



**Franklin-McKinley  
School District**

PREPARING ALL CHILDREN AS GLOBAL LEARNERS

# Facilities Needs Assessment & Master Plan

July 1, 2020

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# Introduction



The Franklin-McKinley School District commissioned Sugimura Finney Architects, Inc., (SFA) to update and revise the Needs Assessment and Master Plan Report for the District 2020. The objectives of this 2020 Needs Assessment and Master Plan Update Report are to reassess and update the needs at each of the school sites related to facilities and maintenance. This 2020 Needs Assessment identifies projects that have been completed, mentions projects currently under construction and highlights the successes of the past renovations as they relate to the funding that was made available by both Measures Q, J, and H. At the time of this report, Measure H funding is at its final \$4 million dollars.

SFA has been involved in most of the major construction projects over the last eleven years and revisited all of the campuses, re-examined all past and current projects, and met with District personnel to develop an updated set of facility standards that further assists the District's facilities to meet a common goal. This updated Master Plan attempts to revise all campus sites to their current conditions and goals for each site.

In November 2010, voters approved Measure J, a 50-million-dollar bond measure. This significant amount of money was used for improvements to District infrastructure and school facilities

and could not be used for salaries. The Franklin-McKinley Board of Education agreed that there were additional needs for improvements related to site safety and security. Subsequently, Measure H was approved by the community in November 2016 for 67.4 million dollars. This new bond measure was used toward improvements to school facilities to continue the successful modernizations and upgrades to all of the Districts' campuses.

KB Homes, the developer of Communications Hill, continues with development activities at the site. A preliminary analysis of the proposed construction plan shows that up to \$8 million in developer fees will become available as construction of housing unit's progress. Developer fees are collected on construction projects within the School District Boundaries. These fees are used to finance school facilities that are needed due to student growth. New housing units will be constructed over a period of years as will developer fees be collected over a period of years. The impact on student growth resulting from further development of Communications Hill is under review.

The 2020 Need Assessment Report will provide a synopsis of improvements still needed at many of the District's schools.

SFA, headed by Mark C. Finney, has been involved in many school renovations projects for the last thirty-three years. In addition, SFA has received input from District staff and from the District's construction and maintenance departments. Based on the input, we had prepared recommendations for future improvements along with estimated costs for these improvements in the original needs assessment.

This 2020 updated Needs Assessment will serve as a working tool guiding the District's future improvement projects based on the original and current/updated needs. Although the current funding from past bonds has been depleted, this document is intended to be a working guide should a future local construction bond be considered, or State bond funding becomes available.

# Executive Summary

## Facilities Funding Overview

For the most part, funding for the construction and repair of school facilities is separate from funding for operations. The bulk of capital costs are paid for through the issuance of school construction bonds.

For many years, particularly through the 1990s, public schools in California faced a serious facilities crisis. The number of students were increasing, many schools were overcrowded, and an alarming number of buildings needed renovation and modernization.

### Major Sources of Facility Funds

School districts rely on state and local G.O. bonds to raise money to build and remodel school buildings and purchase long-term equipment. Some districts also generate funds by levying developer fees and forming Mello-Roos Community facility districts.

### Special Facility Elections

Since 1982, school districts with new residential and commercial development in their boundaries have been able to try to form a special "Mello-Roos Community Facilities District" to build new schools in the area. Two-thirds of the affected property owners who voted had to approve. Of the 64 Mello-Roos elections held since 1983, 31 succeeded. But this option is rarely used now. Of the five Mello-Roos elections held since 1999, only one has passed.

In 1998, a new law permitted the formation of School Facility Improvement Districts with a two-thirds vote, which was lowered to 55% (with some requirements) in July 2001. Through June 2014, 4 of 18 elections passed with a two-thirds vote, while 28 of the 36 under the 55% vote requirement passed.

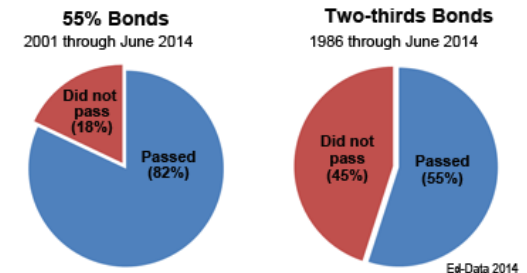
## General Obligation Bond Elections

California has a statewide school building program—the School Facilities Grant Program—supported by statewide bond measures. Statewide bond measures require a simple majority (50% plus one) to pass.

A 1986 voter-approved amendment to Proposition 13 permitted districts to seek approval for local general obligation bonds for school construction or renovation, to be repaid through property taxes. Until 2001, a two-thirds vote was required for passage.

In the November 2000 election, voters approved Proposition 39. It permits the voting threshold for general obligation bonds to be 55% if the school board so chooses. Then the district must abide by several administrative requirements, such as establishing a Citizens Bond Oversight Committee to oversee the use of the funds.

Based on the best available information, of the 796 elections held under this option from 2001 through June 2014, 655 (82.3%) succeeded. Of the 942 elections under the two-thirds requirement from 1986 through June 2014, 516 (54.8%) succeeded.



## Developer Fees

School districts also have the authority to levy developer fees on residential and commercial construction or reconstruction, but statewide these fees generate significantly less money than bonds. The money may be used only for school facilities, including portable classrooms. These fees are charged both to developers of new properties and to property owners who remodel.

They are based on the concept that new construction will lead to additional students. Individual school districts decide whether to levy the fees and at what rate up to the allowed maximum. Districts are required to substantiate the financial impact of the new development and show that they have used the revenues to address that impact.

In January 2014, the State Allocation Board (“SAB”), pursuant to Government Code Section 65995(b)(3), authorized an increase in the allowable amount of statutory school facilities fees (“Level I School Fees”) from \$3.20 to \$3.48 per square foot of assessable space for residential development, and from \$0.50 to \$0.56 per square foot of chargeable covered and enclosed space for commercial/industrial development. Therefore, school districts are now able to assess Level I School Fees at the newly established \$3.48 and \$0.56 rates, provided such rates are properly justified pursuant to law.

### Maintenance Funding

The ongoing maintenance of facilities comes out of district operating funds in ways that are partially determined by state law. Districts are required, for example, to maintain a Routine Restricted Maintenance Fund that dedicates 3% of their general fund budget to this purpose.

The routine cleaning and upkeep of facilities-custodial work cannot be funded from the above sources.

### Prop 39 Funding

The Franklin-McKinley School District has contracted with a consultant specializing in seeking out the prop 39 monies available to the District that will assist in funding long-term energy saving construction such as replacing select 15 year old inefficient HVAC systems and/or replacing antiquated lighting systems.



## Needs Assessment Overview

The original purpose of the Facilities Needs Assessment and Master Plan Report and subsequent updates were prepared for the Franklin-McKinley School District with the intention of documenting critical modernization needs as originally funded from local General Obligation Bond issues. All of the school campuses received construction upgrades or renovations. The needs to upgrade the campus District wide surpasses the ability of the community to fully fund all of the needs at the time of each report based on the bonding capacity of the community. This 2016 Report will provide a fresh study for all District facilities. The Franklin-McKinley Board of Education requested this 2020 Needs Assessment and Master Plan Report to identify and verify the ongoing needs based on the original Needs Assessment and Master Plan Report prepared by Sugimura Finney Architects (SFA) in 2007, and Update Reports prepared in 2011, 2013, and 2016.

This 2020 Needs Assessment and Master Plan Report will review all of the construction enhancements and modernization at existing campuses and document needs for all of the existing campuses. The previous reports summarize a far-reaching assessment, out of reach of a realistic bond capacity within the District borders. Work was completed with many sacrifices and compromises at each campus. There is no doubt that all of the work needed at all of the campuses cannot be completed and will likely never be completed within the capacity to be funded.

Through many discussions with District and School administrators, parents, community and the Board of Education, priorities were established to fund past projects that were identified to be the greatest need to the District based on the priority Site Safety and Security.

SFA will again document existing conditions at all of the Districts' campuses. SFA will then review the long-range design concepts and revise these plans based on work already completed and review as to whether redesign is

needed. SFA will work alongside the District staff and school site staffs to ensure future design concepts are a reasonable solution.

To date, construction costs are becoming again unpredictable. Construction in the Bay area is reaching an all-time high and construction contractor are stretched thin.

In the past, the District has reaped the benefits of constructing more projects than planned in the Needs Assessment for a lower than anticipated cost. The revised cost summaries included in the 2016 Updated Report indicated that significantly more projects were completed at a lower cost.

The Board of Education is considering whether additional funding is needed to continue physical improvements and site safety at each of the Districts' campuses, including expanded parking areas, updated technology systems, latest "green" advances, enclosing the perimeter fencing at each of the campuses, alterations that would meet the Americans for Disabilities Act (ADA) and updating campus buildings that better comply with Title 24 Energy requirements. Even though all campuses have fully automatic fire alarm and intercom systems, the need for updating many of the fire alarm and intercom systems at all campuses is a high priority. There is an added need for on-site closed-circuit security systems. In addition, FMSD has completed several projects in conjunction with Chevron Energy Solutions to coordinate installed covered structures with power produced from the sun with newly installed Photovoltaics at all of their sites, except for Santee, Ramblewood and Franklin Schools. With the ever-changing stringent codes in the state of California and with the ongoing changes to the educational programs, additional funding is needed to update campuses on a regular basis.

The information contained in this 2020 Report is the result of a series of inspections of the sites performed by SFA, as well as many meetings between the SFA team and staff at both the District and site levels. The SFA team worked closely and reviewed all recommendations with District staff.

SFA has been the Architect for most of the major and smaller projects over the last eight years.

The SFA team met with Superintendent Mr. Juan Cruz to collect the updated philosophies of the District. The District will be heading toward a more flexible classroom with less clutter and more options for teaching the students. Changes needed will likely focus on a high level of technology in the classroom. We will also focus on removing permanent obstacles inside the classroom as well as looking at new furnishings that allow for more flexibility of teaching arrangements.

The Franklin-McKinley School District has used State Modernization funding as well as local bond measures to fund most of the completed projects at school sites. As there is a new State Bond measure to go before voters on March 3, 2020, there will be attempts to seek additional state funding to supplement the monies left from Measure H or any future bond measure that maybe considered by the voters within the Franklin-McKinley School District community.

While the past sources of money allowed for most of the improvement goals to be completed such as new drop off areas, new roofing, new HVAC and Energy Management System (EMS), expansion and upgrades to core facilities, at all of the sites, there are still some areas that need to be addressed. Addressing these unfinished items as well as establishing District-wide standards and providing solutions to bring all District facilities to these standards is the focus of this 2020 Updated Report. Many infrastructure items on the original Master Plan have been completed. These updated goals would include:

## Infrastructure

- Underground utility replacement (water, sewer, and gas): some systems are over 40 years old and should be replaced.
- Expansion or upgrade of core facilities, i.e. restrooms.
- Window replacement - existing single pane windows should be replaced with double pane glazing for energy efficiency.
- Air conditioning – ensure that all facilities are air conditioned and are in working order.

- Energy Management System (EMS) – goal is to ensure that all EMS systems are properly installed and functioning correctly.
- Expand parking and drop-off areas for student safety.
- Voluntary Seismic Upgrades.

## Educational Program Issues/Campus Planning

- Review and enlarge inadequately sized rooms such as Libraries, Classrooms, Student Service areas and Cafeterias.
- Replace selected portable classrooms with new portable classrooms.
- Provide covered walkways to portable classrooms.
- Relocate existing Portable Classrooms in a more logical layout.
- New flexible furnishings.
- Backpack storage without cluttering the classroom.
- State of the Art Technology in the classroom.

## Exterior Appearance

- Provide architectural features to update the look of these 40-year-old facilities to make the facilities more pleasing to the neighborhood and establish a more effective sense of community and student pride.
- Replace cracked pavement and deteriorating stucco walls
- Stucco over wood exterior walls that show signs of wear

## Site Security

Although there are several non-construction related issues that will be pursued as an on-going challenge to bring all of the schools to a higher level of safety and security, many additional construction related issues will be necessary to make all of the schools safer such as the expansion and in-fill of perimeter fencing, updating fire alarm and intercom systems and installation of Closed Circuit Visual Systems.

## Other

Matching funds that would provide funding that may become available for existing school campuses that have not received funding from the state modernization bond funds that have exceeded twenty-five years in age or older. Windmill Springs and Franklin elementary schools are likely to re-



several million dollars in state. Growth in certain areas, especially on Communication Hill will certainly create a shortage of student housing within the District boundaries. As the student population at certain areas of the District may be shrinking in size, these large-scale developments will affect

neighboring schools. Should the boundaries to the District not change, consideration for growth at Dahl, Franklin and Shirakawa would surely be needed.

## Process

SFA employed the following process in preparing this Needs Assessment and Master Plan Report in 2016:

- Reviewed improvements from previous construction projects funded by other sources
- Visited each of the sites concerned and recorded our findings
- Met with District Superintendent and another high-ranking District administration
- Established standards for cafeterias, libraries, classrooms, and student support service for the Franklin-McKinley School District
- Drafted preliminary recommendations

- Reviewed preliminary recommendations with the District staff
- Prepared construction cost estimates
- Drafted Final Report

## Criteria for Evaluation

The Franklin-McKinley's goal is that all sites should provide similar facilities for all the District's students based on standards established by the past and current reports. In assessing each site, it is important to consider enrollment, staff size, and available space on the site, and special programs that may be offered which may affect the original and updated master plan.

## Summary of Observations

The following are some general observations of all of the District's facilities.

### Infrastructure

Underground utilities at all the older sites are between 40 to 50 years old. Maintaining these systems has been an ongoing maintenance issue and will continue to be if not replaced. Some of the older sites have had some of the infrastructure updated. Many of the older campuses will still need some attention to utility replacement including electrical upgrades.

Several of the older sites still have parking lots that are inadequate for the increasing number of staff and visitors, causing a significant impact on surrounding neighborhoods. Designated drop-off areas for students are also inadequate creating safety concerns. Many of the campuses parking lots have been enlarged or modified to meet the drop off and pick up loading requirements.

Many of the sites have major energy efficiency concerns including lack of insulation, inefficient mechanical systems and single paned window systems. Since Measure H and Prop39 passed, some of the campuses have upgraded or replaced older HVAC systems. Replacing antiquated systems, adding insulation, changing window glazing to double glazing, and repairing or installing energy management systems will have a positive effect on energy .

### Educational Program Issues/Campus Planning

Classrooms though-out the Franklin-McKinley School District have received some upgrades which contribute toward a positive learning environment for students. The School Board is working feverishly to keep up with the ever-adjusting student population, affected by the change in economy, the introduction of new neighborhood Charter Schools and other ever-changing issues. It is difficult to predict the needs of each campus based on programmatic needs with constant changes.

Although most of the older campuses have had upgrades to floor, wall, ceiling finishes, and cabinetry, there is still a need for these items at some of the older campuses. Most of the campuses have had upgrades to door hardware.

usage throughout the District. Most of the older campuses still need upgrades to windows and insulation.

Restrooms throughout the older campuses have been upgraded over the years to meet the requirements of the American with Disabilities Act. In the process of upgrading these facilities the current fixture counts may not meet the current building code requirements. Adding new restroom facilities will help alleviate this problem. Since Measure H was passed, there are very few restrooms that need to be altered to meet ADA requirements.

The Field Act governs public school construction in California. This act mandates higher standards for seismic safety than is required for other types of buildings built in California. The existing older buildings in the Franklin-McKinley School District were reviewed by a California Licensed Structural Engineering firm to determine how these buildings measure up to the current Field Act requirements. While there is no need for concern regarding the structural integrity of the older buildings, it was determined that, due to the construction methods used when these buildings were built, there are some areas that could benefit from voluntary seismic upgrades if possible. Currently, there are no serious known structural issues at any of the Franklin-McKinley School District campuses.

Portable Classrooms older than 10 years need to be inspected and evaluated for replacement. Ultimately replacing all the portable classrooms older than 10 years would be desirable, but due to economic restrictions, not all classrooms will be able to be replaced with the current construction funds available.

Several portable classrooms were added quickly to most of the school sites in the past which resulted in odd configurations that may not be desirable or functional with the existing campus buildings. It appears that many of the portable classrooms were added at convenient locations, perhaps based on the location of existing utilities.

It is likely that portable classrooms were added to a campus without looking into the future for the possibility that more portable classrooms would be added to the site. Consequently, several of the existing campus sites have clusters of portables in areas that become disjointed with the original permanent school buildings. The Master Plan includes suggested alterations to several of the existing campuses that include a combination of relocation and replacement of portable classrooms with more attention to the campus needs and with what we hope is a more thoughtful approach to site design.

The libraries and computer labs at many of the sites are housed in converted classrooms or need modernization. Renovations and additions to some of these libraries will create a more desirable learning environment.

Some of the cafeterias are undersized and/or have not been renovated in over 30 years. Modernization and new construction will eliminate this problem. The cost associated with enlarging existing cafeterias is not cost effective. This Master Plan update recommends that enlarging existing cafeterias, though important is not feasible currently.

Student Support Areas (Administration Buildings) at many of the campuses have been renovated to meet the current District standards. Some sites still have inadequate facilities that need to be brought up to the new standards established by this report either through modernization or new construction.

There are very few campuses that need updated student support areas as reflected in this Master Plan update.

With the ongoing development of Communication Hill, demographics will be studied to see how neighboring campuses are affected by sudden growth. At the time of print, it is only speculation to assume that there will be some growth needed for Shirakawa School. At this time, it is not known whether additional classrooms can be added to Dahl School as it is not known the impact of cost to bring additional water pressure to this site. The existing water pressure at Dahl is only enough to meet the requirements for putting out fires to this campus and according to the San Jose Water company and the San Jose Fire Department, no more classrooms can be added to this site. Shirakawa is the only site that has expansion capabilities currently.

With the change of administration at the District, the District's philosophy and goals are heading toward looking at teaching spaces in a new way. With the fast pace of technological changes, classrooms need to be more flexible to ever changing technology. Wi-Fi has made hard wired data jacks almost unnecessary. Fixed computer stations have changed to handheld devices moving about the campus. Library space may not be the norm. Classrooms will need to be simple in design with unlimited flexibility. Flexible furnishing and student storage will need to be incorporated.

## Exterior Appearance/Landscape

As with any building that is between 40 to 50 years old, some of the schools in the Franklin-McKinley School District are showing their age architecturally. These facilities can be upgraded significantly by adding architectural features such as expanded entries, signage, the addition of cement plaster coatings to currently "dated" textured exterior walls, repainting walls with contemporary color schemes, replacing exterior windows, construction of new buildings, and upgrading landscaping around some of the campuses.

These upgrades will make the facilities more pleasing to the neighborhoods in which they reside and will have a positive impact on staff, students, and the surrounding community.

## Updated Project Cost

This report includes an estimated project summary cost for each site. Several components make up the Total Project Cost which includes the following:

- Construction Cost – estimated cost for construction
- Escalation – to cover increased construction
- Construction Contingency – to cover the cost of unforeseen items or design scope changes
- Soft Costs – Architects fees, Department of the State Architect plan check fees, Testing and Inspections, Project Management, Reports, Surveys, and Printing
- Interim Housing – Temporary Housing for students and staff displaced during the construction.



## Project Cost Summary Per Site

		<i>Needs Assessment/ Master Plan Modernization</i>
<b>Campus</b>		
Bridges Academy		\$61,387,015
Captain Jason M Dahl Elementary		\$37,249,303
District Service Center		\$28,406,665
Franklin Elementary School		\$13,785,020
Hellyer Elementary School		\$17,063,132
Kennedy Elementary School		\$41,582,988
Lairon Preparatory Academy		\$15,077,568
Los Arboles Elementary		\$45,825,695
McKinley Elementary		\$52,555,371
Meadows Elementary		\$51,572,915
Ramblewood Elementary		\$10,000,117
Santee Elementary		\$41,532,236
Shirakawa Elementary		\$48,095,832
Stonegate Elementary		\$56,072,562
Sylvandale Middle School		\$51,175,467
Windmill Springs School		\$28,281,862
FMSD MOT		\$7,677,800
<b>SubTotal Amount</b>		<b>\$607,341,547</b>
Inflation to Midpoint of 5 years (4%)		\$121,468,309
<b>Total Amount</b>		<b>\$728,809,856</b>