new voter approved bond authorization, State grant reimbursements from Phase 1 or Phase 2 projects, and developer fees.

The planned expenditures of the Adopted Master Budget included a program reserve of approximately \$14.1 million and a project budget of approximately \$185.6 million. Generally, the costs associated with construction are identified as “hard” costs and “soft” costs. In combination, they comprise what is properly called the total “project” cost. Hard costs result from the construction itself (e.g., materials and labor). Soft costs are those costs that are an integral part of the building process and are usually preparatory to, or supportive of, the construction. These include professional fees and other related, but non-construction costs (e.g., design development, legal services, permitting, etc.). For the purpose of designing a program Master Budget, all-in total project costs, inclusive of both hard and soft costs, were used.

As previously noted, Phase 1 improvements are underway and include new classrooms at Righetti High, a new performing arts facility at Pioneer Valley High, acquisition and design of the Districtwide CTE/Ag Farm, improvements to Delta High, and the development of digitally interactive learning environments. Phase 2 improvements include the reconstruction of Santa Maria High, the construction of a new practice gym at Righetti High, the upgrade of all permanent classrooms into 21st century facilities, additional support for digitally interactive learning environments, and an allowance for additional classrooms should enrollment increase significantly in the years ahead.

Table 1: Adopted Master Budget, FY 2015-23* (1st Semi-Annual Program Update)

Sources	Phase I	Phase II	Total
Existing Bond Authorization (Measure C, 2004)			
2015	\$ 28,996,159	\$ -	\$ 28,996,159
New Bond Authorization			
Series A		\$ 32,753,431	\$ 32,753,431
Series B	\$ -	\$ 42,670,123	\$ 42,670,123
Series C	\$ -	\$ 23,627,980	\$ 23,627,980
Existing Building Fund Balance	\$ 13,454,008	\$ -	\$ 13,454,008
Existing State Aid Reimbursements	\$ 3,751,931	\$ -	\$ 3,751,931
Existing Deferred Maintenance	\$ 216,314	\$ -	\$ 216,314
Estimated Projected State Aid Receipts	\$ -	\$ 44,410,794	\$ 44,410,794
Estimated Developer Fee Receipts	\$ 2,578,159	\$ 2,122,272	\$ 4,700,431
Other District Sources *	\$ 5,223,063	\$ -	\$ 5,223,063
Est. Total Funds	\$ 54,219,634	\$ 145,584,601	\$ 199,804,235

Uses	Phase I	Phase II	Total
Righetti High	\$ 21,672,533	\$ 25,302,576	\$ 46,975,109
Pioneer Valley High	\$ 9,600,000	\$ 8,649,336	\$ 18,249,336
Santa Maria High	\$ -	\$ 64,804,812	\$ 64,804,812
Delta High	\$ 138,105	\$ -	\$ 138,105
CTE/Ag Farm	\$ 13,119,946	\$ 2,725,496	\$ 15,845,442
Digitally Interactive Learning Environments	\$ 5,223,063	\$ 5,223,063	\$ 10,446,126
Additional Classrooms		\$ 29,204,684	\$ 29,204,684
Subtotal	\$ 49,753,647	\$ 135,909,968	\$ 185,663,615
Program Reserve	\$ 4,465,987	\$ 9,674,633	\$ 14,140,620
Est. Total Uses	\$ 54,219,634	\$ 145,584,601	\$ 199,804,235

* Includes LCAP funding. Source: CFW, Inc.

4.3 REVISED MASTER BUDGET

Table 2 shows a proposed Revised Master Budget for approximately \$214.9 million for Board consideration as part of the Second Semi-Annual Report. Revisions to the budget incorporate: (1)

adjustments to the District’s existing fund balances over the last six months, (2) the new projected amount of developer fees that increases receipts to the District, (3) proposed modifications to increase Phase 1 project budgets, (4) proposed additions to Phase 2 projects and their corresponding budgets, and (4) corresponding increases to the Program Reserve, including an allowance for projected future increases in costs, should they arise.

Table 2: Revised Master Budget, FY 2015-23

Sources	Phase 1	Phase 2	Total
Existing Bond Authorization (Measure C, 2004)			
2015	\$ 28,996,159	\$ -	\$ 28,996,159
New Bond Authorization			
Series A	\$ -	\$ 35,272,959	\$ 35,272,959
Series B	\$ -	\$ 46,552,202	\$ 46,552,202
Series C	\$ -	\$ 21,204,573	\$ 21,204,573
Existing Building Fund Balance	\$ 14,149,095	\$ -	\$ 14,149,095
Existing State Aid Reimbursements	\$ 3,748,840	\$ -	\$ 3,748,840
Existing Deferred Maintenance	\$ -	\$ -	\$ -
Estimated Projected State Aid Receipts	\$ -	\$ 46,326,459	\$ 46,326,459
Estimated Projected Developer Fee Receipts	\$ 3,602,586	\$ 4,684,000	\$ 8,286,585
Other District Sources*	\$ 5,223,063	\$ 5,223,063	\$ 10,446,126
Estimated Total Funds	\$ 55,719,743	\$ 159,263,255	\$ 214,982,998
Uses	Phase 1	Phase 2	Total
Righetti High	\$ 21,847,503	\$ 35,771,706	\$ 57,619,209
Pioneer Valley High	\$ 10,469,130	\$ 8,649,336	\$ 19,118,466
Santa Maria High	\$ 420,000	\$ 64,804,812	\$ 65,224,812
Delta High	\$ 138,105	\$ -	\$ 138,105
CTE/Ag Farm	\$ 13,574,426	\$ 2,763,238	\$ 16,337,665
Digitally Interactive Learning Environments	\$ 5,223,063	\$ 5,223,063	\$ 10,446,126
Additional Classrooms	\$ -	\$ 29,204,684	\$ 29,204,684
Subtotal	\$ 51,672,227	\$ 146,416,841	\$ 198,089,068
Program Reserve	\$ 4,047,515	\$ 12,846,414	\$ 16,893,929
Estimated Total Uses	\$ 55,719,743	\$ 159,263,255	\$ 214,982,997

* Includes LCAP funding. Source: CFW, Inc.

When compared to the January 2015 adopted Master Budget, the sources of funds in the revised Master Budget show these key differences:

- The proceeds from the third and final series of bonds issued under the Measure “C” authorization of \$28,996,159 were deposited into the District’s Building Fund at the end of December 2014.

- Developer fee receipts in Phase 1 are projected to increase to \$3.6 million from \$2.57 million, increasing to an additional \$4.68 million in Phase 2. The increase recognizes the District's ongoing collection of Level 2 developer fees in excess of conservative Level 1 projections included within the original August 2014 report. Moreover, the Board established a Level 2 Developer Fee of \$2.16 per square foot of new residential construction at its May 12, 2015 meeting, increasing from the previous \$2.13. The basis for the increased Level 2 fee is contained in the District's Level 2 developer fee study produced by SchoolWorks, Inc. and delivered in March 2015..
- LCAP/Common Core funding utilized for digitally interactive learning environments in Phase 1 are likewise utilized in Phase 2

The total proposed uses for Phase 1 have been adjusted upward pursuant to the project updates detailed in Section 3, including the adjustment for the Pioneer Valley GMP, the proposed master planning and conceptual design work for Santa Maria and Righetti High Schools, and to account for prior professional services associated with the CTE Center/Ag Farm land acquisition. The Righetti High School budget has also been expanded in Phase 2 to support the addition of a performance space to the construction of the practice gym and accommodate the potential increase to budget of approximately \$10,469,130. This conceptual budget is an estimate based on the identical current budget of the performing arts center at Pioneer Valley High and is recommended in this report subject to additional future adjustment upon study of potential efficiencies gained in combination with the practice gym.

4.4 MASTER SCHEDULE

The revised Program Master Schedule is presented in Table 3 for Board review. In the previous Program update, Phase 1 schedules were amended to allow more time to develop the educational component and increase the opportunity for firms to participate in Phase 1 projects. The proposed revised Master Schedule for Phase 1 projects amends the adopted Master Schedule to extend the period for acquisition of the CTE/AG Farm site, the additional period to allow the Performing Arts Center at Pioneer Valley High to comply with new lease-leaseback legal requirements and participants, and the extended design period for the Righetti High 38 classroom project to incorporate changes in pre-construction services. As presented in the Master Budget, schedules for the completion of additional projects have also been added, specifically the proposed master planning and conceptual design work for Santa Maria High and the feasibility of adding additional performance space to the Righetti High Practice Gym.

Table 3: Master Program Schedule

Phase I					
School	Project	Cost	Scheduled		Estimated Total Months
			Start	End	
Righetti High	New Classroom Facility	\$21,672,533	8/2014	10/2017	39
	Site Planning & Conceptual Design	\$174,970	9/2015	8/2016	12
Pioneer Valley High	New Performing Arts Center Addition to Bldg. J	\$10,469,130	8/2014	10/2016	27
Santa Maria High	Site Planning & Conceptual Design	\$420,000	9/2015	1/2017	17
Delta High	Classroom, Site Infrastructure, and Maint. Imprvs.	\$138,105	8/2014	4/2017	33
CTE/Ag Farm	Land Acquisition and Construction of Facilities	\$13,574,426	8/2014	9/2017	38
Districtwide	Digitally Interactive Learning Environments *	\$5,223,063	8/2014	8/2016	25
	Phase I Subtotal	\$51,672,227			
	Program Reserve	\$4,047,515			
	Phase I Total	\$55,719,743			
Phase II					
School	Project	Cost	Scheduled		Estimated Total Months
			Start	End	
Righetti High	Classroom, Site Infrastructure, and Maint. Imprvs.	\$15,603,180	1/2017	1/2022	61
	New Practice Gym / Performance Space	\$20,168,526	1/2017	1/2022	61
	Subtotal	\$35,771,706			
Pioneer Valley High	Classroom, Site Infrastructure, and Maint. Imprvs.	\$8,649,336	7/2017	7/2022	61
Santa Maria High	New Classrooms, Athletic, and Support Facilities	\$52,575,433	7/2017	10/2020	40
	Auditorium Renovation	\$12,229,379	7/2019	10/2022	40
	Subtotal	\$64,804,812			
CTE/Ag Farm	Construction of Ag Pavillion	\$2,763,238	7/2017	6/2019	24
Districtwide	Digitally Interactive Learning Environments *	\$5,223,063	7/2020	6/2024	48
	District Enrollment Capacity Improvement	\$29,204,684	7/2022	6/2025	36
	Subtotal	\$34,427,747			
	Phase II Total	\$146,416,841			
	Program Reserve	\$12,846,414			
	Phase II Total	\$159,263,255			
	Phase I & II Total	\$214,982,997			

* The 1:1 device program shall be funded pursuant to the Board approved LCAP/Common Core.

4.5 PROGRAM EXPENDITURES

As a part of its program management services, the Program Team established a budget and expenditures tracking protocol for Phase 1 projects under implementation. As of the February 2015 Program update, the total Phase 1 budget was approximately \$54.2 million, inclusive of the Program Reserve. These amounts have been updated to include all expenditures to date through August 2015 and any changes to anticipated commitments. As needed, the Program Reserve and estimated ending fund balance will be utilized to accommodate unforeseen budget adjustments.

Table 4 provides a summary of expenditures made for the Program during the period of July 1, 2014 through August 31, 2015. The balance presented in Table 4 reflects the Adopted Budget approved by the Board for the Reconfiguration and Facilities Program as of July 2014, plus any adjustments in February 2015, less expenditures through August 31. The information is also presented by fiscal year to match the District's financial accounting system and includes expenditures from July 1, 2010 through June 30, 2014 relating to the Pioneer Valley High Performing Arts Center project and the CTE Center/Ag Farm land acquisition which commenced prior to the development of the Program. Expenditures made after this reporting period will be accounted for in the next semi-annual update. Once the recommended budget adjustments are approved as part of this current update, subsequent expenditure reports will reflect the revised budget value.

Table 4: Phase 1 Expenditures

Project	Program Expenditures (as of 8/31/15)				Total	Balance
	Adopted Budget	7/1/10 - 6/30/14	7/1/14 - 6/30/15	7/1/15 - 8/31/15		
Righetti High School						
New Classroom Facility	\$21,672,533	\$0	\$683,458	\$268,625	\$952,083	\$20,720,450
Pioneer Valley High School						
New Performing Arts Center Addition to Bldg J.	\$9,600,000	\$737,084	\$173,726	\$24,037	\$934,848	\$8,665,152
Delta High School						
Improvements	\$138,105	\$0	\$2,299	\$400	\$2,699	\$135,406
CTE/Ag Farm						
Land Acquisition & Construction of Facilities	\$13,119,946	\$145,542	\$344,921	\$3,787,349	\$4,277,812	\$8,842,134
Districtwide						
1:1 Technology Deployment/Replacement	\$5,223,063	\$552,845	\$2,553,741	\$14,283	\$3,120,869	\$2,102,194
Program Reserve	\$4,465,987					
TOTAL	\$54,219,634	\$1,435,471	\$3,758,145	\$4,094,695	\$9,288,310	\$44,931,324

Notes:

1. Total expenditures for the period July 1, 2014 - August 31, 2015 was \$15,439,903:

This amount includes \$7,852,840 in Reconfiguration & Facilities Program expenditures

plus \$7,587,063 in other District facility related improvements outside of the Reconfiguration & Facilities Program

Source: Santa Maria Joint Union High School District

For the period of July 1, 2014 through August 31, 2015, approximately \$7.8 million has been expended on projects identified within the Reconfiguration and Facilities Program. For the period of July 1, 2014 through August 31, 2015, the District has also spent approximately \$7.6 million in expenditures outside of the Program for other facility needs. Detailed expenditure reports, broken down into subcategories of

spending have been prepared and submitted to District staff, and are available for review by the Board and Citizens Oversight Committee.

4.6 STATE AID

As more fully described in the original Reconfiguration and Facilities Program report, the State maintains a School Facility Program (SFP) administered by the Office of Public School Construction (OPSC) that distributes funds for costs relating to the modernization or new construction of school facilities. Total funding is based on a per-pupil grant amount established by the State Allocation Board (SAB), assuming a general classroom loading standard of 27 high school students per eligible classroom to be modernized or constructed. Eligibility for modernization funding is established separately for each school site, while eligibility for new construction is determined by the gap between a district's projected enrollment and its existing permanent classroom capacity. For purposes of State new construction grant eligibility, portable classroom capacity is not considered available to permanently house students.

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

4.6.1 MODERNIZATION ELIGIBILITY

The SFP modernization program provides funds on a 60/40 State and local sharing basis for improvements that modernize or enhance existing school facilities that are 25 years or older since construction or last modernization. Eligible projects include modifications such as air conditioning, plumbing, lighting, and electrical systems. Table 5 shows the District's estimated amount of modernization eligibility based on the total number of permanent classrooms that meet the 25 year requirement. Future eligibility for the modernization of permanent classrooms of approximately \$18.4 million is anticipated in 2025, increasing thereafter to \$31.9 million in 2029 as the District's newer facilities or previously modernized permanent facilities reach the 25 year requirement.

Unlike new construction grants, the State does provide modernization grants for portable classroom facilities. Correspondingly, the District has approximately 26 portable classrooms as of fiscal year 2016 that are eligible for modernization grant funding of approximately \$3.8 million, increasing cumulatively to \$7.2 million by 2017 and periodically thereafter as indicated in Table 6. These amounts should be available to assist in the Phase 2 construction of 21st century classroom improvements at Righetti, Pioneer Valley and Santa Maria High. The increase in dollar amounts shown for both tables since the last reporting period is a consequence of higher per-pupil grant values for each category of student that

were approved by the State Allocation Board, effective January 1, 2015. All grant amounts were increased by approximately 4.3%.

Table 5: Districtwide Permanent Classroom Modernization Eligibility*

Site	Total CRs	CRs	FY 2016-24	CRs	FY 2025	CRs	FY 2029	CRs	FY 2035	Total
Delta High	11	0	\$0	0	\$0	0	\$0	11	\$1,620,135	\$1,620,135
Righetti High	59	0	\$0	59	\$8,689,815	0	\$0	0	\$0	\$8,689,815
Pioneer Valley High	84	0	\$0	0	\$0	84	\$12,371,940	0	\$0	\$12,371,940
Santa Maria High	74	0	\$0	66	\$9,720,810	8	\$1,178,280	0	\$0	\$10,899,090
Total	228	0	\$0	125	\$18,410,625	92	\$13,550,220	11	\$1,620,135	\$33,580,980
<i>Cumulative CRs</i>				125		217		228		
Cumulative Total					\$18,410,625		\$31,960,845		\$33,580,980	

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

Table 6: Districtwide Portable Classroom Modernization Eligibility*

Site	CRs	FY 2016	CRs	FY 2017	CRs	FY 2019	CRs	FY 2020	CRs	FY 2021	CRs	FY 2022
Delta	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0
RHS	16	\$2,356,560	4	\$589,140	1	\$147,285	6	\$883,710	2	\$294,570	7	\$1,030,995
PVHS	1	\$147,285	0	\$0	10	\$1,472,850	2	\$294,570	0	\$0	0	\$0
SMHS	9	\$1,325,565	0	\$0	8	\$1,178,280	6	\$883,710	11	\$1,620,135	0	\$0
Total	26	\$3,829,410	4	\$589,140	19	\$2,798,415	14	\$2,061,990	13	\$1,914,705	7	\$1,030,995
<i>Cumulative CRs</i>			30		49		63		76		83	
Cumulative Total				\$4,418,550		\$7,216,965		\$9,278,955		\$11,193,660		\$12,224,655

Site	CRs	FY 2023	CRs	FY 2024	CRs	FY 2025	CRs	FY 2028	CRs	FY 2033
Delta	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0
RHS	0	\$0	4	\$589,140	0	\$0	1	\$147,285	0	\$0
PVHS	0	\$0	0	\$0	12	\$1,767,420	0	\$0	0	\$0
SMHS	0	\$0	0	\$0	0	\$0	0	\$0	12	\$1,767,420
Total	0	\$0	4	\$589,140	12	\$1,767,420	1	\$147,285	12	\$1,767,420
<i>Cumulative CRs</i>	83		87		99		100		112	
Cumulative Total		\$12,224,655		\$12,813,795		\$14,581,215		\$14,728,500		\$16,495,920

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

4.6.2 NEW CONSTRUCTION ELIGIBILITY

The SFP new construction program provides State grants on a 50/50 State and local sharing basis for eligible projects that add capacity to a school district. New construction grants may be used by the District at any existing or new school site. The goal is to add capacity to permanently house students, whether by constructing a new school or adding new permanent classrooms at an existing school site. Table 7 shows the estimated amount in new construction grant funding for which the District is currently eligible. The total number of pupil grants remains the same as reported in prior periods, however the amount per pupil grant has been increased by the State to \$ \$13,923, resulting in a larger

amount of eligible funding for the same number of grants. Based on a combined total of 2,634 per-pupil grants established as eligible by the State, the District currently qualifies for nearly \$39 million in State new construction funding. This does not include an available allowance, if deemed needed, for the cost of site development expenditures to accommodate required classroom improvements which is generally assumed to equal approximately 15% of the State grant amount. If applied to all grants, this amount would yield an additional allocation of approximately \$5.8 million, increasing the projected total to approximately \$44.8 million. This amount would be subject to a dollar-for-dollar match from the District. However, new construction grants, like modernization grants, will be extremely limited until funding for the School Facilities Program is replenished at the State level.

Table 7: District’s Estimated New Construction Eligibility*

Grade Level	Est. Grant/Pupil Effective 01-15	Est. Eligible Pupils	Est. State Grant (50%)	Est. Local Match (50%)	Project Total (100%)
9-12	\$13,923	2,389	\$33,262,047	\$33,262,047	\$66,524,094
Severe	\$29,070	101	\$2,936,070	\$2,936,070	\$5,872,140
Non-Severe	\$19,442	144	\$2,799,648	\$2,799,648	\$5,599,296
Subtotal		2,634	\$38,997,765	\$38,997,765	\$77,995,530
Est. Site Service (15%)			\$5,849,665	\$5,849,665	\$11,699,330
Grand Total		2,634	\$44,847,430	\$44,847,430	\$89,694,860

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

4.6.3 USE OF GRANTS

Within the SFP new construction grant program, OPSC allows school districts to utilize higher student loading standards than the normal State standard of 27 grade 9-12 students per classroom. A higher loading standard increases the number of pupil grants that the State will allocate for a project, which in turn increases the dollar amount of potential State funding.

Prior to applying the use-of-grants mechanism, certain conditions must be met:

- The classroom loading standard used in the application cannot exceed the number of students per classroom allowed by the teachers’ collective bargaining agreement or exceed 33 students per classroom, whichever is lower
- The amount of grant funding requested through the mechanism cannot exceed 50% of the project’s total cost of construction

A school district using this funding mechanism on an application is not required to actually operate classrooms at the higher loading standard once the new facility is complete. However, the use of grants mechanism does not increase the overall number of eligible State pupil grants allocated to a district; it simply applies more of those finite pupil grants to a given project.

Table 8 demonstrates the planned impact of a use of grants approach to the proposed Phase 1 projects. The District has already applied for the use of 378 pupil grants for reimbursement of costs associated with the 14-classroom building at Santa Maria High. A separate application to use an additional 56 pupil grants has been prepared to increase the available reimbursement to approximately \$6.04 million. A similar approach would yield approximately \$2.77 million for the Pioneer Valley Performing Arts Center and approximately \$17.5 million for the Righetti 38-classroom building. Adding 60 more pupil grants to the CTE/Ag Farm project would increase funding to approximately \$4.6 million. In total, approximately 2217 pupil grants would be used for this purpose, leaving a balance of approximately 417 pupil grants for future use. Prior to submittal, each application for State grant funding will be brought to the Board for approval.

Table 8: Use of Grants for District Projects

Project	Base Grants	Additional Grants	Total Grants	Per-Pupil Grant Effective 01-15	Est. State Base Grant	Est. Addtl State Grant	Est. Total State Grant (50%)	Est. Local Match (50%)	Project Total (100%)
14-Classroom Building, Santa Maria High *	378	56	434	\$13,923	\$5,262,894	\$779,688	\$6,042,582	\$6,042,582	\$12,085,164
Performing Arts Center, Pioneer Valley High **	108	91	199	\$13,923	\$1,503,684	\$1,266,993	\$2,770,677	\$2,770,677	\$5,541,354
38-Classroom Building, Righetti High ***	1026	228	1254	\$13,923	\$14,284,998	\$3,174,444	\$17,459,442	\$17,459,442	\$34,918,884
CTE Center/Ag Farm ***	270	60	330	\$13,923	\$3,759,210	\$835,380	\$4,594,590	\$4,594,590	\$9,189,180
Total	1782	435	2217		\$24,810,786	\$6,056,505	\$30,867,291	\$30,867,291	\$61,734,582

* 56 additional grants are based on loading each of the 14 classrooms with four additional students (i.e., 31 per classroom instead of 27) .

** 91 additional grants are based on a square footage calculation established by CDE and applied to the overall size of the project .

*** additional grants are based on loading teaching stations with six additional students (e.g., 33 per classroom instead of 27).

Sources: Santa Maria Joint Union High School District, OPSC

4.6.4 COMMUNITY INFORMATION

As progress has been made on the Phase 1 projects of the Reconfiguration and Facilities Program, the District has provided periodic information to the community of ongoing efforts and the advantages they provide to students, teachers and the community. This maintains awareness of these projects and proposed plans for Phase 2 implementation beyond regular progress reports to the Board. A voter survey to gauge the community’s interest in the facilities projects proposed in the Board-approved Program and its willingness to support those projects with a general obligation bond measure is underway. With the next opportunity for voters to decide on a bond measure about a year away, it has been determined that conducting a survey in the fall of 2015 would be an appropriate means of providing information on the Program and evaluating voter interest in expanding its implementation. Results will be presented to the Board in the fall to provide ample opportunity to discuss voter awareness and attitudes of the proposed Program.

SECTION 5:

RECOMMENDATIONS

It is recommended that the Board of Education:

- Approve and adopt this semi-annual Program update, including the Master Budget and Master Schedule, to officially guide the Reconfiguration and Facilities Program's continued implementation
- Consider the next semi-annual Program update at its regularly scheduled February 2016 meeting