

The background of the slide is a photograph of a modern classroom. Students are seated at white tables with laptops, some with their hands raised. The room features large windows, a whiteboard, and educational posters on the wall, including one that says "BE BRAVE" and another that says "BE AWESOME".

Morgan Hill Unified School District

Facilities Master Plan
Board of Education Workshop

February 28, 2019

Agenda

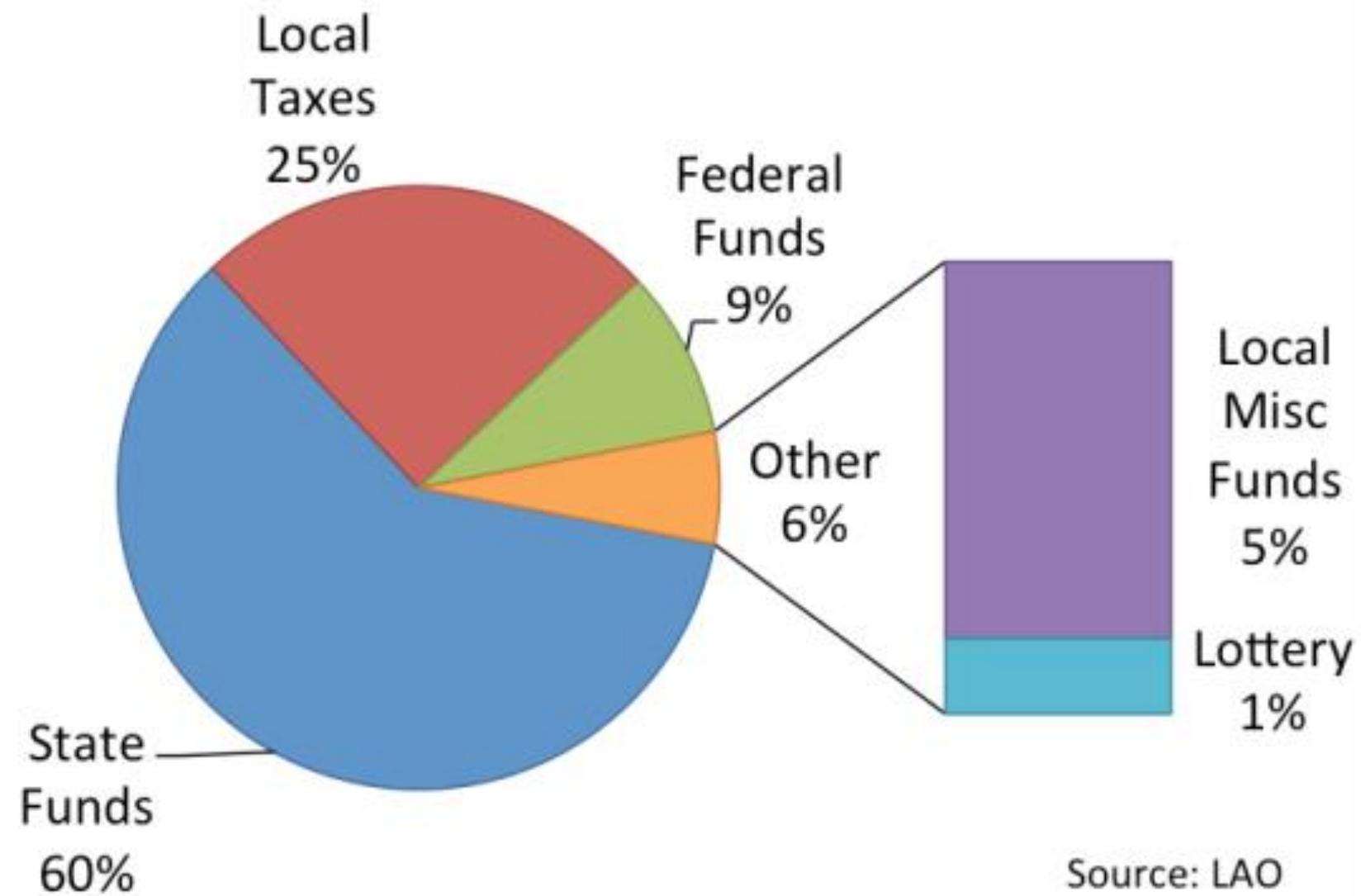
- Background: Review CA standard school facilities funding process (10 slides) ● 20 minutes
- Process: Review the BOE approved 2017 MHUSD Facilities Master Plan (10 slides) ● 20 minutes
- Activity #1: Educational concept “ Dot Polling” exercise ● 15 minutes
- Summary: Forecast projects delivered through FMP (6 slides) ● 15 minutes
- Activity #2: Thermometer exercise ● 15 minutes
- “Next Steps” discussion ● 35 minutes

potential funding overview



types of funding / where does our funding come from?

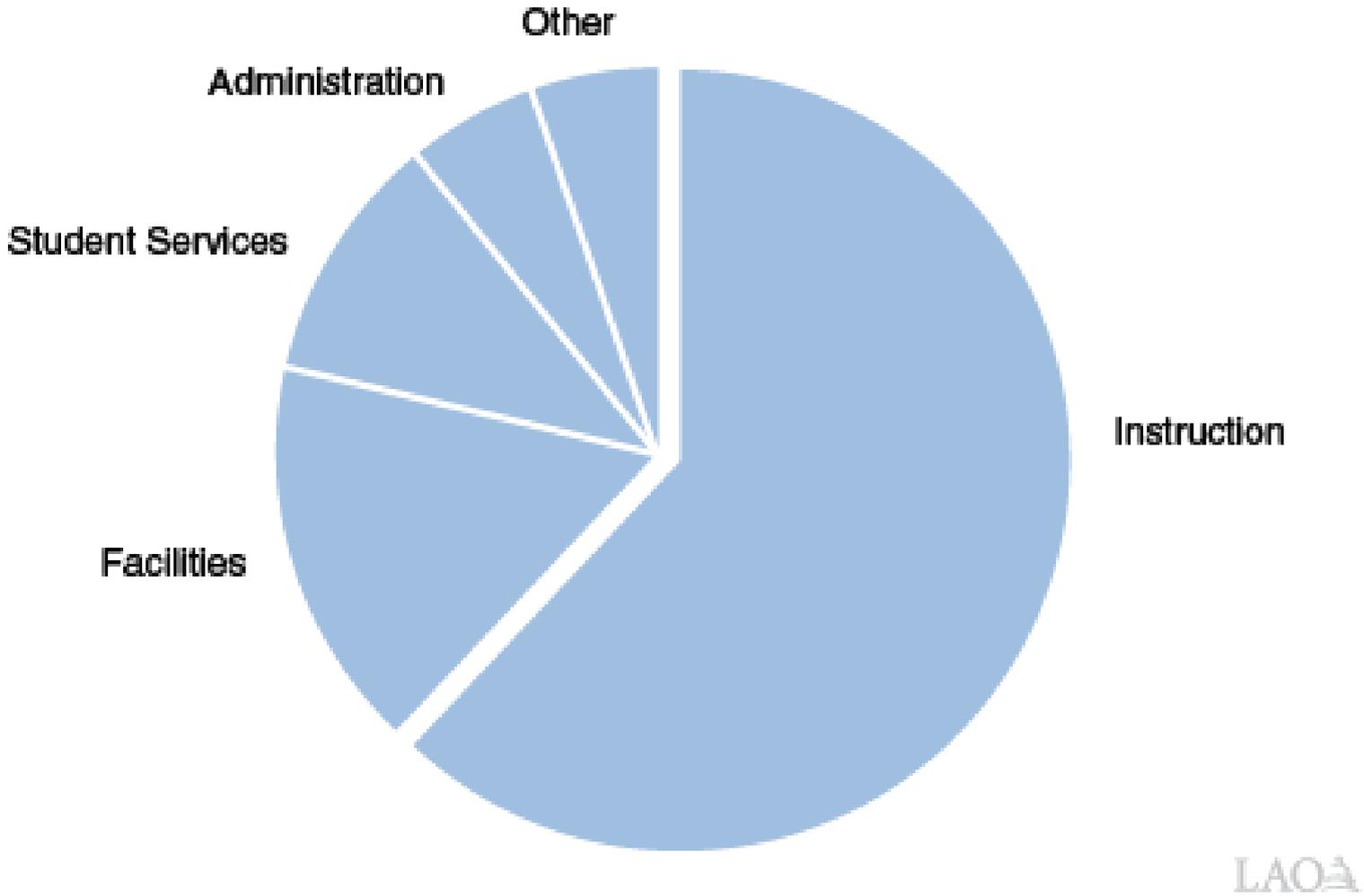
California K-12 Funds by Source, 2016-17



types of funding / distribution of general funds

Most School Spending Is for Instruction

2015-16



*school construction and maintenance are funded mainly by state and local general obligation funds

types of funding / facility funding

Table 7. Sources of School Facility Revenues

Source	1998-2006		2007-2015	
	Total Revenue (\$ Billion)	Percentage	Total Revenue (\$ Billion)	Percentage
Local G.O. Bonds	\$46.47	50	\$44.28	65
State Aid (State Bond Apportionments)	29.94	32	13.04	19
Developer Fees	10.12	11	3.6	5
Other	7.06	7	7.28	11
Total	\$93.72	100	\$68.22	100

Notes: Data on school facility revenue comes from the J200 and SACS accounting records maintained by the California Department of Education. Revenue figures represent sum of revenue over relevant time period. Revenues are adjusted for inflation and reported in real 2016 dollars.

types of funding / general obligation bonds

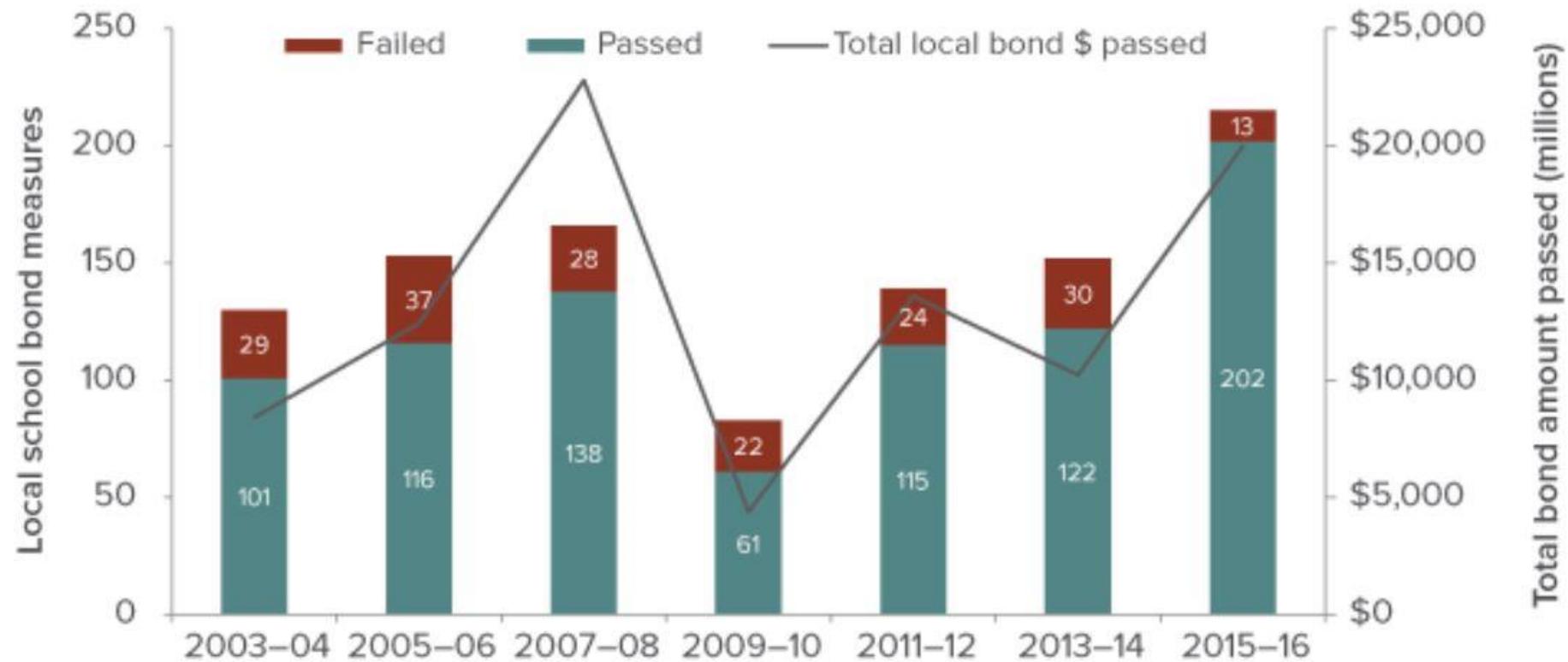
Table 3. Local K-12 Education General Obligations Bonds, 1986-2016 (Millions USD)

Years	No. proposed	No. passed	Percent passed	Amount proposed	Amount passed	Real amount passed (2016 \$)
1986-90	124	65	52%	\$2,730	\$1,334	\$2,584
1991-95	291	127	44%	8,499	3,603	6,210
1996-00	444	282	64%	23,039	14,127	21,938
2001-05	355	285	80%	28,621	26,091	37,234
2006-10	379	290	77%	37,408	33,825	38,401
2011-16	563	483	86%	51,228	45,608	46,397
Total 1986-2016	2,156	1,532	71%	\$151,526	\$124,588	\$152,765
Total 1998-2016	1,581	1,235	78%	\$129,424	\$113,626	\$134,528
Total 2001-2016	1,296	1,058	82%	\$117,257	\$105,524	\$122,033

Notes: Data on local bond elections from 1986 - 2016 comes from *EdSource* and the Coalition for Adequate School Housing (CASH). Real amounts are reported in constant 2016 dollars and adjusted using the producer price index.

types of funding / general obligation bonds

In 2016, a large number of local bond measures were proposed and the passage rate was especially high

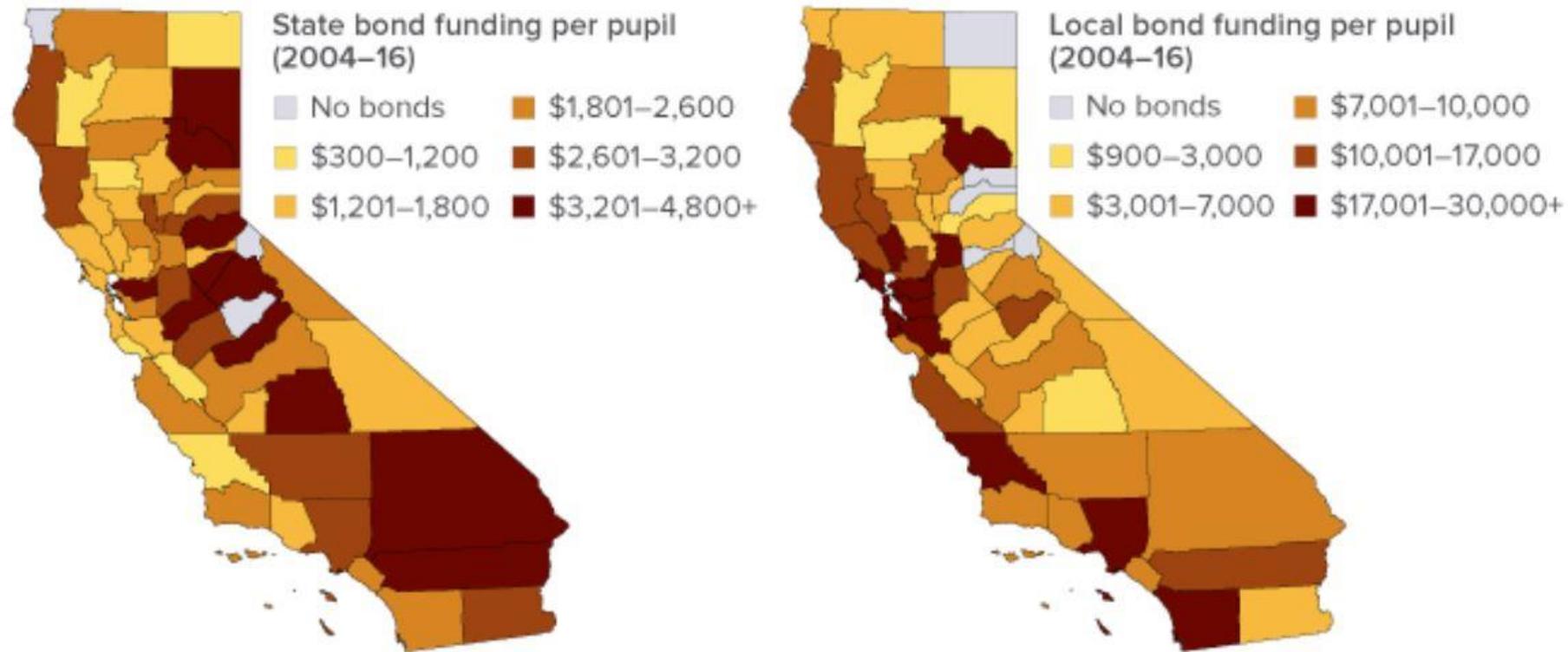


SOURCES: California Office of the State Treasury; California Debt and Investment Advisory Commission; Debt Issuance and Election Data.

NOTE: Yearly numbers of local state bond measures include general, primary, and special elections.

project cost summary / state bond vs. local bond funds

State funding is more evenly distributed and much lower than local bond funding



SOURCE: California Department of Education; Office of Public School Construction; California Debt and Investment Advisory Commission.

NOTES: State bond funding includes only funding from Proposition 55 (2004) and Proposition 1D (2006). State bond funding was exhausted in 2012.

potential funding / summary

Local Funding Sources

- **Fund 25 - Developer Fees**

\$2 million/year x 10 years =

\$ 20,000,000*

Fund 25 Developer Fees can be used to accommodate new students only. This funding stream may be allocated to a potential future elementary school.

- **Fund 14 - LCAP Deferred Maintenance**

\$300,000/year from General Fund

(Used for Ongoing Maintenance)

- **Fund 01 - LCAP Routine Maintenance**

3% / \$2.7 million/year from General Fund

(Used for Staff Salaries and Benefits)

- **Fund 492 - Mello Roos**

\$500,000/year x 10 years =

\$ 5,000,000

State School Facilities Program

- **State SFP Eligibility**

(Too Many Variables to Confidently Include in Current FMP Budget)

Modernization: \$31,408,334

\$ -0-

New Construction: \$ 7,732,959

\$ -0-

CTE: \$ TBD (Future Grant Applications)

\$ -0-

potential funding / summary

Voter Approved

- **Measure G - General Obligation Bond**

Remaining Issuance Balance Available for FMP Projects =	\$ 143,000,000
Allocated Funds (Britton MS) =	(- \$ 50,000,000)

Potential Available Program Funding: \$ 93,000,000

Other Costs Allowance

Escalation 4%/Year x 10 Years = 40% x .5 =	20%
Program Contingency	5%
Offsite/Utility Connection Costs	5%
Interim Housing	<u>3%</u>
Total Contingency Allowance:	33%

x 67%

Total Project Funding in 2017

(75% Hard Construction / 25% Soft Costs)

\$ 62,310,000

Total FMP Program Need in 2017\$:

\$699,841,000

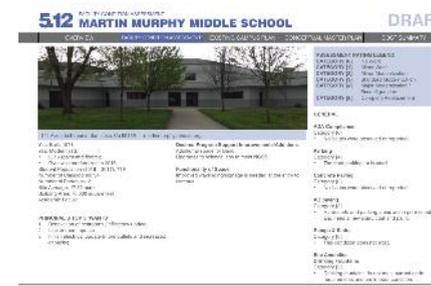
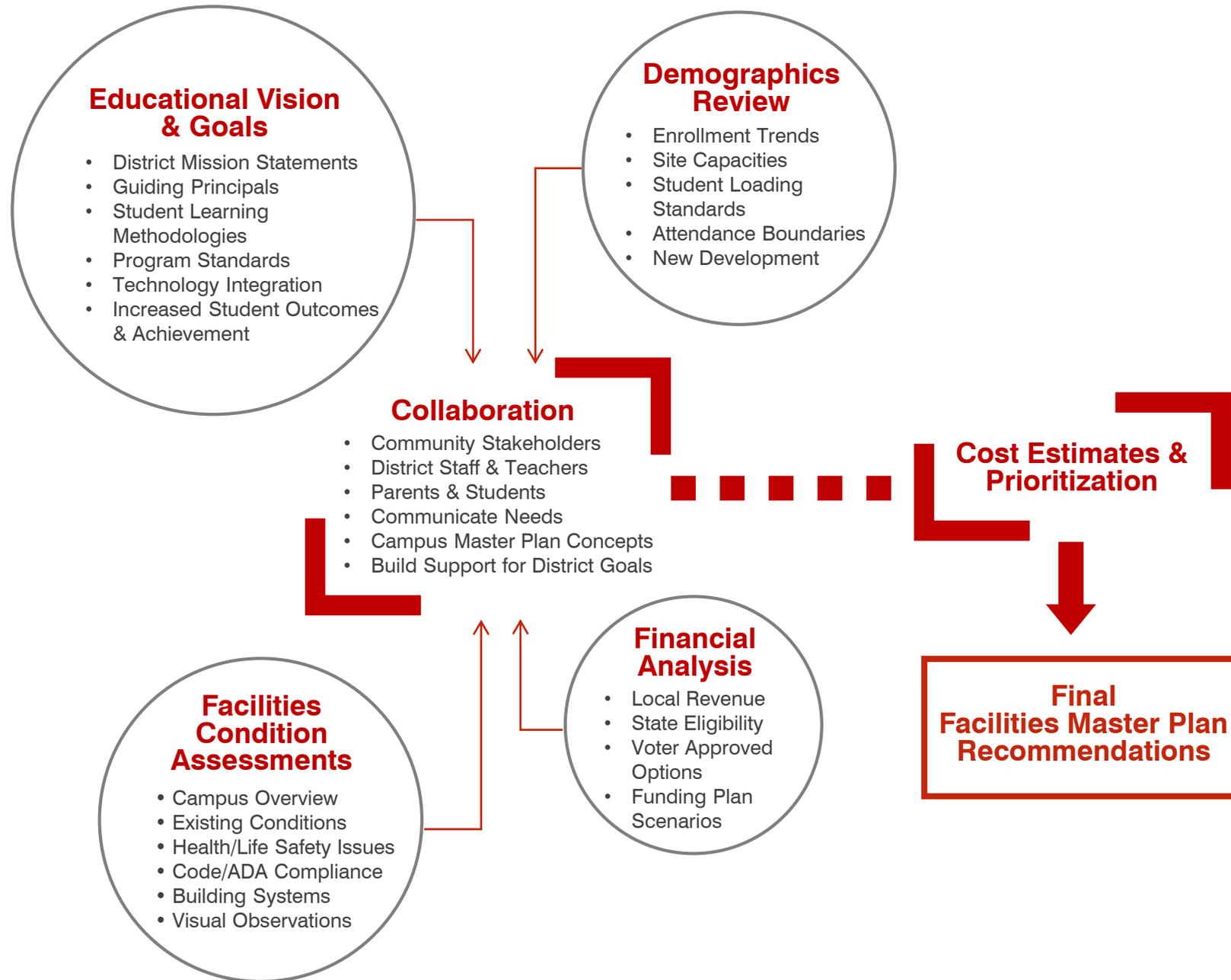
Note
 \$30M has been allocated to Series B projects:

- Nordstrom Elementary (\$10.5M)
- Jackson Academy (\$12M)
- Technology (\$5.5M)
- Programming/Management (\$2.5M)

fmp process overview

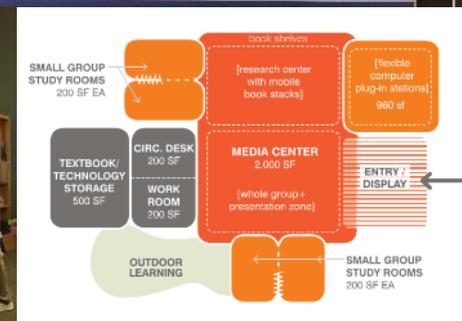


facilities master plan components



MORGAN HILL UNIFIED SCHOOL DISTRICT PROJECT SCOPE CATEGORIES

- MODERNIZE / RECONFIGURE EXISTING CLASSROOMS**
TOTAL FMP COST: \$ 31,047,000
- EXISTING BUILDING SYSTEMS, TOILETS & IMPROVED ENERGY EFFICIENCY**
TOTAL FMP COST: \$ 19,779,000
- SITE UTILITIES & INFRASTRUCTURE**
TOTAL FMP COST: \$ 10,826,000
- NEW CONSTRUCTION (CLASSROOMS)**
TOTAL FMP COST: \$ 153,786,000
- SCIENCE, ART, CTE & ELECTIVE PROGRAMS**
TOTAL FMP COST: \$ 102,495,000
- PERFORMING ARTS IMPROVEMENTS**
TOTAL FMP COST: \$ 26,685,000
- MPR, STUDENT UNION & FOOD SERVICE IMPROVEMENTS**
TOTAL FMP COST: \$ 72,185,300
- PHYSICAL EDUCATION IMPROVEMENTS**
TOTAL FMP COST: \$ 32,842,300



4.5 PROGRAM COSTS SCOPE OF WORK CATEGORIES DRAFT

ITEM/DESCRIPTION	SCOPE OF WORK CATEGORIES	ESTIMATED COST SUMMARY	FINANCIAL ANALYSIS	STRATEGIC PLANNING
1. Modernize / Reconfigure Existing Classrooms	1	\$ 31,047,000	20	20
2. Existing Building Systems, Toilets & Improved Energy Efficiency	2	\$ 19,779,000	10	10
3. Site Utilities & Infrastructure	3	\$ 10,826,000	5	5
4. New Construction (Classrooms)	4	\$ 153,786,000	75	75
5. Science, Art, CTE & Elective Programs	5	\$ 102,495,000	50	50
6. Performing Arts Improvements	6	\$ 26,685,000	10	10
7. MPR, Student Union & Food Service Improvements	7	\$ 72,185,300	35	35
8. Physical Education Improvements	8	\$ 32,842,300	15	15



fmp process-to-date

7 Executive Steering Committee Meetings
(Establish FMP Process)

59
participants

4 Facilities Master Plan Committee Meetings

- 1 – Process & Ed Spec Overview | Visual Listening
- 2 – Guiding Principles | Needs Assessments | Secondary Sites Charrette
- 3 – Focus Groups | School Site Master Plans
- 4 – Scope-of-Work Categories | Prioritization | Next Steps



fmp process-to-date

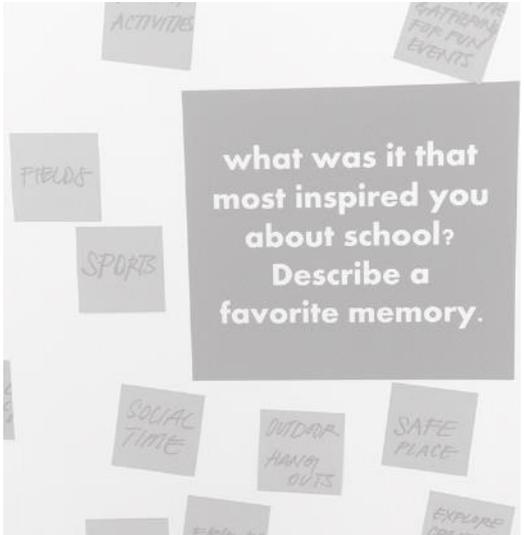
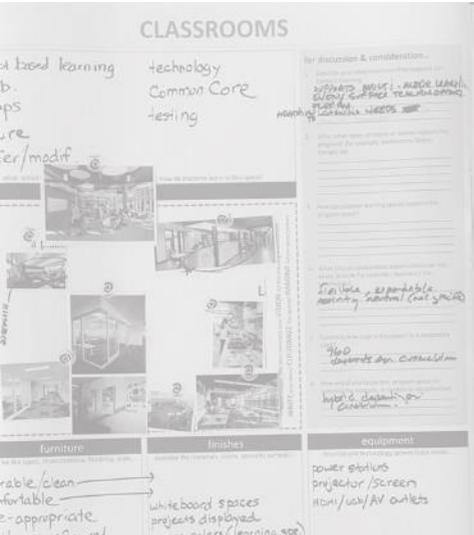
79
participants

10 Educational Vision Development

- 3 – Executive Committee
- 15 – Educational Planning Committee
- 3 – Elementary & Secondary Education
- 2 – Food Service
- 4 – Transportation
- 3 – Operations & Maintenance
- 1 – Technology
- 1 – Special Education

6 FMP Focus Groups

- 36 – Student Ambassadors
- 6 – Mechanical, Electrical, Plumbing & Grounds
- 1 – Technology
- 2 – Transportation
- 1 – Food Service
- 1 – CTE



fmp process-to-date

3 Online Surveys

- 15 – Principals
- 214 – Teachers & Staff
- 320 – Parents & Community (English & Spanish)

600+ participants

16 School Site Council Meetings

- (Community Members, Teachers, Parents, and Students)
- Site Master Plan Review with Principal & District Staff

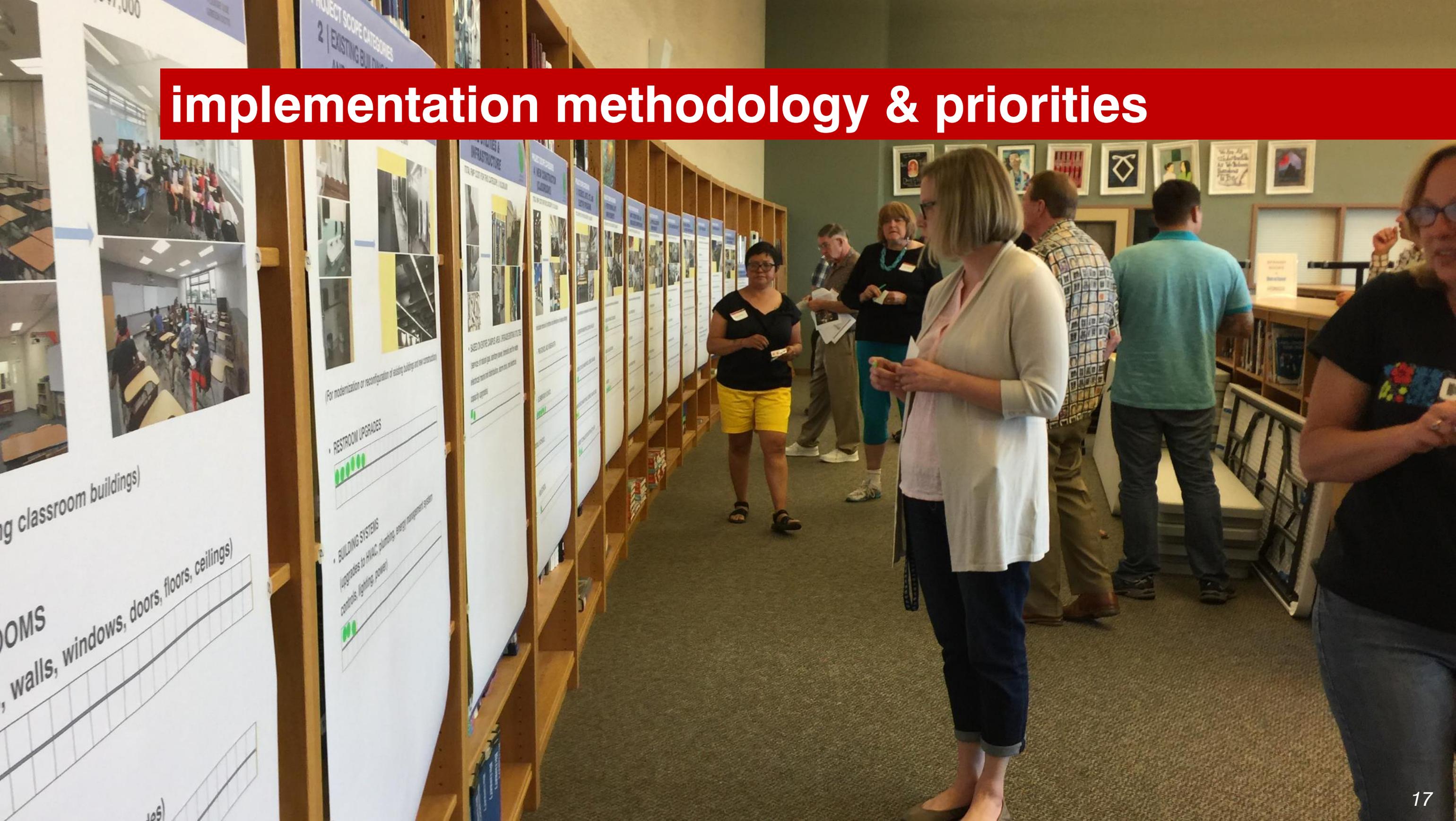
750+ participants

47 meetings

1 Town Hall Meetings



implementation methodology & priorities



g classroom buildings)

ROOMS

, walls, windows, doors, floors, ceilings)

PROJECT SCOPE CATEGORIES
2 | EXISTING BUILDINGS



(For modernization or reconfiguration of existing buildings not new construction)

• RESTROOM UPGRADES



• BUILDING SYSTEMS

(Upgrades to HVAC, plumbing, energy management system, controls, lighting, power)



• REPAIRS & MAINTENANCE

(Repairs to roof, gutters, siding, windows, doors, etc.)

• ELECTRICAL

(Upgrades to electrical systems, wiring, etc.)

• PLUMBING

(Upgrades to plumbing systems, pipes, etc.)

• HVAC

(Upgrades to heating, ventilation, and air conditioning systems)

• ENERGY

(Upgrades to energy efficiency measures, solar panels, etc.)

• SAFETY

(Upgrades to fire safety, security, etc.)

• ACCESSIBILITY

(Upgrades to wheelchair ramps, elevators, etc.)

MODERNIZE / RECONFIGURE Existing Classrooms 01



02 EXISTING BUILDING SYSTEMS Toilets & Improved Energy Efficiency



03 SITE Utilities



15 INSTRUCTIONAL Design Furniture

16 TECHNOLOGY Infrastructure & Equipment

NEW CONSTRUCTION (Classrooms) 04



05 SCIENCE, ARTS, CTE & Electives Programs



17 TECHNOLOGY – Student Devices



06 PERFORMING ARTS Improvements



MPR, STUDENT UNION & Food Service Improvements 07



08 PHYSICAL EDUCATION Improvements



10 MEDIA CENTER & Student Support Services



13 OUTDOOR LEARNING COURTS Quads & Landscape

09 STAFF & PARENT Support



11 SAFETY & Security



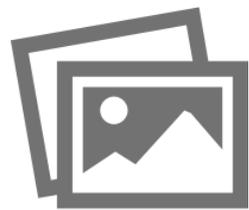
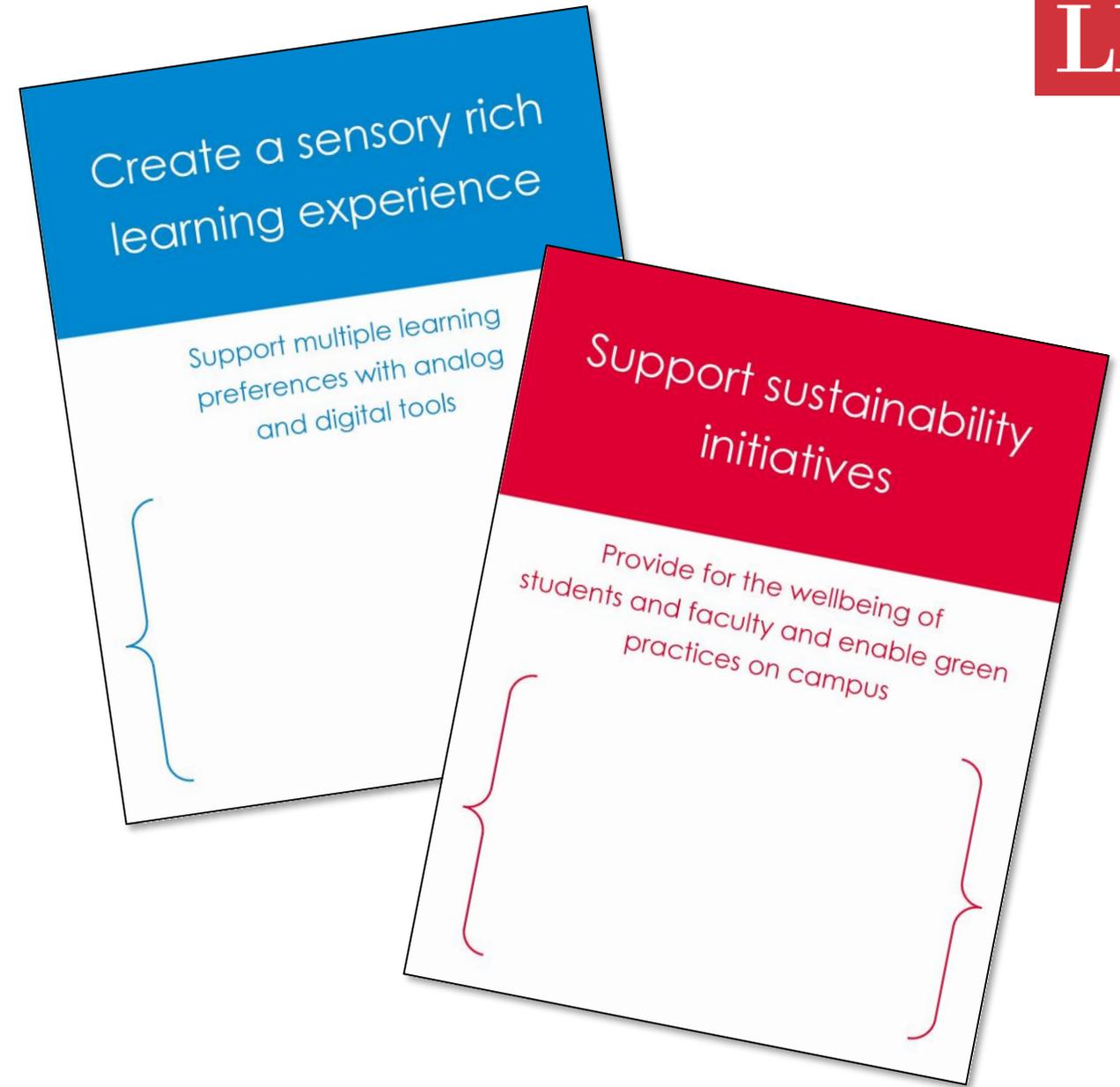
12 PARKING & Drop-Off



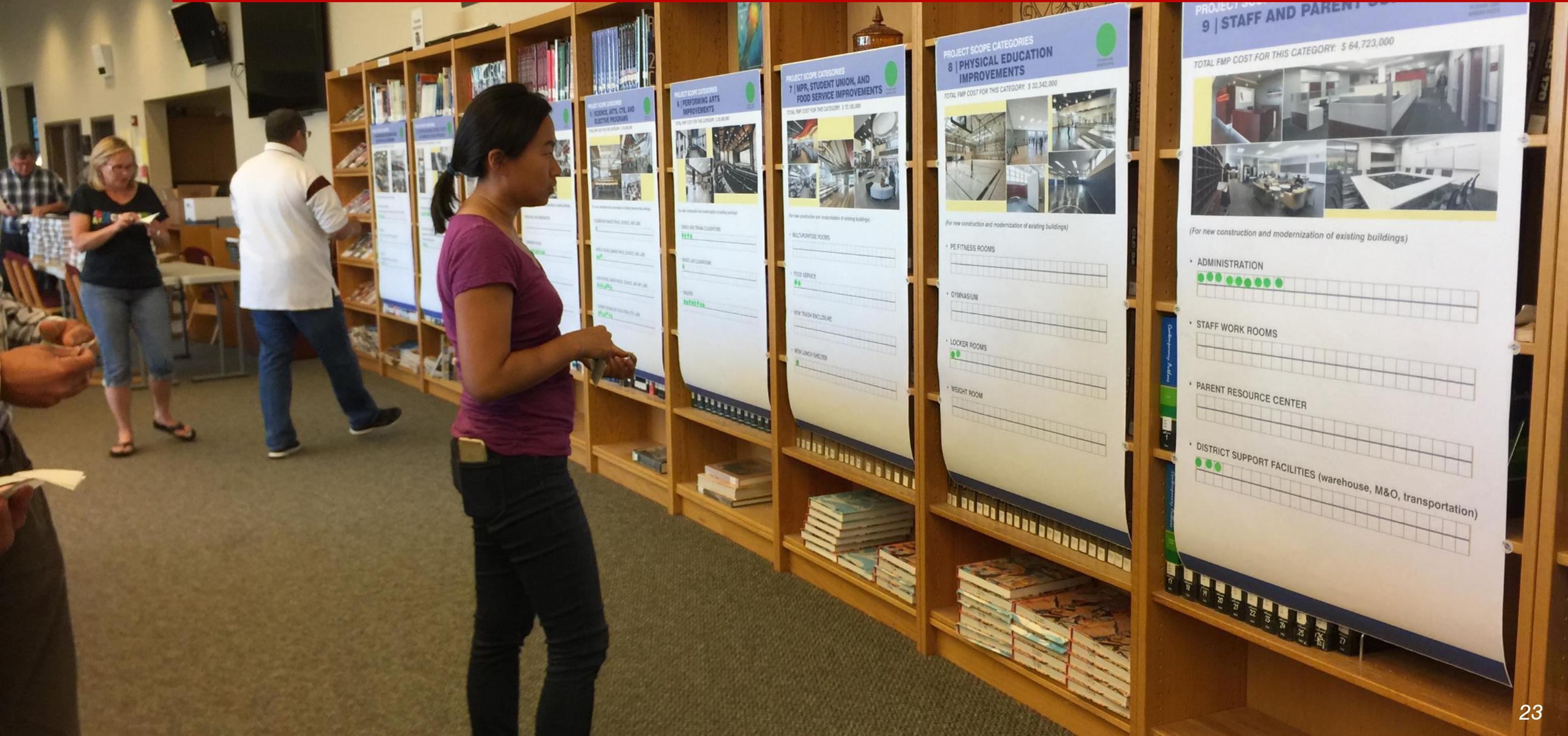
14 EXTERIOR PLAY SPACES Playfields & Hardcourts

workshop activity

DOT POLLING EXERCISE TO DEMONSTRATE CONCEPTS



stakeholder groups priorities



PROJECT SCOPE CATEGORIES
5 | SCIENCE, ARTS, CTE, AND ELECTIVE PROGRAMS
TOTAL FMP COST FOR THIS CATEGORY: \$ 1,548,000

PROJECT SCOPE CATEGORIES
6 | PERFORMING ARTS IMPROVEMENTS
TOTAL FMP COST FOR THIS CATEGORY: \$ 1,548,000

PROJECT SCOPE CATEGORIES
7 | MPR, STUDENT UNION, AND FOOD SERVICE IMPROVEMENTS
TOTAL FMP COST FOR THIS CATEGORY: \$ 12,100,000

PROJECT SCOPE CATEGORIES
8 | PHYSICAL EDUCATION IMPROVEMENTS
TOTAL FMP COST FOR THIS CATEGORY: \$ 32,342,000

PROJECT SCOPE CATEGORIES
9 | STAFF AND PARENT SUPPORT
TOTAL FMP COST FOR THIS CATEGORY: \$ 64,723,000

(For new construction and modernization of existing buildings)

- ADMINISTRATION
●●●●●●●●
- STAFF WORK ROOMS
- PARENT RESOURCE CENTER
- DISTRICT SUPPORT FACILITIES (warehouse, M&O, transportation)
●●●

stakeholder groups priorities / summary

global commonalities

new construction (classrooms)

modernization / reconfigure existing classrooms

existing building systems, toilets, and improved energy efficiency

staff & parent support

parking & drop-off

safety & security

site specific priorities

mpr, student union & food service improvements

physical education improvements

exterior play spaces, playfields & hardcourts



implementation methodology / future projects prioritization

As funding beyond current Measure G is identified, project needs identified in the Facilities Master Plan will be prioritized by District leadership in consultation with the Board of Education, school site and community stakeholders for potential implementation based upon the following influences:

- Deferred Maintenance and Repair Needs
- Ability to Leverage State Funding
- Health / Safety / Code Compliance Issues
- District Educational Program Innovation Goals
- Student Enrollment Growth
- Equity Between Sites / Focus on the Most Needy Communities
- Overall District Stakeholder / Community Priorities

These criteria are not listed in a prioritized order since conditions will often change over time and are intended as a broad guideline to facilitate future Morgan Hill Unified School District decision making.

total program cost



project cost summary / school sites

SCHOOL SITE

MASTER PLAN COST

Barrett Elementary School

\$ 17,723,000

El Toro Health Science Academy

\$ 24,973,000

Jackson Academy of Math & Music

\$ 54,475,000

Los Paseos Elementary School

\$ 38,582,000

Nordstrom Elementary School

\$ 47,561,000

Paradise Valley Engineering Academy

\$ 19,217,000

S.G. Borello Future Elementary School

\$ 48,483,000

San Martin / Gwinn Environmental Science Academy

\$ 32,025,000

P.A. Walsh STEAM Academy

\$ 53,980,000

Encinal Site

\$ 41,582,000

SCOPE CATEGORY	SCHOOL SITE						
	Barrett Elementary	El Toro Health Science Academy	Jackson Academy of Math & Music	Los Paseos Elementary	Nordstrom Elementary	Paradise Valley Engineering Academy	SG Borello Future Elementary
1. Modernize / Reconfigure Existing Classrooms	3,929,000	3,223,000	-	1,849,000	-	1,139,000	-
2. Existing Building Systems, Toilets & Improved Energy Efficiency	3,287,000	2,301,000	-	1,428,000	-	-	-
3. Site Utilities	26,000	27,000	354,000	787,000	407,000	772,000	1,377,000
4. New Construction (Classrooms)	-	5,782,000	19,639,000	14,269,000	24,766,000	7,175,000	25,114,000
5. Science, Arts, CTE & Elective Programs	862,000	-	3,959,000	2,172,000	1,980,000	-	-
6. Performing Arts Improvements	-	-	1,627,000	630,000	-	-	-
7. MPR, Student Union & Food Service Improvements	2,454,000	2,957,000	9,815,000	2,594,000	7,716,000	539,000	6,914,000
8. Physical Education Improvements	-	-	862,000	-	-	-	-
9. Staff & Parent Support	1,941,000	2,082,000	5,789,000	3,912,000	2,949,000	1,567,000	2,522,000
10. Media Center & Student Support Services	812,000	2,508,000	6,204,000	5,435,000	4,137,000	2,655,000	2,442,000
11. Safety & Security	302,000	723,000	1,495,000	1,239,000	422,000	1,172,000	873,000
12. Parking & Drop-Off	1,088,000	974,000	1,049,000	1,029,000	1,672,000	1,291,000	3,085,000
13. Outdoor Learning Courts, Quads & Landscape	623,000	800,000	257,000	312,000	322,000	398,000	1,107,000
14. Exterior Play Spaces, Playfields & Hardcourts	1,316,000	2,551,000	2,525,000	1,864,000	2,288,000	1,783,000	4,233,000
15. Instructional Design Furniture	732,000	788,000	900,000	900,000	900,000	591,000	816,000
16. Technology Infrastructure & Equipment	351,000	257,000	-	162,000	-	135,000	-
Total Project Cost (2017\$)	\$ 17,723,000	\$ 24,973,000	\$ 54,475,000	\$ 38,582,000	\$ 47,561,000	\$ 19,217,000	\$ 48,483,000

SCOPE CATEGORY	SCHOOL SITE						
	San Martin/Gwinn Environmental Science Academy	PA Walsh STEAM Academy	Encinal Site	Britton Middle	Martin Murphy Middle	Ann Sobrato High	Live Oak High
1. Modernize / Reconfigure Existing Classrooms	-	-	1,555,000	2,468,000	3,915,000	6,611,000	5,265,000
2. Existing Building Systems, Toilets & Improved Energy Efficiency	-	-	1,118,000	1,683,000	3,557,000	4,625,000	1,700,000
3. Site Utilities	780,000	445,000	761,000	467,000	1,043,000	1,360,000	1,836,000
4. New Construction (Classrooms)	10,812,000	22,754,000	14,426,000	-	-	-	17,928,000
5. Science, Arts, CTE & Elective Programs	1,569,000	3,585,000	6,599,000	4,959,000	1,265,000	6,565,000	44,186,000
6. Performing Arts Improvements	765,000	978,000	959,000	1,348,000	2,146,000	-	11,026,000
7. MPR, Student Union & Food Service Improvements	9,122,000	8,239,000	539,000	2,070,000	802,000	9,616,000	13,718,000
8. Physical Education Improvements	797,000	-	-	3,840,000	1,752,000	2,199,000	10,373,000
9. Staff & Parent Support	-	4,389,000	4,299,000	449,000	3,865,000	2,180,000	6,885,000
10. Media Center & Student Support Services	760,000	5,334,000	4,890,000	-	1,676,000	841,000	2,297,000
11. Safety & Security	1,848,000	732,000	1,104,000	3,058,000	1,618,000	3,280,000	4,973,000
12. Parking & Drop-Off	240,000	993,000	1,050,000	405,000	1,112,000	3,204,000	1,317,000
13. Outdoor Learning Courts, Quads & Landscape	1,272,000	900,000	240,000	-	775,000	3,074,000	2,883,000
14. Exterior Play Spaces, Playfields & Hardcourts	3,553,000	4,815,000	2,796,000	7,399,000	3,236,000	13,963,000	6,862,000
15. Instructional Design Furniture	507,000	816,000	1,097,000	422,000	872,000	1,632,000	2,166,000
16. Technology Infrastructure & Equipment	-	-	149,000	203,000	419,000	783,000	270,000
Total Project Cost (2017\$)	\$ 32,025,000	\$ 53,980,000	\$ 41,582,000	\$ 28,771,000	\$ 28,053,000	\$ 69,933,000	\$ 133,685,000

The following items are excluded from this budget:

- Utility hook-up fees & City connection fees
- Off-site work and traffic signals
- Land acquisition costs
- Hazardous material surveys, abatement, and disposal
- Escalation

project cost summary / school sites

SCHOOL SITE	MASTER PLAN COST
Britton Middle School	\$ 28,771,000
Martin Murphy Middle School	\$ 28,053,000
Ann Sobrato High School	\$ 59,933,000
Live Oak High School	\$ 133,685,000
LBJ Education Center	\$ 20,365,000
ACT Education Center	\$ 31,287,000
District Office (reconfigure existing)	\$ 9,146,000
Sub-Total	\$ 689,841,000
Technology – Student Devices	\$ 10,000,000
Total Project Cost (2017\$)	\$ 699,841,000

SCOPE CATEGORY	SCHOOL SITE			TOTAL
	LBJ Education Center	ACT Education Center	District Office	
1. Modernize / Reconfigure Existing Classrooms	-	-	-	29,954,000
2. Existing Building Systems, Toilets & Improved Energy Efficiency	-	-	80,000	19,779,000
3. Site Utilities	337,000	826,000	98,000	11,703,000
4. New Construction (Classrooms)	-	11,803,000	-	174,470,000
5. Science, Arts, CTE & Elective Programs	1,740,000	5,693,000	-	85,134,000
6. Performing Arts Improvements	-	-	-	19,479,000
7. MPR, Student Union & Food Service Improvements	1,034,000	-	-	78,129,000
8. Physical Education Improvements	13,777,000	-	-	33,600,000
9. Staff & Parent Support	-	8,740,000	8,568,000	60,137,000
10. Media Center & Student Support Services	-	-	-	39,991,000
11. Safety & Security	705,000	-	110,000	23,654,000
12. Parking & Drop-Off	1,523,000	4,225,000	290,000	24,547,000
13. Outdoor Learning Courts, Quads & Landscape	-	-	-	12,963,000
14. Exterior Play Spaces, Playfields & Hardcourts	1,136,000	-	-	60,320,000
15. Instructional Design Furniture	113,000	-	-	13,252,000
16. Technology Infrastructure & Equipment	-	-	-	2,729,000
Total Project Cost A (2017\$)	\$ 20,365,000	\$ 31,287,000	\$ 9,146,000	\$ 689,841,000
Technology - Student Devices				10,000,000
Total Project Cost B (2017\$)				\$ 699,841,000

The following items are excluded from this budget:

- Utility hook-up fees & City connection fees
- Off-site work and traffic signals
- Land acquisition costs
- Hazardous material surveys, abatement, and disposal
- Escalation

project cost summary / school sites

ALTERNATES	MASTER PLAN COST
New MOTT Yard	\$ 23,068,000
New District Office	\$ 16,368,000
New Central Kitchen	\$ 14,269,000
Machado School	\$ 3,423,000

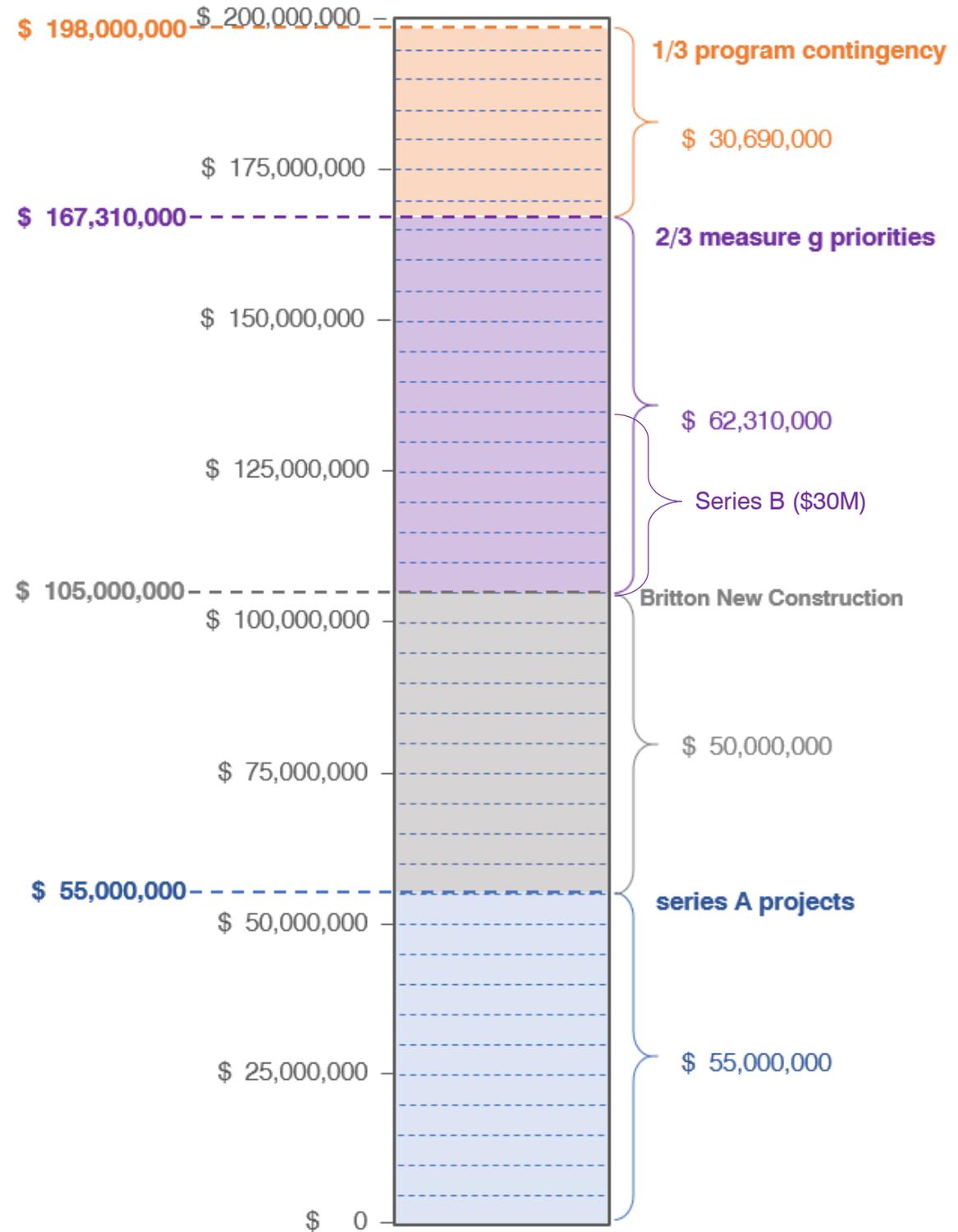
SCOPE CATEGORY	ALTERNATES			
	Machado School	New MOTT Yard	New District Office	New Central Kitchen
1. Modernize / Reconfigure Existing Classrooms	266,000	-	-	-
2. Existing Building Systems, Toilets & Improved Energy Efficiency	188,000	-	-	-
3. Site Utilities	44,000	984,000	705,000	370,000
4. New Construction (Classrooms)	2,401,000	-	-	-
5. Science, Arts, CTE & Elective Programs	-	-	-	-
6. Performing Arts Improvements	-	-	-	-
7. MPR, Student Union & Food Service Improvements	-	-	-	-
8. Physical Education Improvements	-	-	-	-
9. Staff & Parent Support	-	15,069,000	13,122,000	12,861,000
10. Media Center & Student Support Services	-	-	-	-
11. Safety & Security	-	-	-	-
12. Parking & Drop-Off	-	7,015,000	2,541,000	1,038,000
13. Outdoor Learning Courts, Quads & Landscape	-	-	-	-
14. Exterior Play Spaces, Playfields & Hardcourts	439,000	-	-	-
15. Instructional Design Furniture	85,000	-	-	-
16. Technology Infrastructure & Equipment	-	-	-	-
Total Project Cost A (2017\$)	\$ 3,423,000	\$ 23,068,000	\$ 16,368,000	\$ 14,269,000

The following items are excluded from this budget:

- Utility hook-up fees & City connection fees
- Off-site work and traffic signals
- Land acquisition costs
- Hazardous material surveys, abatement, and disposal
- Escalation

workshop activity

THERMOMETER EXERCISE



Next Steps

- Prioritize Measure G, Series C projects
- Identify resources / opportunities to accomplish the Facilities Master Plan