



June 2015

OXNARD  
SCHOOL  
DISTRICT

# SEMI-ANNUAL IMPLEMENTATION PROGRAM UPDATE

**Fifth Semi-Annual Report to the Board of Trustees**

**CFW**  
*Planning and Financing Better  
Schools for California Students*



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## SECTION 1:

# PROGRAM OVERVIEW

Caldwell Flores Winters, Inc. (“CFW”) is pleased to present the fifth Measure “R” Facilities Implementation Program (“Program”) Semi-Annual Update to the Oxnard School District (“District”) Board of Trustees (“Board”). The report reflects conditions of the District’s Program between the conclusion of the December 2014 update and the time of this document’s publishing in June 2015. Updates are provided on the educational and facilities implementation components, as well as the funding and sequencing requirements to implement the Program. Recommendations are provided for consideration and further action by the Board over the next six month period.

The planning and implementation of 21<sup>st</sup> century learning environments in Oxnard is driven by two programs — an **education program** that outlines academic achievement opportunities at the District level, and a **facilities program** that describes how capital improvements will support the implementation of the education program. To that end, the Facilities Implementation Program integrates the District’s vision for education initiatives with a facilities plan that supports the implementation of these initiatives.

Since the adoption of the Program in January 2013, the District has been able to:

- Reduce overcrowding at elementary schools by adopting a K-5 educational strand and facilities program at eleven school sites
- Convert the prior three junior high schools to 6-8 middle schools that support an academy based instructional program
- Expand the K-8 instructional program to six K-8 school sites to increase parent choice
- Implement an extended day kindergarten program with improved facilities
- Deploy over 18,000 1:1 mobile devices to students and teachers

## 1.1 EDUCATIONAL PROGRAM

In the first 18 month period, the educational focus was on implementing an extended day kindergarten program and the implementation of the academy programs in grades 6-8. During the last and current six month period, the focus has been on further developing and implementing the K-5 educational strand program. Eleven educational strand programs have been developed, one for each of the K-5 schools. Each is in varying stages of implementation given the resources readily available to the school sites. The development of the educational strand initiatives are detailed in this report and the selection of each strand is identified below:

- Elm: The School of Environmental & Life Science, and Mathematics

- Brekke: The School of Science and Inquiry
- Harrington: Environmental Sciences and the Arts
- Marina West: School of Environmental Science and Creative Arts
- Marshall: The School of Visual and Performing Arts
- McAuliffe: Science Technology Engineering Arts and Math (Steam)
- McKinna: School of Multimedia
- Ramona: The School of Environmental Science
- Ritchen: The School of Science and Technology
- Rose Avenue: The School of Science and Wellness
- Sierra Linda: The School of Health and Art

The focus over the next six months will continue on the further development and integration of the educational strands with the development of the feeder middle school academies. Lessons learned will be utilized in the next 6 month period to work with the K-8 schools to further define and articulate their respective educational programs.

## 1.2 FACILITIES PROGRAM

At this time, Phase 1 of the Facilities Implementation Program is in full operation, and includes the completed implementation of grade reconfiguration, integration of state-of-the-art technology and 1:1 mobile programs, completion of kindergarten and science lab upgrades to 22 classrooms across eight school sites, ongoing reconstruction of the Harrington campus, and design submittal to the Division of the State Architect (DSA) for reconstruction of Lemonwood and Elm schools. For the most part, Phase 1 goals are on schedule and all of the scope of work has been met within the total budget allocated to Phase 1.

In addition, the District is proceeding with the visioning and development of Early Childhood Development centers that will reutilize, reconfigure, and modernize a portion of existing buildings at Harrington and Lemonwood for kindergarten and optional preschool use, subsequent to the completion of each school's reconstruction. Advance planning and Board consideration has also extended to a 12 classroom building expansion at the Marshall campus to implement a K-8 educational program that also addresses interim 6-8 capacity needs district wide, a future 6-8 middle school facility at the Doris/Patterson site to address projected enrollment growth, a District Administrative Support Center to address long term functionality and operational requirements of District staff, and acquisition and development of an additional K-5 school site.

With Phase 1 projects underway, the work program is now focused on completing these projects and reaping the benefits from Phase 1 to initiate the launch of Phase 2 project improvements. During Phase 1, a reuse of plans approach substantially reduced the overall timeline, design and construction cost for

each new school, including classrooms and support facilities. As a result, the District now has two design options (Harrington and Elm) for Phase 2 construction of support facilities; in particular multipurpose rooms at Chavez, Curren, Kamala, and Driffill. A major goal in the next six month period is to work on the required advance planning, selection, siting, and method of construction with the Board for Phase 2 multipurpose room construction at these school sites.

Specific details of the status of each project are provided in this report and summarized below.

- Construction of the new Harrington K-5 school continues and is anticipated to be completed in December 2015. Building exteriors have been completed, site work is underway, and interior finishes and landscaping is anticipated to commence in August. A camera has been mounted at the site and connected to the school District and Measure “R” bond websites for live viewing of the progress. The integration of design and construction of the early childhood development facility at the northeast of the site is anticipated to start in late summer.
- Architectural drawings for the new Lemonwood campus were submitted by Board action to DSA in January with anticipated approval in July. The project is anticipated to receive California Department of Education (CDE) approval in June and the integration of design and construction of the early childhood development facility at the northeast of the site is also anticipated to start in late summer.
- By Board action, architectural drawings for the new Elm Elementary School were approved by the District and submitted to DSA in June with anticipated approval in January.
- A visioning plan and project budget for a 12 classroom building at Marshall has been presented to the Board and is recommended for project approval as part of this report to address the need for interim 6-8 grade level capacity until a new middle school is constructed and to provide Marshall with additional classrooms and a long-term K-8 educational program option, if desired.
- Necessary actions to acquire the Doris/Patterson property as a middle school site continue. An envisioning process with the Board of a conceptual site plan to establish preliminary feasibility and estimated cost has been undertaken, including the potential to accommodate a District Support Center facility. A similar process is underway to identify the feasibility of an additional elementary site for potential acquisition.

### 1.3 FUNDING & SEQUENCING

Given the Governor’s decision to not replenish the State School Facilities Program (SFP) at this time, the Implementation Program has been adjusted as designed to accommodate the delayed funding of the SFP, if necessary, without negatively impacting the Phase 1 improvement schedule or budget. A plan of adjustment and finance is proposed in this report and summarized as follows:

- The remaining \$30.1 million in authorization of Measure “R” bonds is proposed to be sold in support of Phase 1 projects, including the construction of Lemonwood school and remaining Phase 1 projects. As presented to the Board, the sale of bonds is subject to the granting of a debt waiver by the State Board of Education at its July meeting.

- The \$19.8 million in SFP grant applications approved by the Board and filed with the State on behalf of the southwest land acquisition, Harrington new construction, and Fremont and McAuliffe modernizations are assumed to be available as reimbursements to fund Phase 2 project improvements.
- All applications for modernization and new construction eligibility have been updated and adjusted to incorporate the State’s latest increase in pupil grant amounts, resulting in a total net increase of \$4 million in estimated District eligibility since the December 2014 report.
- Additional applications for SFP grant applications will continue to be prepared, submitted for Board approval, and processed through the State for reimbursement in Phase 2 and 3. The anticipated receipt of these funds continues to require future replenishment funding of the State School Facilities Program (SFP).
- Developer fees will continue to be levied, pursuant to periodic adjustment by the Board as established by the annual developer fee study.
- A detailed expenditure report will be maintained of all Measure “R” funds in support of the Program.

The overall sequencing and timeline has been adjusted as needed to accommodate changes in implementation, including availability of funding, time constraints for third party approvals, and required design and construction schedules. Based on the sequencing approved by the Board in December for Phase 1, all such projects are scheduled to be implemented within Phase 1; except as stipulated below:

- Based on the proposed issuance of the final series of Measure “R” funds, construction of the new Lemonwood campus is now scheduled to begin in the fall of 2015, approximately two (2) years in advance of the original schedule.
- Planning for the proposed multipurpose room improvements at Chavez, Curren, Kamala, and Driffill are proposed to be initiated to maintain and accelerate their construction in Phase 2.
- Prospective land acquisition and associated project reviews, approvals and considerations are proposed for the assignment of budget and timeline adjustments.

## 1.4 RECOMMENDATIONS

It is recommended that the Board:

- Accept and adopt the June 2015 Semi-Annual Implementation Program Update as an adjustment to the Facilities Implementation Program.
- Establish a date at its regularly scheduled December 2015 meeting to consider the next six month update.



## SECTION 2:

# EDUCATION & TECHNOLOGY PROGRAM

The District is in its second year of implementing the reconfigured educational program, which is now focused on school site staff to develop and implement a grade K-5 educational strand focus and program. As planned, once the K-5 educational strands are developed, attention will be focused on integration and articulation with the 6-8 and K-8 academic programs. Over the next six months, additional focus will be placed on staff development and commissioning in anticipation of the Harrington school opening in January as the District's first 21<sup>st</sup> century K-5 facility.

The deployment of 18,000 mobile devices on a 1:1 basis to students and teachers now enables greater integration of technology for daily instruction and promotes improved learning and engagement on Common Core State Standards. The District continues to move forward with procurement of network switching equipment, utilizing an opportunity for Federal E-rate grants to enhance data throughput and improve iPad use. Additional recommendations are included in this report pertaining to the necessary replenishment of iPads at the original pilot school site, McKinna. Over the next six months, CFW will support District staff to further develop a District educational portal to increase parent and student access to learning materials, assignments, and performance.

## 2.1 K-5 ACADEMIC STRANDS

Adopted by the Board of Trustees in January 2013, the Facilities Implementation Program called for the development of K-5 Strand Focus educational themes that better prepare students for matriculation to the middle schools. The first year of implementation at each of the K-5 elementary schools was achieved during the 2014-15 school year and was facilitated by an ongoing process of professional development, principal and small group training, and individual meetings.

The Program Team met on January 7, 2015 to outline a work plan for the development of the Strand Focuses at each of the K-5 schools. Over the course of the next six months, the Team collaborated in the development of Strand Focus programs at each school site, convened meetings with the K-5 principals as a group in January and April, held individual meetings with principals, and provided training to small groups of principals on specific topics that were requested.

The goals of the initial group meeting were to: 1) review components of the Strand Focus program, 2) explain how the Strand Focus integrates with 6-8 Academies, 3) assess where each school was in the development of their Strand Focus, 4) determine specific practices to support the development of Strand Focus programs, 5) establish next steps for each school, and 6) provide support with Board presentations. At the April training, principals were given more specific information on Project Based

Learning, specific iPad applications to use for integration with the curriculum, and support available for ongoing development of the Strand Focus programs.

The process of Strand Focus development began by providing information on the components of a Strand Focus. Specific examples were given and a discussion was held with the principals about possibilities at their school. The Team emphasized how the Strand Focus program integrates with implementation of the Common Core State Standards and Next Generation Science Standards and how to integrate Strand development into these initiatives to add rigor to the academic program. Processes for leadership development and consensus building were provided, including methods to ensure every person has a “voice” in the decision and can take ownership of the Strand Focus. These processes were modeled and principals were trained and encouraged to use them. Implementation plans were reviewed, and principals were given feedback for further refinement.

Specific training on how to develop integrated units for the Strand Focus were also provided. Templates were then developed with the principals to use with their staff. Outlines of integrated units were reviewed and principal were given feedback for improving the depth of rigor for the integrated units.

Meetings with principals were held as needed, and together solutions were developed to overcome barriers the sites encountered in the development process. This was an iterative process with discussions over time which had the benefit of providing leadership mentoring in a “teachable moment” and providing support as situations arose that were not anticipated. Each of the K-5 principals presented an update on their school’s Strand Focus implementation at various Board meetings between January 2015 and May 2015. Part of the implementation required each of the schools to develop integrated units that culminated in a student project or product using their strand focus theme.

In addition to the District’s K-5 programs, a strand focus was initiated be developed by each of the K-8 schools in conjunction with the implementation of a Dual Language Immersion Program. Meetings were held with all of the K-8 principals for training on development and next steps for implementation of a Strand Focus at their schools. A goal was set for June 1, 2015 for each of the schools to reach a decision on their Strand Focus and to begin putting together their Action Plan for Implementation for the 2015-16 school year. As with the K-5 principals, the same training was provided to the K-8 principals on the components of the Strand Focus program, leadership processes to use, and specific tools and templates to use with their staffs for the actual development of the integrated units.

The development of the Strand Focus at some of the K-5 and K-8 schools had the additional benefit of unifying the staff with a common purpose or mission. School staff is working together in a collaborative manner which is one hallmark of a school that provides for strong student achievement. In each of the schools, the integrated units provide more rigor to the curriculum through the integration of language arts, math, and science with other academic disciplines. They also incorporate expository reading and writing (a focus of the Common Core), Next Generation Science Standards, and promote student engagement through creation of projects and products. Due to the emphasis on pacing calendars and double blocking of students for language arts and math under No Child Left Behind (NCLB), there was very little time for other academic instruction. In contrast, the Common Core requires students to use

the standards in an integrated manner, in meaningful ways and to work in collaborative groups to create, problem solve and communicate effectively with others – all of which demonstrate 21st century learning standards. The sections that follow provide detailed reports on the development of an Academic Strand Focus at each of the District’s K-5 school sites and include the plan each school has initiated for ongoing development of their Strand for the second year of implementation during the 2015-16 school year.

### 2.1.1 ELM: THE SCHOOL OF ENVIRONMENTAL & LIFE SCIENCE, AND MATHEMATICS

To choose their Strand Focus, Elm’s Leadership Team held a series of meetings to develop a theme, reviewed programs at the District’s three middle school academies, and considered trends in science and math related employment opportunities. Also considered were the educational assets that students and families bring to Elm School. The team presented suggested themes to the entire school staff, which ultimately chose the Strand Focus: Environmental & Life Science and Mathematics.

The school began by developing integrated units with environmental science in the core curriculum for each grade level:

- For transitional kindergarten and kindergarten, the integrated unit was “Animals Live in Different Environments for Many Reasons”. The students used “Classflow” on the iPad to sort animals into categories, gathered a collection of screen shots on the iPad of animals in their habitats, and illustrated a story report on a selected animal.
- First grade students studied “Exploring Our World: Environment Influences my Life”. Students began by formulating opinions and critiquing their neighborhoods, citing evidence for what they have observed, and then drew conclusions about how the environment had influenced their life. The students then compared locations and re-formulated opinions to see if their original conclusion held true, changed or expanded. They read books about the environmental influences in other parts of the world and used their iPads for research and recording of information.
- In second grade, the students studied natural habitats and the effects on plant and animal life. Students wrote a cause and effect report on seasons and the effect on leopards. They read books about the natural habitats and used their iPads for research and recording of information.
- The integrated unit chosen for third grade was “Conflict Influences a Person’s Decision about Environment”. The students produced written opinion pieces supporting a point of view. Again, students read books on conflict related to the environment and choices people make. They used the iPad for research and recording of information.
- “Amazing Stories: People must Adapt to Changes in Life” was the integrated unit chosen for fourth grade students as it incorporates the life skill of being resilient to overcome obstacles.

Students studied energy sources and the effects of these sources on the environment. They used books and iPads for research.

- In fifth grade, the students studied how the “Environment Creates Change in Groups of People”. They read informational text and created a *Showbie* presentation on their iPads.
- In the After School Program, the students cultivated, planted and cared for the school garden.

The Academic Strand was communicated to parents at English Language Advisory Committee (ELAC), School Site Council (SSC) meetings and at the “Monthly Coffee with Mrs. Ramos” gatherings. In addition, the theme was referenced when EdConnect messages were sent to all parents in the District. The school has also created an Elm University which works with local universities to recruit teacher candidates and provides professional development in science for the teachers currently at Elm School.

The Strand Focus for Elm Elementary will be further developed next year with the addition of an additional integrated unit that uses English Language Development as the controlling standard for the academic focus of environmental and life science and mathematics. The goal of the school is to develop partnerships within the community such as the City of Oxnard and the Environmental Protection Agency to implement a recycling program for the entire school.

### 2.1.2 BREKKE: THE SCHOOL OF SCIENCE AND INQUIRY

For several years Brekke Elementary School has emphasized a focus on student inquiry, in part by utilizing a set of learning tools known as the “Depth & Complexity Icons.” These tools add rigor to instruction and help students explore a subject through its trends, rules, details, perspectives, ethical issues, and changes over time. Given this background, the Brekke staff believed that a Strand Focus of inquiry was a good fit for the work they had already begun. The staff further recommended the addition of science to the Strand Focus, as the staff is passionate about its importance for their students’ success in life. Inquiry is viewed as a necessary component for being a good scientist. Thus, the school became the School of Science and Inquiry.

The school staff was organized into four leadership teams: Strand Focus Development, Common Core State Standards (CCSS), Technology, and Writing. The four teams came together to develop a school-wide Action Plan for implementing a yearlong Strand Focus that integrated each team’s findings. The staff began with a driving question, “How do we get our students involved in science?” This fit with the use of Depth & Complexity Icons as well as the conceptual thinking and complex reasoning required by the CCSS. The school began by having every child participate in labs that focus on the scientific process.

Brekke utilized one of its available classrooms as a science lab and involved every child in lab activities throughout the year. Each month a different scientist was highlighted and students researched what they were known for and how they contributed to the world. Science was integrated with English language arts through expository reading and writing and into math through collecting and analyzing data. Every student kept a science journal of recorded observations and notes. In one lab, the growth of

bacteria was considered: bacteria were collected from around the school, students wrote research papers about Jonas Salk, and looked at different bacteria through microscopes. They read about bacteria as well as made and tested hypotheses on places in the school that would have the most bacteria.

Brekke’s Action Plan for Science and Inquiry is detailed in the chart below:

Month	Topic	Writing Piece	Scientist	Type of Science
October	Observations and Creating Questions	Note taking, opinion statements		
November	Background Information and Research	Expository, taking notes	Jonas Salk	Life
December - February	Forming and Testing a Hypothesis, Data (collecting, analyzing and evaluating results)		Thomas Edison	Physical
March	Forming a Conclusion Based on Results	Writing a conclusion statement	Beatrix Potter	Natural (Biology)
April	Student Conducted Science Experiments (Demonstration vs. Experiments)		Students	All
May	Reflection			
June	Science Fair			

A Science and Inquiry Parent Night was held in May to highlight student work completed during the year and present the plan for the following year. The principal has also spoken about the Science and Inquiry Strand Focus during ELAC and Coffee with the Principal meetings.

Brekke has developed an Action Plan for the 2015-16 school year beginning with the topic of science lab norms, expectations and use of equipment. The next topic will be learning how to make good observations and create good questions. Students will then learn how to gather background information and do research. Beginning in January, 2016, they will work for three months on forming and testing hypotheses, and in collecting, analyzing and evaluating data. In April, students will learn to form conclusions based on the results of science experiments. All topics will be integrated into the CCSS for English language arts, math and the Next Generation Science Standards.

### 2.1.3 HARRINGTON: ENVIRONMENTAL SCIENCES AND THE ARTS

Harrington Elementary has chosen Environmental Sciences and the Arts as their Strand Focus, building upon the use of the school’s garden as a learning environment and adding the arts to prepare their students for the academy curriculum at Haydock Middle School, where many students matriculate.

For the first year of implementation, each grade level developed an integrated unit of instruction in the Arts that incorporated English Language Arts and Math Common Core State Standards, English Language Development standards, technology and project based learning. Outside experts taught music lessons and all students had the opportunity to go on field trips and attend assemblies with an art focus. These events were paid for by grants as well as PTA and school site budgets. The principal established partnerships with local artists through Focus on the Masters, with additional outreach made to establish

art, music and performance programs for the students in addition to creating mentor relationships with university programs.

The school expanded the garden and nutrition education program to all students and organized field trips to local agriculture and marine environments. The staff began using new technology to access virtual learning and participated in science professional development to implement the Next Generation Science Standards. The school leadership team explored the viability of hosting a weather station at Harrington and determined that it is a good fit for the school. In addition, the principal continues to seek partnerships for Science Technology Engineering Arts and Math (STEAM) and applied for the Educational Foundation Grant to expand science projects into the after-school program.

Ongoing communication with parents occurs at parent meetings, via the school web site, and to attendees of fieldtrips as well as Parent Teachers Association (PTA), ELAC and SSC meetings. Because the PTA exclusively funds assemblies and fieldtrips, and because both of these learning opportunities are now integrated with Environmental Science and the Arts, parents receive frequent updates about development of the Strand Focus.

For the 2015-16 school year, the school will add a piano keyboarding class within its new facilities that will give students the opportunity to learn to read music and play an instrument. A second integrated unit is being developed based on efforts by the principal and a local TV station to bring a Weather Station to the school. Once installed, this weather monitoring device will help students learn about weather patterns, how to make predictions based on data, and how to do weather broadcasts. The staff will provide more hands on and project-based learning experiences in the area of Environmental Science while also adding arts activities such as dance to the physical education curriculum. The principal will continue to meet with the Marina West principal and Debbie West to share ideas and develop articulation of the K-5 Strand Focus with the middle school academies while the staff continues to build professional capacity and allocate time and resources to further develop of the program. Parent support will continue with workshops that share their talents in the science and arts with students.

#### 2.1.4 MARINA WEST SCHOOL OF ENVIRONMENTAL SCIENCE AND CREATIVE ARTS

The Marina West staff chose a Strand Focus of Environmental Science and Creative Arts, with particular emphasis on water and agriculture given the proximity of the ocean and agricultural land. The Environmental Science emphasis will prepare students for academy opportunities at Haydock where many of the students matriculate, raise awareness of the human impact on the natural world, encourage environmental stewardship, and develop a foundation for higher education and well-paying jobs in science. The Creative arts emphasis provides an additional outlet for students to display their strengths, provides a way for different types of learners to feel successful, confident and motivated, and establishes another path to college or career choices.

To develop the Strand Focus, staff engaged with Nature Bridge, an organization that provides professional development focused on hands-on learning experiences to students in science. In addition, the principal worked in collaboration with Debbie West and the Harrington principal to share

information, ideas, and resources as well as considered articulation with the three middle school academies. The Parent Teacher Association (PTA) funded an Artist in the Classroom program to provide instruction on drawing, painting, sculpture and dance, while creative writing was highlighted in the Online Writing Magazine that showcased exemplary writing of students from every grade level.

Marina West staff decided that all field trips would be Science and Art oriented: Kindergarteners experience the Butterfly Conservatory, first and second grades saw a performance by Chinese dancers, third grade went to the Natural History Museum, fourth graders attended a Symphony, and fifth grade experienced the Maritime Museum Floating Lab.

The staff developed integrated units in the area of Environmental Science organized around Water/Agriculture and Sharks, with a culminating research paper on the shark selected per grade level:

Grade	Water/Agriculture	Sharks
K	Life Cycle	Nurse Shark
1 <sup>st</sup>	Food Chain	Leopard Shark
2 <sup>nd</sup>	Beach Conservation	Whale Sharks
3 <sup>rd</sup>	Ecosystems	Hammerhead Sharks
4 <sup>th</sup>	Aqueducts	Tiger Sharks
5 <sup>th</sup>	Petroleum Environmental Impact	Great Whites

In the spring, Marina West held an arts event for parents known as the Spring Fling wherein every class showcased student art projects and each grade level performed a dance or song.

Ongoing development of the Strand Focus will include the addition of one more integrated unit for each grade level. Teachers will continue to work collaboratively during their grade level planning time to ensure art is incorporated into core curriculum lessons and units and will align both with Artist in the Classroom projects. In addition, the principal is working with outside organizations to expand the school garden to serve as a living environmental science lab.

#### 2.1.5 MARSHALL: THE SCHOOL OF VISUAL AND PERFORMING ARTS

Marshall has developed a Strand Focus of Visual and Performing Arts, setting an expectation for each grade level to perform in drama, music and dance and to incorporate the visual and performing arts into their core curriculum.

- Drama presentations for second through fifth grade students included a second grade Musical Presentation, a third grade dramatic role play, a fourth grade Musical and Reader’s Theater, and

a fifth grade musical drama. These presentations were integrated with English language arts Common Core State Standards.

- An introduction to instrumental music was provided to fifth grade students, who formed a “band” by learning to read music and play a recorder. The school established a Ukulele Club, participated in the Oxnard Music Advocacy Group (OMAG), held an Evening of Song, and attended the Oxnard High School Winter Show.
- Dance instruction for students in Kindergarten or Transitional Kindergarten integrated singing, while Latin Dancing instruction was provided to all students and fifth grade classes learned square dancing. Dance instruction was further promoted in workshops and interactive assemblies that included presentations by Crenshaw High School Choir and Stepping, Roots of Latin Dance, and Dancing around the World.

Historical connections and world knowledge were integrated through student awareness and discovery of art forms from various cultural backgrounds. Students gained confidence and satisfaction as they learned to identify and distinguish artistic styles, compare and contrast these styles, and engage in problem solving, analysis and synthesis as they worked on their performances. In addition, language development was enhanced through visualization and performance using visual, kinetics-motor and auditory learning modalities.

Students learned about Art History and were engaged in the Visual Arts through individual and cooperative drawing, painting, clay sculpting, and other mediums. Visual Arts was linked to the core curriculum through the use of note taking, developing opinion statements, expository writing, and understanding how to compare and contrast. Each student created one piece of visual art and the Artist in the Classroom program brought additional visual arts experiences to the students. Students participated in Oxnard Scholars Winter Mural and attended field trips to museums and concerts. Like Marina West, the school also held a celebration attended by parents called Spring Fling to feature the work the students had done in music, dance, art and writing.

The Marshall Elementary leadership team has begun planning for future development of their Strand Focus by developing grade level expectations for the Visual and Performing Arts, developing additional units of study that integrate the Common Core State Standards with the Visual and Performing Arts, exploring additional options for reaching out the parents as well as community partners, and evaluating participation in the programs and events held this year to determine what to build upon for next year. A goal for next year is that all students learn how art relates to culture, time periods, history, country of origin and geography. The school plans to expand their music program with enrichment activities in the Afterschool Program such as Ukulele Club, percussion instruction and other visual and performing arts.

#### 2.1.6 MCAULIFFE: SCIENCE TECHNOLOGY ENGINEERING ARTS AND MATH (STEAM)

McAuliffe chose the strand focus of Science Technology Engineering Arts and Math (STEAM) to further explore the identity of the school, whose name memorializes Christa McAuliffe, a teacher assigned to the Space Shuttle Challenger mission and one of seven crewmembers who died in the shuttle explosion.



The McAuliffe staff met several times to develop the STEAM selection and chose to use an inquiry model for their first year implementation.

Staff for each grade level chose a unique driving question around the topic of “Ocean Defenders” as the focus of their integrated unit. The teachers integrated social studies, language arts and math Common Core State Standards with the Next Generation Science Standards for the curriculum units developed. To complete the projects, students were required to collaborate, create, communicate and participate in critical thinking activities that teachers provide through their instruction. The integrated units and student projects are outlined in the chart below:

Grade	Driving Question	Student Project
T/K-K	How can recycling help our oceans?	Illustrate clean and duty oceans
1 <sup>st</sup>	Why are oceans important to me?	Write and display the interdependence between the ocean and humans.
2 <sup>nd</sup>	How do humans affect the ocean habitat and marine animals?	Board display showing the effects of human trash, video display
3 <sup>rd</sup>	How do our local coastal water environments differ and how can we keep it clean?	Mural, musical play “Oceanography,” 3D creations
4 <sup>th</sup>	How did the channel islands affect the history of California?	Publish portfolio of ocean animals and habitats
5 <sup>th</sup>	How are ships designed to travel the sea?	Build a floating ship

Students participated in distance learning through virtual field trips facilitated by their iPads and learned to make presentations to other students, parents and guests at the school’s Ocean Night. Partnerships were developed with the following groups: Aquarium of the Pacific, Jason Learning, Project Noah, Channel Islands National Park, Maritime Museum, Ty Warner, Fillmore Fishery and Island Packers.

McAuliffe will continue to develop their STEAM Strand Focus by working together in professional learning communities (PLC). The school will participate in professional development on the implementation of Project Based Learning and will work to align the Common Core State Standards with efforts to develop integrated units and parent and community partnerships.

**2.1.7 MCKINNA: SCHOOL OF MULTIMEDIA**

McKinna Elementary School has been named an Apple Distinguished School for three consecutive years as a tribute to the early efforts by staff to pilot and utilize iPads for multimedia learning. As the School

of Multimedia, McKinna envisions students shifting from consumers of digital media to becoming content creators prepared for success at the District's middle school academies.

School staff has used the SAMR model (Substitution, Augmentation, Modification, and Redefinition) to integrate instruction with technology, beginning by substituting technology for activities previously done on paper, such as using an iPad app instead of a worksheet, or by augmenting classroom instruction, such as adding use of the iPad's dictionary application to an otherwise traditional lesson. The staff is using technology to modify their instruction, for example by using "Educreations" software that allows students to create reports that can then be presented and shared. The final level of integration requires use of technology to redefine the educational experience. Applications such as iMovie and Vscreen have redefined student created video projects while Skype has created new opportunities for virtual field trips on a regular basis, such as a class video conference with a night zoo keeper in London, England.

In 2013-14, each grade level created one integrated unit and in 2014-15, each grade level created two integrated units. Examples include:

- Kindergarten students began this year with the integrated unit "How do we keep safe?" They created portfolios of images on their iPads of people who are allowed to pick them up from school or other events. Students demonstrate reading, writing, speaking and listening as they create and give feedback on blogs supervised by the school.
- First grade students studied, "What can we do to Make Our World Better for People and Animals?" The students created books on iPads, used Educreations, Story Creator, and made public service announcements.
- Second grade students studied, "What is a Mammal?" They produced a visual and oral report and did research on the iPad.
- Third grade students studied, "How do Animals Adapt to their Environment?" They began by reading "Charlotte's Web." They used Educreations to create reports that they then presented and shared.
- Fourth grade students studied, "What does Culture mean to me?" Students did a culture snapshot, heard from guest speakers, and wrote about Latino culture during National Hispanic Heritage Month. They created a book using Think Link and/or iBooks Author.
- Fifth grade students studied "The Weather," did research on its effects, and created a newscast using iMovie, V Screen or DoInk. The use of "green screens" when doing the weather forecast allows them to superimpose images behind them as they broadcast the information.

Parents and community members attended student presentations and shared their expertise, advice and feedback to the students. For example, the fourth grade participated in a planning project to redesign the school playground. First students drew a two dimensional design, later followed by a three dimensional model on their iPad. The District's Director of Facilities and an architect presented

information to the students, reviewed their plans, and gave feedback on their designs which the students then modified. Every child in the school also participated in “Hour of Code” activities in which they did some form of computer programming. The school partnered with video game developers at the University of California Santa Barbara, who worked with McKinna students as they learned to program video games. The programmers judged the final products the students created, and those scoring high enough entered regional competitions.

McKinna has planned for the ongoing development of their Multimedia Academic Strand Focus, with new integrated units to be decided for each grade level next year and continued use of the SAMR model for full integration of technology into the curriculum and instruction. Students will continue to create digital content using Keynote and iMovie as well as additional multimedia applications. The staff has embraced Project Based Learning and will continue to teach through projects that students create.

### 2.1.8 RAMONA: THE SCHOOL OF ENVIRONMENTAL SCIENCE

Ramona identified a Strand Focus on Environmental Science after gathering input from teachers and parents and examining the Department of Education’s Career Technical Industry Clusters to determine pathways students would be matriculating to at the high school level. The staff then researched science curriculum and selected the Full Option Science System (FOSS), a hands-on elementary curriculum created by the UC Berkeley Lawrence Hall of Science and aligned with the Next Generation Science Standards.

Classroom instruction at the transitional kindergarten through second grade levels focused on exploration. The transitional kindergarten and kindergarten students studied the “Changes around Us: Plants, Animals and People”. First grade studied “Biomes” and performed a play on the same topic, and second grade studied “Structures of Living Things: Plant Life”. Beginning in third grade, the students began to investigate the world, studying “Adaptation in Water/Antarctica.” Fourth grade studied the “Wetlands” and fifth grade studied “Ocean Acidification”. All grades integrated the scientific reading with language arts activities in the classroom.

Additional strand-related activities have included a World Oceans Day attended by parents, where student projects were displayed, three assemblies were held (Mad Science, Trash and Recycling, and Water) and an environmental science fair was conducted. Field trips centered on environmental science were made to the Painted Pony Farm, the California Science Center, and the Channel Islands National Park Visitor Center. An afterschool Junior Science Club has been established for all fourth and fifth grade students as well as GATE students in the third grade. Additionally, part of the library is now utilized as a Maker’s Lab to offer students a place to complete iMovie projects with a green screen or use smaller stations for individual and small group work so that students can work together on projects with an environmental science focus.

Parents are engaged with the Strand Focus through an internet reading program loaded onto each student’s iPad in which students can download up to twenty books at a time, either at school, home or community access locations provided to parents. Over Spring Break, 239 students accessed books

related to Environmental Science and over the course of the school year, a total of 93,000 books were downloaded and 63,000 books read. Students showcased their work on the iPad, and shared their work with their parents, many of whom participated by reading to their children in both English and Spanish.

Ramona will continue to develop their Academic Strand Focus for the 2015-16 school year by offering science professional development to teachers so they may further develop integrated units focused on environmental science that incorporate a technology component. The school will use its Maker's Lab as they add additional activities in which the students create projects with an environmental science focus, such as robotics or electricity from new energy sources. The World Oceans Day will be expanded into a weeklong learning celebration next year and the successful Science Club will be further developed.

### 2.1.9 RITCHEN: THE SCHOOL OF SCIENCE AND TECHNOLOGY

Inspired by science instruction at the District's Middle School Academies, Ritche Elementary staff chose Science and Technology as the strand focus for their school to provide students with essential knowledge for future opportunities in higher education and well-paying jobs. Technology was also chosen to prepare students not only to use technology and digital media in a way that enhances their reading, writing, listening and speaking, but also to have students be creators and problem solvers using technology in the global economy.

In support of the Strand Focus, Ritche adopted the "Train-the-Trainer" or "Expert" model for professional development as it not only maximized school resources, but it also helped with ongoing sustainability. Each grade level sent a teacher representative to the National Science Teacher Association (NSTA) conference as well as another teacher to the Computer Using Educator (CUE) conference. Following their training, the teachers provided professional development for the entire staff, supported their grade level colleagues in creating integrated units, and presented to parents during family events held at the school.

During this first year of implementation, Ritche Elementary developed a unit of study for each grade level that integrates the Next Generation Science Standards with Common Core State Standards for language arts, mathematics, and technology. These units are in the domains of life and physical sciences and include the following titles:

- TK/Kindergarten: Animals live in different environments for many different reasons.
- 1<sup>st</sup> Grade: From Molecules to Organisms
- 2<sup>nd</sup> Grade: Insects and Plants: Investigations
- 3<sup>rd</sup> Grade: Motion and Matter
- 4<sup>th</sup> Grade: Energy and Natural Resources: How their uses affects the environment.
- 5<sup>th</sup> Grade: Mixtures and Solutions/Metric Measurements

The goal for Ritche Elementary was to have technology integrated in all curricular areas. Once receiving iPads in October 2014, the staff decided to begin using and participated in training on iPad applications that could be used effectively by all grade levels (Educreations, Edmodo, QRcodes and ThinkLink). Specific iPad applications that were tailored to the individual needs of students at each

grade level were also chosen. Transitional kindergarten and kindergarten chose “ABCs”, first and second grade chose “Learn to Read”, and fourth and fifth grade chose iMovie.

A pilot enrichment program for GATE identified or other high performing 2<sup>nd</sup>-5<sup>th</sup> grade students was established pursuant to the Local Control Accountability Plan (LCAP). Second and third grades learned computer coding with their iPads and were challenged to learn a new programming language called “Blockly.” Students learned programming vocabulary such as algorithms and iteration and improved math skills as well as engaged in “unplugged” activities to help their understanding. Students in fourth and fifth grades worked on an integrated physics curriculum that focused on roller coasters. They learned Newton’s three laws of motion and completed experiments using the Scientific Method to prove each law, recording their thoughts and findings in a classroom blog. Students completed a research project about important scientists, which concluded with a “Prezi” presentation created by small groups. At the culmination of this unit, students created a roller coaster to demonstrate their knowledge of such concepts as kinetic and potential energy.

The Mouse Squad is a group of fifth grade students in the After School Program that are learning technology skills to troubleshoot problems that arise with computers and iPads. These students are given many opportunities to use their skills during the school day as they troubleshoot technology problems in a real world learning environment.

Ritchen’s plan for ongoing development of its Academic Strand Focus for the 2015-16 school year begins with reorganization of the staff into four committees: Leadership Team, Science Committee, Technology Committee and Writing Committee. These committees will take a leadership role in the ongoing development of the Strand Focus and will collaborate to train the rest of the staff after they have attended training in their respective areas. The goal is to develop a second integrated unit that will use the common core state standards for ELA, ELD, and Next Generation Science Standards and incorporate technology into each of the lessons. As a part of the integrated unit, students will be required to create a project to demonstrate content mastery. Teachers on these committees will host science nights for parents and students and the focus for all students will be on providing further enrichment opportunities in Science and Technology.

#### 2.1.10 ROSE AVENUE: THE SCHOOL OF SCIENCE AND WELLNESS

Rose Avenue staff chose the strand focus of Science and Wellness. This year, each grade level developed an integrated unit with a culminating project. Examples include:

- Transitional kindergarten and kindergarten students studied the “Life Cycle of Animals” and visited the Moorpark Zoo and Underwood Farms. They held conversations about the life cycle of animals as well as read and wrote about farm animals and butterflies.
- First grade students studied the “Life Cycle of Plants”. They learned about sprouting seeds, took plant walks, classified leaves by shape, size, and color, and also visited the Underwood Farms to observe and classify the animals.

- Second grade students studied “Earth’s Fossils”. They researched mammals and predators, developed diagrams, wrote about the animals, analyzed videos, and related the water cycle to the life cycle.
- Third grade students studied “Adaptations and Habitats”. They visited the Santa Barbara Museum of Natural History Sea Center, used binoculars to observe and compare animals, researched various animals and their habitats, made dioramas and dissected birds.
- The fourth grade studied “Ecosystems” and learned about food chains, wrote research papers within foldable books, studied archeology, and toured the Santa Barbara Museum of Natural History.
- The fifth grade students studied “Agriculture and Horticulture”. They propagated succulents, used their iPads for research, and produced drawings of their findings.

Each of the units of study developed was integrated with the Common Core State Standards as noted in the chart below.

Grade	Integrated Unit	Core Curriculum Standards	Student Project
TK/K	Life Cycles - Animals	ELD KP1.B5/B6; KOAA1/AA2; ELA RL K5/K6/K7/K9, RIK6, RIK7, RIK9	Writing a journal entry, writing a number sentence
1 <sup>st</sup>	Life Cycles – Plants	Sci. LS 1.2; Math 1.MD -2/-4; ELA W1.7, PE Movement 3.1; Art Creative Exp 2.6; Social St. 1.2	Paragraph based on research, Math chart with apple graphs
2 <sup>nd</sup>	Earth’s Fossils	ELA R1-10, SL2 Informational Text/Lit.	Animal research report
3 <sup>rd</sup>	Adaptations & Habitats	ELA IT W3.2, RI 3.3 main idea, 3.9, Literacy 3.1,	Research paper & oral presentation focusing on animal adaptation.
4 <sup>th</sup>	Ecosystems	ELA 4 –LS1-1, Math 3, Social Studies 4.1,	Research essay with illustrated poster and oral presentation.
5 <sup>th</sup>	Agriculture & Horticulture	ELA 6-8.7/6-8.8/6-8.9 ELA Lit. 7 Integration of Know & Ideas; 3 Explain Relationships between events, ideas, concepts; Vis & Performing Arts 5.0/5.1	Science fair project and oral presentation

Annual school traditions have taken on the Academic Strand Focus to provide stronger links to learning. For example, the end of the year carnival focused on science and wellness with 15 booths that contained activities such as distribution of bicycle helmets for safety and students collecting plant seeds to take home for their own garden. The annual spring jog-a-thon focused on health and wellness by adding instruction about healthy eating, healthy activity, and how jogging supports the body’s health, with many parents and staff modeling this behavior by participating in the run. This has extended to staff outside of structured events, with some expressing their desire to improve their health and fitness

as role models. Science activities were promoted through a newly established partnership with Ventura Community College, which donated 19 state-of-the-art microscopes.

Rose Avenue will continue to develop their Academic Strand Focus of Science and Wellness, develop a brochure to share with parents and the community, launch a school wide science fair, and add an additional integrated unit at each of the grade levels next year. The Technology Committee is researching iPad applications that support and integrate science and will purchase various applications for the students to use in the 2015-16 school year. Rose Avenue will form a Science Club for additional science enrichment activities and one of the school's two computer labs will be converted into a science lab with an adjoining door into the adjacent computer lab. This configuration will provide a Maker's Lab where students can design work in the computer lab and then build or assemble their work in the science lab.

#### 2.1.11 SIERRA LINDA: THE SCHOOL OF HEALTH AND ART

Sierra Linda chose "Health and Art" as their Academic Strand Focus following staff collaboration through a series of meetings and discussions. For the first year of implementation, the staff created integrated units that culminate in student-created art projects to show content mastery. Students design and illustrate blank pages in their own "Bare Book" by writing a fiction or non-fiction work and creating a related cover design. When finished, each student has their own published book to take home.

For the Health focus of the school, staff emphasized physical education, nutrition, and sports through school wide events such as Jog-a-Thon and Jump Rope for Heart. More intentional emphasis was given to structured physical education instruction and its relationship to good health. The Arts were integrated into the physical education instruction by having students participate in Zumbia dance instruction. Staff used "GoNoodle" to engage students in short physical activities near their desks — also called brain breaks — wherein students learn the relationship between the brain and learning and the importance of motion and physical activity to keep the brain active and engaged. For nutrition, the school participated in a fresh fruit and vegetable program that included a Dairy Council lesson for the students. Students also took a field trip to Underwood Farms. The prior sports program consisted of basketball, volleyball, and track. This year, the school added distance running. This new group receives specific instruction on distance running performance, including proper pacing and the walk-run combination. Distance running has become very popular at the school and has extended to weekend activities that include parents and teachers running with students in local 5K's.

The following table outlines the integrated units taught, standards integrated and the projects students completed.

Grade	Integrated Unit	Core Curriculum Standards	Student Project Completed
TK/K	Down On the Farm	Writing Emphasis: WK.7, WK.8, SLK.1, R1K1 Art Content Standards: 2.2, 2.3	Animal Collage
1 <sup>st</sup>	All Things Change Over Time (ELA CCSS Integrated Unit)	ELA: W.1.2, W1.5, W.1.8, RI.1.1, RI.1.2, RI.1.5, RI.1.7, RI.1.10, RL.1.15, SL 1.1-1.6, ELD.P1.1.10, ELD.P1.1.6 Art Content Standards: Visual Arts 1.3, Theater 2.0	Play – Life Cycles Butterfly Drawings
2 <sup>nd</sup>	Life Cycle Unit	ELA RL.2.1, RL.2.7, RL2.1, SL2.1, W2.5, W.2.7 Art Content Standards: Visual Arts 2.1, Music 2.1	Brochure, gallery walk to showcase brochure, chanting, drawings, diagrams
3 <sup>rd</sup>	Solar Systems/Earth Sciences	ELA: RL3.1-3.10, SCI 3ES.4, 3IE.5 Art Content Standards: Visual Arts 2.0, 2.1, 2.4, Theater 2.0	Drawings of Solar System Play of Solar System (“Vacation on Mars”)
4 <sup>th</sup>	Native American Homes	ELA: W.4.7, W.4.2, SL4.5 Art Content Standards: 4.3	Model of a Native American Home
5 <sup>th</sup>	Voices of the Revolution	ELA Art Content Standards: Visual Arts 1.0	Reproduction of a painting by Grant Wood – The Midnight Ride of Paul Revere

Outreach to parents and the community was conducted through announcements at PTA meetings, Coffee with the Principal, and English Language Learner Advisory Committee meetings. Parents were further engaged attending the school’s Winter Performance featuring student dance and a Spring Art-Literacy Night that showcased student published books.

Sierra Linda has developed a second year implementation plan for the 2015-16 school year. A brochure will be made available to parents and community members when school begins in the fall and the school’s website will be updated to include a focus on Health and Art, showcase the events from 2014-15, and highlight the new events for 2015-16 school year.

Future school events have been planned that further develop pride and excitement for staff and students on an annual basis. These include an Animal Theme Sing Along for TK-K, art shows for first and second grade, a “Vacation on Mars” play for third grade, a “Gold Rush or Bust” play for fourth grade, and a Revolutionary War themed play for fifth grade.

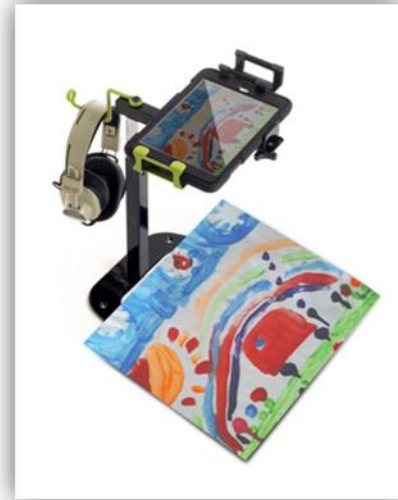
Art Trek, Artist in the Classroom and Art of the Masters will provide additional Academic Strand activities and physical education curriculum and materials will be purchased to support the rigor of the PE program and its integration with Art and Health. Sierra Linda will expand its sports teams, add additional field trips to support Health Standards, add an additional integrated unit for each grade level that reflects Art, Music, Performance, and Health, and incorporate technology to expand Visual Media Arts and Music.



## 2.2 TECHNOLOGY PROGRAM

The District's Facilities Implementation Program guides and envisions two mutually supportive technology goals: the purchase, provisioning, deployment, and instructional use of a mobile device to each district student and teacher ("1:1 devices") and the improvement of facilities necessary to support current teaching and learning approaches as well as enhanced interactivity, collaboration, and flexibility made possible by the use of these devices as part of daily instruction ("21<sup>st</sup> century learning environments").

The first of these goals was realized in the fall of 2014, when Apple iPad deployment was completed Districtwide and an estimated 18,000 devices were provided to District students, staff and school site personnel. The deployment was completed ahead of schedule by almost 18 months.



The second goal has been implemented on an ongoing basis, first with the improvement of 22 classrooms across eight different school sites in the summer of 2014, and now with the construction of Harrington Elementary School, the District's first campus to be fully designed and built to apply the concepts of 21<sup>st</sup> century learning environments in every one of its 23 classrooms and support facilities. Classrooms at the new Harrington facility are each outfitted with one or more 60" flat-screen AV displays. Teachers will be able to control the displays using a standard remote control and may view enlarged applications, documents, videos, and learning exercises from their iPad screens using a wireless connection within the classroom.

The convenience of this classroom technology integration is furthered when an instructor wishes to visually share an object, piece of paper, or writing surface with the rest of the classroom as part of instructional activities (e.g. a Kindergarten teacher demonstrating how to write letters on the dotted line of a piece of paper; a lesson on multiplication tables wherein a teacher places a page of warm-up exercises on the screen; a social studies lesson showing a picture of the pyramids from a textbook). Enabling this practice has long required either a costly addition to classroom equipment or ongoing maintenance costs, and is characterized by devices such as overhead projectors, document cameras, or Promethean boards. New Harrington classrooms will be equipped with an iPad mounting stand that allows teachers to take advantage of the iPad's camera mode to wirelessly transmit a live picture to the classroom. This provides identical capability to document cameras, but without the added equipment cost. Moreover, this solution alleviates costly projector bulb replacement and staff time for maintenance of Promethean boards, suffers none of lighting limitations that occur when using projectors, and allows the option of free movement of the instructor throughout the room in such a way that they are no longer "tethered" to the equipment at the front of the room.

## 2.2.1 BUDGET

The iPad deployment has been achieved within budget, setting aside remaining Phase 1 funds for upgrades to District infrastructure and network hardware as well as select replacement of older devices in circulation purchased prior to the District's 1:1 program implementation.

Nearly all but 750 of the District's approximately 18,000 iPads were purchased as part of the Facilities Implementation Program budget of \$11,201,175. Prior to establishment and adoption of the Program, McKinna Elementary School utilized a combination of site discretionary funds and District special education funds to launch a pilot initiative of classroom iPads starting in 2010. While the McKinna devices are not yet functionally obsolete, their operating systems will no longer support upgrades by the end of 2015 and District peripherals (e.g. keyboards for SBAC testing) purchased for the 1:1 program are not compatible with the discontinued interface utilized by these older models. Moreover, the Program budget had anticipated 1:1 device deployment at all school sites in order to establish a District-wide standard of features, functionality, and maintenance.

As documented within this report, expenditure analysis thru April, 2015 accounted for technology expenditures in the amount of \$10,450,878, in line with original estimates of the funds required to deploy mobile devices through the fiscal year ending 2016. A total of \$750,297 remains available as of that date and may be utilized as the funding source for remaining District devices yet to be deployed to McKinna as well as equipment needs pertaining to the Phase 1 technology deployment.

In the December 2014 report, it was anticipated that a substantial portion of the remaining funds would be required for upgrades to network switching technology to better manage the increasing day-to-day bandwidth required for District-wide iPad use. This includes implementation of "Layer 3" technology and the improvement of uninterruptable power supply (UPS) components to minimize disruption to wireless network connectivity and prevent power fluctuations from damaging expensive network equipment. In pursuit of reduced District expenditures, the Program Team recommended an approach whereby these improvements were included within an application for Federal E-Rate funding. As a result of this grant application process, as much as 80-90% of the cost of infrastructure may ultimately be funded by the Federal government, reducing the District's anticipated share of expenses to approximately \$215,000.

In a similar fashion, the Program Team is exploring methods to decrease the cost of replacing the 750 older iPads in circulation at McKinna. New District-purchased devices are estimated to cost approximately \$305,000, including required taxes and fees. However, given the particularly strong resale value of used iPads on the secondary market, Apple has indicated it may be able to further discount pricing based on the "trade-in" value of the older devices. At this time, older devices may qualify for as much as a \$110 trade-in value per unit, reducing the total cost of device replacement by approximately \$80,000. As with any technology product, depreciation is typically accelerated by new product announcements or obsolescence of older devices, and thus the trade-in value of these older devices would be expected to decrease considerably if not utilized at this time.

The Program Team recommends that a portion of the remaining Phase 1 technology budget be utilized toward the District's required local match for Federal E-Rate funding of network and infrastructure upgrades as well as for the replacement of the 750 original McKinna iPads in order to fully integrate these users with the District's 1:1 device program.

### 2.2.2 FUTURE DEPLOYMENT AND INTEGRATION

Initial iPad deployments in the fall of 2013 and spring of 2014 as well as the first District-wide deployment in the fall of 2014 now form the basis of staff expertise in the management of a 1:1 device program, with this experience enabling ongoing improvements to policies, procedures and site practices. The District now operates multiple simultaneous deployment teams to accommodate distribution of devices to parents and students across all District schools. The entire district-wide distribution in fall 2015 is anticipated to be completed at all sites over approximately six weeks.

As with prior deployments, the fall 2015 process is anticipated to include scheduled sessions with parents to deliver the device and provide training on setup, proper use, and safekeeping. These deployment events provide parents an opportunity to learn about the District's self-insurance pool, which provides a low-cost option for protecting each iPad against theft or accidental damage. The District now takes advantage of features and tools that have been introduced by Apple to accelerate the setup process for each iPad, including bulk account creation, eliminating some of the tedious process that previously was required of parents and expanding the amount of time in training sessions dedicated to operating the device and utilizing educational resources.

The Program Team continues to dedicate its attention to integrating all devices into the academic program as well as improving the utilization of the District's systems via a "portal" solution. Today, for example, a student or parent visiting the Oxnard School District website ([oxnardsd.org](http://oxnardsd.org)) on their District issued iPad are greeted with a wealth of options for learning about District news and logging-in to websites of various third-party District vendors that provide access to attendance data, grades, homework assignments, or learning materials. A "portal" serves to integrate these disparate third-party functions into a format designed to maximize convenience for students and parents. Transparency and ease of access to these important metrics can be further improved when data are consolidated into a student "dashboard" that provides a quick review of a student's performance. Though simple in concept, the programming and digital security for such integration requires substantial effort. As such, the Program Team will explore options that best position the District to take advantage of these tools using an approach that is efficient with both cost and District staff time.

The Program Team continues to meet regularly to assess technology deployment issues and consider short and long term planning needs. At these meetings, progress reports on technology integration are discussed and recommended next steps are reviewed. A technology transformation timeline is consulted where needed to ensure that program elements are sequenced effectively, and is updated every six months to reflect completed work. The semi-annual Master Schedule update incorporates technology updates and has been provided along with this report document.

## SECTION 3:

# FACILITIES PROGRAM

To date, the Phase 1 improvements have been implemented at eleven existing school sites. The acquisition and development of three additional school sites and the proposed expansion of Marshall school to accommodate 6-8 grade level students increase the scope of the Program to fifteen sites. This section provides summaries and updates on the status of facilities projects completed, planned, or under construction as well as proposed adjustments.

### 3.1 PROJECT 1: KINDERGARTEN & SCIENCE RECONFIGURATION

Project 1 of the Facilities Implementation Program provided 21<sup>st</sup> century learning environments and modernization upgrades to 22 classrooms spread across eight school sites. The original scope of work was completed in August 2014, supporting the District's grade reconfiguration with additional Kindergartens and science instructional facilities. Specific project improvements consisted of kindergarten Improvements at Brekke, McAuliffe and Ritche Elementary Schools; K-8 science lab modernizations at Chavez, Curren, and Kamala Elementary Schools; and academy science upgrades at Fremont and Haydock Academies.

Once completed, facilities projects must be closed out with certification by DSA demonstrating that DSA is accepting the work as being performed and completed per the plans and specification. Seven of the eight sites are now closed out with DSA certification, while the eighth site, Ritche, is scheduled for construction of a Special Day Classroom (SDC) in summer of 2015.

### 3.2 DRIFFILL KINDERGARTEN RECONFIGURATION

The Driffill kindergarten reconfiguration project is being managed by the District's Facilities Department, but is included in the Measure "R" Program budget. It is not within the CFW program management scope of work. The project provides for the construction of a new kindergarten building with four classrooms at the Driffill school site to replace aging facilities and requires the demolition of Building 8, removal of three portables, and related site work.

DSA approval of the project was received in October 2014 and put out for public bid with a bid opening date of November 21, 2014. Original bids for the project were beyond the budget value provided and redesign was performed in order to bring the plans and budget in line with the bidding market. Both the value engineering and constructability reviews were completed by the architect of record and construction manager in February 2015 culminating in a new plan to remain within the original budget. The plans were recently re-advertised to the public for bidding purposes. Per the Executive Director of

Facilities, the project construction schedule has been adjusted for an anticipated construction start in the third quarter of 2015, and completion in February 2016.

### 3.3 LEMONWOOD RECONSTRUCTION

The Lemonwood reconstruction project provides for the replacement of the aging facilities at the Lemonwood School site with a new grade K-8 school facility. The new school has been designed pursuant to Board specifications to serve a 900 student capacity per State loading standards and to maximize reimbursements from eligible SFP new construction grants. The Board approved the final design at its February 2015 meeting for submittal to DSA for review and approval which is anticipated in July. Construction has been planned over three phases in order to minimize disruption to the existing academic program and accelerate the availability of portions of the completed campus. Phase 1 includes the construction of the main 2-story classroom building and is projected for completion in the summer of 2016. Phase 2 construction provides for the new administration and multi-purpose room buildings and Phase 3 includes the new kindergarten facilities and final site work, both anticipated to be completed in 2017.

#### 3.3.1 EARLY CHILDHOOD DEVELOPMENT CENTER

The reconstruction of the Lemonwood facility also retains and repurposes Building 3 of the original campus for use as an Early Childhood Development facility. The facility will provide classrooms that meet Board approved specifications for enhanced kindergarten programs that may also accommodate transitional kindergarten or preschool programs as may be required by the District. Programming for the facility, a conceptual reconfiguration, and budget were presented to the Board in February 2015. At that time the Board directed staff to proceed with the design of the project and to return for formal approval as part of the June six month review.

It is recommended that the District retain the same design and construction team for the balance of the Lemonwood project to construct the Early Childhood Development Center. The goal is to initiate design drawings as soon as possible and integrate the construction of the improvements with the final Phase 3 construction of the broader Lemonwood project. As has been the case in all other projects, design and construction contracts will be presented for Board approval when ready and a detailed schedule and update will be provided as part of the next six month review.

### 3.4 HARRINGTON RECONSTRUCTION

The construction and replacement of the existing Harrington Elementary School with a new 28 classroom, state of the art K-5 facility is well underway. The new campus is designed pursuant to Board specifications to serve a capacity of up to 700 students per State standards and to maximize reimbursements from eligible SFP new construction grants. Construction activities began in September 2014 with a projected completion in December of 2015. The new school replaces one of the oldest

schools in the district that was found in need of replacement to maintain continued K-5 grade capacity in the area.

All 5 building exteriors have been completed, site work is underway, and interior finishes and landscaping is anticipated to commence in August. A camera has been mounted at the site and connected to the school District and Measure “R” bond websites for live viewing of the progress. Once the new facility is occupied, work will begin on demolition of the existing buildings as well as associated site work and parking.

#### 3.4.1 EARLY CHILDHOOD DEVELOPMENT CENTER

Like Lemonwood, the reconstruction of the Lemonwood facility retains and repurposes Building 3 of the original campus for use as an Early Childhood Development facility. The facility will provide classrooms that meet Board approved specifications for enhanced kindergarten programs that may also accommodate transitional kindergarten or preschool programs as may be required by the District, in particular the current NfL program and the Buenaventura Migrant Head Start.

Programming for the facility, a conceptual reconfiguration, and an updated budget were presented to the Board in March 2015. The updated budget adjustment calls for an increase of \$189,575 to incorporate additional classrooms previously slated for demolition and now proposed to become part of the improved facilities. It is recommended that the Board approve the revised scope and budget as part of this report. As has been the case in all other projects, design and construction contracts will be presented for Board approval when ready and a detailed schedule and update will be provided as part of the next six month review.

#### 3.4.2 FURNITURE, FIXTURE & EQUIPMENT

A final list of products has been prepared, containing selections from multiple manufacturers to furnish the new Harrington school. Furniture will be ordered by the District to be received in time for the required furnishing and opening of the new school. During the process, specifications were generated with assistance from the design consultants to meet the 21<sup>st</sup> century needs of the school and to be considered for further use in the furnishing of the new Elm and Lemonwood schools. These new learning environments are designed to support a flexible, collaborative and project based teaching methodology as well as integrate the use of interactive learning tools such as 1:1 mobile technology into the classroom.

Selection choices were focused on teacher and student engagement and furnishings that best encourage and increase communication, collaboration, creativity, critical thinking, and working strategically with others. There was a strong desire to select furniture that provides flexibility and mobility so that students can regroup themselves quickly and easily and that can be adapted to the preferred lay-out of future teachers; including modular storage and other components that can be reconfigured over time or moved between classrooms as needed. Moreover, there was a strong need for the product to demonstrate durability, a built to last feel, and the ability to respond to changes

brought about by the implementation of new technologies, including second, third and fourth generation 1:1 devices.

### 3.5 ELM RECONSTRUCTION

The final project design for the K-5 Elm reconstruction project was presented to the Board and approved in May 2015 for submittal to DSA for review and approval of construction drawings. At that meeting, a budget increase adjustment of approximately \$906,400 was recommended to be approved as part of the next six month report to accommodate increasing costs in construction since the project was formulated in January 2013. The project replaces an older school with 25 new classrooms to serve up to 600 students per State standards and to maximize reimbursements from eligible SFP new construction grants. The project has undergone preliminary review by the California Department of Education, with final approval anticipated subsequent to DSA approval. The project is currently scheduled for DSA approval in January and for the start of construction in the first half of 2016. It is recommended that the Board approve the increase to budget as part of this report.

### 3.6 MARSHALL NEW CLASSROOM BUILDING

At the Board's April 2015 meeting, an analysis of projected enrollment growth in grade levels 6-8 by the District's enrollment consultants was presented demonstrating a need to create additional permanent capacity. Based on the status of efforts to acquire a new site and the timeline required to construct a new middle school, it was determined that an interim solution was required. Various options were presented, including increasing permanent capacity at Haydock and Fremont schools, as well as creating additional grade 6-8 capacity at Marshall school.

The Board identified the construction of a twelve (12) classroom building at Marshall as a preferred option, and suggested staff return with a recommendation for Board action as part of the June six-month update. As envisioned, Marshall would contain 40 permanent classrooms at completion and include updated parking to satisfy the District's specification for K-8 facilities with a capacity for up to 900 students. The project will be designed to meet the interim 6-8 grade level capacity required until a new middle school is constructed and to provide Marshall with additional classrooms and a long-term K-8 educational program option, if desired. The process of requesting proposals for design and construction services has begun and will be presented for Board approval when ready along with a detailed schedule and update. As directed, an estimated budget of \$8,097,558 has been prepared, subject to the Board's approval and adoption as part of this Semi-Annual report.

### 3.7 LAND ACQUISITION

Based on enrollment projections by the District's demographic consultant, the Program requires the planning and acquisition of additional school sites to accommodate anticipated enrollment increases in future years. Efforts for acquisition of additional school sites have concentrated in the District's southwest area as part of the Seabridge development, the northwest area near the intersection of Doris



Avenue and Patterson Road, and in the southeast area of the District. The District's overall capacity is heavily impacted by smaller school sites, a built out environment with minimal areas for new school sites, aging facilities in need of replacement or repair, a large number of portable buildings, many which now exceed their economic life, and a projected growth in student population.

### 3.7.1 SOUTHWEST SCHOOL SITE

Land acquisition of the Southwest School Site is complete. The site was purchased in June 2013 pursuant to Coastal Commission approval. State SFP grant applications for reimbursement of site acquisition costs under the new construction program have been approved by the Board and submitted to the State. Pending State reimbursement, the District continues to resolve outstanding grading issues with the seller of the site. Conceptual site plans were prepared as part of the Coastal Commission process.

The parcel is designed as a joint use site with the City of Oxnard providing an immediately adjacent park site for use during school hours. The conceptual design accommodates a student population of approximately 630 students at State loading standards. The planned construction of the site is proposed to be considered as part of the District's overall plan for mitigating new enrollment growth district wide and subject to active funding by the State SFP. At this time, the SFP is oversubscribed by new school construction applications and requires a replenishment of funding by the State in order to proceed to actively fund similar new construction applications.

### 3.7.2 DORIS/PATTERSON SCHOOL SITE

The District has been engaged with property owners and the City of Oxnard regarding acquisition of a 20-acre parcel that may be suitable for a 6-8 middle school near the intersection of Doris Avenue and Patterson Road. Enrollment projections indicate that the District may need a new middle school by 2020. A conceptual feasibility study was presented to the Board at its May 2015 meeting. Pursuant to the Board's adopted specifications for new middle school facilities, a 1200 student facility is the subject of study with specified support facilities, parking, and play fields.

The District continues to proceed with the proposed acquisition of the site. Necessary reviews and studies required by the California Department of Education for school site approval have been underway, including preliminary geological and environmental surveys. Additional consultants were approved by the Board at the February 2015 meeting to conduct a site survey and legal description. The District continues to monitor the progress of the adjoining and proposed Teal Club residential development through communication with the City of Oxnard. The Environmental Impact Report produced by the developer and provided to the City has yet to be released. The District will continue to seek CDE approval and maintain communications with the owner, the City of Oxnard and necessary local agencies with respect to the District's interest in purchasing the property and building a new school. At this time additional funding of \$ 275,000 is requested to continue with the necessary planning, testing, negotiation, acquisition, and approval efforts from the Program Reserve.



### 3.7.3 SOUTHEAST SCHOOL SITE

In consultation with representatives of the California Department of Education, alternative sites for the construction of a new K-5 elementary school to alleviate overcrowding in the Southeast quadrant of the District have been under review. The site must be large enough to accommodate the development of a 700 student K-5 facility, pursuant to the District's specification and standards and to maximize reimbursements from eligible SFP new construction grants. Additional sites are still being reviewed and considered. The effort is heavily impacted by the lack of readily available land for school construction within the boundaries of the city, thus requiring the need to consider sites that may be repurposed for school use. In these cases, CDE approval is contingent of necessary site tests and reports be conducted on land the District does not own which further complicates the review process.

Once the District and the California Department of Education are in agreement as to the site(s) most feasible for development into a new elementary school, efforts with existing owners to obtain access for additional testing, reviews and acquisition similar to those at the Doris/Patterson site will be undertaken. It is recommended that the Board approve an additional \$85,000 from the Program Reserve to the Adopted Budget to provide for further planning, testing, negotiation, and acquisition efforts.

### 3.8 MULTIPURPOSE ROOM CONSTRUCTION AT P/P K-8 SITES

During Phase 1, a reuse of plans approach substantially reduced the overall timeline, design and construction cost for each new school, including classrooms and support facilities. In the reuse of plans approach, the District requested that prequalified design firms present proposals to reuse the plans of school facilities they had previously built for other districts that could be adapted for construction in Oxnard. The Board reviewed submittals, toured the actual built facilities, requested modifications, and approved the final revised plans for construction of Oxnard facilities. This has led to the design and proposed construction of Harrington, Elm and Lemonwood classrooms and support facilities.

The Board is now being requested to consider the next step in its reuse of plans approach – allowing for the reuse of the plans for Harrington, Elm and Lemonwood to build the required support facilities at its “Portable to Permanent” (P/P) K-8 schools. The District now has two design options (Harrington and Elm) for construction of support facilities for multipurpose rooms at Chavez, Curren, Kamala, and Driffill. These plans have already been revised to accommodate District specifications and budget constraints. As pointed out by LPA, the District's Master Plan consultants, the P/P improvements at these sites were built to replace portable classrooms and not necessarily master planned to accommodate future support facility improvements. It is proposed that the Board adopt a recommendation to allocate an initial budget of \$175,000 to be funded from the Program Reserve to allow for the initial work program to proceed for the selection, planning, siting, and method of construction of the proposed multipurpose improvements at Chavez, Curren, Kamala and Driffill. As in the previous efforts, the Board will have the opportunity to receive updates on the initial work program, tour proposed options, request modifications, and approve the final plan of action and necessary steps and construction budgets

**TABLE 1: DISTRICT ADMINISTRATIVE SUPPORT CENTER SPECIFICATIONS**

Use	Sq. Ft.	Unit	Total Sq.
<b>Departments &amp; Staff</b>			
Dept Heads/Directors - Private	285	20	5,700
Business Dept. Staff	80	11	880
Purchasing Staff	80	3	240
Educational Services Dept. Staff	80	25	2,000
Human Resources Dept. Staff	80	12	960
Risk Management Staff	80	2	160
Special Education Dept. Staff	80	16	1,280
Nutrition/Health Services Dept.	80	4	320
Technology Dept. Staff	80	12	960
<b>Shared Spaces</b>			
Board Room / Training Space	2,000	1	2,000
Large Conference Room	800	2	1,600
Small Conference Room	400	2	800
Tech Workroom	500	1	500
Reception	300	1	300
Staff Lounge	450	1	450
Mail Room/Delivery	300	1	300
Textbook Processing Area	500	1	500
Storage Areas	100	10	1,000
Circulation	1,250	1	1,250
<b>Administrative Office Space</b>			
Private Office	350	1	350
Private Office	325	2	650
Private Office	285	1	285
Admin Assistant	100	3	300
Admin Assistant	80	1	80
Conference Room	500	1	500
Storage	75	4	300
<b>Total Square Footage:</b>			<b>23,665</b>

### 3.9 DISTRICT SUPPORT CENTER SPECIFICATIONS

The District’s January 2013 Facilities Implementation Program established educational specifications for facilities as required by Education Code 14001 and 14030. These specifications outline essential educational concepts and detailed facility requirements so that the form of the school facilities effectively follows the function required by the educational program. These specifications also help to anticipate activities and costs associated with the modernization and construction of school facilities and to evaluate space requirements needed to operate District functions.

At its May 2015 meeting, the Board was presented specifications for consideration of required central administrative facilities. The existing configuration of District office facilities consists of the reuse of a former lumber yard facility and does not allow optimal configuration in support of a professional work environment that produces staff and community collaboration, efficiency, and an interdepartmental team approach to resources and problem solving.

The District's administrative support center facilities are currently located at the corner of Wooley Road and A Street and housed in approximately 35,000 square feet of refurbished space. A purpose-built Support Center has been studied as part of the Doris Avenue site acquisition and draft specifications have been proposed to the Board for consideration. A total of 23,665 square feet is recommended. The study at the Doris site includes a two-story facility with staff workspace and offices for major departments, as well as a community oriented board room and adjacent conference spaces. A proposed budget and cost analysis has been prepared for Board consideration in the funding section of this report. However, it should be noted that facilities for maintenance and operations, warehousing and receiving, and a bus yard facility are proposed to be housed separately in a more appropriate light industrial/commercial environment, outside of the proposed budget.

### 3.10 RECOMMENDATIONS

The following facilities program components are recommended for Board adoption as part of this fifth Semi-Annual Implementation Program Update:

- Provide for a budget increase adjustment of \$189,575 to incorporate additional classrooms previously slated for demolition and now proposed to become part of the improved Early Childhood Development facilities at Harrington
- Increase the budget for the Elm Reconstruction Project by \$906,400 to accommodate increasing costs in construction since the project was formulated in January 2013.
- Increase the budget for interim middle school improvements by \$3,007,039 to design and construct the required 12 classroom building at Marshall Elementary to accommodate a grade 6-8 program.
- Proceed with a \$275,000 budget increase from the Program Reserve for the necessary site planning, local and State agency reviews, testing and land acquisition and site development requirements for a future middle school at the Doris/Patterson site.
- Establish an initial budget of \$175,000 to be funded from the Program Reserve for the initial selection, planning, siting, and method of construction of the proposed multipurpose improvements at Chavez, Curren, Kamala and Driffill.
- Adopt specifications and proceed with planning activities required for a future District Support Center
- Proceed with an \$85,000 budget increase from the Program Reserve for necessary planning, testing, negotiation, and approval efforts for the proposed acquisition of an additional elementary school site in the Southeast portion of the District.

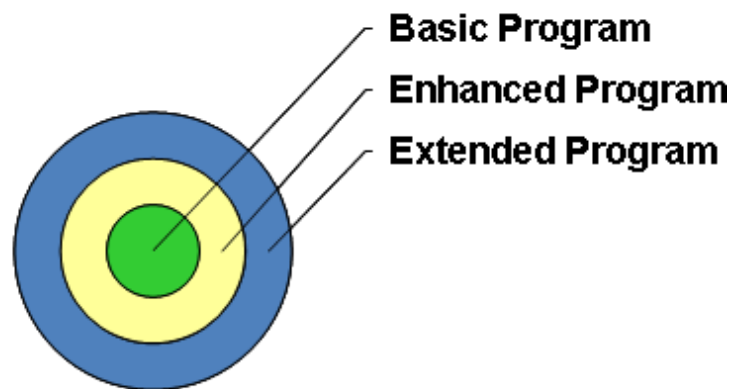
- Provide a portion of the remaining Phase 1 technology budget towards the District's required local match for Federal E-Rate funding of network and infrastructure upgrades as well as for the replacement of the 750 original McKinna iPads in order to fully integrate these users with the District's 1:1 device program.

## FUNDING & SEQUENCING

In January 2013 the Board adopted an Implementation Program for a comprehensive approach to Measure R improvements. The program called for an approximate \$190 million capital improvement program that would substantially improve required facilities at multiple sites over three phases based on the availability of local funding, the eligibility for State facilities grants and alternate levels of projected State funding.

Based on these parameters, three alternate levels of program scope and funding were considered:

- **Basic Program:** The Basic Program would rely on local funding only. These local funds include the District’s current fund balances for developer fees as well as Capital Program fund balances which include Measure “R”, “L”, and “M” proceeds, State reimbursement from completed projects, and Mello Roos proceeds
- **Enhanced Program:** The Enhanced Program would rely on the Basic Program, plus matching State grants for Modernization (60/40) and New Construction (50/50) under the State’s School Facilities Program
- **Extended Program:** The Extended Program would rely on the Basic Program, plus the Enhanced Program, plus State Financial Hardship Funding to provide the District’s local match share for Modernization (40%) and New Construction grants (50%)



Under the adopted program, the District would proceed with the implementation of the Basic Program for Phase I improvements, and thereafter would proceed with the Enhanced Program as State grants became available, subject to the continued availability of a local match. The use of the Extended Program would rely on the strategic sequencing of projects to maximize State grants under the Financial

Hardship Program, plus local funding under the Basic Program. The ability to use these funds would be based on the passage of a future State bond, program changes by the State, and local decisions or requirements to construct projects for which the District will have no opportunity to seek reimbursement or participation by the State.

#### 4.1 ADOPTED MASTER BUDGET

The following Program Master Budget on Table 2 was adopted as part of the Facilities Implementation Program, based on Board approved projects and estimated costs at the December Six Month Update. The costs associated with construction are generally identified as “hard” costs and “soft” costs. In combination, they comprise what is properly called the total “project” cost. Hard costs are resultant from the construction itself (e.g. materials and labor). Soft costs are those costs that are an integral part of the building process and are usually preparatory to, or supportive of, the construction. These include professional fees and other related, but non-construction costs (e.g. design development, legal services, permitting, etc.). For the purpose of designing a program Master Budget, all-in total project costs, inclusive of both hard and soft costs, were used. Additionally, unit prices are sourced from the latest version of Saylor construction cost manuals in 2014 dollars.

The adopted Master Budget anticipates project funding for approximately \$202 million from various sources by phase and over time, including Capital Program fund balances from Measure “R”, “L”, and “M” , State reimbursement from completed projects, Mello Roos proceeds, and developer fees. The largest portion relies on the issuance of the full \$90.0 million in Measure R bond authorization. The balance is anticipated to be available from prior bond sales, collected and projected developer fees, reimbursements from prior and ongoing state aid projects and collected Mello Roos proceeds.

Phased improvements are scheduled as follows:

- Phase 1: The first phase of the implementation program began in 2013 and extends through the fiscal year ending in 2017. Major work is focused on the implementation of the educational reconfiguration plan during this phase and includes acquisition of a new elementary school site, design and reconstruction of Harrington, Elm, and Lemonwood schools, improvement of kindergarten facilities at Ritche, Brekke, McAuliffe, and Drifill schools, and design and construction of science labs at Chavez, Curren, Kamala, Haydock, and Fremont schools. Phase 1 also includes funding for the deployment of new technology to improve student and teacher access to state-of-the-art learning resources, childhood development centers at Harrington and Lemonwood schools, a twelve classroom grade 6-8 expansion at Marshall school, and a program reserve to fulfill required, but as yet unanticipated, changes to the scope of work. This portion is highly dependent on the implementation of the Basic Program, which is funded from local available funds.
- Phase 2: The second phase of the implementation program begins in 2017 and extends through the fiscal year ending in 2020. Major work during this phase includes the improvement of Fremont and Haydock Middle School gyms/multipurpose rooms, the scheduled replacement funding for new technology, and the design and construction of multipurpose rooms at Chavez, Curren, Kamala and

**TABLE 2: ADOPTED MASTER BUDGET (FY 2013 – FY 2026)**

Sources	Est. Total	Phase 1	Phase 2	Phase 3
Measure "R" Authorization				
Series A	\$ 18,390,000	\$ 18,390,000	\$ -	\$ -
Series B	\$ 25,500,000	\$ 25,500,000	\$ -	\$ -
Series C	\$ 15,750,000	\$ 15,750,000	\$ -	\$ -
Series D	\$ 18,500,000	\$ -	\$ 18,500,000	\$ -
Series E	\$ 11,860,000	\$ -	\$ -	\$ 11,860,000
Measure "L" Authorization	\$ 3,316,728	\$ 3,316,728	\$ -	\$ -
Measure "M" Authorization	\$ -	\$ -	\$ -	\$ -
State Bonds	\$ 285,166	\$ 285,166	\$ -	\$ -
Est. State Aid Receipts	\$ 51,639,682	\$ 32,510,565	\$ 7,715,269	\$ 11,413,848
Est. Developer Fees	\$ 36,733,314	\$ 10,100,619	\$ 8,792,399	\$ 17,840,297
Mello Roos Proceeds	\$ 9,088,089	\$ 9,088,089	\$ -	\$ -
State Reimbursements (Driffill)	\$ 9,001,083	\$ 9,001,083	\$ -	\$ -
Est. Interest Earnings	\$ 2,378,500	\$ 1,173,945	\$ 886,823	\$ 317,732
<b>Est. Total Sources</b>	<b>\$ 202,442,562</b>	<b>\$ 125,116,194</b>	<b>\$ 35,894,491</b>	<b>\$ 41,431,877</b>

Uses	Est. Total	Phase 1	Phase 2	Phase 3
Acquire Site New Elem K-5	\$ 7,625,000	\$ 7,625,000	\$ -	\$ -
Acquire Site New SE Elem	\$ 60,000	\$ 60,000	\$ -	\$ -
Acquire Site New Middle School	\$ 60,000	\$ 60,000	\$ -	\$ -
Reconstruct Harrington ES	\$ 24,020,947	\$ 24,020,947	\$ -	\$ -
Reconstruct Elm ES	\$ 20,170,543	\$ 20,170,543	\$ -	\$ -
Reconstruct Lemonwood K-8	\$ 32,262,636	\$ 32,262,636	\$ -	\$ -
Marshall K-8 (CR)	\$ 5,090,519	\$ 5,090,519	\$ -	\$ -
Driffill K-8 (K/MPR)	\$ 6,371,802	\$ 2,477,832	\$ 3,893,970	\$ -
Chavez K-8 (SL/MPR)	\$ 2,594,211	\$ 586,632	\$ 2,007,579	\$ -
Curren K-8 (SL/MPR)	\$ 5,127,912	\$ 546,412	\$ 4,581,500	\$ -
Kamala K-8 (SL/MPR)	\$ 2,628,568	\$ 544,028	\$ 2,084,539	\$ -
McAuliffe ES (K/MPR)	\$ 1,740,679	\$ 299,954	\$ -	\$ 1,440,725
Brekke ES (K/MPR)	\$ 959,607	\$ 262,050	\$ -	\$ 697,557
Ritchen ES (K/MPR)	\$ 3,853,411	\$ 583,523*	\$ -	\$ 3,269,888
FF&E Allowance	\$ 133,320	\$ 133,320	\$ -	\$ -
Fremont MS (SL/Gym)	\$ 7,216,909	\$ 1,659,474	\$ 5,557,436	\$ -
Haydock MS (SL/Gym)	\$ 6,569,505	\$ 1,012,069	\$ 5,557,436	\$ -
Marina West ES (K, MPR)	\$ 6,027,002	\$ -	\$ -	\$ 6,027,002
McKinna ES (K)	\$ 1,307,554	\$ -	\$ -	\$ 1,307,554
Rose ES (K,MPR)	\$ 7,992,686	\$ -	\$ -	\$ 7,992,686
Sierra Linda ES (K,MPR)	\$ 5,024,564	\$ -	\$ -	\$ 5,024,564
Ramona ES (MPR)	\$ 1,755,474	\$ -	\$ -	\$ 1,755,474
Soria K-8	\$ -	\$ -	\$ -	\$ -
Frank MS	\$ -	\$ -	\$ -	\$ -
Technology	\$ 24,174,302	\$ 11,201,175	\$ 4,714,613	\$ 8,258,514
Subtotal	\$ 172,767,152	\$ 108,596,115	\$ 28,397,072	\$ 35,773,965
Program Reserve	\$ 17,276,715	\$ 10,859,611	\$ 2,839,707	\$ 3,577,396
<b>Est. Total Uses</b>	<b>\$ 190,043,867</b>	<b>\$ 119,455,726</b>	<b>\$ 31,236,780</b>	<b>\$ 39,351,361</b>
Est. Ending Fund Balance	\$ 12,398,695	\$ 5,660,468	\$ 10,318,179	\$ 12,398,695
<b>Adopted Master Budget</b>	<b>\$ 202,442,562</b>			

\*Includes New Special Day Classroom

Driffill. A program reserve of approximately 10% has also been set aside. This portion is also highly dependent on the implementation of the Basic Program in Phase 1 and a fully funded State Facilities Program under the Enhanced Program. No Hardship funding is contemplated.

- Phase 3: The third and final phase of the implementation program is projected to begin in 2021 and extends through the fiscal year ending in 2026. Major work during this phase includes design and construction of multipurpose room improvements at Marina West, Rose, Sierra Linda, Brekke, McAuliffe, Ramona, and Ritche schools. This phase also includes design and improvement of kindergarten facilities at McKinna, Marina West, Rose, and Sierra Linda schools. Funds for the scheduled refresh and deployment of modern classroom technology and a Phase 3 Program Reserve have also been set aside. Proceeds for construction are focused on remaining Measure “R” authorization, developer fees and State reimbursement/matching funds.

Mid way through the prior six month review period ending in December 2014, the governor elected not to proceed with a new statewide bond measure in support of the State School Facility Program. While approximately \$305 million in program funding remains, the existing funding level for State facility grants remains oversubscribed. The next available option to increase state funding is not anticipated until June or November of 2016. In the interim, the District has continued to proceed with Phase I improvements that rely on local funding and that have the greatest potential to be eligible for SFP reimbursements should additional state funding become available. Such reimbursements, plus continued increases in local assessed values, would allow the District to accelerate remaining bond sales and to continue with Phase 2 and 3 improvements, wherever possible.

## 4.2 REVISED MASTER BUDGET

Table 3 presents the revised Master Budget for Board consideration as of the June 2015 Program Update report. The revised Master Budget makes substantial modifications to projected sources of funding within identified sources of funds as well as within prior identified phases of planned improvements. Overall funding, however, is projected to be substantially similar levels to previously identified for implementation of the Basic Program and, to the extent the State elects to once again fund the Facilities Program, the Enhanced Program. Proposed uses include all previously identified projects while expanding proposed additional projects that have been presented in the Facilities Program section of this report for Board consideration. These included the repurposing of prior school facilities into childhood development centers at Harrington and Lemonwood schools, an expansion to accommodate 6-8 facilities at Marshall, additional land acquisition costs, proposed advance planning for scheduled multipurpose room improvements, and the planned refreshment of student and teacher technology devices in Phase 2 and Phase 3.

As previously discussed, the lack of a state bond to replenish the School Facility Program until at least 2016, requires that the District continue to move forth with implementation of the Basic Program through local funding to complete projects already approved by the Board as part of the Phase 1 improvements. This includes facility improvements to 13 school sites, infrastructure and 1:1 mobile



device technology for all students and teachers, the acquisition of a new elementary site and the initiation for the acquisition of a new middle school and additional elementary site. These projects have been selected to also allow for the maximum amount of State reimbursement should the School Facilities Program be adequately funded and available for distribution by the end of fiscal year 2017. Such reimbursement, in conjunction with remaining sources of local funds, would provide the required local match to garner additional State funding to assist in completing Phase 2 and 3 projects. Facility improvement projects during these phases would provide improvements for five additional school sites, plus further facility improvements to schools receiving improvements in Phase 1.

A major modification to the funding program requires issuing the remaining authorization under Measure “R” to accelerate the start and completion of the new Lemonwood K-8 facility which is anticipated to receive DSA approval for construction this summer. Completing the school sooner would also lessen the potential risk of construction cost escalation on the adopted budget. The District has worked hard over the last three years to take advantage of historically lower interest rates to issue new bonds and to refinance prior outstanding bonds that transfer interest savings to taxpayers without increasing the term of outstanding debt. In combination with a recovering tax base, these efforts have kept the required tax rate below the rate projected to taxpayers with room to issue the remaining Measure “R” authorization within Proposition 39 requirements.

Absent a waiver from the State, the statutory debt limit for elementary school districts pursuant to Education Code Section 15270 is 1.25% of the total assessed valuation of the taxable property within the District’s boundaries. On May 8, 2013, the State Board of Education granted the District a waiver to 1.5% of the total assessed valuation of the taxable property within its boundaries allowing the District to issue approximately \$59.6 million to date in bonds to finance Phase 1 improvements. In May 2015, the District held a public hearing and adopted a resolution to request an increase in the waiver to 1.67% of its current bonding capacity to issue the remaining Measure “R” authorization and construct Lemonwood school, subject to State approval.

Subsequently, the District adopted a resolution approving the submittal of a waiver application. As of fiscal year 2015, the District’s debt limit is 1.39% which is expected to increase to 1.67% with the new waiver and projected over the next 5 years to decline to the statutory limit of 1.25%, absent any further action. The State Board of Education is scheduled to hear the District’s request on July 9. If approved, Lemonwood and the remaining Phase I projects will no longer be dependent on the receipt of State grants. Any future reimbursements from these projects will be utilized instead to fund planned Phase 2 and 3 projects.

Another major modification to the funding program is the amount of developer fees projected to be available to assist in funding Implementation Program improvements. As of March 2015, the District’s latest developer fee study recommended a Level 2 developer fee of \$3.06 per square foot of new residential development. The study reviewed the projected impact on the demand for new school facility improvements as a result of planned residential development over the next 5 years. The study projects approximately 925 residential units being constructed over the next five years. Subsequent

conversations with the City of Oxnard regarding pending developments suggest that 598 of these units will be built over the next 24 months, with the balance of units anticipated to be developed on an ongoing basis thereafter, as anticipated by the rate of growth indicated in the District's Developer Fee Study. The rate over the next 5 years is less than the average projected rate that has been used to establish the District's developer fee over the last 4 years. While this rate is less than the historical average for the District and may increase as the economy improves, it will be utilized for purposes of projecting the amount to be available for the remaining portion of the program.

In overview, this is a substantial decrease in the amount projected to be available at this time through Phase 3. Certain factors do, nonetheless, mitigate its immediate impact. First, of the total amount projected in the Adopted Master Budget, approximately \$6.4 million has already been collected. The adopted Master Budget developer fees anticipated to be available through Phase 1 were projected to be approximately \$10.1 million. The Revised Master Budget maintains this amount based on the City's projected pace of development and on the developer fee study which has just been completed. The balance of the impact will be in the later phases if the economy does continue to improve.

The Master Budget has also been revised on a cash flow basis to account for the lack of a State bond to fully fund the SFP prior to the completion of Phase 1 improvements. Absent the granting of a waiver by the State, there is sufficient taxing authority to issue the remaining \$30.4 million in Measure "R" bonds. The Adopted Master Budget projected the receipt of approximately \$32.5 million in State receipts as part of Phase 1 funding and \$30.4 million of remaining Measure "R" funding in Phase 2. It is requested that the District substitute remaining Measure "R" funding to Phase 1 and budget State reimbursements submitted in Phase 1 for receipt and use for Phase 2 funding. This would allow the District to proceed with the completion of Phase 1 improvements based on local funding, including the accelerated construction of Lemonwood school.

No further State grant receipts are being budgeted as being available for Phase 1 funding and are now to be considered as reimbursements due in Phase 2 to meet proposed project improvement requirements. This is demonstrated with a new \$33.1 million amount in State reimbursements budgeted in Phase 2. In a similar manner, all anticipated State receipts previously budgeted in Phase 2 have now been moved to Phase 3 as reimbursements anticipated to be available at that time. These reimbursements, plus anticipated further State grant receipts in Phase 3, are projected to be sufficient to fund identified projects for that period.

Modifications to the anticipated Use of Funds are discussed in the following pages by phase, Master Budget and schedule. A total net increase of \$7,994,401 is proposed to be absorbed through the use of the Adopted Budget Fund Balance.

**TABLE 3: REVISED MASTER BUDGET (FY 2013 – FY 2016)**

Sources	Est. Total	Phase 1	Phase 2	Phase 3
Measure "R" Authorization				
Series A	\$ 18,390,000	\$ 18,390,000	\$ -	\$ -
Series B	\$ 25,500,000	\$ 25,500,000	\$ -	\$ -
Series C	\$ 15,750,000	\$ 15,750,000	\$ -	\$ -
Series D	\$ 30,360,000	\$ 30,360,000	\$ -	\$ -
Measure "L" Authorization	\$ 3,316,728	\$ 3,316,728	\$ -	\$ -
Measure "M" Authorization	\$ -	\$ -	\$ -	\$ -
State Bonds	\$ 285,166	\$ 285,166	\$ -	\$ -
Est. State Reimbursements	\$ 61,721,398	\$ -	\$ 33,127,856**	\$ 28,593,542
Est. Developer Fees	\$ 22,121,646	\$ 10,072,597	\$ 3,977,819	\$ 8,071,230
Mello Roos Proceeds	\$ 9,088,089	\$ 9,088,089	\$ -	\$ -
State Reimbursements (Driffill)	\$ 9,001,083	\$ 9,001,083	\$ -	\$ -
Est. Interest Earnings	\$ 2,504,158	\$ 1,173,945	\$ 1,291,267	\$ 38,946
<b>Est. Total Sources</b>	<b>\$ 198,038,268</b>	<b>\$ 122,937,607</b>	<b>\$ 38,396,942</b>	<b>\$ 36,703,718</b>

Uses	Est. Total	Phase 1	Phase 2	Phase 3
Acquire New K-5 Elementary Site	\$ 7,635,282	\$ 7,635,282	\$ -	\$ -
Acquire New Middle School Site	\$ 335,000	\$ 335,000	\$ -	\$ -
Acquire New SE Elementary Site	\$ 145,000	\$ 145,000	\$ -	\$ -
Reconstruct Harrington Elementary	\$ 24,210,522	\$ 24,210,522	\$ -	\$ -
Reconstruct Elm Elementary	\$ 21,076,943	\$ 21,076,943	\$ -	\$ -
Reconstruct Lemonwood K-8	\$ 32,262,636	\$ 32,262,636	\$ -	\$ -
Marshall K-8 (CR)	\$ 8,097,558	\$ 8,097,558	\$ -	\$ -
Driffill K-8 (K/MPR)	\$ 6,371,802	\$ 2,477,832	\$ 3,893,970	\$ -
Chavez K-8 (SL/MPR)	\$ 2,616,944	\$ 609,365	\$ 2,007,579	\$ -
Curren K-8 (SL/MPR)	\$ 5,142,440	\$ 560,940	\$ 4,581,500	\$ -
Kamala K-8 (SL/MPR)	\$ 2,637,928	\$ 553,389	\$ 2,084,539	\$ -
McAuliffe ES (K/MPR)	\$ 1,777,234	\$ 336,509	\$ -	\$ 1,440,725
Brekke ES (K/MPR)	\$ 968,679	\$ 271,122	\$ -	\$ 697,557
Ritchen ES (K/MPR)	\$ 3,901,725	\$ 631,837*	\$ -	\$ 3,269,888
Project 1 Adjustment	\$ 405,851	\$ 405,851	\$ -	\$ -
Fremont MS (SL/Gym)	\$ 7,353,479	\$ 1,796,043	\$ 5,557,436	\$ -
Haydock MS (SL/Gym)	\$ 6,623,903	\$ 1,066,467	\$ 5,557,436	\$ -
Marina West ES (K, MPR)	\$ 6,027,002	\$ -	\$ -	\$ 6,027,002
McKinna ES (K)	\$ 1,307,554	\$ -	\$ -	\$ 1,307,554
Rose ES (K, MPR)	\$ 7,992,686	\$ -	\$ -	\$ 7,992,686
Sierra Linda ES (K, MPR)	\$ 5,024,564	\$ -	\$ -	\$ 5,024,564
Ramona ES (MPR)	\$ 1,755,474	\$ -	\$ -	\$ 1,755,474
Planning for K-8 MPRs	\$ 175,000	\$ 175,000	\$ -	\$ -
Technology	\$ 29,201,175	\$ 11,201,175	\$ 9,000,000	\$ 9,000,000
Subtotal	\$ 183,046,382	\$ 113,848,471	\$ 32,682,459	\$ 36,515,451
Program Reserve	\$ 14,991,885	\$ 9,089,135	\$ 3,268,246	\$ 2,634,504
<b>Est. Total Uses</b>	<b>\$ 198,038,268</b>	<b>\$ 122,937,607</b>	<b>\$ 35,950,705</b>	<b>\$ 39,149,955</b>
Est. Ending Fund Balance	\$ 0	\$ 0	\$ 2,446,237	\$ 0
<b>Revised Master Budget</b>	<b>\$ 198,038,268</b>			

\*Includes New Special Day Classroom

\*\*Assumes that only reimbursements for Lemonwood, Harrington, and Land Acquisition are received in Phase 2

#### 4.2.1 PHASE I MASTER BUDGET & SCHEDULE

The overall total of budgeted expenditures for Phase 1 improvements presented in Table 4 has increased to \$122.9 million to incorporate the proposed improvements to Marshall, escalating costs to Elm, the scope of the Harrington Childhood Development Center as well as adjustments to the Program Reserve for land acquisitions. Table 4 documents these changes as well as to the Board approved adjustments to Project No. 1. Jointly, the total net increase for all projects is estimated at approximately \$3.5 million.

**TABLE 4: PHASE I MASTER BUDGET & SCHEDULE (FY 2013 – FY 2017)**

Project	Adopted Schedule Jan 2013	Adjusted Schedule Jun 2015	Budget	Variance
Acquire New Sites				
Elementary School	2013	2013	\$7,635,282	\$10,282
<b>SE Elementary School</b>		<b>2014/17</b>	\$145,000	\$85,000
<b>Middle School</b>		<b>2014/16</b>	\$335,000	\$275,000
Est. Subtotal Acquire New Sites			\$8,115,282	\$370,282
Design & Reconstruct Sites				
Harrington Elem. K-5	2013/14	2013/14	\$23,127,171	\$0
Lemonwood K-8	2014/16	2014/16	\$31,402,250	\$0
<b>Elm Elem. K-5</b>	2015/16	<b>2014/16</b>	\$21,076,943	\$906,400
Est. Subtotal Design & Reconstruct Sites			\$75,606,364	\$906,400
Design & Improve K-5 Kindergarten Facilities	2013/14	2013/14		
Ritchen			\$631,837 **	\$48,314
Brekke			\$271,122	\$9,072
McAuliffe			\$336,509	\$36,555
Driffill			\$2,477,832	\$0
Est. Subtotal Kindergarten Facilities			\$3,717,300	\$93,941
Design & Construct Science Labs	2013/14	2013/14		
Chavez Science Labs K-8			\$609,365	\$22,733
Curren Science Labs K-8			\$560,940	\$14,528
Kamala Science Labs K-8			\$553,389	\$9,361
Haydock Science Labs 6-8 & Utility Upgrades			\$1,066,467	\$54,398
Fremont Science Labs 6-8 & Utility Upgrades			\$1,796,043	\$136,569
Est. Subtotal Science Labs			\$4,586,204	\$237,588
<b>Project 1 Adjustment</b>		<b>2015</b>	\$405,851	\$405,851
<b>Childhood Development Center Improvements</b>				
<b>Harrington</b>		<b>2015</b>	\$1,083,351	\$189,575
<b>Lemonwood</b>		<b>2016</b>	\$860,386	\$0
Est. Subtotal Pre-Kindergarten Improvements			\$1,943,737	\$189,575
<b>Marshall K-8 12 Classroom Building</b>		<b>2015/17</b>	\$8,097,558	\$3,007,039
<b>Planning related to MPRS for Kamala, Curren, Kamala &amp; Chavez</b>		<b>2016</b>	\$175,000	\$175,000
<b>Technology</b>	2013/16	<b>2013/15</b>	\$11,201,175	\$0
Program Reserve	2013	2013	\$9,089,136	(\$1,770,475)
<b>Est. Total</b>			<b>\$122,937,608</b>	<b>\$3,481,882</b>

Est. Ending Fund Balance

\$0

\*Current dollars

\*\*Includes New Special Day Classroom

Relative to schedule, the DSA approval and therefore construction of Elm has been moved into fiscal year 2016, incorporating delays in the need to substitute construction managers in 2014. Lemonwood has already been adjusted to be completed by the end of 2016. A schedule has been prepared for Marshall where design begins immediately and construction is anticipated to end in 2016. The land acquisition schedule for the Southeast site has been lengthened to recognize the ongoing difficulties in identifying a suitable site acceptable to the District, CDE and sale by a willing landowner. The Childhood Development center at Lemonwood has been accelerated consistent with the new schedule of construction for the new Lemonwood school, particularly to accommodate Phase 3 construction of the new school.

#### 4.2.2 PHASE II MASTER BUDGET & SCHEDULE

The total Phase II project budget in Table 5 has been adjusted upward to accommodate a complete refresh of student and teacher technology requirements. The design and construction of K-8 multipurpose rooms at Chavez, Curren, Kamala, and Driffill remain on budget, although they are now being proposed to be undertaken in fiscal year 2020, accelerating the completion of the construction period. Haydock 6-8 grade gym/multipurpose room improvements are likewise proposed to be accelerated, subject to the availability of State aid. All of these schedules may be severely impacted if a new State bond is not placed before voters or the State School Facility Program is not otherwise adequately funded. Phase 2 improvements are substantially dependent on State reimbursement of Phase 1 eligible projects.

**TABLE 5: PHASE II MASTER BUDGET & SCHEDULE (FY 2018 – FY 2020)**

Project	Adopted Schedule Jan-13	Adjusted Schedule Jun-15	Budget	Variance
Design & Construct K-8 Multipurpose Room				
<b>Chavez</b>	2023	<b>2020</b>	\$2,007,579	\$0
<b>Curren</b>	2025	<b>2020</b>	\$4,581,500	\$0
<b>Kamala</b>	2023	<b>2020</b>	\$2,084,539	\$0
<b>Driffill</b>	2023	<b>2020</b>	\$3,893,970	\$0
Est. Subtotal K-8 Multipurpose Room			\$12,567,588	\$0
Design & Construct 6-8 Gym/MPR				
Fremont	2019	2019	\$5,557,436	\$0
<b>Haydock</b>	2021	<b>2019</b>	\$5,557,436	\$0
Est. Subtotal 6-8 Gym/MPR			\$11,114,871	\$0
Est. Subtotal K-8/6-8 MPR/Gyms			\$23,682,459	\$0
Technology	2020	2020	\$9,000,000	\$4,285,387
<b>Program Reserve</b>	2017	<b>2018</b>	\$3,268,246	\$428,539
<b>Est. Total</b>			<b>\$35,950,705</b>	<b>\$4,713,926</b>
Est. Ending Fund Balance			\$2,446,237	

\*Current dollars

### 4.2.3 PHASE III MASTER BUDGET & SCHEDULE

Table 6 demonstrates that Phase 3 projects remain on schedule and budget for the most part. The major increase is to accommodate the refresh of infrastructure technology and mobile device access to teachers and students. Like Phase 2 improvements, these schedules and budgets may be severely impacted if a new State bond is not placed before voters or the State School Facility Program is not otherwise adequately funded. Phase 3 improvements are substantially dependent on State receipts and reimbursement from eligible Phase 2 improvements.

**TABLE 6: PHASE III MASTER BUDGET & SCHEDULE (FY 2021 – FY 2026)**

Project	Adopted Schedule Jan-13	Adjusted Schedule Jun-15	Budget	Variance
Design & Construct K-5 Multipurpose Room				
<b>Marina West</b>	2025	<b>2026</b>	\$3,511,836	\$0
<b>Rose</b>	2025	<b>2024</b>	\$4,812,469	\$0
<b>Sierra Linda</b>	2025	<b>2023</b>	\$3,197,339	\$0
<b>Brekke</b>	2025	<b>2026</b>	\$697,557	\$0
McAuliffe	2022	2022	\$1,440,725	\$0
Ramona	2022	2022	\$1,755,474	\$0
Ritchen	2021	2021	\$3,269,888	\$0
Est. Subtotal K-5 Multipurpose Room			\$18,685,288	\$0
Design & Improve K-5 Kindergarten Facilities				\$0
<b>McKinna</b>	2022	<b>2021</b>	\$1,307,554	\$0
<b>Marina West</b>	2022	<b>2021</b>	\$2,515,166	\$0
<b>Rose</b>	2024	<b>2022</b>	\$3,180,218	\$0
<b>Sierra Linda</b>	2022	<b>2021</b>	\$1,827,226	\$0
Est. Subtotal Kindergarten Facilities			\$8,830,164	\$0
Technology	2025	2025	\$9,000,000	\$741,486
Program Reserve	2021	2021	\$2,634,504	(\$942,892)
<b>Est. Total</b>			<b>\$39,149,955</b>	<b>(\$201,406)</b>
Est. Ending Fund Balance				\$0

\*Current dollars

# ENROLLMENT, STATE AID & EXPENDITURES

## 5.1 ENROLLMENT ANALYSIS

In an effort to analyze the District's eligibility for State new construction and modernization grants and to project the demand for future school facilities, the District's 2013 Facilities Implementation Program included a general review of enrollment characteristics. In an effort to update this information, a review of recent enrollment data based on the Fiscal Year 2014-15 CALPADS (formerly CBEDS) attendance data was utilized by the District's demographic consultant, DecisionInsite.

Table 7 presents the latest enrollment information for the District as of March 2015 by school and grade level. Total enrollment is stated at 16,997 with the majority in K-5 schools, followed by K-8 and 6-8 enrollment totals. Total K-5 enrollment is stated at 11,893 and total grade 6-8 enrollment among the K-8 and middle school sites is tabulated at 5,104.

**TABLE 7: CURRENT ENROLLMENT**

School	K	1	2	3	4	5	6	7	8	Grand Total	Total K-5	Total 6-8
Brekke	117	98	93	115	107	107				637	637	
Elm	110	132	156	106	125	114				743	743	
Harrington	166	88	61	76	78	63				532	532	
Marina West	95	105	112	111	100	104				627	627	
Marshall	129	80	72	94	106	95				576	576	
McAuliffe	174	93	114	136	104	138				759	759	
McKinna	167	101	103	102	143	121				737	737	
Ramona	126	108	89	110	82	72				587	587	
Ritchen	147	101	113	121	82	103				667	667	
Rose	145	144	123	117	94	109				732	732	
Sierra Linda	137	135	115	123	102	95				707	707	
<b>Subtotal K-5</b>										<b>7304</b>	<b>7304</b>	
Lemonwood	108	120	121	148	127	115	95	81		915	739	176
Chavez	114	119	97	109	125	93	123	95		875	657	218
Curren	122	138	137	123	139	107	108	106	99	1079	766	313
Kamala	119	158	146	149	140	135	130	105	91	1173	847	326
Driffill	133	119	166	152	130	157	136	116	124	1233	857	376
Soria	91	118	115	141	139	119	107	117	109	1056	723	333
<b>Subtotal K-8</b>										<b>6331</b>	<b>4589</b>	<b>1742</b>
Frank							390	419	529	1,338		1338
Fremont							385	377	394	1,156		1156
Haydock							254	274	340	868		868
<b>Subtotal 6-8</b>										<b>3,362</b>		<b>3362</b>
<b>Total</b>	<b>2200</b>	<b>1957</b>	<b>1933</b>	<b>2033</b>	<b>1923</b>	<b>1847</b>	<b>1728</b>	<b>1690</b>	<b>1686</b>	<b>16997</b>	<b>11893</b>	<b>5104</b>

The State’s CALPADS data system reported 2014-2015 District enrollment in October at 16,932 Kindergarten through 8th Grade students, updated to 16,997 in March. Comparable enrollment numbers for each of the last 3 years are presented in Table 8, as reported to the State the first Wednesday of October and demonstrating an overall growth of 197 students from the prior academic year and a growth of 878 students since 2012. Based on cohort growth analysis and pending development permits with the City of Oxnard, DecisionInsite data suggests a stabilizing of annual kindergarten enrollment into the next five year period, yielding a projected growth in total K-5 enrollment of approximately 303 students. As further displayed, the majority of growth is projected to occur in the grade 6-8 level with a projected increase of 792 students. Overall enrollment is projected to increase by 1,095 students. Overall, the District needs to anticipate the housing of 18,092 students by 2020, 12,196 in facilities that support K-5 instruction and 5,896 in grades 6-8 facilities.

**TABLE 8: LAST 3 YEARS & PROJECTED ENROLLMENT NEXT 5 YEARS**

Grade	Prior Enrollment			Current 2014-15	Projected Enrollment					Projected Net Change
	2011-12	2012-13	2013-14		2015-16	2016-17	2017-18	2018-19	2019-20	
Kindergarten	2,052	2,015	2,105	2,200	2,342	2,322	2,315	2,328	2,343	143
1st	1,973	2,077	1,943	1,957	1,848	2,011	1,998	1,994	2,009	52
2nd	1,872	1,926	2,037	1,933	1,896	1,827	1,991	1,981	1,995	62
3rd	1,820	1,854	1,924	2,033	1,907	1,899	1,833	2,000	1,990	(43)
4th	1,722	1,786	1,850	1,923	2,028	1,907	1,897	1,836	2,007	84
5th	1,712	1,759	1,762	1,847	1,915	2,033	1,911	1,908	1,849	2
<b>Subtotal</b>	<b>11,152</b>	<b>11,415</b>	<b>11,624</b>	<b>11,893</b>	<b>11,937</b>	<b>11,999</b>	<b>11,944</b>	<b>12,045</b>	<b>12,196</b>	<b>303</b>
6th	1,744	1,746	1,752	1,728	1,854	1,936	2,054	1,925	1,937	209
7th	1,668	1,719	1,706	1,690	1,699	1,824	1,912	2,033	1,917	227
8th	1,554	1,658	1,717	1,686	1,691	1,707	1,830	1,921	2,041	355
<b>Subtotal</b>	<b>4,967</b>	<b>5,122</b>	<b>5,176</b>	<b>5,104</b>	<b>5,245</b>	<b>5,467</b>	<b>5,795</b>	<b>5,878</b>	<b>5,896</b>	<b>792</b>
<b>Total</b>	<b>16,119</b>	<b>16,537</b>	<b>16,800</b>	<b>16,997</b>	<b>17,182</b>	<b>17,466</b>	<b>17,739</b>	<b>17,923</b>	<b>18,092</b>	<b>1,095</b>

### 5.1.1 PROJECTED K-5 ENROLLMENT AND NEED FOR PERMANENT SCHOOL FACILITIES

The Implementation Plan established the District’s goal to house all students in permanent school facilities and to eliminate the use of portable facilities as soon as possible. To that end, the District established specifications for grade K-8 facilities and adopted a financing program that would amalgamate local funding sources to optimize and leverage over \$60 million in eligible State grants under the SFP to replace all portables with permanent classroom facilities. Regardless of the District’s educational program, the State School Facilities Program only counts the capacity of permanent classrooms to house enrollment and loads each permanent classroom for K-5 at 25 students. Any portion of the total student enrollment district wide not found to be housed in permanent school facilities is deemed to be “unhoused” by the State and eligible for grant funding.

Table 9 presents current and projected enrollment by school site and the amount of permanent classrooms currently available and those projected to be completed as part of the construction of the



new Harrington, Elm and Lemonwood schools. Based on this methodology, the District will have a net “unhoused” student population as characterized by the State of approximately 1224 students. Based on the District’s specifications for new school student enrollment, this is approximately equivalent to the need for two new schools to house the projected and current new K-5 enrollment in permanent classroom facilities.

**TABLE 9: PROJECTED GRADE K-5 ENROLLMENT GROWTH**

School	Current Enrollment (2015)	Permanent Classrooms (2015)	Est. Perm. Capacity (2015)	Adtl. Perm. Capacity (2020)	Projected Enrollment (2020)	Amt. Housed/ (Unhoused) (2020)
Brekke	637	27	675		685	(10)
Elm	743	12	300	300	699	(99)
Harrington	532	17	425	250	773	(98)
Marshall	576	28	700		632	68
McAuliffe	759	28	700		886	(186)
McKinna	737	17	425		813	(388)
Ramona	587	26	650		668	(18)
Ritchen	667	28	700		716	(16)
Rose	732	31	775		826	(51)
Sierra Linda	707	21	525		825	(300)
Marina West	627	20	500		600	(100)
Chavez	657	27	675		741	(66)
Curren	766	27	675		703	(28)
Driffill	857	27	675		652	23
Kamala	847	27	675		784	(109)
Lemonwood	739	13	325	300	618	7
Soria	723	29	725		578	147
<b>Total K-5</b>	<b>11,893</b>	<b>405</b>	<b>10,125</b>	<b>850</b>	<b>12,199</b>	<b>(1,224)</b>

**Notes:**

1. Capacity loading at State standards: 25 per permanent classroom

**5.1.2 PROJECTED 6-8 ENROLLMENT AND NEED FOR PERMANENT SCHOOL FACILITIES**

Table 10 presents a similar analysis of the need for permanent grade 6-8 school facilities. It presents current and projected enrollment by school site and the amount of permanent classrooms currently available and those projected to be completed as part of the planned grade 6-8 construction of facilities at Lemonwood school. Under this analysis, the District will have a net “unhoused” student population as characterized by the State of approximately 873 students. Based on the District’s specifications for new school student enrollment, this is approximately equivalent to the need for a new school to house the projected and current 6-8 enrollment in permanent classroom facilities.

**TABLE 10: PROJECTED GRADE 6-8 ENROLLMENT GROWTH**

School	Current Enrollment (2015)	Permanent Classrooms (2015)	Est. Perm. Capacity (2015)	Adtl. Perm. Capacity (2020)	Projected Enrollment (2020)	Amt. Housed/ (Unhoused) (2020)
Frank	1,338	45	1,215		1,349	(134)
Fremont	1,156	34	918		1,352	(434)
Haydock	868	32	864		770	94
Chavez	218	14	378		444	(66)
Curren	313	14	378		375	3
Driffill	376	14	378		403	(25)
Kamala	326	13	351		484	(133)
Lemonwood	176	3	81	243	298	26
Soria	333	8	216		420	(204)
<b>Total 6-8</b>	<b>5,104</b>	<b>177</b>	<b>4,779</b>	<b>243</b>	<b>5,895</b>	<b>(873)</b>

**Notes:**

1. Capacity loading at State standards: 27 per permanent classroom

## 5.2 STATE AID

Through the Department of General Services, Office of Public School Construction (OPSC), the State of California provides assistance to eligible school districts in the modernization and new construction of public schools through the School Facilities Program. OPSC operates various programs pursuant to State Law and provides projects to be considered by the State Allocation Board for specific funding. Historically, project funding by the State has been supported through the periodic approval of State bonds for school improvements by California voters.

The Oxnard School District continues to participate in the State School Facilities Program. Under the current program, school districts must apply and qualify for specific grant amounts, pursuant to various rules, regulations and requirements. The amount, type and process for securing grant funds is subject to periodic adjustment; therefore the district has elected to maintain an active role in seeking and navigating the overall process. Currently, the District participates in the State program for school modernization and in the program to construct new school facilities. These programs are summarized below as well as the District's current and projected eligibility for program funding. Applications that have been approved by the District and submitted to OPSC are also summarized and presented for review.

### 5.2.1 STATE AID MODERNIZATION ELIGIBILITY UPDATE

The State's Modernization Program provides state funds on a 60-40 state and local sharing basis for improvements that educationally enhance existing school facilities. Eligible projects include modifications such as air conditioning, plumbing, lighting, and electrical systems. Applications are submitted to the Office of Public School Construction in two stages:

1. **Eligibility:** Modernization eligibility is established separately for each school site and requires that permanent facilities be at least 25 years old and portable facilities be at least 20 years old. Students must be enrolled in those facilities based on State classroom loading standards of 25 per classroom for grades K-6 and 27 per classroom for grades 7-8. Once established, site eligibility is not subject to annual review.
2. **Funding:** A district with modernization eligibility may request funding. Funding is provided on a 60-40 State grant/local match basis. The pupil grant is currently \$3,939 for grades K-6 and \$4,167 for grades 7-8. Eligible costs include design, construction, educational technology, testing, inspection, furniture and equipment. Limited supplemental funding is available for excessive cost such as fire safety and accessibility improvements. Grant levels are periodically reviewed by the State. Program funding is subject to project performance and “close out.”

Table 11 summarizes the District’s eligibility for State modernization grants for permanent and portable facilities. These are estimated based on an inventory maintained by the District for each school site relative to age of classroom facilities. Total eligibility dollars for classroom modernization, including both permanent and portable facilities, are estimated to be \$29,441,181 over the planned phases of improvements. Approximately \$ 13.0 million is projected to be available during the Phase 1 period of improvement with the balance available during the Phase 3 period. No additional eligibility is anticipated for modernization during the Phase 2 period.

**TABLE 11: ESTIMATED MODERNIZATION ELIGIBILITY – CLASSROOMS 60-40 PROGRAM\* (2015)**

School Site	Phase I (FY 2013-17)		Phase II (FY 2018-2020)	Phase III (FY 2021-26)		Total Amount
	CRMs	CRMs Amount		CRMs	Amount	
Brekke	28	0		28	\$2,757,300	\$2,757,300
Chavez	0	0		0		\$0
Curren	1	0		1	\$98,475	\$98,475
Driffill	0	0		0		\$0
Elm	19	0		19	\$1,871,025	\$1,871,025
Frank	48	0		48	\$5,400,432	\$5,400,432
Fremont	36	36	\$4,050,324	0		\$4,050,324
Harrington	0	0		0		\$0
Haydock	0	0		0		\$0
Kamala	5	0		5	\$492,375	\$492,375
Lemonwood	15	8	\$787,800	7	\$689,325	\$1,477,125
Marina West	14	8	\$787,800	6	\$590,850	\$1,378,650
Marshall	0	0		0		\$0
McAuliffe	35	33	\$3,249,675	2	\$196,950	\$3,446,625
McKinna	14	7	\$689,325	7	\$689,325	\$1,378,650
Ramona	24	0		24	\$2,363,400	\$2,363,400
Ritchen	29	27	\$2,658,825	2	\$196,950	\$2,855,775
Rose	3	0		3	\$295,425	\$295,425
Sierra Linda	16	8	\$787,800	8	\$787,800	\$1,575,600
Soria	0	0		0		\$0
<b>Total</b>	<b>287</b>	<b>127</b>	<b>\$13,011,549</b>	<b>160</b>	<b>\$16,429,632</b>	<b>\$29,441,181</b>

\*Current dollars

## 5.2.2 STATE AID NEW CONSTRUCTION ELIGIBILITY UPDATE

The State’s New Construction Program provides State funds on a 50/50 state and local sharing basis for eligible projects that add capacity to a school district. The goal is to add capacity to school districts to house students, including the construction of a new school or the addition of classrooms to an existing school. Applications are submitted to the Office of Public School Construction in two stages:

1. **Eligibility:** Eligibility for new construction funding is not site specific and is determined by the gap between a district’s projected enrollment and its existing classroom capacity. Classroom capacity is based on State loading standards of 25 students per classroom for grades K-6 and 27 students per classroom for grades 7-8. Historical and projected student enrollment, plus approved, but not yet built residential units, are utilized to estimate the gap between the amount of future students and the current ability to house students in permanent facilities. Portable classrooms are not counted by the State as being permanently available to house pupils. Until approved for construction, eligibility is subject to annual review.
2. **Funding:** Once eligibility is approved a district may apply for funding. Funding is provided on a 50/50 State grant/local match basis. The pupil grant is currently \$10,345 for grades K-6 and \$10,942 for grades 7-8, and is counted based on each student found to exceed a district’s permanent capacity to house students. Eligible costs include design, construction, testing, inspection, furniture and equipment, and other costs closely related to the actual construction of school buildings. Supplemental grants are available for site acquisition, utilities, on/off-site and general site development, and other excessive costs. Grant levels are periodically reviewed by the State.

Table 12 summarizes the District’s estimated new construction eligibility based on the latest pupil grant amounts approved by the State. The District is currently eligible for approximately \$69.1 million in new construction grants. Of this total, approximately \$58.9 million is available for grades K-6 facilities and \$10.2 million is available for 7-8 grade levels. These amounts continue to be subject to a local match requirement by the District equal to the amount of the total State grant. If enrollment continues to grow, the amount of State eligibility for new construction is expected to increase. The estimated eligibility is available district wide, but subject to the availability of funding from the State School Facilities Program as previously referenced.

**TABLE 12: ESTIMATED NEW CONSTRUCTION ELIGIBILITY – 50/50 PROGRAM\* (2015)**

Grade Level	Est. Eligible Pupils	Est. Grant per Pupil Effective 01-15	Est. Grant Amount (50%)	Est. Local (50%)	Project Total (100%)
K-6	5,691	\$10,345	\$58,873,395	\$58,873,395	\$117,746,790
7-8	932	\$10,942	\$10,197,944	\$10,197,944	\$20,395,888
<b>Total</b>	<b>6,623</b>		<b>\$69,071,339</b>	<b>\$69,071,339</b>	<b>\$138,142,678</b>

\*Current dollars

### 5.2.3 SUBMITTED STATE GRANT APPLICATIONS TO DATE

Pursuant to Table 13, six applications have been approved by the Board and subsequently approved by the Office of Public School Construction (OPSC) for approximately \$19.8 million in applications for reimbursement funding from the State for acquisition of the Southwest school site, kindergarten improvements to Drifill, the Harrington new school construction, and the Fremont and McCauliffe modernization improvements. The application for Harrington was also utilized to optimize available modernization funding for the new school construction by utilizing the “like for like” replacement of portables with permanent facilities option allowed by the State, garnering additional grant dollars. The District has secured its place in line under the current program rules for funding of these applications. Under current rules, funding would be available subsequent to the completion, return, or cancellation of uncertified projects filed prior to the District applications. As of the latest accounting, a range of approximately \$338 - \$396 million in grant funding applications remain ahead of the District.

**TABLE 13: SUBMITTED STATE GRANT APPLICATIONS (2015)**

Project	Application Type	Est. Grant Amount*	Pupil Grants Utilized				
			K-6	7-8	Non-Severe	Modernization	New Construction
Seabridge	Site Acquisition	\$4,838,306	0	0	0	0	0
Drifill Kindergarten	New Construction	\$1,477,290	0	132	0	0	132
New Harrington School	New Construction	\$12,057,784	990	0	13	0	1,003
New Harrington School	"Like for Like" Modrn.	\$295,425	75	0	0	75	0
Project 1 - Fremont	Modernization	\$992,502	0	238	0	238	0
Project 1 - McCauliffe	Modernization	\$98,475	25	0	0	25	0
<b>Total</b>		<b>\$19,759,782</b>	<b>1,090</b>	<b>370</b>	<b>13</b>	<b>338</b>	<b>1,135</b>

\*Current dollars

### 5.3 PROJECTED FUNDING FOR “UNHOUSED” K-5 & 6-8 STUDENT ENROLLMENT

Based on the total development cost of Harrington Elementary, including construction costs (net land), approximately \$24 million is estimated to be needed to construct a similar 28 classroom, 700 student facility with necessary multipurpose, library, administration and related support facilities. The District qualifies for approximately 5,691 pupil grants for grade levels K-6; 990 have already been applied towards the new Harrington school construction. At this time, the remaining 4,701 pupil grants may be used for K-5 construction, including the projected two new schools, Elm, and the K-6 portion of Lemonwood. Any balance would also be available towards meeting the sixth grade component of the planned new middle school and Marshall 6-8 addition. At the current amount of \$10,345 per pupil grant, the use of 1224 K-5 pupil grants would result in approximately \$12.6 million in State grants, plus associated site development allowances

The estimated cost for the new middle school at the Doris site is estimated to be approximately \$41 million, including the need to construct 48 classrooms to accommodate 1200 students with a necessary

gym, library, administration and support facilities. As of 2015, the District is eligible for approximately 932 grade 7-8 pupil grants. Of these, 132 have already been submitted for use at Drifhill. The balance is available to be used for new grade 7-8 construction, including the new middle school. If all pupil grants were applied against the cost of a new middle school, approximately \$9.5 million would be available towards total construction costs, plus some allowance for site development costs.

**TABLE 14: PROJECTED STATE FUNDING FOR “UNHOUSED” K-5 & 6-8 ENROLLMENT**

<b>Grade Level</b>	<b>Est. Eligible Pupils</b>	<b>Est. Grant/Pupil Effective 01-15</b>	<b>Est. State Grant (50%)</b>
K-5	1,224	\$10,345	\$12,662,280
6-8	873	\$10,942	\$9,552,366
<b>Subtotal</b>			<b>\$22,214,646</b>
Est. Site Service (15%)			\$3,332,197
<b>Grand Total</b>			<b>\$25,546,843</b>

*\* In current dollars*

To obtain State funding, a local match of State grants is required, plus any additional amounts necessary to complete the required total school costs. At this time, these local sources of funding are beyond the scope of the Basic Program.

#### 5.4 PROJECT EXPENDITURE TO DATE

A budget and expenditure tracking protocol has been established and utilized for Phase 1 projects under current implementation. As of the December 2014 Semi-Annual Report, the total Phase 1 budget was approximately \$119.4 million, inclusive of the program reserve. Any changes to sources, uses, and schedules included in this report have taken into account actual District expenditures for the respective projects and are tracked against established project budgets. As needed, the program reserve and estimated ending fund balance will be utilized to accommodate unforeseen but required budget adjustments.

Table 15 provides a summary report of expenditures made for the Program during the period July 1, 2012 – April 30, 2015. Expenditures made after this period will be accounted for in the next Semi-Annual update. The District’s financial system accounts for expenditures by Fiscal Year (July 1 – June 30). The report is organized by Fiscal Year and includes expenditures across various construction funds. It should be noted that expenditures reporting is based on the budget approved as part of the December 2014 Semi-Annual Report. Once the recommended budget adjustments are approved as part of this June 2015 report, subsequent expenditure reports will reflect the revised budget value.

**TABLE 15: ESTIMATED PHASE I EXPENDITURES TO DATE**

Project	Adopted Budget	Fiscal Year Expenditures (as of 4/30/15)			Total
		2012-13	2013-14	2014-15	
Acquire Site New Elem K-5	\$7,635,282	\$7,601,124	\$34,158	\$0	\$7,635,282
Acquire Site New MS Site	\$60,000	\$0	\$14,625	\$3,276	\$17,901
Acquire Site New SE Elem	\$60,000	\$0	\$0	\$2,553	\$2,553
Design & Reconstruct Harrington Elem K-5	\$23,127,171	\$180,707	\$1,417,721	\$9,331,598	\$10,930,026
Design & Reconstruct Lemonwood Elem K-8	\$31,402,250	\$175,006	\$817,688	\$1,425,019	\$2,417,713
Design & Reconstruct Elm Elem K-5	\$20,170,543	\$0	\$403,304	\$970,334	\$1,373,638
<b>Design &amp; Improve K-5 Kindergarten Facilities</b>					
Ritchen	\$456,837	\$10,550	\$63,364	\$275,957	\$349,871
Brekke	\$271,122	\$11,473	\$55,041	\$181,143	\$247,656
McAuliffe	\$336,509	\$10,521	\$84,984	\$156,921	\$252,426
Driffill	\$2,477,832	\$51,334	\$56,711	\$187,469	\$295,514
<b>Total K-5 Kindergarten Facilities<sup>1</sup></b>	<b>\$3,542,300</b>	<b>\$83,877</b>	<b>\$260,099</b>	<b>\$801,490</b>	<b>\$1,145,467</b>
<b>Design &amp; Construct Science Labs/Academies</b>					
Chavez	\$609,365	\$11,733	\$163,069	\$404,149	\$578,951
Curren	\$560,940	\$11,733	\$113,723	\$416,587	\$542,043
Kamala	\$553,389	\$11,733	\$148,583	\$404,174	\$564,489
Haydock	\$1,066,467	\$62,116	\$294,587	\$575,492	\$932,195
Fremont	\$1,796,043	\$83,074	\$505,454	\$1,028,029	\$1,616,557
<b>Total Science Labs/Academies<sup>1</sup></b>	<b>\$4,586,204</b>	<b>\$180,388</b>	<b>\$1,225,415</b>	<b>\$2,828,432</b>	<b>\$4,234,235</b>
<b>Pre-Kindergarten Improvements</b>					
Harrington	\$893,776	\$0	\$0	\$0	\$0
Lemonwood	\$860,386	\$0	\$0	\$0	\$0
<b>Total Pre-Kindergarten Improvements</b>	<b>\$1,754,162</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Ritchen New Special Day Classroom</b>	\$175,000	\$0	\$0	\$0	\$0
<b>New MS Classroom Addition</b>	\$5,090,519	\$0	\$0	\$0	\$0
<b>FF&amp;E Allowance</b>	\$133,320	\$0	\$14,455	\$2,705	\$17,160
<b>Technology</b>	\$11,201,175	\$1,320,563	\$7,455,662	\$1,674,652	\$10,450,878
<b>Program Planning</b>	\$150,474	\$150,000	\$474	\$0	\$150,474
<b>Program Reserve</b>	\$10,698,854				
<b>TOTAL</b>	<b>\$119,787,254</b>	<b>\$9,691,666</b>	<b>\$11,643,603</b>	<b>\$17,040,058</b>	<b>\$38,375,327</b>

Notes:

1. Budgets have been adjusted to include Board approved Project 1 Change Order of \$331,529

2. Figures presented above are unaudited

As of April 30, 2015, approximately \$38.4 million has been expended for the Program. The District has also expended approximately \$27.2 million in expenditures outside of the program for other facilities related needs, for a total of \$65.6 million in total construction fund expenditures for the duration of the Program to date. Detailed expenditure reports, broken down into subcategories of spending have been prepared and submitted to District staff, and are available for review by the Board and Citizens Oversight Committee.

## SECTION 6:

# RECOMMENDATIONS

## 6.1 CONCLUSION & RECOMMENDATIONS

Over the next six months of implementation, the Master budget will continue to be monitored and maintained. Expenditure reporting will continue and be updated to reflect recommended budget adjustments provided in this June 2015 report. Budgets will also be reviewed and adjusted, where required, to accommodate actual contract commitments achieved over the next six months. Steps will be taken to continue filing for State funding applications and required agency approvals for project development and construction. Status reports will be provided to the Board as need.

As part of the formal review process, It is recommended that the Board:

- Accept and adopt the June 2015 Semi-Annual Implementation Program Update as an adjustment to the Facilities Implementation Program as recommended.
- Establish a date at its regularly scheduled December 2015 meeting to consider the next six month update.



# EXHIBIT A

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

The table below contains a listing of presentations, workshops, and updates to the Board of Trustees for the Oxnard School District Facilities Implementation Program. Documentation of all Board activities are provided for the prior six months. For documentation of prior related Board Action items, please reference the same section of previous reports.

Date	Board Agenda Item	Agenda Description	Purpose	Action
20-May-15	C-9	Report on General Obligation Bond Refunding	Presentation and overview of the bond refunding	Pending
20-May-15	D-5	Approval of Pre-Qualified Architect for the Oxnard School District’s Measure “R” Facilities Implementation Program	Approve the selection and recommendation of the list of pre-qualified Architectural firms for the OSD’s Measure “R” Facilities Implementation Program	Pending
6-May-15	A-4	K-5 Strand Schools Report Updated – Sierra Linda School	Presentation to the Board regarding the updated development of the Academy Stand Focuses for the Sierra Linda School	Presentation /No Action
6-May-15	D-2	Approval of Resolution #14-32, The Use of Grants Application to OPSC for the Lemonwood Construction, by the Board of Trustees of The Oxnard School District	Approve the submittal of the use of grants application for Project 3: Lemonwood Reconstruction	Approved
6-May-15	D-3	Approval of Resolution #14-33, The Use of Grants Application to OPSC for the Elm Construction, by the Board of Trustees of The Oxnard School District	Approve the submittal of the use of grants application for Project 5: Elm Reconstruction	Approved
6-May-15	D-4	Consideration and Approval of Resolution #14-34 of the making certain environmental findings of fact and determinations in connection with the reconstruction of Project 5: Elm	Approve of the Tetra Tech’s findings and determinations related to certain environmental conditions in connection with Project 5: Elm reconstruction	Approved
6-May-15	D-5	Approval of Resolution #14-43 approving the final architectural drawings for Project 5- Elm Elementary School Reconstruction and authorizing the District to submit the drawings to the DSA for review	Approve of the final architectural drawings for Project 5: Elm and authorization to submit to DSA for review	Approved
6-May-15	D-7	Approval of Amendment #5 to Agreement #07-100 with Caldwell Flores Winters, Inc. - Financial Consulting and Advisory Services	Approve of Amendment #5 to Agreement #07-100 for Financial Consulting and Advisory Services with CFW	Approved
22-Apr-15	5	Approval of change orders and amended Lease-Leaseback Agreements #13-198 through #13-221 for Vanir Construction, Inc. for Project No. 1 – Kindergarten & Science Reconfiguration	Approve of change orders and amended Agreements #13-198 through #13-221 with Vanir Construction for Project 1: KG & Science Reconfiguration	Approved
15-Apr-15	A-6	Middle School Capacity Improvements	Presentation to Board regarding the options to respond to the anticipated enrollment increases in the 6-8 configuration that may continue to increase demand for middle school facilities	Presentation /No Action

15-Apr-15	D-4	Approval of Resolution #14-32, The Use of Grants Application to OPSC for the Lemonwood Construction, by the Board of Trustees of The Oxnard School District	Approve the submittal of the use of grants application for Project 3: Lemonwood Reconstruction	Pulled
15-Apr-15	D-5	Approval of Resolution #14-33, The Use of Grants Application to OPSC for the Elm Construction, by the Board of Trustees of The Oxnard School District	Approve the submittal of the use of grants application for Project 5: Elm Reconstruction	Pulled
15-Apr-15	D-6	Consideration and Approval of Resolution #14-34 of the making certain environmental findings of fact and determinations in connection with the reconstruction of Project 5: Elm	Approve of Resolution #14-34 providing the Tetra Tech's findings and determinations related to certain environmental conditions in connection with Project 5: Elm reconstruction	Pulled
15-Apr-15	D-8	Approval of Amendment #5 to Agreement #07-100 with Caldwell Flores Winters, Inc. - Financial Consulting and Advisory Services	Approve of Amendment #5 to Agreement #07-100 for Financial Consulting and Advisory Services with CFW	Pulled
18-Mar-15	A-4	K-5 Strand Schools Report Update – Rose Avenue School	Presentation to the Board regarding the updated development of the Academy Stand Focuses for Rose Avenue Schools	Presentation /No Action
18-Mar-15	C-3	Award of RFP #14-02, Network Switches Project - E-Rate	Approval of RFP #14-02 for Network Switches Project – E-rate to CDW Government LLC	Approved
18-Mar-15	C-4	Award of RFP #14-03 Uninterruptable Power Supply Project - E-Rate	Approval of RFP #14-03 Uninterruptable Power Supply Project – E-Rate to MJP Technologies, Inc.	Approved
18-Mar-15	D-3	Approval of Resolution No. 14-31 Authorizing The Issuance of 2015 General Obligation Refunding Bonds In An Aggregate Amount Not To Exceed \$15,000,000	Approval of Resolution #14-31 authorizing the issuance, sale and delivery of 2015 General Obligation Refunding Bonds and authorize District representative to execute and deliver related documents and take related actions	Approved
18-Mar-15	D-5	Approval of Amendment #5 to Agreement #07-100 with Caldwell Flores Winters, Inc. - Financial Consulting and Advisory Services	Approval of Amendment #5 to Agreement #07-100 for Financial Consulting and Advisory Services with CFW	Pulled
18-Mar-15	E-1	Measure R Oversight Committee Annual Report	Presentation to Board of the Measure R Oversight Committee Annual Report	Approved
18-Mar-15	E-2	K-5 Strand Schools Report – Schools (McAuliffe/Ritchen)	Presentation to the Board regarding the development of the Academy Stand Focuses for the following schools: McAuliffe and Ritchen Schools	Presentation /No Action
11-Mar-15	5	Report on Facilities Implementation Program	Presentation to Board regarding Facilities Implementation Plan Quarterly Report Update and proposed plans until the end of the 2015 fiscal year	Presentation /No Action
4-Mar-15	A-6	Harrington Pre-School Facility	Presentation to Board of the design Harrington Pre-School Facility and intent to reconfigure three existing buildings to meet the Pre-K District specifications	Presentation /No Action
18-Feb-15	A-6	K-5 Strand Schools Report – Schools (Elm and Marshall)	Presentation to the Board regarding the development of the Academy Stand Focuses for the following schools: Elm and Marshall schools.	Presentation /No Action
18-Feb-15	C-2	Approval of WAL #001 for CEQA Compliance Services at Project No. 5 - Elm Pursuant to Master Agreement #13-132 with Tetra Tech	Approval of WAL #001 for CEQA Compliance Services at Project 5: Elm with Tetra Tech	Approved
18-Feb-15	C-3	Approval of WAL #001 for CEQA Consultant Services at the Proposed New Middle School Academy Site at Doris and Patterson Pursuant to Master Agreement #13-133 with LSA Associates, Inc.	Approval of WAL #001 for CEQA Consultant Services at the Proposed New Middle School Academy Site at Doris and Patterson with LSA Associates	Approved

18-Feb-15	C-4	Approval of WAL #002 for Surveying Services at the Proposed New Middle School Academy Site at Doris and Patterson Pursuant to Master Agreement #13-126 with MNS Engineers, Inc.	Approval of WAL #002 for Surveying Services at the Proposed New Middle School Academy Site at Doris and Patterson with MNS Engineers	Approved
18-Feb-15	D-2	Consideration and Ratification of Supplemental Work Authorization Letter #001S for Additional DSA Inspection Services (IOR), for Project No. 1 - Kindergarten and Science Reconfiguration Projects Pursuant to Master Agreement #13-130 with Nolte Vertical 5	Ratification of Supplemental WAL #001S for Additional DSA Inspection Services for Project 1: KG & Science Reconfiguration with Nolte Vertical 5	Approved
18-Feb-15	E-1	Report on General Obligation Bond Refunding	Presentation and overview of the potential savings to be realized by a possible May 2015 refinancing	Presentation/No Action
4-Feb-15	A-6	Presentation on Proposed Pre-School Facilities For Lemonwood Site	Presentation on the proposed use of the existing Kindergarten building at Lemonwood K-8 campus to be transformed into an Early Childhood Development Center	Presentation/No Action
4-Feb-15	D-2	Measure R GO Bond Building Fund of OSD Audit Report, June 30, 2014	Presentation of the findings from an independent auditor of the Measure "R" Bond program, and confirmed compliance with the compliance requirements of the Measure "R" General Obligation Bond proceeds	Presentation/No Action
21-Jan-15	C-3	Appointment of Representative To Fill Vacancy - Measure R Bond Oversight Committee	Approval of Measure "R" Bond Oversight Committee at-Large representative	Approved
21-Jan-15	C-15	Declaration of Restrictive Covenant for Storm Water Quality Control Measures, Maintenance and Access - New Harrington School Project	Authorize the Superintendent to execute the Declaration of Restrictive Covenant for Storm Water Quality Control Measures, Maintenance and Access for Project 4: Harrington	Approved
21-Jan-15	D-3	Consideration of Acceptance by the OSD Board of Trustees of the Fourth Semi-Annual Facilities Implementation Program Update	Acceptance of the 4 <sup>th</sup> Semi-Annual Facilities Implementation Program Report	Approved
21-Jan-15	D-4	Consideration & Approval Of Resolution No. 14-22 Of The Board Of Trustees Of The OSD Approving The Final Architectural Drawings For Project No. 3: Lemonwood K-8 Reconstruction, Authorizing the District to Submit The Drawings To The Division Of The State Architect For Review & Approval Of The Modified Project Schedule	Approval of Resolution #14-22 and final architectural drawings for Project 3: Lemonwood to be submitted to DSA for review and approval of the modified project schedule	Approved
21-Jan-15	D-5	Consideration & Approval Of Resolution No. 14-23 Releasing Seward L. Schreder Construction Inc. Of Certain Obligations Under Agreement #13-155 and Approval Of Agreement #14-166 with Swinerton Builders For Preconstruction Services Related To The Design & Reconstruction of Project No. 5: Elm Elementary School	Approval to release SLS from certain obligations under Agreement #13-155 and approval of Agreement #14-166 with Swinerton Builders for Precon Services related to Project 5: Elm	Approved
21-Jan-15	E-2	K-5 Strand Schools Report – Schools (Harrington, Marina West, Ramona)	Presentation to the Board regarding the development of the Academy Stand Focuses for the following schools: Harrington, Marina West and Ramona Schools	Presentation/No Action
21-Jan-15	E-3	Report On Close-Out Of Project No. 1: Kindergarten & Science Reconfiguration Projects	Presentation on the status of the closeout of Project 1: KG & Science Reconfiguration and the need for approval of change orders and amended agreement	Presentation/No Action
21-Jan-15	E-4	Presentation On Project No. 6: Modifications To SDC Room At Ritche School And Proposed Method Of Delivery	Presentation on modification to SDC Room at Ritche ES and proposed method of delivery	Presentation/No Action
10-Dec-14	C-7	Approval of WAL #001 for CEQA Compliance Services Project 3 - Lemonwood per Master Agreement #13-131 Rincon Consultants Inc.	Approval to contract with Rincon for CEQA Compliance Services on Project 3: Lemonwood Reconstruction	Approved

10-Dec-14	C-8	Approval of WAL #004 for Asbestos, Lead & Hazardous Materials Survey, Testing & Monitoring Services Project 4 - Harrington School per Master Agreement #13-136 Encorp	Approval to contract with Encorp for hazardous materials survey, testing and monitoring construction phase services on Project 4: Harrington Reconstruction	Approved
10-Dec-14	C-10	Annual Appointment/ Re-Appointment of Measure R Bond Oversight Committee	Appoint and reappoint community and organizational members to the Bond Oversight Committee	Approved
10-Dec-14	E-1	K-5 Strand Schools Report – Schools (Brekke, Harrington, McKinna, Rose Avenue, Sierra Linda)	Presentation to the Board regarding the development of the Academy Stand Focuses for the following schools: Brekke, Sierra Linda, Rose Avenue, McKinna, and Harrington schools.	Presentation /No Action
10-Dec-14	E-2	Report on Facilities Implementation Program	Presentation to Board of the 4 <sup>th</sup> Semi-Annual Report on Facilities Implementation Program	Presentation/No Action