

Morgan Hill Unified School District

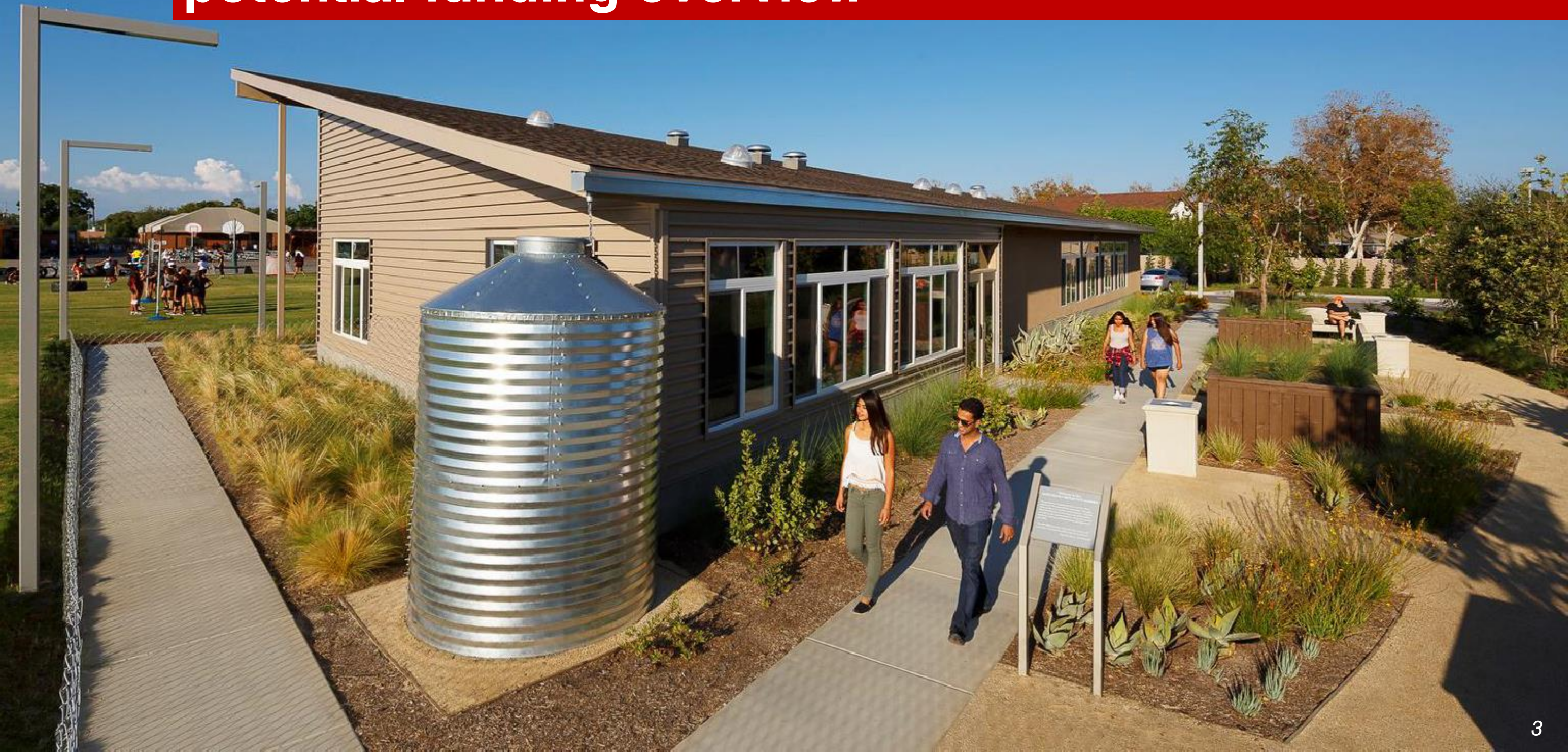
Facilities Master Plan
Board of Education Workshop

February 28, 2019

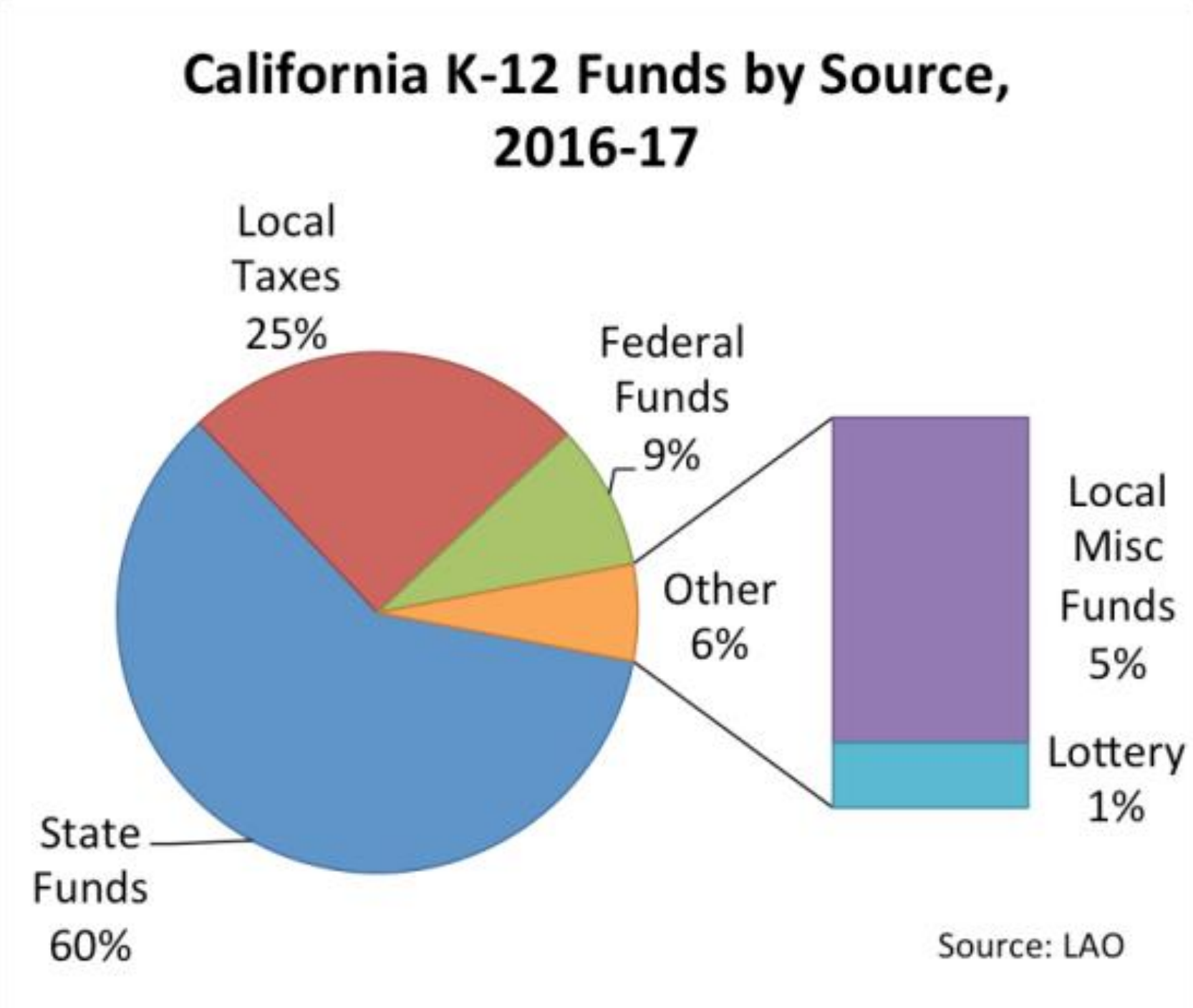
Agenda

- 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



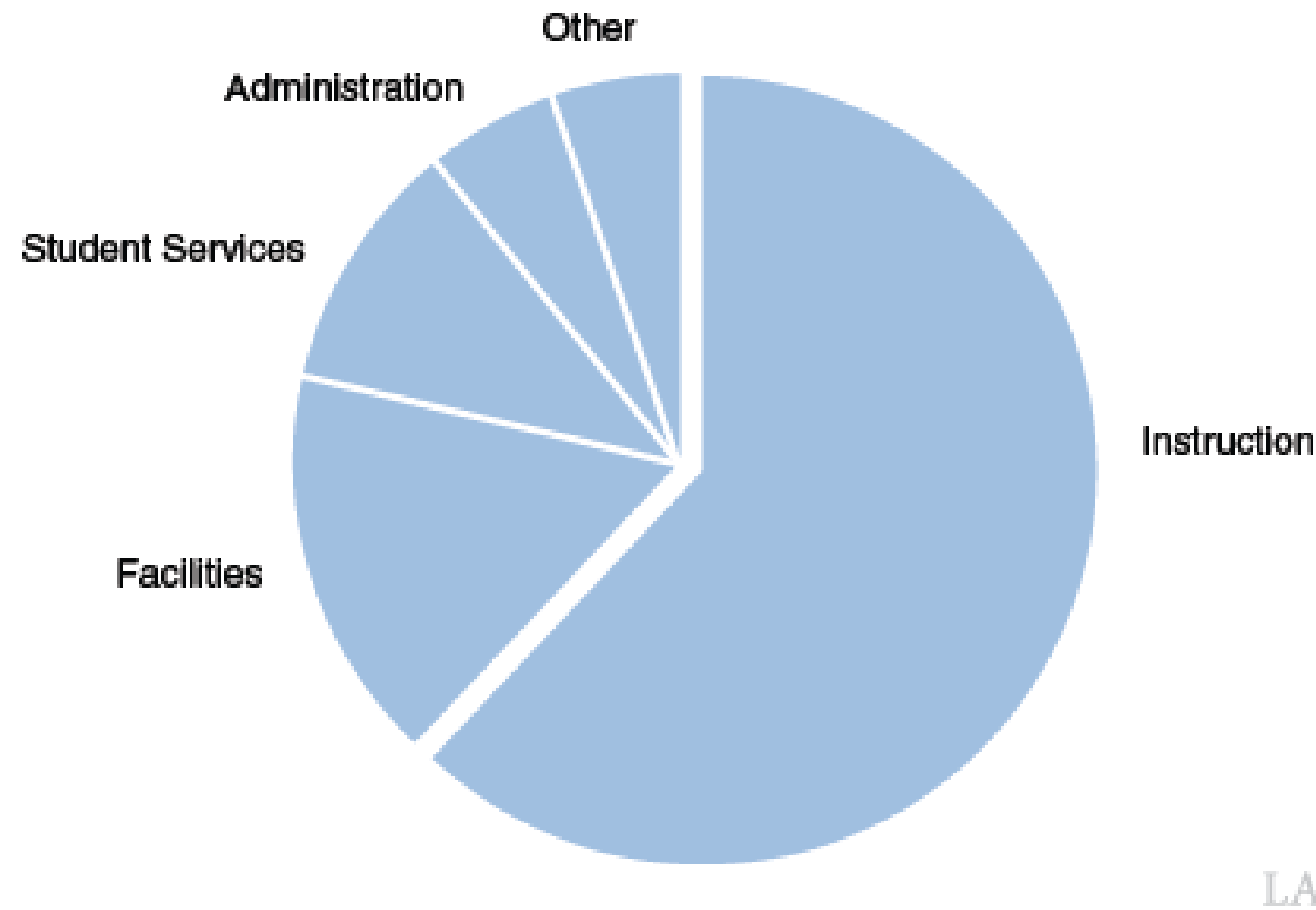
types of funding / where does our funding come from?



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

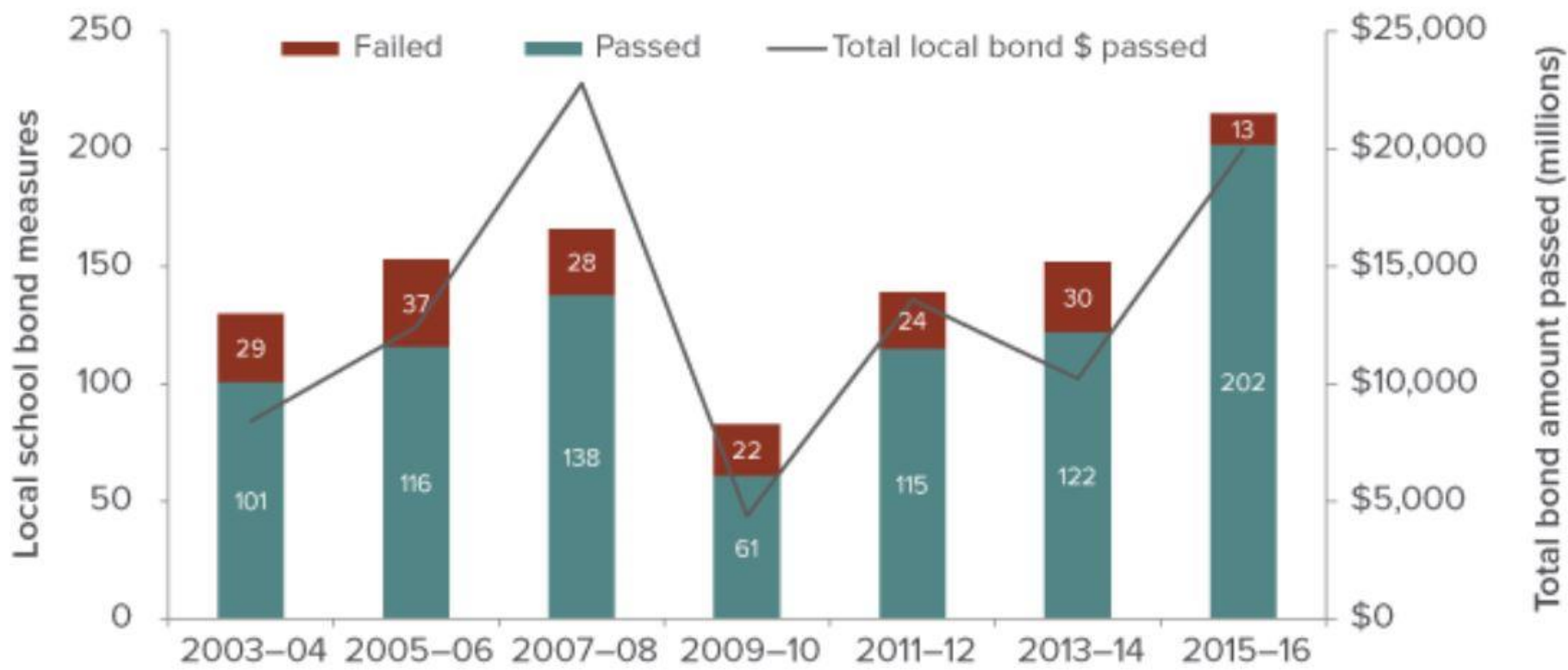
Table 3. Local K-12 Education General Obligations Bonds, 1986-2016 (Millions USD)

| 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

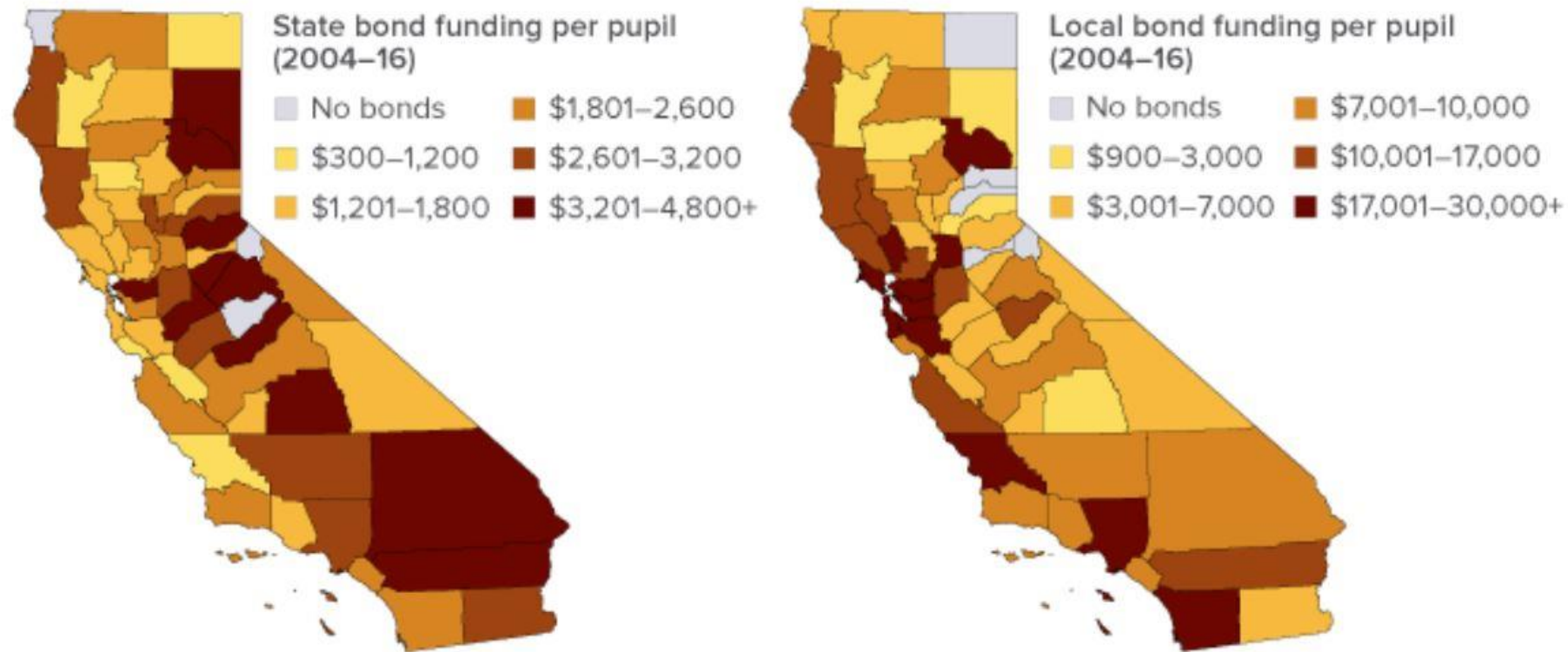


SOURCES: California Office of the State Treasury; California Debt and Investment Advisory Commission; Debt Issuance and Election Data.

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 =

Fund 25 Developer Fees can be used to accommodate new students only. This funding stream may be allocated to a potential future elementary school.
\$ 20,000,000*

- **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% | <u>x 67%</u> |

Total Project Funding in 2017
(75% Hard Construction / 25% Soft Costs)

\$ 62,310,000

Total FMP Program Need in 2017\$:

\$699,841,000

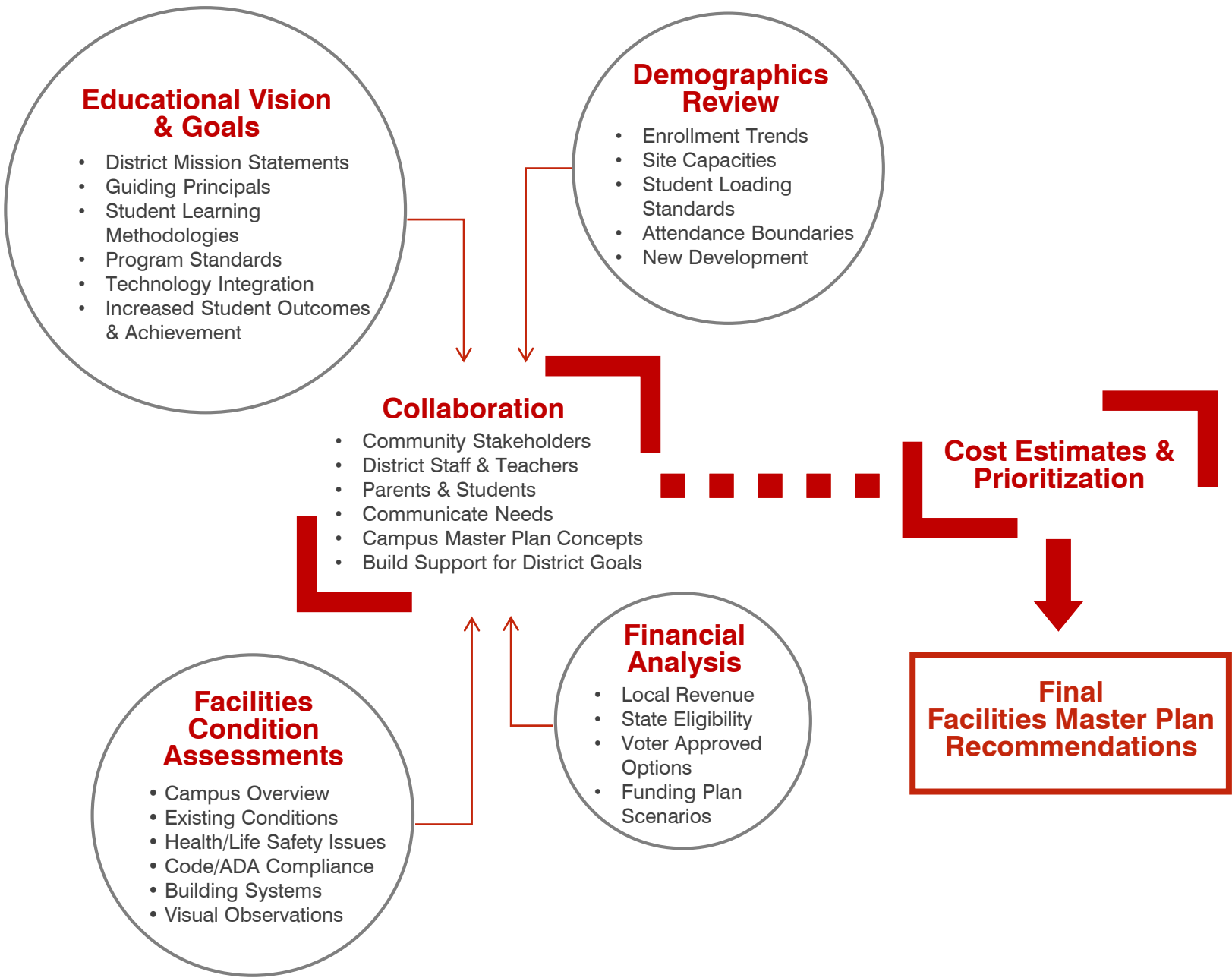
Note
\$30M has been allocated to Series B projects:

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

fmp process overview



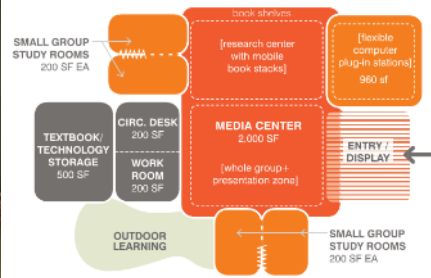
facilities master plan components



MORGAN HILL UNIFIED SCHOOL DISTRICT

PROJECT SCOPE CATEGORIES

| Category | Description | Total FMP Cost |
|----------|---|----------------|
| 1 | MODERNIZE / RECONFIGURE EXISTING CLASSROOMS | \$ 51,047,000 |
| 2 | EXISTING BUILDING SYSTEMS, TOILETS & IMPROVED ENERGY EFFICIENCY | \$ 19,779,000 |
| 3 | SITE UTILITIES & INFRASTRUCTURE | \$ 10,326,000 |
| 4 | NEW CONSTRUCTION (CLASSROOMS) | \$ 153,786,000 |
| 5 | SCIENCE, ART, CTE & ELECTIVE PROGRAMS | \$ 102,495,000 |
| 6 | PERFORMING ARTS IMPROVEMENTS | \$ 20,685,000 |
| 7 | MPR, STUDENT UNION & FOOD SERVICE IMPROVEMENTS | \$ 72,185,300 |
| 8 | PHYSICAL EDUCATION IMPROVEMENTS | \$ 32,842,300 |



4.5 PROJECT COSTS

SCOPE OF WORK CATEGORIES

DRAFT

| Category | Description | Estimated Cost |
|----------|---|----------------|
| 1 | MODERNIZE / RECONFIGURE EXISTING CLASSROOMS | \$ 51,047,000 |
| 2 | EXISTING BUILDING SYSTEMS, TOILETS & IMPROVED ENERGY EFFICIENCY | \$ 19,779,000 |
| 3 | SITE UTILITIES & INFRASTRUCTURE | \$ 10,326,000 |
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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

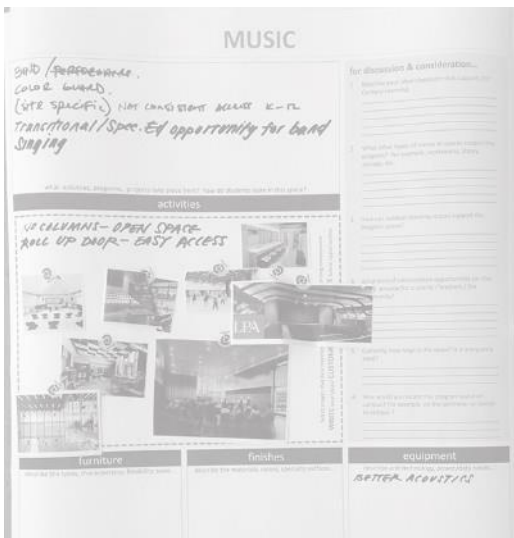
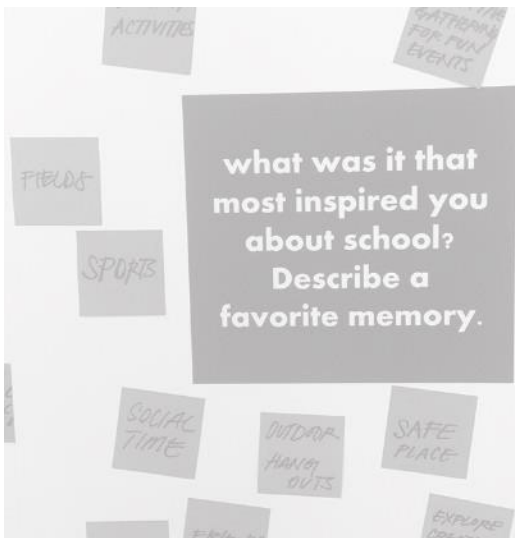
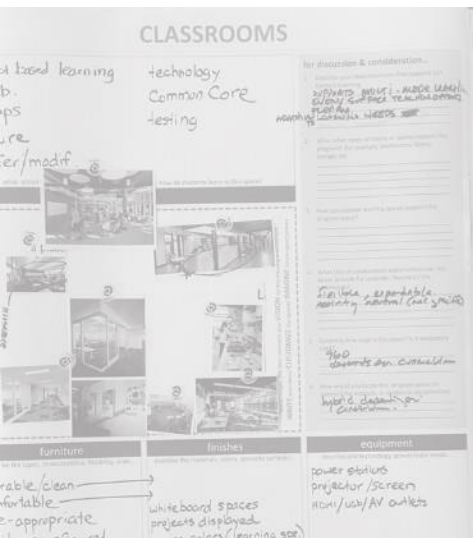
79
participants

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

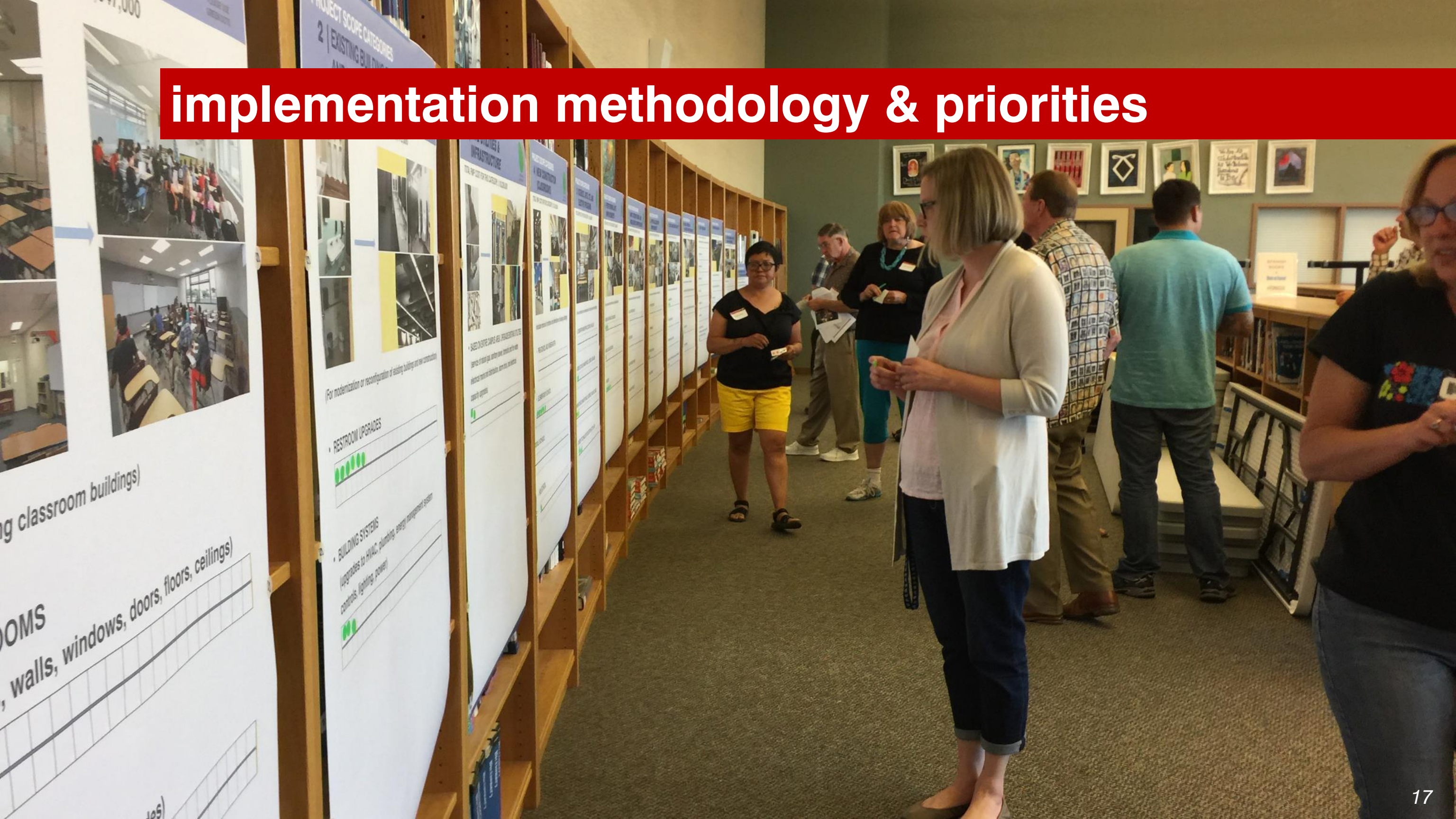
750+
participants

47
meetings

1 Town Hall Meetings



implementation methodology & priorities



MODERNIZE / RECONFIGURE Existing Classrooms 01



03 SITE Utilities



02 EXISTING BUILDING SYSTEMS Toilets & Improved Energy Efficiency



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



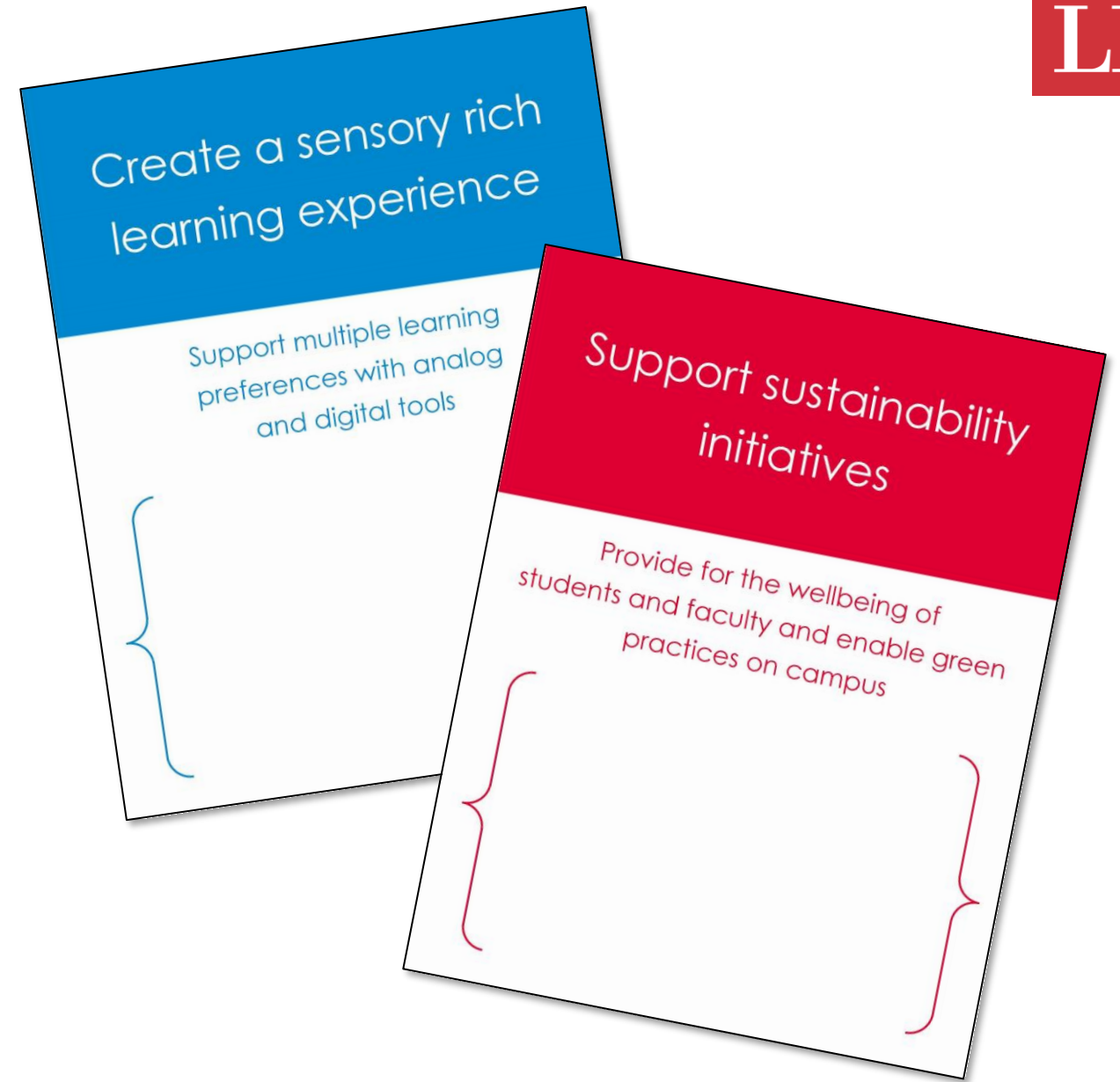
12 PARKING & Drop-Off



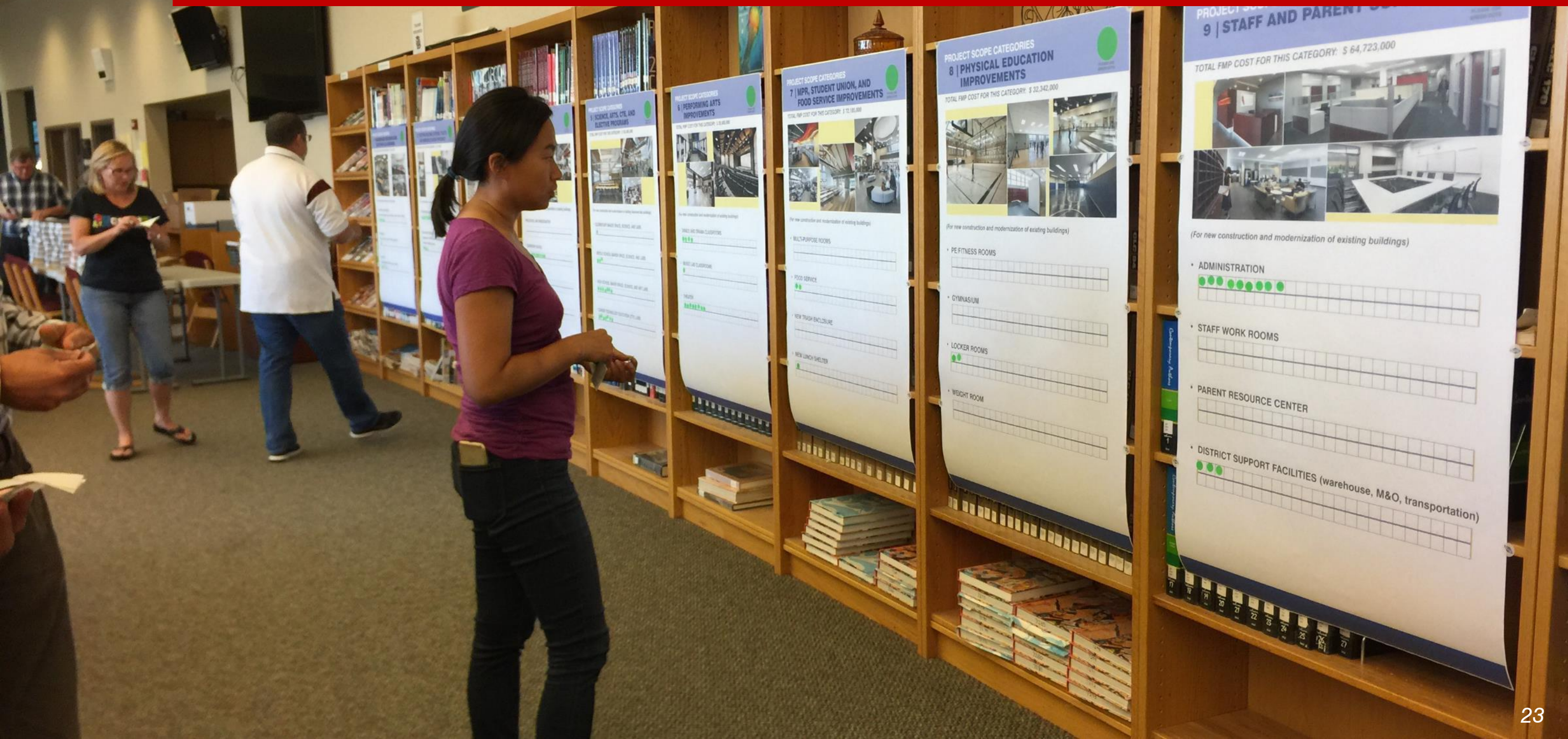
14 EXTERIOR PLAY SPACES Playfields & Hardcourts

workshop activity

DOT POLLING EXERCISE TO DEMONSTRATE CONCEPTS



stakeholder groups priorities



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



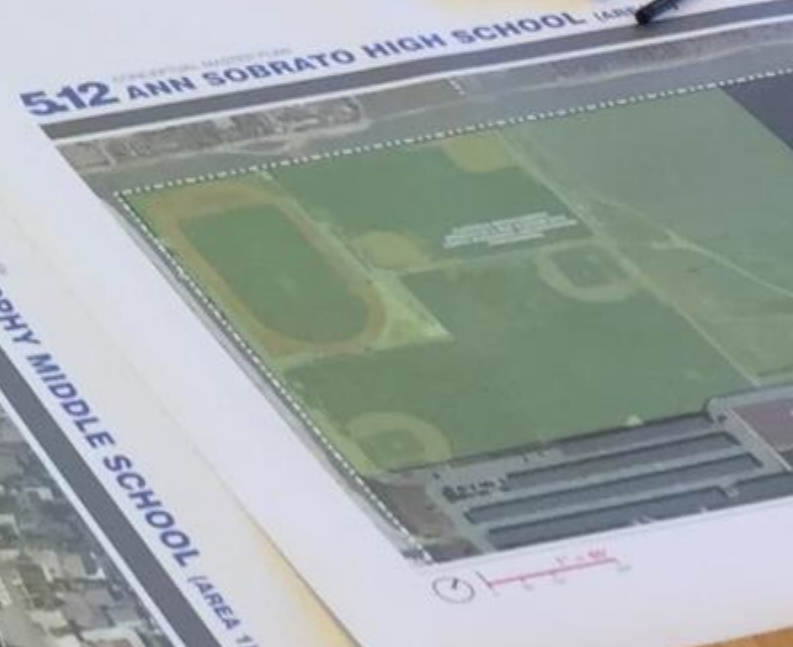
implementation methodology / future projects prioritization

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 | 26,114,000 |
| 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 | 396,000 | 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 | 616,000 | 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 | \$ 59,933,000 | \$ 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 | | | |
|--|----------------------|----------------------|---------------------|-----------------------|
| | LBJ Education Center | ACT Education Center | District Office | TOTAL |
| 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

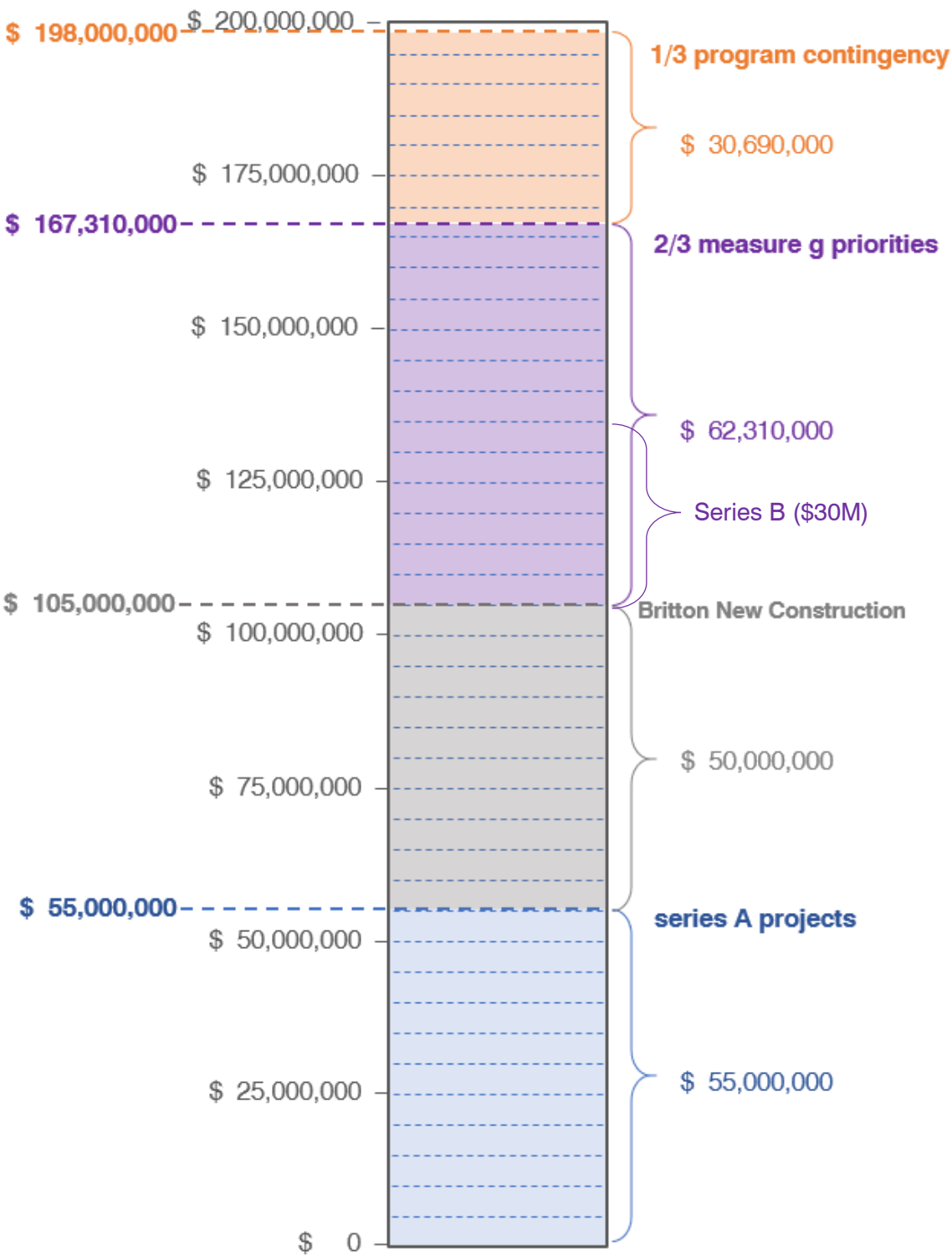
| ALTERNATES | MASTER PLAN COST |
|---------------------|------------------|
| New MOTT Yard | \$ 23,068,000 |
| New District Office | \$ 16,368,000 |
| New Central Kitchen | \$ 14,269,000 |
| Machado School | \$ 3,423,000 |

| 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