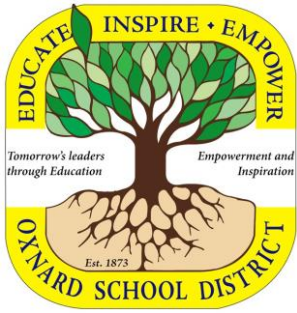


July 2013



OXNARD  
SCHOOL  
DISTRICT

# SIX MONTH IMPLEMENTATION PROGRAM UPDATE

**A Status Report on Measure "R" Improvements  
to the Board of Trustees**

Caldwell Flores Winters, Inc.



Prepared by:

**Caldwell Flores Winters**

6425 Christie Avenue, Suite 270  
Emeryville, CA 94608

1901 Victoria Avenue, Suite 106  
Oxnard, CA 93035

For:

**Oxnard School District**

1051 South A Street  
Oxnard, CA 93030

**Board of Trustees**

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# PROGRAM OVERVIEW

In November 2012, voters in the Oxnard School District (“District”) approved Measure “R”, a \$90 million bond measure to build new classrooms, relieve student overcrowding at every school, and modernize school facilities to meet current building standards. To assist in this process, the District selected Caldwell Flores Winters, Inc. (“CFW”) to serve as its Program Manager and to develop an implementation program.

District staff, with assistance from CFW, carried out an analysis of the District’s Facilities Master Plan (“FMP”) to study implementation requirements and formalize a capital and financing strategy that matched the District’s vision and goals. The resulting study, inclusive of Board workshops and actions, established the specifications and parameters of Measure “R” and related capital facilities projects. The report was entitled “Facilities Implementation Program” and was approved by the Board of Trustees in January 2013.

The implementation program established projects, budgets, schedules, and timelines to guide the implementation of the Measure “R” improvement program. A six month update is required to assist the Board and staff in evaluating program progress and determining upcoming implementation tasks. Where changes have been required from the original documents, details of necessary adjustment are noted and recommendations for improvement are suggested.

CFW is pleased to present the District with the initial six month update report to its January 2013 Facilities Implementation Program. Pursuant to Board direction, District staff and the program management team have launched a capital improvement program to:

- Reduce overcrowding at elementary schools by adopting a K-5 educational strand and facilities program
- Convert existing junior high schools to 6-8 middle schools that support an academy based instructional program
- Expand the K-8 instructional program and additional K-8 school facilities to increase parent choice
- Implement an extended day kindergarten program with improved facilities
- Increase enrollment capacity over time to accommodate projected growth in grades K- 8
- Transform the functionality of District schools and reconfigure the District’s educational program for improved academic achievement.

The District has elected to proceed with the implementation of the Basic Program which relies on local funding and an Enhanced Program that captures State reimbursements for the modernization and new construction of eligible facilities. In total, approximately \$200 million (current dollars) is anticipated to be available to support program

implementation over three phases. For purposes of this report, all sources and uses of funds are stated in current dollars.

Phase 1 implements the District’s K-5, 6-8 and K-8 grade reconfiguration and technology programs. The Phase also acquires additional school sites to accommodate planned growth and reconstructs three of the District’s oldest schools: Lemonwood, Harrington and Elm.

Phase 2 provides for the funding of additional and periodic technology improvements and begins the improvement of school gym/multipurpose rooms at existing school sites, including Fremont School.

Phase 3 includes replacement funding for new technology and support facility upgrades to Chavez, Curren, Kamala, Driffill, Haydock, Frank, Marina West, Rose, Sierra Linda, Brekke, McAuliffe, Ramona, and Ritchen schools and improved kindergarten facilities at McKinna, Marina West, Rose, and Sierra Linda schools. Should State funds become available to allow for further Program enhancements or to extend the replacement of the District’s older schools, budget alternatives have been designed for Phases 2 and 3. The designs are presented as an alternative in the Technical Background Report of the Facilities Implementation Program.

### 1.1 ESTIMATED SOURCES OF FUNDING: PHASE 1

The implementation program is a combination of the Basic Program which relies on local funding, including developer fees, Mello Roos funds, Capital Program balances, voter approved Measure “R” proceeds and the Enhanced Program that seeks to maximize State aid reimbursements for modernization and construction of school facilities. Table 1 presents the estimated Source of Funds per the approved plan for Phase 1 during the 2013- 2016 period. Actual and projected funds and adjustments over the last 6 months are presented for review and variances are noted for further consideration.

**Table 1  
Estimated Sources of Funds for Phase I**

<b>Sources</b>	<b>Adopted Budget (A)</b>	<b>Est. Budget (B)</b>	<b>Variance (B-A)</b>
Series A	\$ 21,228,488	\$ 18,375,027	(\$2,853,461)
Series B	\$ 20,417,231	\$ 25,499,684	\$5,082,453
Est. Series C	\$ 7,474,618	\$ 14,690,989	\$7,216,371
Measure L	\$ 3,900,000	\$ 2,151,835	(\$1,748,165)
Measure M	\$ 1,900,000	\$ 0	(\$1,900,000)
State Bonds	\$ 300,000	\$ 254,586	(\$45,414)
Est. State Aid Receipts	\$ 35,032,328	\$ 28,617,960	(\$6,414,367)
Est. Developer Fees	\$ 9,683,611	\$ 8,889,808	(\$793,803)
Mello Roos Proceeds	\$ 8,500,000	\$ 8,845,492	\$345,492
State Reimbursements (Driffill)	\$ 4,700,000	\$ 9,001,083	\$4,301,083
Est. Interest Earnings	\$ 1,850,406	\$ 1,162,418	(\$687,988)
<b>Est. Total Sources</b>	<b>\$ 114,986,682</b>	<b>\$ 117,488,883</b>	<b>\$ 2,502,201</b>

Measure “R” Series “A” bond proceeds were sold in December 2012 at a substantial reduction in interest rates than were originally projected. A subsequent bonding cap waiver by the State in favor of the District allowed Series “B” bonds to be offered at similar rates in May 2013. Jointly, these interest rate savings should allow the

District to advance the amount of bonds available for sale in subsequent series than was otherwise planned, at rates below the tax rate of \$30/\$100,000 of assessed value committed to voters.

Available Measure “L” and “M” proceeds have been encumbered or expended pursuant to Board action for related projects. Any remaining balances are available to be added back to the Capital Program once projects have been completed.

The District’s eligibility for State funding remains high, but dependent on the successful passage of a new State bond measure, which the earliest it is anticipated is November 2014. Nonetheless, the District was able to increase its State reimbursements for Drifill construction by utilizing some of its State aid eligibility in conjunction with facility hardship funding. Further decreases for the period were due to the reduction in the scope of eligible State aid projects for Phase 1 improvement projects. Such eligibility may be subject to recapture in subsequent phases as the scope of those projects increase.

Both developer fee and interest earnings remain sluggish, but are anticipated to increase with an improved overall economy. Nonetheless, a variance analysis indicates that approximately \$2.5 million in additional dollars were made available during this period in support of identified projects for the remaining period of Phase 1.

## 1.2 ESTIMATED USES OF FUNDING: PHASE 1

As indicated below, most of the estimated Use of Funds were either on budget or were further reduced in the design and procurement of services and facility improvements during the initial six month period. This was true in almost all cases, including the planned design and reconstruction of Lemonwood, Harrington and Elm schools.

Based on its appraised value and subsequent purchase of the Seabridge school site, the overall cost of site acquisition for the next elementary school site has decreased. Negotiations for the location and acquisition of a suitable middle school site continue to move forward under the assumption that any such site will be deeded to the District at no cost to mitigate any further impact from proposed residential construction.

Permanent kindergarten facilities and middle school science lab facilities costs continue to be refined. The overall net increase in cost is attributable to the Board’s decision to reconstruct existing Drifill kindergarten facilities in need of replacement with new classrooms. This is offset with a finding that the existing classroom configuration at Ramona school is sufficient to accommodate the extended day kindergarten program without additional classroom construction. Likewise, the McAuliffe project has been adjusted to reflect the actual net increase required to provide additional classroom facilities.

Technological infrastructure improvements continue to be deployed throughout the District. Upon review, the District has elected to increase the amount of funding to accommodate the initial deployment of 1:1 devices to over 7,500 students and staff at the start of fiscal year 2014. Overall funding for the period for technology, however, remains the same.

An additional line item has been proposed to accommodate increased furniture, fixture and equipment specifications at schools scheduled to receive improved kindergarten and science lab spaces. Any further net savings are proposed to be allocated for additional middle school academy improvements, including portable classroom replacements at Fremont, a virtual library at Frank, and performing arts support spaces at Haydock. The Program Reserve to accommodate unforeseen program adjustment remains at approximately \$10 million. Overall, approximately \$117 million in program expenditures are anticipated during the implementation of Phase 1.

**Table 2**  
**Estimated Uses of Funds: Phase I**

Uses	Adopted Budget (A)	Est. Budget (B)	Variance (B-A)
Acquire Site New Elem K-5	\$8,450,000	\$7,250,000	(\$1,200,000)
Acquire Site New MS Site	\$0	TBD	
Design & Reconstruct Harrington Elem. K-5	\$22,822,171	\$22,822,171	\$0
Design & Reconstruct Lemonwood K-8	\$31,402,250	\$31,402,250	\$0
Design & Reconstruct Elm Elem. K-5	\$20,170,543	\$20,170,543	\$0
Design & Improve K-5 Kindergarten Facilities:			
Ritchen	\$265,571	\$262,140	(\$3,431)
Brekke	\$286,000	\$282,568	(\$3,432)
McAuliffe	\$628,179	\$262,140	(\$366,039)
Driffill	\$794,671	\$2,477,832	\$1,683,161
Ramona	<u>\$2,688,463</u>	<u>\$0</u>	<u>(\$2,688,463)</u>
Subtotal	\$4,662,884	\$3,284,680	(\$1,378,204)
Design & Construct Science Labs/Academies:			
Chavez	\$293,319	\$293,319	\$0
Curren	\$293,319	\$293,319	\$0
Kamala	\$818,293	\$293,319	(\$524,974)
Haydock	\$2,132,475	\$1,047,651	(\$1,084,824)
Fremont	<u>\$2,286,919</u>	<u>\$1,843,007</u>	<u>(\$443,912)</u>
Subtotal	\$5,824,324	\$3,770,615	(\$2,053,709)
FF&E Allowance	\$0	\$445,000	\$445,000
Additonal Academy Improvements	\$0	\$1,688,325	\$1,688,325
Technology	\$11,201,175	\$11,201,175	\$0
Subtotal	\$104,533,347	\$102,034,759	(\$2,498,589)
Program Reserve	\$10,453,335	\$10,203,476	(\$249,859)
Estimated Fund Balance	\$403,908	\$5,250,648	
Est. Total Uses	<u>\$ 114,986,682</u>	<u>\$ 117,488,883</u>	

### 1.3 MASTER SCHEDULE AND BUDGET BY PHASE

All previously approved projects are scheduled to be completed pursuant to the adopted Facilities Implementation Plan. In certain cases, schedules have been adjusted earlier to accelerate projects, where feasible or to optimize the delivery date of combined reconfiguration projects. A summary of adjustments to the start of scheduled projects is provided below. All changes are noted in bold type and altered dates are also highlighted for comparison purposes.

Phase 1 improvements continue to be implemented, including the design and reconstruction of Harrington, Lemonwood and Elm. The planning and design of Lemonwood School, however, was accelerated from 2014 to 2013, pursuant to Board action to accommodate the opening of an interim K-8 school facility at the site, beginning in August 2014. To minimize disruption to the educational program and minimize the cost of interim facilities, the design, phasing and permanent location of the new Lemonwood K-8 school was selected before proceeding with the addition of interim facilities. Thereafter, interim K-8 facilities may be located, with confidence, in areas not

scheduled for construction of the permanent facility. Additional academy improvements are scheduled to be completed by August 2015, if approved by the Board.

**Table 3**  
**Master Schedule and Budget: Phase 1**  
**Phase 1 (2013-2016)**

Project	Year	Budget
Acquire site New Elem. K-5	2013	\$7,250,000
Design & Reconstruct Harrington Elem. K-5	2013/14	\$22,822,171
<b>Design &amp; Reconstruct Lemonwood K-8</b>	<b>2014/2016 2013/16</b>	<b>\$31,402,250</b>
Design & Reconstruct Elm Elem. K-5	2015/2016	\$20,170,543
Design & Improve K-5 Kindergarten Facilities	2013-2014	
Ritchen	2013	\$262,140
Brekke	2013	\$282,568
McAuliffe	2013	\$262,140
Driffill	2014	<u>\$2,477,832</u>
Est. Subtotal Kindergarten Facilities		\$3,284,680
Design & Construct Science Labs		
Chavez Science Labs K-8	2013	\$293,319
Curren Science Labs K-8	2013	\$293,319
Kamala Science Labs K-8	2013	\$293,319
Haydock Science Labs 6-8 & Utility Upgrades	2013	\$1,047,651
Fremont Science Labs 6-8 & Utility Upgrades	2013	<u>\$1,843,007</u>
Est. Subtotal Science Labs		\$3,770,615
<b>FF&amp;E Allowance</b>	<b>2015</b>	<b>\$445,000</b>
<b>Additional Academy Improvements</b>	<b>2014</b>	<b>\$1,688,325</b>
Technology	2013/2016	\$11,201,175
Program Reserve	2013-2016	\$10,203,476
Est. Ending Fund Balance		\$5,250,648
Est. Total		\$117,488,883

In Phase 2, the design and construction of the gym/multipurpose room at Fremont remains on schedule. A combination of eligible State grants and interest rate savings in the initial bond sales, should provide additional funding to accelerate gym/multipurpose room improvements at Frank from 2021 to 2018. Similarly, the design and construction of the gym/multipurpose room at Haydock has been accelerated from 2021 to 2019 and the design and construction of the Driffill multipurpose room has also been accelerated from 2023 to 2020. At the end of Phase 2, the District should have multipurpose rooms at its Soria, Driffill, and Lemonwood K-8 campuses and at its new Harrington and Elm K-5 schools, as well as gym/multipurpose rooms at all middle school academies.

Additionally, \$4.7 million is projected to be available for the planned redeployment of technology in 2020. These funds will constitute the third deployment of technology in the District and complement prior technology improvements and deployments to provide additional 1:1 devices and technology upgrades to students and teachers. Additional program reserve monies are projected to be available to accommodate unplanned program changes that may arise as the District's facilities program proceeds through implementation.



**Table 4**  
**Master Schedule and Budget: Phase 2**

Phase 2 (2017-2020)			
Project	Year		Budget
Design & Construct 6-8 Gym/Multipurpose Room			
<b>Frank</b>	2021	<b>2018</b>	<b>\$4,750,837</b>
Fremont		2019	\$5,557,436
<b>Haydock</b>	2021	<b>2019</b>	<b><u>\$5,557,436</u></b>
Est. Subtotal 6-8 Gym/Multipurpose Room			\$15,865,709
<b>Driffill K-8 Multipurpose Room</b>	2023	<b>2020</b>	<b>\$3,893,970</b>
Technology		2020	\$4,714,613
Program Reserve		2017-2020	\$2,447,429
Est. Ending Fund Balance			<u>\$6,614,792</u>
Est. Total			\$33,536,513

Phase 3 is substantially dedicated to the design and construction of support facilities and improved kindergarten spaces. The schedule for design and construction of K-8 multipurpose rooms at Chavez, Curren, and Kamala remains unchanged. Design and construction of multipurpose rooms at four of the seven K-5 sites have been accelerated within the period of Phase 3. The design and construction of the multipurpose rooms at Marina West, Sierra Linda, and Brekke have been accelerated from 2025 to 2023. Additionally, the design and construction of the multipurpose room at Rose has been accelerated from 2025 to 2024. The schedule for the remaining K-5 multipurpose room projects at McAuliffe, Ramona, and Ritchen remain unchanged.

The schedules for design and improvement of the kindergarten facilities at McKinna, Marina West, Rose, and Sierra Linda have been accelerated. The schedules for McKinna, Marina West, and Sierra Linda have been accelerated from 2022 to 2021. The design and improvement of the kindergarten facilities at Rose has been accelerated from 2024 to 2022.

Additional technology deployments are budgeted for Phase 3. Periodic unit replacements and changing per unit costs will need to be monitored. Historically unit costs have decreased over time and unit capacity has increased. Likewise, there are periodic paradigm shifts which substantially alter the platform for ongoing technology devices and deployment. These factors will also be influenced by any continued increase in student enrollments. This will ultimately lead to the need to reset the method and calculation of the allowance for ongoing technology replacement. At this time in the program, no adjustments are suggested to the Phase 3 technology deployment allowance established in the original plan for Phase 3.

At the end of Phase 3, it is anticipated that all projects originally presented to the Board and subsequently approved will be completed. Additional projects may be funded by any remaining fund balance at the completion of Phase 3 projects and would be subject to approval by the Board. Additional projects must meet the requirements of the funding sources comprising the ending fund balance. For example, funds in the ending balance received from existing bond authorizations must be spent according to the project lists approved by voters at the time of the corresponding election. Similarly, any funds received from the State aid program either through grants or reimbursements may have restrictions on the type of projects the ending balance of funds can support.

**Table 5**  
**Master Schedule and Budget: Phase 3**

Phase 3 (2021-2025)			
Project	Year	Budget	
Design & Construct K-8 Multipurpose Room			
Chavez	2023	\$2,007,579	
Curren	2025	\$4,581,500	
Kamala	2023	<u>\$2,084,539</u>	
Est. Subtotal K-8 Multipurpose Room			\$8,673,618
Design & Construct K-5 Multipurpose Room			
<b>Marina West</b>	2025	<b>2023</b>	\$3,511,836
<b>Rose</b>	2025	<b>2024</b>	\$4,812,469
<b>Sierra Linda</b>	2025	<b>2023</b>	\$3,197,339
<b>Brekke</b>	2025	<b>2023</b>	\$697,557
McAuliffe	2022		\$1,440,725
Ramona	2022		\$1,755,474
Ritchen	2021		<u>\$3,269,888</u>
Est. Subtotal K-5 Multipurpose Room			\$18,685,288
Design & Improve K-5 Kindergarten Facilities			
<b>McKinna</b>	2022	<b>2021</b>	\$1,307,554
<b>Marina West</b>	2022	<b>2021</b>	\$2,515,166
<b>Rose</b>	2024	<b>2022</b>	\$3,180,218
<b>Sierra Linda</b>	2022	<b>2021</b>	<u>\$1,827,226</u>
Est. Subtotal Kindergarten Facilities			\$8,830,164
Technology	2025		\$8,258,514
Program Reserve	2017-2020		\$4,444,758
Est. Ending Fund Balance			\$675,848
Est. Total			\$49,568,189

#### 1.4 MASTER BUDGET

A program Master Budget was adopted as part of the Facilities Implementation Program based on approved projects and projected costs. Based on estimated actuals to date, the total budget for the Phase 1 work program is expected to increase from \$114.9 million to \$117.5 million. This increase is primarily contributed to an increase of scope at Driffill to include new kindergarten spaces, additional academy improvements and anticipated additional cost to meet new specifications for facilities, fixture, fixtures, and equipment. The acceleration of the design and construction of the multipurpose rooms at the middle school sites and Driffill result in an increase in budget for Phase 2 from \$11.3 million to \$26.9 million. Correspondingly, the budget in Phase 3 declines from \$62.2 million to \$48.9 million primarily as part of the reallocation of projects and associated costs to the prior phases, including the multipurpose room projects at Frank, Fremont, Haydock, and Driffill. Overall the Master Budget for the Facilities Implementation Program has increased from \$188.5 million to \$200.5 million to accommodate increased revenues and proportionate increases in select projects, including Driffill kindergarten improvements, additional improvements at the selected academies, and increases in allowances for additional furniture, fixtures and

equipment that may be needed to meet the District's adopted specifications for new schools and associated facilities.

**Table 6**  
**Master Budget by School Site**

School Site	Est.Total	Phase I	Phase II	Phase III
New Elm ES	\$ 20,170,543	\$ 20,170,543	\$ -	\$ -
New Harrington ES	\$ 22,822,171	\$ 22,822,171	\$ -	\$ -
Marina West ES	\$ 6,027,002	\$ -	\$ -	\$ 6,027,002
McKinna ES	\$ 1,307,554	\$ -	\$ -	\$ 1,307,554
Rose ES	\$ 7,992,686	\$ -	\$ -	\$ 7,992,686
Sierra Linda ES	\$ 5,024,564	\$ -	\$ -	\$ 5,024,564
McAuliffe ES	\$ 1,702,865	\$ 262,140	\$ -	\$ 1,440,725
Brekke ES	\$ 980,125	\$ 282,568	\$ -	\$ 697,557
Marshall ES	\$ -	\$ -	\$ -	\$ -
Ramona ES	\$ 1,755,474	\$ -	\$ -	\$ 1,755,474
Ritchen ES	\$ 3,532,028	\$ 262,140	\$ -	\$ 3,269,888
New Lemonwood K-8	\$ 31,402,250	\$ 31,402,250	\$ -	\$ -
Driffill K-8	\$ 6,371,802	\$ 2,477,832	\$ 3,893,970	\$ -
Chavez K-8	\$ 2,300,898	\$ 293,319	\$ -	\$ 2,007,579
Curren K-8	\$ 4,874,819	\$ 293,319	\$ -	\$ 4,581,500
Kamala K-8	\$ 2,377,858	\$ 293,319	\$ -	\$ 2,084,539
Soria K-8	\$ -	\$ -	\$ -	\$ -
Frank MS	\$ 4,750,837	\$ -	\$ 4,750,837	\$ -
Fremont MS	\$ 7,400,443	\$ 1,843,007	\$ 5,557,436	\$ -
Haydock MS	\$ 6,605,087	\$ 1,047,651	\$ 5,557,436	\$ -
New Elementary School	\$ 7,250,000	\$ 7,250,000	\$ -	\$ -
FF&E Allowance	\$ 445,000	\$ 445,000	\$ -	\$ -
Additonal Academy Improvements	\$ 1,688,325	\$ 1,688,325	\$ -	\$ -
Technology	\$ 24,174,302	\$ 11,201,175	\$ 4,714,613	\$ 8,258,514
Subtotal	\$ 170,956,633	\$ 102,034,759	\$ 24,474,292	\$ 44,447,582
Program Reserve	\$ 17,095,663	\$ 10,203,476	\$ 2,447,429	\$ 4,444,758
Est. Ending Fund Balance	\$ 12,485,230	\$ 5,250,648	\$ 6,614,792	\$ 675,848
<b>Est. Total Uses</b>	<b>\$ 200,537,526</b>	<b>\$ 117,488,883</b>	<b>\$ 33,536,513</b>	<b>\$ 49,568,189</b>

# REVIEW OF IMPLEMENTATION PROGRAM

## 2.1 INTRODUCTION

Following the completion of the Facilities Implementation Program, the Board of Trustees directed District staff and CFW to undertake implementation activities for the improvement of school facilities and the reconfiguration of the existing educational program. The Facilities Implementation Program is comprised of various moving parts that must be designed, coordinated and implemented. Overall, it comprises a complex set of elements that integrate various aspects of the District’s educational and financing program, technology, State aid and construction program in order to maximize resources and transform District schools.

The following is a more detailed description and analysis of each project and program component. Where required, changes to program budgets or scope are described in comparison to the original January 2013 implementation program. The report provides a more detailed status and update on the program’s management, educational program, financing resources, state aid opportunities and technology transformation initiatives.

## 2.2 MANAGEMENT

Given the multidisciplinary nature of the program, a similar approach has been initiated to staff and manage a team approach among participating District and assigned CFW staff. The multidisciplinary nature of the program requires unique professional expertise to be integrated in each of the District’s levels of program implementation. The District has established a workflow with its program manager to provide applicable resource integration through a teaming concept that provides staff to assist with, track, and report on implementation progress as follows:

<b>Category</b>	<b>District Staff</b>	<b>CFW Assigned Personnel</b>
Overall Program	Jeff Chancer	Yuri Calderon / Ernesto Flores
Educational Program	Cathy Kawaguchi	Janet Kliegl
Technology	Dan Kubilos	Jeremy Cogan
Finance	Lisa Cline	Emilio Flores
Purchasing and Program Accounting	Lisa Franz	Patricia Raphael
Facilities, State Aid & Construction	Jorge Gutierrez	Tylor Middlestadt / Greg Norman

The Facilities Implementation Program is now utilized by District staff and consultants as a management tool by which to organize and integrate the various competing facilities needs of the District. Program team meetings occur weekly as does corresponding meetings of team members assigned to particular components of the programs overall implementation. The attached exhibit to this report also identifies a chronology of all Board of Trustee meetings to receive updates, consider policy issues, and to set the overall direction of the program. This

approach lays out a basis by which to go forth in the allocation of resources to optimize the benefits that can be derived to the educational and facilities program of the District.

## 2.3 EDUCATIONAL RECONFIGURATION UPDATE

The Board approved an educational reconfiguration program in December 2012. Improvements are designed to enhance academic achievement and provide parents with a range of educational options for their children. The District desires to have children feel more connected to their neighborhood schools, provide stronger relationships with the families, increase parent involvement, allow for more flexible educational groupings of students, decrease discipline problems and increase the self-esteem of students. The reconfigured program will support K-5, K-8 and 6-8 school models. The K-5 schools will offer educational strands that would be further enhanced by academy programs and reconfigured 6-8 middle schools. The K-8 schools will provide additional choice to parents and provide greater opportunities to extend select educational programs, such as Dual Language Immersion (DLI) instruction.

Following approval of this educational program, District administration and CFW began working to create necessary components through the execution of a 20 month work program. The program will be further designed and implemented in consultation with staff and parents as needed. Thus far, the following meetings and deliverables have been achieved, consistent with the implementation schedule:

- ✓ Several meeting were held between October 2012 and May 2013 with Oxnard Administration and CFW staff to develop the Academies at the Middle Schools, the Strand Focus at the K-5 schools and Dual Immersion at the K-8 Schools. Meetings occurred with all Intermediate and Elementary principals on 10/24, 10/31, 11/7, 11/27 and 12/5, 2/7, 2/20, 3/6, 3/20. Additional meetings were held by Oxnard Administration to develop the Dual Language Immersion Strand at the K-8 schools from February-May 2013. Beginning November 2012, at monthly Instruction Leadership Team (ILT) meetings, information and discussions have occurred regarding all aspects of the educational reconfiguration and corresponding educational program.
- ✓ Superintendent Chancer and Assistant Superintendent Kawaguchi met with Intermediate Principals at two additional meetings to further define what academy options are available to them and supporting community resources for the Academies.
- ✓ Assistant Superintendent Kawaguchi, Principals, and Teachers visited La Habra School District Academy of the Arts & Technology and Science and Math Academy on February 4, 2013.
- ✓ Assistant Superintendent Kawaguchi, Principals, Teachers and School Board Trustee visited Hawthorne School District Humanities and Fine Arts Academy, STEM Academy, and Business Academy on February 11, 2013.
- ✓ Assistant Superintendent Kawaguchi developed a communication plan. Meetings were held with principals to discuss the communication plan and the process for seeking information from staff and parents.
- ✓ Community meetings were held to give information to parents and community members as well as seek input on the educational reconfiguration on 2/28, 3/7, 3/14, 4/22, 4/29, 5/2, 5/20, 5/22, 5/23, 6/3 and the final one on 6/6.

- ✓ Academies for the Middle Schools were determined on April 17, 2013 based on the input from staff, strengths and talents of staff, and facility strengths of each site. They are:
  - Frank Middle School: Science & Technology Academy
  - Fremont Middle School: Environmental Services and Design Academy
  - Haydock Middle School: Visual and Performing Arts Academy
- ✓ Development of the Academy courses has begun. Assistant Superintendent Kawaguchi and Middle School Principals met with Elizabeth Rothrock from California State University, Channel Islands (CSUCI) on May 15, 2013 and Dr. Phil Hampton from California State University, Channel Islands on May 21, 2013. Follow-up meeting was held on June 10, 2013 to discuss the Science Academy courses. CSUCI is willing and enthusiastic about working with Oxnard as a partner in developing the Academies.
- ✓ Extended Day Kindergarten curriculum has been developed. It will be the same curriculum that is currently in use by those classes that have extended the day this school year. This curriculum has been aligned to the Common Core State Standards.
- ✓ In February 2013, the Special Education placement of classrooms was determined for the entire district when the reconfiguration is implemented August 2014.
- ✓ Staff development needs have been determined for the 1:1 technology deployment and dates have been determined for staff development. Staff development needs for the Academy courses will begin to be discussed in June 2013.
- ✓ Oxnard Board Policies have been reviewed. It has been determined that the Transportation, Transportation Routes and Services, Transportation for Students with Disabilities, and School Attendance Boundaries Board Policies do not need to be revised to meet the Educational Reconfiguration Program.
- ✓ Collective Bargaining issues that could potentially have an impact on the Educational Reconfiguration Program have been identified and will be addressed through negotiations.
- ✓ An Educational Program Committee, membership consisting of Oxnard Cabinet members, Presidents of both unions, teacher representative and four principal representatives, was established. This group has met on March 4, April 15, and May 20. The focus of the meetings is to give information and receive input regarding all aspects of the Educational Reconfiguration Program.
- ✓ Decision Insights has been contracted and will do the boundary changes for the reconfiguration plan.

Certain components of the educational reconfiguration program require adjustments to the January 2013 timeline in order to reflect current timing.

Development of K-5 Strand Focus:

- **July 2013:** CFW and District Staff to prepare a new timeline for the development of the Strand Focus at K-5 sites
- **September 2013:** Work with principals at K-5 sites to begin the development of the Academic Strand Focus for each site

Middle School (Grades 6-8) Academy Course development:

- **June 2013:** Begin discussion of courses and integrated units with California State University, Channel Islands professors; CFW and District Staff to prepare a new timeline for the development of courses, integrated units and accompanying staff development needs

Gifted And Talented Education (GATE) Program:

- **June 2013:** Begin discussion with District administration and alter timeline to reflect decisions as to the most appropriate timing of program changes

Library book redistribution:

- **September 2013:** District to begin inventory of current library collection and make a recommendation for purchase or redistribution of library books for the reconfiguration.

Boundary changes: While this component remains unchanged from the January timeline, changes are anticipated pending District decisions about the educational program and school choice.

## 2.4 TECHNOLOGY PROGRAM UPDATE

The cost of technology equipment upgrades, and the associated costs including network infrastructure, professional development, and support staff, has traditionally been a barrier to large scale technology deployments in school districts. Decreased K-12 education funding levels in California has also been a factor over the last decade as school districts are asked to maintain or increase academic achievement with diminishing resources. However due to the voter's support of Measure "R", and the corresponding availability of the required funds, the Oxnard School District is in a unique position to implement a transformative technology plan. The approved Facilities Implementation Program allocates approximately \$11.2 million towards funding the first phase of classroom technology throughout the District.

In March 2013, the Oxnard School District reconvened its Educational Technology Advisory Committee (ETAC) for the purpose of collaborating on strategies for the successful deployment of new mobile computing devices. The group was representative of school sites and District departments and initially tasked with determining the key ingredients to a successful deployment of technology at a ratio of one device per student (1:1).

After months of planning and several meetings of the ETAC, the District has made significant progress toward the deployment of its 1:1 handheld devices. The District studied available technologies and considered the functionality, performance, and cost of multiple platforms, before ultimately recommending the deployment of iPad devices in the initial phase of deployment. The project continues to proceed on schedule, and the District anticipates formalizing an initial order for student devices by July 2013. Initial distribution and deployment of devices will occur between August and October of 2013.

To ensure that the internal planning efforts for networking and wireless internet infrastructure are adequate, the District has engaged an outside information technology consultant as of June 2013 to conduct an independent review of the District's network upgrade plan and infrastructure capacity.

The District has identified direct and indirect costs associated with upgrading the existing technology infrastructure and implementing classroom use of mobile computing devices. These costs are based upon estimates from vendors, District staff, and the implementation of similar programs. The prepared cost estimates are deemed to

be accurate based upon available information, but are meant for budgetary purposes only. The actual costs may vary, and can only be determined at the time of the receipt of bids to provide the required infrastructure improvements and for the purchase of devices and equipment.

In the future, device cost will vary depending on the selection of a particular device platform by the District at time of implementation. As technology vendors are continually refreshing their product lines, the cost analysis provides a snapshot in time for available devices and price points as of the writing of this document. It is anticipated that individual data points will fluctuate and necessitate evaluation of additional options in the future.

For budgetary purposes, the technology implementation planning process assessed a variety of common platforms used in school technology programs and assumed that for each stage of deployment a single platform will be implemented across all grade levels at specified school sites. The first stage of technology deployment will utilize iPad devices and will occur at the following school sites, selected based on the results of an application process and readiness to proceed with implementation:

- Brekke
- Chavez
- Curren
- Frank
- Marshall
- Haydock
- Soria
- Fremont

These sites had a combined total enrollment of 7,202 according to the California Department of Education at the time of its student count for the 2012-13 school year. Districts are generally recommended to procure a device order 5% greater than the most recent enrollment number to account for teacher, loaner, and replacement devices. Therefore, a total of 7,570 devices are estimated to be needed, of which 500 have already been procured for teacher training.

## 2.5 MEASURE “R” FINANCING UPDATE

The passage of Measure “R” authorized the District to issue a maximum of \$90 million in new General Obligation bond proceeds over a projected 12 year period. General Obligation bonds are secured by an annual levy on all taxable parcels within the boundaries of a school district. The levy is based on the assessed value of a taxable parcel as determined by the County, pursuant to Proposition 13. The assessed value of a parcel is typically less than current market value.

On December 11, the District successfully sold \$18.39 million in Series “A” G.O. bonds at an all-in total interest cost of 3.82%. The District’s Series 2012 “A” bonds have a debt repayment ratio of 1.89:1, well below the 4:1 ratio recommended by the State Treasurer’s Office. Proceeds from the sale of bonds were deposited in the District’s construction fund on December 27, 2012 and are now available to fund proposed improvements.

As a result of the Series “A” bond sale, the District reached its statutory debt limit of 1.25% of total District assessed value as a non-unified school district. Although the District had ample tax rate and voter authorized capacity to issue additional bonds, the District required approval of a General Waiver by the State Board of Education to sell additional series of bonds. On May 8, 2013, the District received approval from the State Board of Education to sell additional bonds up 1.50% of total District assessed value.

On May 29, the District completed the sale of \$25.50 million in Series “B” general obligation bonds by utilizing the additional bonding capacity granted by the State Board of Education. The bonds sold at an all-in total interest cost of 4.12% and the Series “B” bonds have a debt repayment ratio of 2.00:1. The total amount of Measure “R” proceeds available to fund proposed improvements is \$43.89 million, approximately \$1.89 million greater than originally projected. Both Series “A” and “B” are comprised of current interest bonds which repay interest and



principal annually and do not include any capital appreciation bonds that may defer principal and interest payments into the future at higher rates of interest.

The future sale of bond series “C” through series “F” remains as projected in the Facilities Implementation Program timeline. However, due to the lower than anticipated interest rate environment at the time of the recent bonds sales, significant taxing capacity remains which may allow the District to accelerate its facilities program by generating more future bond proceeds sooner in Series “C” and “D” than originally projected. Depending on assessed valuation growth leading up to the planned 2016 Series “C” issuance, the District may need additional bonding capacity to be approved by the State Board of Education for future bonds sale. As always, these activities will be monitored and progress reports will be provided as needed to the Board for appropriate direction.

## 2.6 STATE AID UPDATE

The Facilities Implementation Program was designed to optimize available and anticipated State aid grants for improved school facilities. The State provides periodic funding to school districts from its School Facility Program in the form of per pupil grants. The program provides new construction and modernization grants to construct new school facilities or modernize existing schools.

Currently, funds in the School Facility Program are limited. New projects are being accepted to the unfunded project list but are unlikely to receive funding until a new State Bond is approved by the voters. Today, there are three State bills that have been introduced for a 2014 statewide school bond:

- AB 41 (Buchanan)
- SB 45 (Corbett)
- SB 301 (Liu)

These bills are very preliminary and will continue to be monitored by District staff and the program manager as they progress through the legislature.

During the first six months of the implementation program, the following State aid activities were completed on behalf of the District:

- Resubmission and Appeal of the Driffill Elementary School Modernization and New Construction applications
- Submission of request for Priority Funding for Driffill Elementary School Project
- Analysis of the prior Driffill applications to the State and the development of a strategic plan to resubmit new Driffill Modernization and New Construction applications for the Driffill K-8 Program
- Monitoring of April apportionments by the State Allocation Board for Driffill project disbursement
- Strategic planning related to the Seabridge school site New Construction Application
- Strategic planning related to Teal Club School Site approval and New Construction Application

Additionally, the following State Aid applications are currently in process:

- Driffill Application for conversion to K-8
- Driffill application for relocation of facilities department
- Seabridge application related to acquisition of site

- Project No. 1 grade reconfiguration, science labs and kindergarten classroom improvements
- Project No. 2 Drifill kindergarten classroom improvements
- Project No. 3 Lemonwood School reconstruction
- Project No. 4 Harrington School reconstruction

## 2.7 FACILITIES PROGRAM UPDATE

The following summaries provide an overview of budget and schedule adjustments that have occurred within the first six months of Phase 1 projects. Each project that has experienced an adjustment is summarized briefly to indicate the original scope, budget, and schedule, the revised scope, budget, and schedule, and the need for any changes that have taken place.

The Board of Trustees approved the implementation of Extended Day Kindergarten across the District beginning in August 2014 as part of the grade reconfiguration. Subsequently the Board approved educational specifications for all future District school facilities that identify a requirement of four (4) kindergarten classrooms at all K-5 and K-8 schools, each room consisting of approximately 1,120 square feet, with a student restroom inside the classroom, as well as a teacher’s work room of approximately 200 square feet for every two (2) kindergarten classrooms. Approved Educational Specifications also identify a requirement for 1,200 square foot science labs at the K-8 and Middle School sites, with a 200 square foot prep room to be provided for every two (2) science labs.

Project 1 was developed to encompass all required kindergarten and science lab reconfigurations required to accommodate the District’s desire to implement grade level reconfiguration across the entire District beginning August 2014. To meet this requirement, CFW reviewed the existing conditions and capacity of all sites with the District Superintendent and staff, identified particular sites that required facility improvements to accommodate the grade reconfiguration, and adjusted the selected sites’ project scope, schedules, and budgets to ensure that all required reconfiguration work could be completed by the August 2014. Below is a brief summary for the eight sites that require improvements to accommodate the grade reconfiguration.

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### MCAULIFFE ELEMENTARY SCHOOL – KINDERGARTEN RECONFIGURATION

Original Scope of Work: The project was originally defined as a reconfiguration and enhancement of three (3) existing kindergarten classrooms.

Revised Scope of Work: Reconfigure existing 1<sup>st</sup> grade classroom #6 into a kindergarten classroom by converting an adjacent existing staff restroom/janitor’s closet into a new student restroom accessible from the reconfigured kindergarten classroom. The displaced janitor’s closet will be relocated immediately adjacent to the new student restroom using a small area within an existing teacher’s prep room.

Original Budget: \$628,179.00  
Revised Budget: \$262,140.00  
**(Savings of \$366,039.00)**

Original Schedule: Start (1/15/2013) Finish (9/5/2014)  
Revised Schedule: Start (1/15/2013) Finish (8/8/2014)  
**(Accelerated finish date by one (1) month.)**

*\*Note: Construction finish dates are reflected above, close out is typically an additional six (6) months.*

Summary of Changes: McAuliffe currently has three (3) kindergarten classrooms, and required one additional kindergarten classroom to meet the approved educational specifications, and to accommodate four (4) extended day kindergarten classes in August of 2014. It was determined by the District Superintendent and CFW that the preferred solution for the McAuliffe improvements was to revise the project scope, budget, and schedule to reflect the new scope of work including reconfiguration of an existing 1<sup>st</sup> grade classroom into a kindergarten classroom with a restroom.

Classroom #6 was selected as the preferred location for the new kindergarten classroom because it was adjacent to an existing staff restroom/janitor's closet that could conveniently be converted to a student restroom accessible from classroom #6. Furthermore, directly opposite of the existing staff restroom was an existing teacher's prep room that could be conveniently utilized by the new kindergarten classroom teacher as a work room for the adjacent classroom. The janitor's closet displaced by the new student restroom will be replaced by creating a new service closet immediately adjacent to the existing staff restroom, utilizing a small portion of the area currently serving as the teacher's prep room referenced above.

The McAuliffe scope of work was made a part of Project 1, and awarded to Dougherty + Dougherty Architects, LLP for design, and Vanir Construction Management, Inc. for pre-construction services, and CM-at-Risk delivery of the project construction phase.

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#### BREKKE ELEMENTARY SCHOOL – KINDERGARTEN RECONFIGURATION

Original Scope of Work: The project was originally defined as a reconfiguration of one (1) existing 1<sup>st</sup> grade classroom into a kindergarten classroom, including the addition of a student restroom accessible from the classroom, as well as a new teacher work room also accessible from the classroom. Both the student restroom and teacher work room would be provided by utilizing a small portion of two existing teacher prep rooms that both share a common wall with the existing 1<sup>st</sup> grade classroom. In addition, the project includes the removal of two existing portable buildings currently in the school hard court area.

Revised Scope of Work: There has been no substantive change to the project scope of work.

Original Budget: \$286,000.00  
Revised Budget: \$282,568.00  
**(Savings of \$3,432.00)**

Original Schedule: Start (1/15/2013) Finish (9/5/2014)  
Revised Schedule: Start (1/15/2013) Finish (8/8/2014)  
**(Accelerated finish date by one (1) month.)**

*\*Note: Construction finish dates are reflected above, close out is typically an additional six (6) months.*

Summary of Changes: The budget adjustment at Brekke was the result of actual square footage of the areas to be reconfigured being slightly less than the original estimate. There has been no change to the project scope of work. The schedule adjustment was made to ensure that the project improvements are complete by August 2014 in time for the grade reconfiguration.

The Brekke scope of work was made part of Project 1, and awarded to Dougherty + Dougherty Architects, LLP for design, and Vanir Construction Management, Inc. for pre-construction services, and CM-at-Risk delivery of the project construction phase.

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## RITCHEN ELEMENTARY SCHOOL – KINDERGARTEN RECONFIGURATION

Original Scope of Work: The project was originally defined as a reconfiguration of one (1) existing SDC classroom into a kindergarten classroom with a student restroom and teacher work room accessible from the classroom. The scope of work included the relocation of an existing wall separating the SDC classroom from the adjacent room to increase the square footage of the reconfigured kindergarten classroom to meet the approved Education Specifications. The project also included the reconfiguration of an existing restroom to be ADA compliant, as well as a new teacher work room also accessible from the classroom. The adjacent classroom that is reduced in size to accommodate the new kindergarten will be repurposed as a resource room for the school site.

Revised Scope of Work: There has been no substantive change to the project scope of work.

Original Budget: \$265,571.00  
Revised Budget: \$262,140.00  
**(Savings of \$3,431.00)**

Original Schedule: Start (1/15/2013) Finish (9/5/2014)  
Revised Schedule: Start (1/15/2013) Finish (8/8/2014)  
**(Accelerated finish date by one (1) month.)**

*\*Note: Construction finish dates are reflected above, close out is typically an additional six (6) months.*

Summary of Changes: The budget adjustment at Ritchen was the result of actual square footage of the areas to be reconfigured being slightly less than the original estimate. There has been no change to the project scope of work. The schedule adjustment was made to ensure that the project improvements are complete by August 2014 in time for the grade reconfiguration.

The Ritchen scope of work was made part of Project 1, and awarded to Dougherty + Dougherty Architects, LLP for design, and Vanir Construction Management, Inc. for pre-construction services, and CM-at-Risk delivery of the project construction phase.

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## CHAVEZ ELEMENTARY SCHOOL – K-8 SCIENCE LAB RECONFIGURATION

Original Scope of Work: The project was originally defined as a reconfiguration of three (3) existing classrooms into two (2) larger science labs to accommodate the K-8 science academic program. The work included demolition of all interior partitions separating the three existing classrooms and removal of all casework and other interior improvements required to accommodate the reconfiguration. A new partition was to be installed separating the reconfigured science labs, as well as the construction of 200 square feet of prep room space to service the new science labs.

Revised Scope of Work: There has been no substantive change to the project scope of work.

Original Budget: \$293,319.00  
Revised Budget: No Change

Original Schedule: Start (1/15/2013) Finish (9/5/2014)  
Revised Schedule: Start (1/15/2013) Finish 8/8/2014  
**(Accelerated finish date by one (1) month.)**

*\*Note: Construction finish dates are reflected above, close out is typically an additional six (6) months.*

Summary of Changes: There has been no change to the project scope of work or budget. The schedule adjustment was made to ensure that the project improvements are complete by August 2014 in time for the grade reconfiguration.

The Chavez scope of work was made part of Project 1, and awarded to Dougherty + Dougherty Architects, LLP for design, and Vanir Construction Management, Inc. for pre-construction services, and CM-at-Risk delivery of the project construction phase.

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#### CURREN ELEMENTARY SCHOOL – K-8 SCIENCE LAB RECONFIGURATION

Original Scope of Work: The project was originally defined as a reconfiguration of three (3) existing classrooms into two (2) larger science labs to accommodate the K-8 science academic program. The work included demolition of all interior partitions separating the three existing classrooms and removal of all casework and other interior improvements required to accommodate the reconfiguration. A new partition was to be installed separating the reconfigured science labs, as well as the construction of 200 square feet of prep room space to service the new science labs.

Revised Scope of Work: There has been no substantive change to the project scope of work.

Original Budget: \$293,319.00

Revised Budget: No Change

Original Schedule: Start (1/15/2013) Finish (9/5/2014)

Revised Schedule: Start (1/15/2013) Finish (8/8/2014)

***(Accelerated finish date by one (1) month.)***

*\*Note: Construction finish dates are reflected above, close out is typically an additional six (6) months.*

Summary of Changes: There has been no change to the project scope of work or budget. The schedule adjustment was made to ensure that the project improvements are complete by August 2014 in time for the grade reconfiguration.

The Curren scope of work was made part of Project 1, and awarded to Dougherty + Dougherty Architects, LLP for design, and Vanir Construction Management, Inc. for pre-construction services, and CM-at-Risk delivery of the project construction phase.

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#### KAMALA ELEMENTARY SCHOOL – K-8 SCIENCE LAB RECONFIGURATION

Original Scope of Work: The project was originally defined to include construction of (2) new modular science labs, and (1) new modular classroom.

Revised Scope of Work: Reconfiguration of three (3) existing classrooms into two (2) larger science labs to accommodate K-8 science academic program, including demolition of all interior partitions separating the three existing classrooms and removal of all casework and other interior improvements required to accommodate the reconfiguration. A new partition is to be installed separating the reconfigured science labs, as well as the construction of 200 square feet of prep room space to service the new science labs.

Original Budget: \$818,293.00  
Revised Budget: \$293,319.00  
**(Savings of \$524,974.00)**

Original Schedule: Start (1/15/2013) Finish (9/5/2014)  
Revised Schedule: Start (1/15/2013) Finish (8/8/2014)  
**(Accelerated finish date by one (1) month.)**

*\*Note: Construction finish date is 8/8/14, Close out finish is 2/9/15*

Summary of Changes: It was determined by the District Superintendent and CFW following a detailed site visit, that the site's existing capacity was adequate to accommodate the K-8 reconfiguration and provide required science labs without adding new modular lab or classroom spaces. It was determined that the preferred solution for the Kamala improvements was to revise the project scope, budget, and schedule to reflect the new scope of work including reconfiguration of three existing classrooms into two larger science labs.

The final location of the three (3) existing rooms to be reconfigured included classrooms #201, #202, and existing teacher work room #213. This location was selected due to proximity to existing restrooms providing necessary plumbing connections for lab facilities, and although inclusion of the work room slightly reduced the square footage available for the reconfiguration as compared to Chavez & Curren, it provided the added benefit of preserving an additional existing classroom for future use at the school site.

The Kamala scope of work was then made part of Project 1, and awarded to Dougherty + Dougherty Architects, LLP for design, and Vanir Construction Management, Inc. for pre-construction services, and CM-at-Risk delivery of the project construction phase.

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#### FREMONT MIDDLE SCHOOL – MIDDLE SCHOOL SCIENCE LAB RECONFIGURATION

Original Scope of Work: The project was originally defined to include construction of two (2) new science labs along with major utility upgrades.

Revised Scope of Work: Modernization of the existing science wing located in Building 800, including the reconfiguration of eight (8) existing science labs/classrooms into six (6) larger science labs, conversion of an existing classroom into a science classroom, and enhancement of an additional existing classroom into a digital arts lab.

Original Budget: \$2,286,919.00  
Revised Budget: \$1,843,007.00  
**(Savings of \$443,912.00)**

Original Schedule: Start (1/15/2013) Finish (9/4/2014)  
Revised Schedule: Start (1/15/2013) Finish (8/8/2014)  
**(Accelerated finish date by one (1) month.)**

*\*Note: Construction finish dates are reflected above, close out is typically an additional six (6) months.*

Summary of Changes: It was determined by the District Superintendent and CFW following a detailed site visit, that the site's existing science wing provided adequate space to accommodate the Middle School reconfiguration and provide required science labs without adding new science labs. Site utility upgrades were minimized to

accommodate the revised scope of work within the original budget. It was determined that the preferred solution was to revise the project scope, budget, and schedule to reflect the new scope of work including modernization of the existing science wing in Building 800 to reconfigure ten (10) existing classrooms into six (6) larger science labs, one (1) enhanced science classroom/lab, and one (1) digital arts lab.

The Fremont scope of work was made part of Project 1, and awarded to Dougherty + Dougherty Architects, LLP for design, and Vanir Construction Management, Inc. for pre-construction services, and CM-at-Risk delivery of the project construction phase.

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#### HAYDOCK MIDDLE SCHOOL – MIDDLE SCHOOL SCIENCE LAB RECONFIGURATION

Original Scope of Work: The project was originally defined to include modernization of (2) existing labs as well as significant utility upgrades.

Revised Scope of Work: Enhance four (4) existing science labs and one (1) existing science classroom, and reconfigure of a portion of an existing tech lab into an SDC classroom with shared facilities with the existing adjacent SDC classroom to accommodate the required work. Reconfigured science labs will all include at least 200 square feet of prep room space for every two (2) labs. Reconfigured science classrooms also include enhanced prep room space.

Original Budget: \$2,132,475.00  
Revised Budget: \$1,047,651.00  
**(Savings of \$1,084,824.00)**

Original Schedule: Start (1/15/2013) Finish (9/5/2014)  
Revised Schedule: Start (1/15/2013) Finish (8/8/2014)  
**(Accelerated finish date by one (1) month.)**

*\*Note: Construction finish dates are reflected above, close out is typically an additional six (6) months.*

Summary of Changes: It was determined by the District Superintendent and CFW following a detailed site visit, that the site's existing science facilities provided adequate space to accommodate the Middle School reconfiguration and the site would benefit from additional lab/classroom upgrades. Site utility upgrades were minimized to accommodate the revised scope of work within the original budget. It was determined that the preferred solution for the Haydock improvements was to revise the project scope, budget, and schedule to reflect the new scope of work.

The new scope of work includes: Building 400 & 500: modernization of the existing science labs in Buildings 400 and 500 including the reconfiguration of existing adjacent storage closet into a prep room; Building 900: Modernization of the existing science labs in Building 900 including the reconfiguration of the existing teacher's workroom/lounge into a shared prep room space, Building 1000: Modernization of existing biology classroom including the reconfiguration of existing storage and office space into a prep room, and reconfiguration of existing tech lab to accommodate a new SDC classroom which will share toilet, laundry, and quiet room facilities with the existing SDC classroom.

The Haydock scope of work was made part of Project 1, and awarded to Dougherty + Dougherty Architects, LLP for design, and Vanir Construction Management, Inc. for pre-construction services, and CM-at-Risk delivery of the project construction phase.

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## RAMONA ELEMENTARY SCHOOL – KINDERGARTEN RECONFIGURATION

Original Scope of Work: The project was originally defined to include removal of two (2) portable classrooms, relocation of two (2) portable classrooms, and construction of a new kindergarten building.

Revised Scope of Work: Project was eliminated from the Facilities Program.

Original Budget: \$2,688,463.00  
Revised Budget: \$0  
**(Savings of \$2,688,463.00)**

Original Schedule: Start (1/15/2013) Finish (9/4/2014)  
Revised Schedule: N/A

*\*Note: Construction finish dates are reflected above, close out is typically an additional six (6) months.*

Summary of Changes: It was determined by the District Superintendent and CFW following a detailed site visit, that the site's existing kindergarten facilities provided adequate space to accommodate the grade reconfiguration and Extended Day kindergarten without further improvements at this time.

### 2.7.1 PROJECT 2: DRIFFILL KINDERGARTEN RECONFIGURATION

Original Scope of Work: The project was originally defined to include removal of (1) portable and reconfiguration of (3) existing kindergarten classrooms.

Revised Scope of Work: Construct four (4) new kindergarten classrooms, demolish existing kindergarten classroom wing, remove of three (3) portables, and enhance exterior finishes and site work to improve the aesthetics of existing buildings.

Original Budget: \$794,671.00  
Revised Budget: \$2,477,832.00  
**(Increase of \$1,683,161.00)**

Original Schedule: Start (7/1/2013) Finish (8/7/2014)  
Revised Schedule: Start (2/15/2013) Finish (8/8/2014)

*\*Note: Construction finish dates are reflected above, close out is typically an additional six (6) months.*

Summary of Changes: It was determined by the District Superintendent and CFW following a detailed site visit, that the site's existing kindergarten facilities required costly upgrades to aging buildings, and new kindergarten facilities would more adequately meet the requirements of the grade reconfiguration. It was determined that the preferred solution for the Driffill improvements was revise the project scope, budget, and schedule to reflect the new scope of work.

The new scope of work includes: Construction of four (4) new kindergarten classrooms, demolition of existing kindergarten classroom wing, removal of three (3) portables, and enhancements to exterior finishes and site work to improve the aesthetics of existing buildings.

To accommodate the new scope of work within the required timeframe for the August 2014 grade reconfiguration, the Board elected to retain the Architect of Record (AOR) for the Driffill P2P new construction project, Flewelling &



Moody, to also serve as AOR for the Drifill new kindergarten project. This change also transferred the project management out of CFW's scope of work, and the project is now being directly managed by the District. The project was defined as Project 2, and awarded to Flewelling & Moody for design. Pre-construction and construction management services have yet to be awarded.

### 2.7.2 PROJECT 3: LEMONWOOD RECONSTRUCTION

Original Scope of Work: The project was originally defined to include the reconstruction of the Lemonwood campus on the existing school site, with minimal disruption to the existing school site which will remain in operation throughout the design and construction of the new school facilities.

Revised Scope of Work: The project scope of work has not changed substantively.

Original Budget: \$31,402,250.00

Revised Budget: No change

Original Schedule: Start (3/4/2013) Finish (2/7/2017)

Revised Schedule: Start (2/18/2013) Finish (2/7/2017)

***(Accelerated start date by two (2) weeks.)***

*\*Note: Construction finish dates are reflected above, close out is typically an additional six (6) months.*

Summary of Changes: The Board approved the District's grade reconfiguration to occur at all sites beginning in August 2014, prior to the completion of the new Lemonwood school facilities. This circumstance requires that the existing school facilities operate as an interim K-8 facility beginning in August 2014, through completion of construction in February 2017. To ensure that the interim K-8 facilities were fully coordinated with the project's proposed design, the project start date was accelerate by four (4) months and ten (10) days. This accelerated start date allows for the interim facilities to be planned in coordination with the Architect of Record's proposed design, and allows the architect to locate any interim facilities required to ensure they do not negatively impact the project schedule, scope or budget.

The project was defined as Project 3, and awarded to MVE Institutional for design. Pre-construction and construction management services have yet to be awarded.

### 2.7.3 PROJECT 4: HARRINGTON RECONSTRUCTION

Original Scope of Work: The project was originally defined to include the reconstruction of the Harrington campus on the existing school site, with minimal disruption to the existing school site which will remain in operation throughout the design and construction of the new school facilities.

Revised Scope of Work: The project scope of work has not changed substantively.

Original Budget: \$22,822,171.00

Revised Budget: No change

Original Schedule: Start (1/15/2013) Finish (1/6/2016)

Revised Schedule: Start (3/11/2013) Finish (1/6/2016)

***(Delayed start date by two (2) months.)***

*\*Note: Construction finish dates are reflected above, close out is typically an additional six (6) months.*

Summary of Changes: The start of the Harrington project planning phase was slightly delayed due to the acceleration of the Lemonwood project, and the planning requirements for the Lemonwood interim K-8 facilities. The delayed start has been accounted for in the project design and construction schedule to ensure that the project's completion date is not affected by the slightly delayed start.

The project was defined as Project 4, and has been issued to pre-qualified architectural firms for consideration with final Board approval scheduled for June 26.

#### 2.7.4 PROJECT 5: ELM RECONSTRUCTION

Original Scope of Work: The project was originally defined to include the reconstruction of the Elm campus on the existing school site.

Revised Scope of Work: The project scope of work has not changed substantively.

Original Budget: \$20,170,543.00

Revised Budget: No change

Original Schedule: Start (7/1/14) Finish (7/26/17)

Revised Schedule: No change

*\*Note: Construction finish dates are reflected above, close out is typically an additional six (6) months.*

Summary of Changes: The project has been defined as Project 5, and will be issued to pre-qualified architectural firms for consideration at a future date consistent with the original schedule.

#### 2.7.5 LAND ACQUISITION

The Facilities Implementation Program recommended the acquisition of land for additional elementary and middle school sites expected to be constructed as needed and when permitted by available funding. During the last six months, land acquisition has been underway for the following sites:

- Sea Bridge
- Teal Club

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#### SEA BRIDGE ELEMENTARY SCHOOL SITE

Original Scope of Work: The new elementary school site acquisition project was originally defined as the completion of the site purchase as defined by the Settlement Agreement, and Mitigation & Option Agreement between the Developer and the District.

Revised Scope of Work: The project scope of work has not changed substantively.

Original Budget: \$8,450,000.00  
Revised Budget: \$7,250,000.00

***(Decrease of \$1,200,000.00)***

Original Schedule: Start (5/20/2013) Finish (2/11/2014)  
Revised Schedule: Start (3/11/2013) Finish (6/14/2013)

***(Accelerated start date by two (2) months and one (1) week, accelerated finish date by eight (8) months.)***

*\*Note: Revised finish date reflects current date for close of escrow.*

Summary of Changes: The start of the Seabridge school site acquisition process was accelerated to ensure that the District secured the lower purchase price of \$7,250,000.00 by tendering the purchase agreement to the Developer prior to April 1, 2013 as stipulated by the Settlement Agreement. The purchase agreement was tendered to DR Horton on March 27, 2013, and returned fully executed by the developer on April 10, 2013. Escrow was opened on April 10, 2013 upon receipt of the executed agreement which commenced the sixty (60) day escrow period as stipulated by the Settlement Agreement. The escrow closed on June 14, 2013.

Brief History of the Seabridge School Site Acquisition: The Seabridge school site was initially inspected by the California Department of Education (CDE) in December of 2000 for its suitability to be developed as an elementary school site. Subsequent to this inspection, the District commissioned multiple studies, engineering reports, environmental assessments, and other requirements to obtain CDE site approval. On March 6, 2013, the District obtained approval from the Coastal Commission to amend the Local Coastal Plan to provide for the development of an elementary school site on the Seabridge school site property. On March 22, 2013, the District submitted the complete site approval application submittal to CDE for review and approval. As of June 26, 2013, the application is still under review at CDE, and CFW is working closely with CDE to ensure that the site is approved in a timely manner. CFW has worked closely with the City to ensure that Oxnard City Council approved the Coastal Commission's LCP Amendment on June 18, 2013. A Joint-Use Agreement is pending approval with the City Parks Department to allow for shared park/play field facilities to be utilized by the elementary school site, as well as the general public when not in use by the school. CFW will continue to work with the City to approve a Joint-Use Agreement.

A mitigation & option agreement was entered into in 2002 between the District and the original Seabridge Developer, OLY Mandalay Bay General Partnership. In 2004, the development interest was acquired by DR Horton, the sites' current developer, and subsequently DR Horton requested the City create Community Facilities District #3 (CFD #3) to provide bond resources for the development of the Seabridge community. In November 2004, the City and the District entered into a Joint Community Facilities Agreement so that a portion of the CFD #3 bond proceeds could be used to fund capital facilities by the District. In 2005, in response to the DR Horton's request, the City formed CFD #3 and sold approximately \$32 million in municipal bonds, of which \$15,564,117.00 was deposited by the City and CFD #3 into a sub-account named the "School District Facilities Account". Between 2008 and 2009, the District and DR Horton engaged in three separate lawsuits relating to the School District Facilities Account funds and the District's exercise of the purchase option to acquire the site. In August 2010, the District and DR Horton entered into a Settlement Agreement, consolidating all pending actions into a final and binding agreement which is now in place.

Pursuant to the Settlement Agreement, the Developer maintains certain obligations to complete development of site work, and the District maintains certain obligations to tender the purchase agreement, establish an escrow

account, and accept the site work once DR Horton notifies that all work is complete. The District has met its obligations to tender the purchase agreement in a timely manner in order to secure the lower purchase price of \$7,250,000.00. DR Horton is in the process of completing the site work. The District has retained expert consultants in construction management, geotechnical engineering, and survey to verify the completeness of DR Horton's site work obligations.

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## NEW MIDDLE SCHOOL SITE ACQUISITION

The Teal Club site acquisition efforts are underway. The District has notified the city of the need for approximately 20 acres for its proposed middle school site. Eight (8) acres would be deeded to the District by the developer as a condition for its development permits, with the remaining acreage to be a negotiated purchase by the District. A basic agreement is required for all parties to accept the proposed site layout, prospective terms of a long term joint-use agreement for the adjacent park area, and to allow access to the site by the District to perform site analyses required for site approval by the California Department of Education (CDE). Work continues in this effort by all parties.

### 2.8 RECOMMENDATIONS

It is recommended that the Board accept and adopt the Six Month Implementation Report as an adjustment to the Facilities Implementation Program adopted by the Board at its January 2013 meeting. It is also recommended that the Board establish a date at its regularly scheduled December 2013 or January 2014 meeting to consider the next six month update report.

# EXHIBIT A

## PRESENTATIONS, WORKSHOPS & UPDATES TO THE BOARD OF TRUSTEES

Board Agenda				
Date	Item	Agenda Description	Purpose	Action
3-Oct-12	C-4	Ratification of Agreement #12-118 with F&M Architecture, Inc.	Appoint AOR to resolve pending issues with Martinez Architects related to Driffill School P2P construction project.	Unanimously Approved
3-Oct-12	D-2	Consideration and Approval of Agreement #12-132 with Caldwell Flores Winters, Inc., for Professional Program Management & Implementation Services	Appoint CFW to prepare Oxnard Facilities Implementation Program and manage Measure "R" and Facilities Program	Unanimously Approved
10-Oct-12	5	Board Governance Planning Session	Develop goals and objectives for the 2012-13 Academic Year	Workshop/No Action
17-Oct-12	A-5	Report on State Aid and State Facilities Program	Update and present regarding State Aid	Presentation/No Action
17-Oct-12	D-1	Appointment of Measure "R" Bond Oversight Committee	Appoint community and organizational members to the Bond Oversight Committee	Unanimously Approved
25-Oct-12	8	Consideration and Approval of Proposal for Construction Management Services for the Driffill School Project from EUR Consulting Inc., OSD Agreement #12-153	Approve interim replacement of Martinez Architects as project manager for Driffill P2P construction project	Unanimously Approved
	9	Board Governance Facilities Planning Session	Conduct workshop with Board of Trustees to develop Capital Facilities Implementation Plan	Workshop/No Action
8-Nov-12	8	Board Governance Planning Session	Continue workshop to develop Goals and Objectives for the 2012-2013 Academic Year	Workshop/No Action
14-Nov-12	D-1	Approval of Resolution #12-20 Authorizing the Issuance and Sale of OSD General Obligation Bonds, Election 2012, Series A.	Approve resolution authorizing sale of first series of Measure "R" bonds in an amount not to exceed \$21M	Unanimously Approved
14-Nov-12	D-4	Approval of Agreement #12-153 with EUR Consulting and Development, Inc. for Driffill Construction Program	Approve permanent appointment of EUR as the CM on the Driffill P2P Project.	Unanimously Approved
15-Nov-12	5	Board Governance Facilities Planning Session	Continue workshops to develop Board of Trustees direction for the Oxnard Facilities Implementation Plan	Workshop/No Action
13-Dec-12	A-5	Board Workshop Session	Conduct Session III of the Board workshops to develop the Oxnard Facilities Implementation Plan	Workshop/No Action
3-Jan-13		Special Meeting to Visit Ceres Unified School District Pre-Engineered Construction (2) school sites	Visit school sites to review Saramark pre-engineered final product	Workshop/No Action
9-Jan-13	5	Public Hearing - Waiver of Statutory Bonding Capacity Limitation	Conduct public hearing and adopt resolution seeking a waiver from the Department of Education to exceed bonding cap	Unanimously Approved
9-Jan-13	6	Board Governance Facilities Planning Session	Final workshop planning session for the development of the Oxnard Facilities Implementation Plan	Workshop/No Action
16-Jan-13	D-2	Approval of OSD Facilities Implementation Program	Adopt the Facilities Implementation Plan prepared by CFW at the Direction of the Board of Trustees	Unanimously Approved
6-Feb-13	E-1	Report from CFW, Inc. - Facilities Implementation Program	Update the Board of Trustees regarding progress and communication plan for the grade level reconfiguration from K-6, 7-8 to K-5, K-8 and 6-8; Academy Program and Board Policies that are anticipated to need revision	Presentation/No Action
13-Feb-13	8	Board Governance Planning Session	Conduct final session to develop the Board's Goals and Objectives for the 2012-13 and 2013-14 Academic Years	Workshop/No Action
20-Feb-13	A-5	Study Session - Facilities Implementation Program	Update to the Board of Trustees regarding Facilities Implementation Plan and the communication plan regarding the grade level reconfiguration for K-5, K-8 & 6-8	Presentation/No Action
20-Feb-13	D-4	Request for Approval of Resolution #12-25 Tax Revenue Anticipation Notes 2012-13	Approve resolution authorizing TRAN	Unanimously Approved
20-Feb-13	D-7	Approval of Resolution #12-27 Authorizing the Acquisition of the Site Known as Southwest Site/Seabridge Site. . .	Approve resolution authorizing the acquisition of the Southwest School Site	Unanimously Approved
6-Mar-13	D-1	Approval of Amendment #1 to Agreement #12-118 - F&M Architecture Inc.	Approve amendment to provide services related to project closeouts for all outstanding DSA projects	Unanimously Approved
6-Mar-13	D-2	Approval of Agreement #12-205 - Dougherty & Dougherty Architects, LLP	Conclude selection process and appoint Dougherty & Dougherty, LLP as architect of record for Project No.1	Unanimously Approved
6-Mar-13	E-1	Report from CFW, Inc. - Facilities Implementation Program	Present Academy Program Visitation, Academy Program, parent and teacher input and collaboration.	Presentation/No Action

<b>Board Agenda</b>				
<b>Date</b>	<b>Item</b>	<b>Agenda Description</b>	<b>Purpose</b>	<b>Action</b>
13-Mar-13	5	Closed Session	Present update on acquisition of Seabridge site	Presentation/No Action
20-Mar-13	D-1	Approval of Amendment #2 to Agreement #12-118 - F&M Architecture Inc.	Approve contract amendment to provide architectural services for the additional Kindergarten building at Driffill School	Unanimously Approved
10-Apr-13	5	Facilities Planning Session	Provide update on community meetings and communication plan related to grade reconfiguration	Presentation/No Action
17-Apr-13	A-6	Study Session - Facilities Implementation Program	Present Academy development, Academies selection for Frank, Fremont and Haydock; update on communication with stakeholders regarding the educational reconfiguration	Presentation/No Action
17-Apr-13	C-1	Decision Insite, LLC Agreement (Consent) to provide District attendance boundary modification analysis and study	Approve agreement for services related to studying the necessary boundary changes that will occur as a result of Grade Reconfiguration and the Academy Programs	Unanimously Approved
1-May-13	A-6	Study Session - Facilities Implementation Program	Provide update to the Board of Trustees regarding technology 1:1 deployment and K-8 community meetings	Presentation/No Action
1-May-13	D-1	Consider Adopting Resolution #12-39 of the Board of Trustees of the Oxnard School District Authorizing the Issuance and Sale of OSD General Obligation Bonds, Election 2012, Series B, in the Aggregate Principal Amount of Not to Exceed \$30,000,000.00.	Approve resolution authorizing the issuance of Series B of Measure "R" General Obligation bonds as soon as the State approved the waiver of the statutory bonding cap	Unanimously Approved
15-May-13	D-6	Consider Appointment of Vanir Construction Management, Inc., as Construction Manager for Pre-Construction Services for Project No. 1 of Measure "R" and Oxnard Facilities Program	Appoint CM for preconstruction services for Project No. 1; CFW recommended the use of Construction Manager-At-Risk as the delivery method for Project No. 1	Unanimously Approved
15-May-13	D-7	Consider Appointment of MVE Institutional as Architect of Record (AOR) for Project No. 3 of Measure R and Oxnard Facilities Program.	Appoint Architect of Record for Lemonwood reconstruction project	Unanimously Approved
15-May-13	E-3	Driffill School Kindergarten Building Project Status Report	Present Kindergarten Project update to the Board of Trustees - by F&M ( <i>Not a CFW Managed Project but is included in District's Facilities Implementation Plan</i> )	
5-Jun-13	A-7	Facilities Implementation Program Update	Provide update on Academy development, technology 1:1 deployment and community meetings	Presentation/No Action
5-Jun-13	D-7	Approval of Agreement #12-229 - OneInterface Engineering LLC	Approve consultant agreement to review and analyze District's technology infrastructure to insure adequate and ideal platform for 1:1 deployment	Unanimously Approved
5-Jun-13	D-8	Adoption of Resolution #12-41 of OSD Board of Trustees Authorizing the Filing of a Change Request For a County-District-School (CDS) Code Reflecting Driffill as a K-8 School and Submission of a New Application to OPSC for an Additional Grant Apportionment	Adopt resolution authorizing District staff and CFW to proceed with converting Driffill to K-8 effective August 2014 and maximizing the grant application to OPSC.	Unanimously Approved
5-Jun-13	D-9	Consider Approval of Architectural Services Contract/Agreement #12-231 - MVE Institutional and Proposed School Site for Project 3 - Lemonwood Reconstruction	Approve contract with MVE Institutional.	Unanimously Approved
5-Jun-13	D-10	Consider Approval of Pre-Construction Services Contract/Agreement #12-230 - Vanir Construction Management, Inc. for Project No. 1 of Measure "R" and Oxnard Facilities Program	Approve contract with Vanir Construction Management.	Unanimously Approved
5-Jun-13	D-11	Consider Approval of Pre-Qualified Lease-Leaseback Construction Manager Short List for the Oxnard School District Measure R Facilities Implementation Program	Approve prequalified Lease leaseback entities for the Facilities Program. The District will select from this list when it determines that Lease Leaseback Delivery method is the most appropriate method for a particular project.	Unanimously Approved