WCCUSD

CITIZENS' BOND OVERSIGHT COMMITTEE

MEETING PACKET FOR: OCTOBER 19, 2020

1400 MARINA WAY SOUTH RICHMOND, CA 94804

NORMS OF BEHAVIOR

Every team has two components that team members must keep in mind if the team is going to succeed.

- The team must pay attention to the Committee's purpose.
- The team must also carefully shape and monitor the team process it uses to accomplish its purpose.

Team process includes:

- How team members interact with and communicate with each other
- How team members will be responsible and accountable for accomplishing the CBOC's purpose

These team norms or ground rules are established with all members of the team participating equally:

- Recognize cross-disciplinary interaction requires patience and openness to diverse perspectives
- All views are important
- Participation needs to be equitable and balanced
- Expect, respect, and accept disagreements
- Reducing defensiveness is the responsibility of all
- Be tough on issues not on each other
- Place cell phones on silent
- Read agenda packet before the meeting

CBOC Chair Don Gosney can be reached at:
Home Office: (510) 233-2060 Mobile: (510) 685-2403
email dongosney@comcast.net
CBOC members are requested to call or email if they are unable to attend a CBOC meeting

WCCUSD

CITIZEN'S BOND OVERSIGHT COMMITTEE

B A S I C P A R L I A M E N T A R Y P R O C E D U R E S

THE CBOC CONDUCTS THEIR AFFAIRS USING
ROBERTS RULES OF ORDER

All discussions and actions go through the Chair.

All actions require a MOTION and a SECOND before proceeding.

- Once a MOTION has been seconded, it then belongs to the body.
- There is no such thing as a friendly (or unfriendly) amendment. Amendments are made and seconded, discussed and then the amendment is voted on for acceptance or rejection.
- If an amendment is passed, then the AMENDED MOTION is voted on.

Motions and amendments need to be clear and concise in what is being discussed and voted on. The CBOC does not vote on general ideas—they vote on specific language. Words matter.

A MOTION TO END DEBATE must be seconded and requires a 2/3 majority for passage.

- A MOTION TO TABLE is used to postpone the vote on an issue until a later date.
- A MOTION TO TABLE **cannot** be used as a means to kill a motion—only postpone it.
- When a MOTION TO TABLE is made, it must also be stated when the item is to be removed from the table for a vote.

Motions require a simple majority (50%+1 of those voting) for passage.
An ABSTENTION does not count as a 'YES' or a 'NO' vote. An ABSTENTION is used to validate that a quorum exists.

A quorum (50%+1 of the total number of CBOC members) must be present to vote on any issue.

A MOTION TO ADJOURN is always in order.

WCCUSD
CITIZENS' BOND OVERSIGHT COMMITTEE

Guadalupe Enllana, Vice Chairperson
Don Gosney, Chairperson
Cameron Moore, Secretary

AGENDA

Monday October 19th, 2020 at 2:00 PM

Viewing and Participating in the CBOC Meetings

As authorized by the Governor's Emergency Executive Order issued on March 17, 2020, the West Contra Costa Unified School District Citizens' Bond Oversight Committee will conduct meetings via video conference/teleconference until further notice. The meeting will be streamed via Zoom using the following link:

By computer, please click the link below to join the webinar:
https://wccusd.zoom.us/j/94978999187?pwd=dGxPVnNZT2RMaThaYWJYVlkwRnR2QT09

Or by Telephone:
US: 1+(669) 900 6833
Webinar ID: 949 7899 9187
Passcode: 657852

Participating in Board Meetings:

The WCCUSD CBOC welcomes participation from concerned citizens. Participants must provide their first and last name and either an email address or phone number.

Note: Links in this document are PDFs on Google Drive. Clicking on the links should open the PDFs in a web browser on your computer. The full agenda packet may be viewed on the CBOC website or by clicking this link:

10.19.20 CBOC Agenda Packet

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WCCUSD
CITIZENS' BOND OVERSIGHT COMMITTEE

A) OPENING PROCEDURES

B) CALL TO ORDER/PLEDGE OF ALLEGIANCE

C) ROLL CALL

John Anderson, Ken Burns, Maisha Cole, Sallie DeWitt, Guadalupe Enllana, Don Gosney, Lorraine Humes, Anton Jungherr & Cameron Moore

[9 members ~ 5 required for a quorum]

D) APPROVAL OF AGENDA

To discuss a Consent Calendar item, it must be removed from the agenda

DEPENDING ON THE LENGTH OF THIS AGENDA AND MEETING, ITEMS ON THIS AGENDA MAY BE DEFERRED TO THE CBOC MEETING OF 11.09.20

E) PUBLIC COMMENTS FOR ITEMS NOT ON THE AGENDA

Items already on the agenda may not be spoken on in this section. Speakers must fill out a Speaker Form with the appropriate agenda item listed. Speakers will be allowed three minutes

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D I S T R I C T R E P O R T S

F) BOND PROGRAM PROJECTS STATUS and FINANCIAL REPORTS

(Luis Freese/Melissa Payne)

Presentation on progress of current Bond Projects including newsletters and financial reports

D I S C U S S I O N O N L Y

10.19.20 Facilities Master Plan Projects Update
Page 8 of 426

Michelle Obama Ribbon Cutting
Page 18 of 426

Michelle Obama Newsletter (October)
Page 23 of 426

Richmond HS Newsletter Number 15 (October)
Page 24 of 426

Fairmont Critical Needs Modernization Phase 2 Status Report (October)
Page 25 of 426

Michelle Obama School Project Status Report (October)
Page 26 of 426

RHS Critical Needs Project Status Report (October)
Page 27 of 426

10.08.20 Lake Rebuild ~ Site Specific Educational Specification and Bridging Document Update
Page 28 of 426

10.08.20 District Facility Standard Documents
Page 47 of 426

10.08.20 Elementary Educational Specifications with Check List
Page 54 of 426

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10.10.20 Material and Product Standards 2020 FINAL
Page 138 of 426

10.21.20 Sole Source Resolution
Page 175 of 426

10.10.20 Lake Rebuild Educational Specifications
Page 183 of 426

Consolidated Budget Report 09.30.20
Page 261 of 426

Consolidated Budget Report-2016 Master Plan 09.30.20
Page 267 of 426

Report #2 Bond Program Spending to Date 09.30.20
Page 269 of 426

Report #13 Bond Program Financial Status 09.30.20
Page 271 of 426

Report #13A Variance Report 09.30.20
Page 277 of 426

'20-'21 Accounts Payable Check List 09.30.20
Page 278 of 426

10.14.20 Draft WCCUSD Tax Rates History and Projections
Page 280 of 426

2016 Facilities Master Plan Projects Implementation Update
Page 281 of 426

G) BOARD OF EDUCATION LIAISON REPORT
(Consuelo Lara)
D I S C U S S I O N O N L Y

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WCCUSD
CITIZENS' BOND OVERSIGHT COMMITTEE

C B O C R E P O R T S

C O N S E N T I T E M S
D I S C U S S I O N O N L Y
Unless pulled from the consent calendar by a member of the CBOC, staff or the public, consent items are approved without discussion

H) ADOPTION OF MINUTES
(Cameron Moore)
09.14.20 CBOC Draft Minutes
Page 286 of 426

I) CBOC MEMBER INFORMATION REQUEST LOG
(Don Gosney)
10.19.20 CBOC Member Information Requests Status Log
Page 291 of 426

J) ADAM FERBER INVOICE (CBOC INDEPENDENT COUNCIL)
(Don Gosney)
09.30.20 Adam Ferber CBOC Invoice
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K) APPROVED RECOMMENDATIONS LOG
(Don Gosney)
10.19.20 CBOC Approved Recommendations
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C O M M I T T E E R E P O R T S

L) MEMBERSHIP
(Cameron Moore)
F O R I N F O R M A T I O N O N L Y
10.19.20 CBOC Attendance Review
Page 305 of 426

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M) MEMBERSHIP ROSTER

(Don Gosney)

F O R I N F O R M A T I O N O N L Y

10.19.20 CBOC Roster
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N) CHAIRPERSON REPORTS

(Don Gosney)

Reports on issues relevant to the operation of the CBOC, future issues and reports to the Board of Education

D I S C U S S I O N O N L Y

09.23.20 Chair Report
Page 307 of 426

10.07.20 Chair Report
Page 311 of 426

O) IMPLEMENTATION OF FORENSIC ACCOUNTING INVESTIGATION RECOMMENDATIONS

(Anton Jungherr)

A C T I O N I T E M

Implementation of Forensic Accounting Investigation Recommendations
Page 315 of 426

P) ANNUAL REPORT UPDATE

(Sallie DeWitt and Lorraine Humes)

Review draft of 2019 Annual Report

A C T I O N I T E M

Draft 2019 Annual Report (Rev-1)
Page 316 of 426

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Q) AUDIT SCHEDULES

(Anton Jungherr)

An update on the relevant dates surrounding the 2020 Financial and Performance Audits

D I S C U S S I O N O N L Y

10.19.20 2020 Audit Schedules
Page 423 of 426

R) CBOC WEB SITE UPDATE DRAFT GUIDELINES

(Don Gosney)

Discuss options, needs and a plan for updating the CBOC web site.

A C T I O N I T E M

CBOC Web Site Update Draft Guidelines
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S) CALENDAR

(Don Gosney)

F O R I N F O R M A T I O N O N L Y

10.19.20 CBOC Meetings Calendar
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T) FUTURE AGENDA TOPICS

(Don Gosney)

Suggest and discuss issues that the CBOC and members of the public want to see brought up at future meetings between the CBOC and the Board of Education

A C T I O N I T E M

10.19.20~Future Agenda Items Log (short list)
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V) ADJOURNMENT

NEXT SCHEDULED CBOC MEETING: **November 9, 2020**

Disability Information

Upon written request to the District, disability related modifications or accommodations—including auxiliary aids or services—will be provided.
Contact the Superintendent's Office at (510) 231-1101 at least 48 hours in advance of the meeting.

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Facilities Master Plan Projects Update

Citizens' Bond Oversight Committee
October 19, 2020

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Bond Project Status Update
October 2020

	SITE	PROJECT	REVISED CONTRACT AMOUNT	STATUS
CONSTRUCTION	Michelle Obama School	New Campus	$37,763,093*	Under Construction
	Richmond HS	Critical Needs	$19,932,841*	Under Construction
	Fairmont ES	Critical Needs Phase 2	$1,363,095	Under Construction
	Fairmont ES	Critical Needs Phase 3	$53,700	Under Construction
	SITE	**PROJECT**	**BUDGET**	**STATUS**
PROCUREMENT	Riverside ES	Critical Needs (Soils Stabilization)	$6,900,000	Negotiating Agreement
	E-Rate Year 23	Wireless Upgrades at Various Sites	$650,000	Awarded; pending Erate approval
	SITE	**PROJECT**	**BUDGET**	**STATUS**
DESIGN	Korematsu MS	Fall Protection	$255,000	Pending DSA approval
	Pinole Valley HS	Fields Restoration & Bleachers	$ 19,000,000	Pending DSA approval
	Lake ES	Campus Replacement	$65,600,000	Bridging documents complete; RFQ to be issued
	Stege ES	Critical Needs	$2,900,000	Planning
	Cameron School	Critical Needs	$1,300,000	Planning
	Collins ES	Critical Needs	$3,500,000	Planning
	Hercules MS & HS	Critical Needs	$14,700,000	Planning
	Kennedy HS	Critical Needs	$12,200,000	Planning
	Shannon ES	Critical Needs	$7,100,000	Planning

LEGEND & ACRONYMS

(DSA) Division of the State Architect

*Contract funding includes non-bond funding sources

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Michelle Obama School





Main Entry Plaza

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Michelle Obama School



Learning Suites South



Learning Suite North

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Michelle Obama School



Learning Suites Shade Structure & Landscape



Multipurpose Room Shade Structure

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Michelle Obama School



South Site Work

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Richmond High School Critical Needs





Gym Exterior Insulation

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Richmond High School Critical Needs



Quad Bio-Retention Pond

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Richmond High School Critical Needs



Coaches Office



Dance Studio

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Richmond High School Critical Needs



Science Building Elevator Pit



Main Building Repairs

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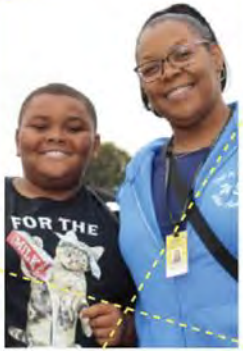
Thursday, Oct. 29 @ 11 A.M.

VIRTUAL 360° TOUR

GRAND OPENING!

MICHELLE OBAMA SCHOOL









LIVE

@westcontracostaschools
@MichelleObamaSchool

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The Committee

School Site -	Maisha Cole
	Claudia Velez
Communications –	Raechelle Forrest
	Bobby Jordan
	Maria Munoz
Facilities -	Ellen Mejia Hooper

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Agenda Includes…

- Speakers Include
  - Student MC
  - 3 Student Speakers
  - PTA President
  - Board Member
  - Superintendent
  - Principal
- Each speaker will highlight and be filmed in different parts of the campus

- Other Features
  - Aerial Flyby
  - Band performance
  - Ribbon cutting in many locations

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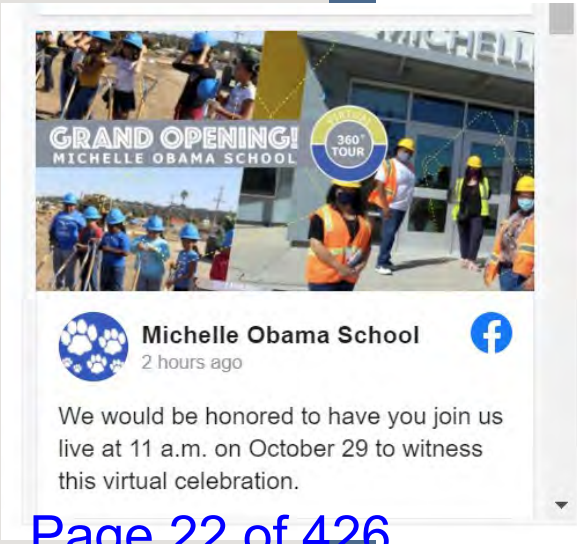
Viewing

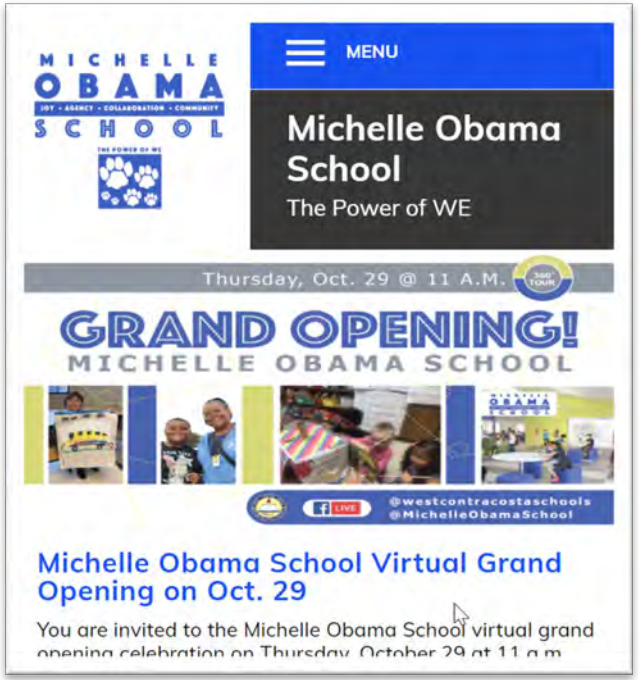
- Michelle Obama families will watch through the student classroom zoom accounts
- General public can watch through Facebook live @westcontracostaschools or @MichelleObamaSchool

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Advertising

- Facebook @MichelleObamaSchool
- Instagram @michelleobamaschoolca
- Michelle Obama School Website
- Class Dojo
- Seesaw
- Classroom teachers
- District Website front banner





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MICHELLE OBAMA SCHOOL October 2020

CONSTRUCTION NEWS

OVERVIEW

Welcome to our monthly newsletter issued to inform neighbors and the campus community about construction activities and updates to the **Michelle Obama School Reconstruction project.**

We understand that a construction project does not make the best neighbor. While we strive to make the experience as pleasant as possible, we are working hard to reach the long-term goal of providing a new 21st century Elementary School for our community here in Richmond.

Please don't hesitate to email us at facilitiesplanning@wccusd.net to request to be removed or added to this newsletter mailing list.

UPCOMING ACTIVITIES

PLANNED CONSTRUCTION WORK THIS MONTH

- Complete finish work at buildings
- Complete walkway canopy
- South sitework

POTENTIAL IMPACTS TO NEIGHBORS

- ***Truck traffic on 41st and 42nd Street***
- ***Noise due to construction***
- ***Increased site security patrols***

MITIGATION MEASURES

- Water down the soil for dust control
- Maintain gravel at construction entry/ exit for tracking control

COMPLETED WORK

- Paving in central areas
- North play structures
- Stairs installed
- Shade structures

Main Quad:



Covered Walkway:



CONTACT INFORMATION

Contractor: C. Overaa Construction, Inc.

Frank Driscoll 510-234-0926
Niall Walsh 510-234-0926

Construction Manager: Swinerton Management & Consulting

Peter Hempel 415-516-1250

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RHS CONSTRUCTION NEWS | NUMBER 15, OCTOBER, 2020



Gym / Main Entry & Student Quad

CONSTRUCTION ACTIVITIES

Previous Month:

Exterior Metal Stud and Shear-ply installation completed
MEP Rough-in nearing completion
Flashings, Building paper and Rigid Insulation installations started
Low roofing nearing completion - High Roof ongoing
Sheetrock installation started

Bio-Swale walls completed and Drainage installation started
Earthwork and utilities on-going at quad

Health Clinic earthwork and underground utilities started

Upcoming Month:

Flashings, building paper and Rigid to complete
Lath and Plaster operations to continue
Rough-In of MEP on-going
Sheetrock installations on-going
Roofing ongoing

Bio-Swale drainage work on-going
Earthwork grading for site work on-going

Elevator Installation anticipated to start

Health Clinic utility work, grading and asphalt paving





PROJECT FACTS

New Auxiliary Gym Square Footage: 15,500

Completion: The Science Classroom Building is scheduled to be substantially complete for occupancy for the Fall 2020 semester, and the new Auxiliary Gym in the first quarter of 2021.

Design Build Contractor:
Lathrop Construction Associates
www.lathropconstruction.com

Design Build Architect:
HKIT Architects
www.hkit.com

CONTACT INFORMATION

To subscribe to this monthly newsletter or to submit project questions, please email:
Facilitiesplanning@wccusd.net

Construction Manger
Peter Hempel
Project Manager
Swinerton Management & Consulting
415.516.1250

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Project Status Report: 10/01/2020

Fairmont Elementary School
Critical Needs Modenization Phase 2

724 Kearney Street
El Cerrito, CA 94530

Project No: **1000003356** DSA No: **01-117906**

Project Scope

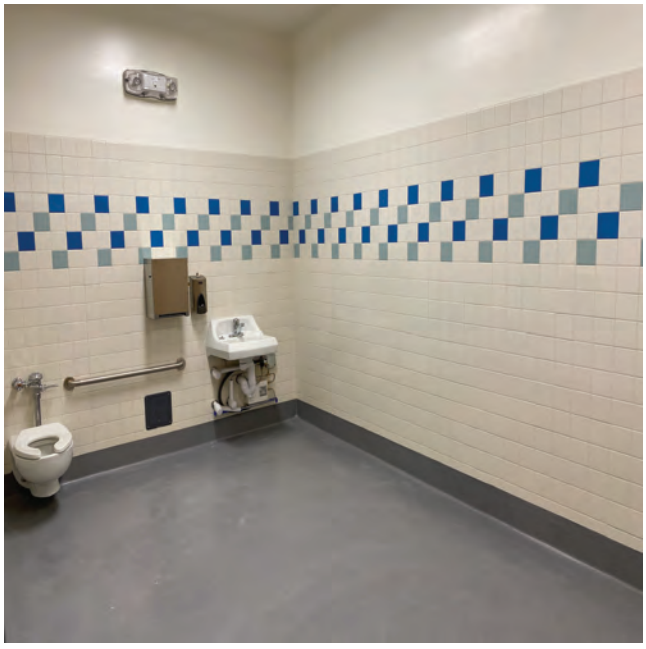
Replacement of fire alarm system, three new ADA compliant restrooms, and replace classroom flooring.

Project Team

Owner	WCCUSD
Architect	HY Architects
Construction Manager	Lisa Nagai
Contractor	Mar Con Builder, CA
Inspector	Brad Williamson

Schedule

NTP	06/08/2020	
Original Project Duration	109	
Final Completion	09/25/2020	
Approved Time Extensions	0	
Revised Project Duration	**109**	
Revised Completion Date	**09/25/2020**	
Calendar Days Lapsed	116	106%



Contract Summary

Original Contract Amount	$ 1,363,095		
BOE Executed Cos	**2**	**$ 4,550**	**0%**
Unforeseen Conditions	0	$ 0	0%
Owner Requested	0	$ 0	0%
Design Changes	1	$ 0	0%
Outside Agency/Other	1	$ 4,550	0%
Revised Contract Amount (Contract + $ Executed CO)	**$ 1,367,645**		
No. of PCOs	**0**	**$ 0**	**0%**
Pending PCOs	0	$ 0	0%
Rejected PCOs	0	$ 0	0%
Contractor Net $ Billed to Date		**$ 665,597**	**49%**
Stop Notices	$ 0		

Project Status

Completed Work:

All Work completed.

Punch list is 96% complete.

Upcoming Work:

None

Project Issues:

None

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Project Status Report: 10/6/2020

Michelle Obama School Campus Replacement

629 42nd Street
Richmond CA 94805

Project No: 1000002635 DSA No: 01-117849

Project Scope

New construction of single and two story k-6 academic buildings. The buildings include kindergarten/pre-kindergarten classrooms, administration office/reception, library, community rooms, multi-purpose room, kitchen, special education, flex office, learning suites, and supporting space. Site design includes public quads, parking, library patio, outdoor learning spaces, outdoor student dining, court and play yards.

Project Team

Owner	WCCUSD
DBE	C.Overaa & Co.
Construction Manager	Swinerton
Inspector	Structure Groups

Schedule

NTP	8/2/2019	
Original Project Duration	362	
Final Completion	7/28/2020	
Approved Time Extensions	0	
Revised Project Duration	**362**	
Revised Completion Date	**7/28/2020**	
Calendar Days Lapsed	432	119%



Contract Summary

Original Scope		$33,441,281	
District Contingency		$836,032	
Project Contingency		$836,032	
Original Contract Amount		**$35,113,345**	
Amendment to Scope		$849,748	
Amendment to District Contingency		$1,800,000	
Amendment to Project Contingency		$0	
Amendments to Date		**$2,649,748**	
Revised Contract Amount		**$37,763,093**	
District Contingency		**$2,636,032**	
Executed CO	6	$816,247	31%
Remaining Contingency		$1,819,785	69%
Project Contingency		**$836,032**	
Executed CO	6	$605,306	72%
Remaining Contingency		$230,726	28%
Pending PCOs (District)	17	$1,096,799	42%
Pending PCOs (Project)	19	$386,708	46%
Rejected PCOs (District)	8	$85,198	3%
Rejected PCOs (Project)	4	$202,847	24%
Completed & Stored $ Billed to Date		**$32,725,518**	**87%**
Stop Notices		$0	

Project Status

Completed Work:

All buildings- Flooring 100% complete. Fire alarm testing completed. HVAC system Testing and Balancing in progress. Window shades installed. Wireless Access points installed. AT&T phone lines connected. Interior punchwork in progress.

Site - Bioswales filled and graded. Landscape trees and irrigation controls in progress. Flatwork for path of travel to elevator complete. Poured stair treads. Trash enclosure steel shade strucutre installed. Walkway Canopy metal roof, Site fencing in progress. Concrete sidewalks on West side. Play area Safety Surfacing at PreK and Kinder and Shade structures installed. Overexcavation on South side complete.

Furniture deliveries in progress, starting 8/9.

Upcoming Work:

Final Janitorial Cleaning
Commissioning
Elevator State Inspection.
Site - Landscape planting and irrigation controls. Metal Chain Link fence in south area. Architectural metal fence and Gates at the entry. Place precast tables, benches, trash receptacles and pebbles. Grade south parking lot. Driveways at 41st and 42nd St. AC paving on South side and existing sidewalk along 42nd St. Rock compaction for AC Paving and Synthetic turf on South side. Bike racks and lockers.

Project Issues:

Fire incident at the exterior wall of LSS 2nd floor/ Stair 2 landing. Per contractor no damage to the structural sheathing and no injuries were reported.
COVID 19 Pandemic - Impact to site productivity.

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Project Status Report: 10/3/2020

Richmond High School
Critial Needs Project

1250 23rd Street
Richmond CA 94804

Project No: 1000003023 DSA No: 01-118099

Project Scope

New construction of a single story gymnasium, demolition of old gymnasium and new plaza sitwork. Seismic upgrade of existing two-story Science Building and sitwork surrounding the building, including adding a new exterior elevator to the building. Demolition of existing Building A (old auto-shop building) and repavment of area to prepare for new Health Clinic portable buildings.

Project Team

Owner	WCCUSD
DBE	Lathrop Construction
Construction Manager	Swinerton
Inspector	Structure Groups

Schedule

NTP	11/11/2019	
Original Project Duration	459	
Final Completion	2/11/2021	
Approved Time Extensions	0	
Revised Project Duration	**459**	
Revised Completion Date	**2/11/2021**	
Calendar Days Lapsed	332	72%





Contract Summary

Original Scope		$16,399,899	
District Contingency		$0	
Project Contingency		$1,639,990	
Original Contract Amount		**$18,039,889**	
Amendment to Scope		$1,092,952	
Amendment to District Contingency		$800,000	
Amendment to Project Contingency		$0	
Amendments to Date		**$1,892,952**	
Revised Contract Amount		**$19,932,841**	
District Contingency		**$800,000**	
Executed CO	5	$361,480	45%
Remaining Contingency		$438,520	55%
Project Contingency		**$1,639,990**	
Executed CO	4	$169,598	10%
Remaining Contingency		$1,470,392	90%
Pending PCOs (District)	10	$219,007	27%
Pending PCOs (Project)	3	$14,000	1%
Rejected PCOs (District)	0	$0	0%
Rejected PCOs (Project)	0	$0	0%
Completed & Stored $ Billed to Date		**$11,655,042**	**56%**
Stop Notices		$0	

Project Status

Completed Work:
At new Auxiliary Gymnasium:
Installed insulation board onto high gym roof.
Continued rough plumbing and electrical in walls and ceiling.
Completed install of insulation board and roofing system onto low roof.
Completed wood sheating on exterior walls and started exterior waterproofing system and insulation board installation.

At Science Building:
Completed punchlist items.
Tested and passed fire alarm system with IOR.
Some faculty are using 1st floor classrooms for distance learning.

At Quad:
Continuted underground storm drain work at Gym Quad.
Completed new Bio-Retention basin concrete walls at Gym Quad.
Installed Bio-Retention soil mix and sump pump equipment.

Upcoming Work:
At new Auxiliary Gymnasium:
Complete exterior wall insulation and waterproofing system.
Continue MEP rough-in.
Continue exterior wall plaster system install.
Complete roofing of Gym high roof.

At Quad:
Continue storm drain work at Quad.
Start on Quad paving base rock and rebar.
Start to patch wall of Main Bldg at Quad area.

At Science Building:
Start install of new elevator tower on east side of building.

Project Issues:
Existing site gas piping leak discovered and repaired.

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SITE SPECIFIC EDUCATIONAL SPECIFICATION AND BRIDGING DOCUMENT UPDATE

LAKE REBUILD



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WHY LAKE ?

The school was originally built in 1956 and consists of the Office and Library Building as well as classrooms 1 through 12. The main buildings are all one-story and consist of a wood framed and built in 1956. Multi-Purpose Building, Classroom Building and two portables were added in the 1960's. Other portables were added in the 1990's.

No Major work has been completed at the school since the original construction.

April 2002 Seismic Report
"Given the vintage of the building(s), some elements of the construction will not meet the provisions of the current building code."

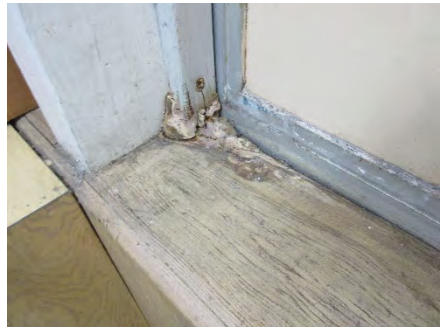
2016 Facility Master Plan

- "Due to the condition of the buildings, Lake was not recommended for modernization."
- Facility Assessment Score
  - Condition 27
  - Function 33

2016 Facility Master Plan Priority Committee ranked Lake Elementary second behind Wilson Elementary for Total replacement.













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HISTORIC AND PROJECTED ENROLLMENTS

- The 2016 FMP call for Lake to be built at a capacity of 450
- Bridging architect was directed to plan for 530
  - Additional capacity was added to allow the positive affects of a new building to be experienced by more students which would draw on adjacent school's enrollment although budget was a concern when the plan for a bigger school was desired
- Demographic project show highest enrollment over the next 10 years at 437 so 475 is appropriate for local need
- Start of school 2020 current projected enrollment for 20/21 is 421

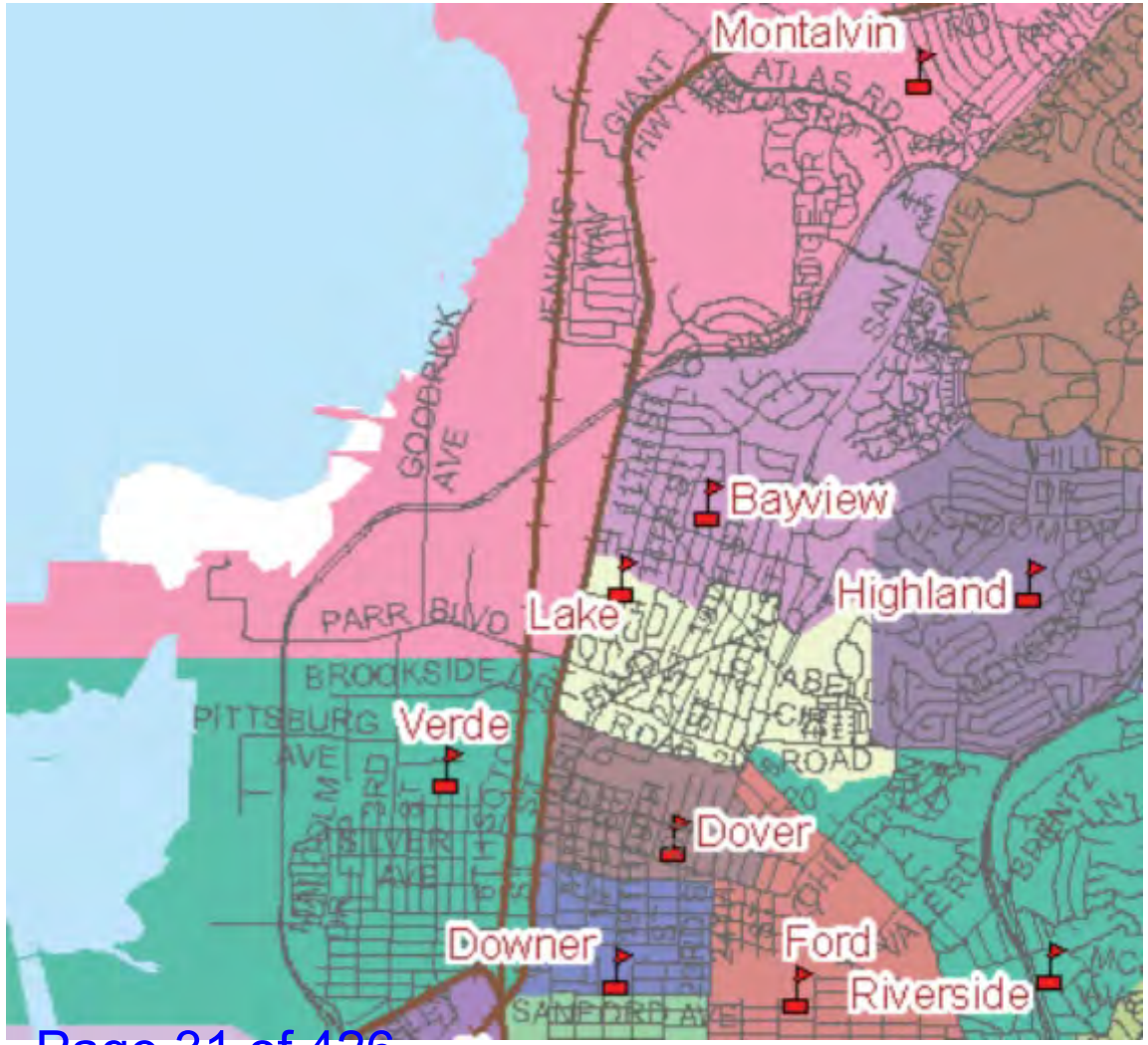
Grade	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
TK	24	20	14	24	24	25	26	26	26	26	26	26	25	25
K	62	57	52	61	61	61	62	62	61	60	60	59	59	58
1	69	68	47	57	59	60	60	60	60	59	59	58	58	57
2	43	66	58	46	56	58	58	59	59	59	59	58	58	57
3	40	41	67	66	47	57	59	59	59	60	60	59	59	58
4	62	42	40	63	68	48	58	60	60	60	60	60	60	59
5	56	62	38	34	58	62	44	53	58	57	57	58	58	57
6	59	56	57	41	33	55	60	42	52	56	56	56	56	56
Totals:	**415**	**412**	**373**	**392**	**406**	**426**	**427**	**421**	**435**	**437**	**437**	**434**	**433**	**427**
Pct Chg:	0%	-0.7%	-9.5%	5.1%	3.6%	4.9%	0.2%	-1.4%	3.3%	0.5%	0%	-0.7%	-0.2%	-1.4%

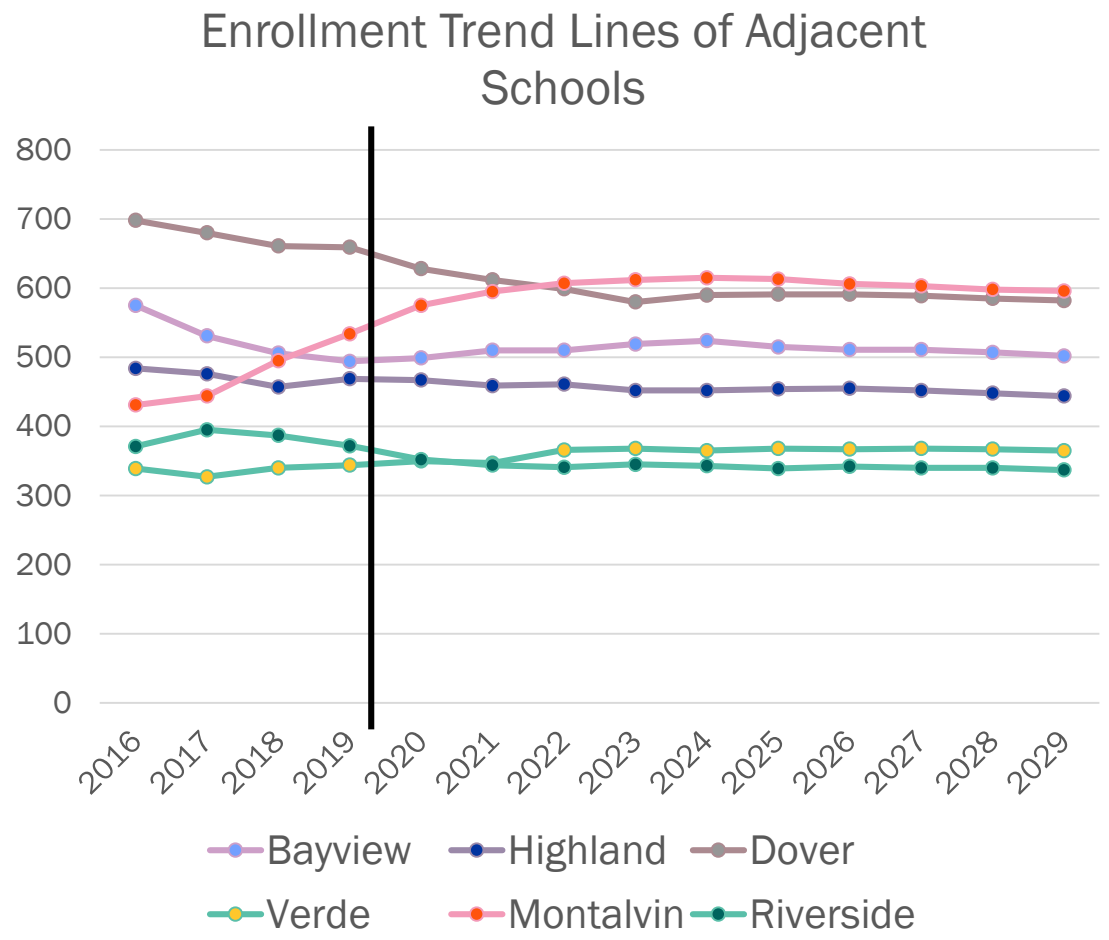
Historic Enrollment | Projected Enrollment

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Source: Decision Insite Moderate Projection

ADJACENT SCHOOLS

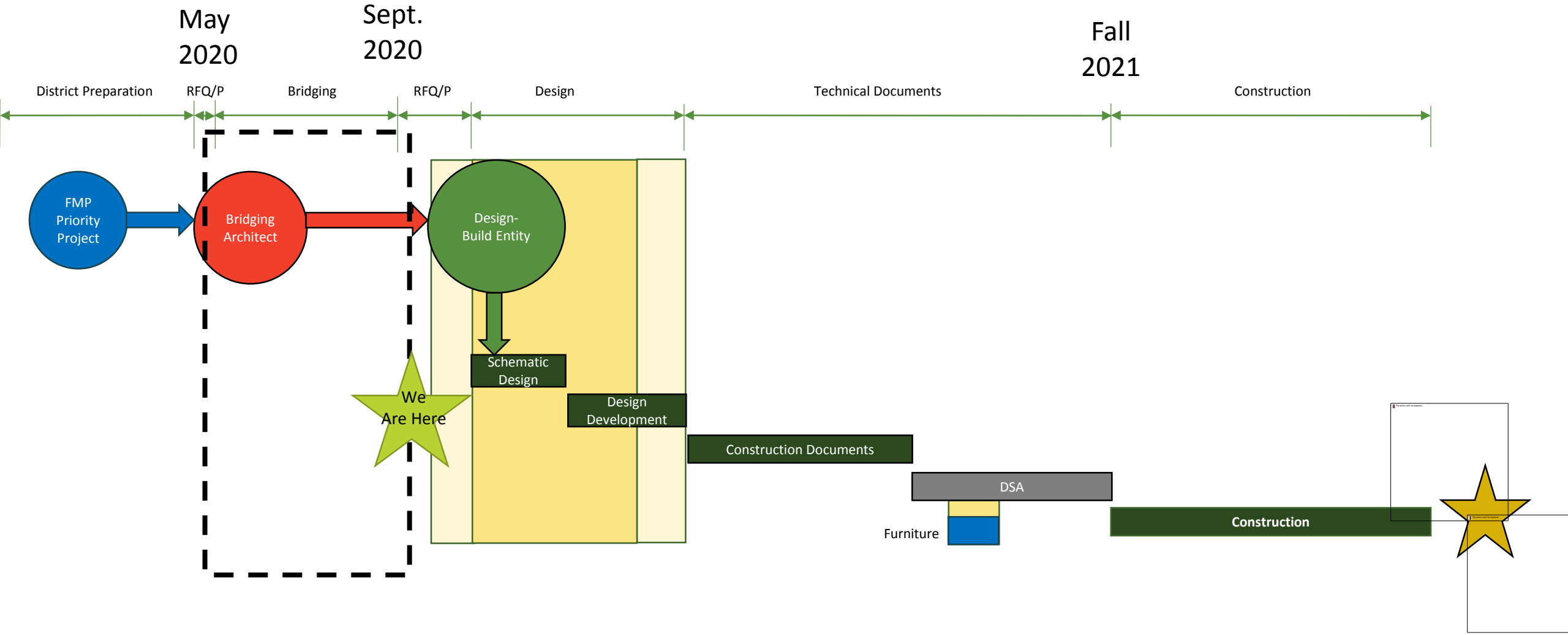




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Source: Decision Insite Moderate Projection

THE DESIGN BUILD PROCESS

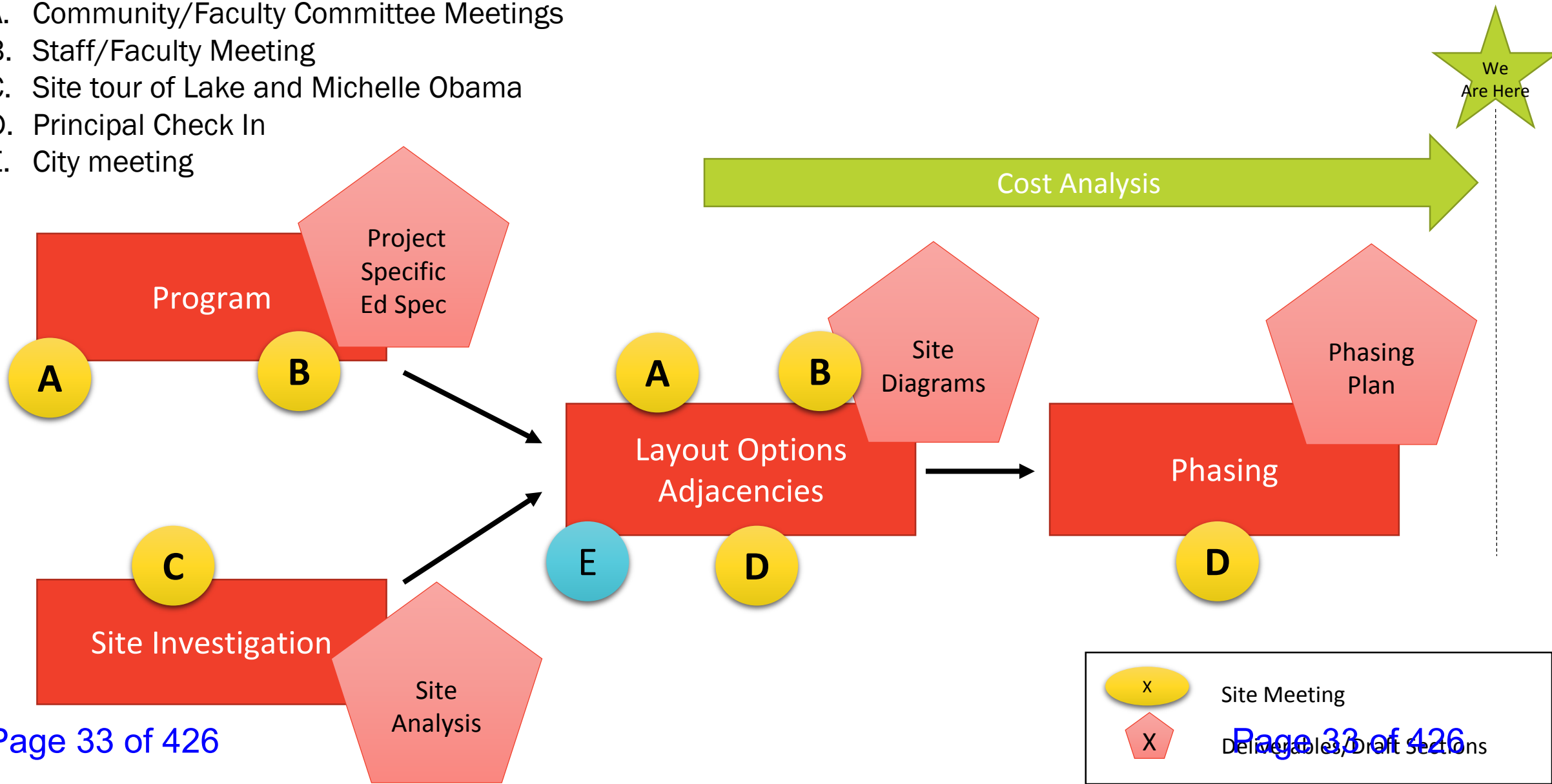


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BRIDGING ARCHITECT

Meetings competed to date:

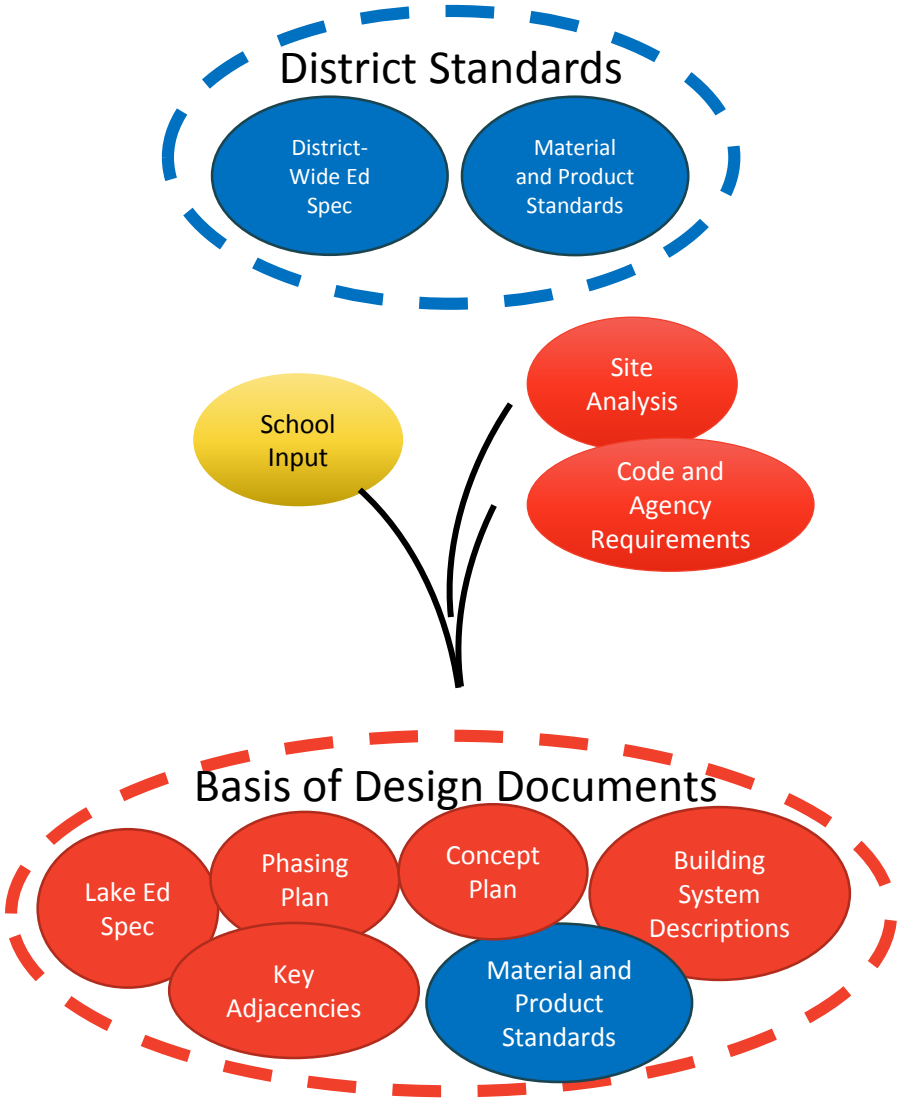
A. Community/Faculty Committee Meetings
B. Staff/Faculty Meeting
C. Site tour of Lake and Michelle Obama
D. Principal Check In
E. City meeting



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CREATING PROJECT SPECIFIC EDUCATIONAL SPECIFICATION

- Understanding Site Specific Goals
- Define learning approach
- Define capacity which affects the quantity and sizes of space
- Define full-service community school spaces



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INVOLVEMENT

Lake ES/District Representatives

Kenneth Bonner	Principal
Jeannie Williams	Vice Principal
Karen Rodriguez	Secretary
Katherine Garcia	Dir. Beacon
Adelina Abril	Teacher, Gr. K
Michelle Douglas	Teacher, Gr. 3
Gretchen English	Teacher, Gr. 6
Robert Gerson	Teacher, Gr. 5
Dominic Moody	Teacher, Gr. 3
Tesla Moreno	SS Council
Angela Perry	Teacher, Gr. 2
Josephina Publico	
Brenda Rankin	SS Council
Joyce Yoon	Teacher, Gr. TK
Nemesis Vasquez-Jimenez	Teach, Gr. 4
Alison Makela	Deeper Learning

San Pablo Agencies

Jill Mercurio	Dir. City Engineer,
Sarah Kolarik	Environ. Program
Analyst	
Allan Panganiban	Senior Civil
	Engineer
Jimmy Zhou	Assistant Engineer
Steve Rupnow	Fire Inspector,
	CCC Fire
	Protection District

Design Team

Perkins Eastman Planning and Design
Brian Dougherty FAIA, LEED AP
Lance Kutz AIA, NCARB
Kim Coffeen AIA, LEED AP, ALEP
Kathryn Wagner AIA, LEED AP BD+C
Leah Lock LEED Green Assoc.
Alejandro Viteri
Olivia Law
Bryan Tranbarger LEED Green Assoc.

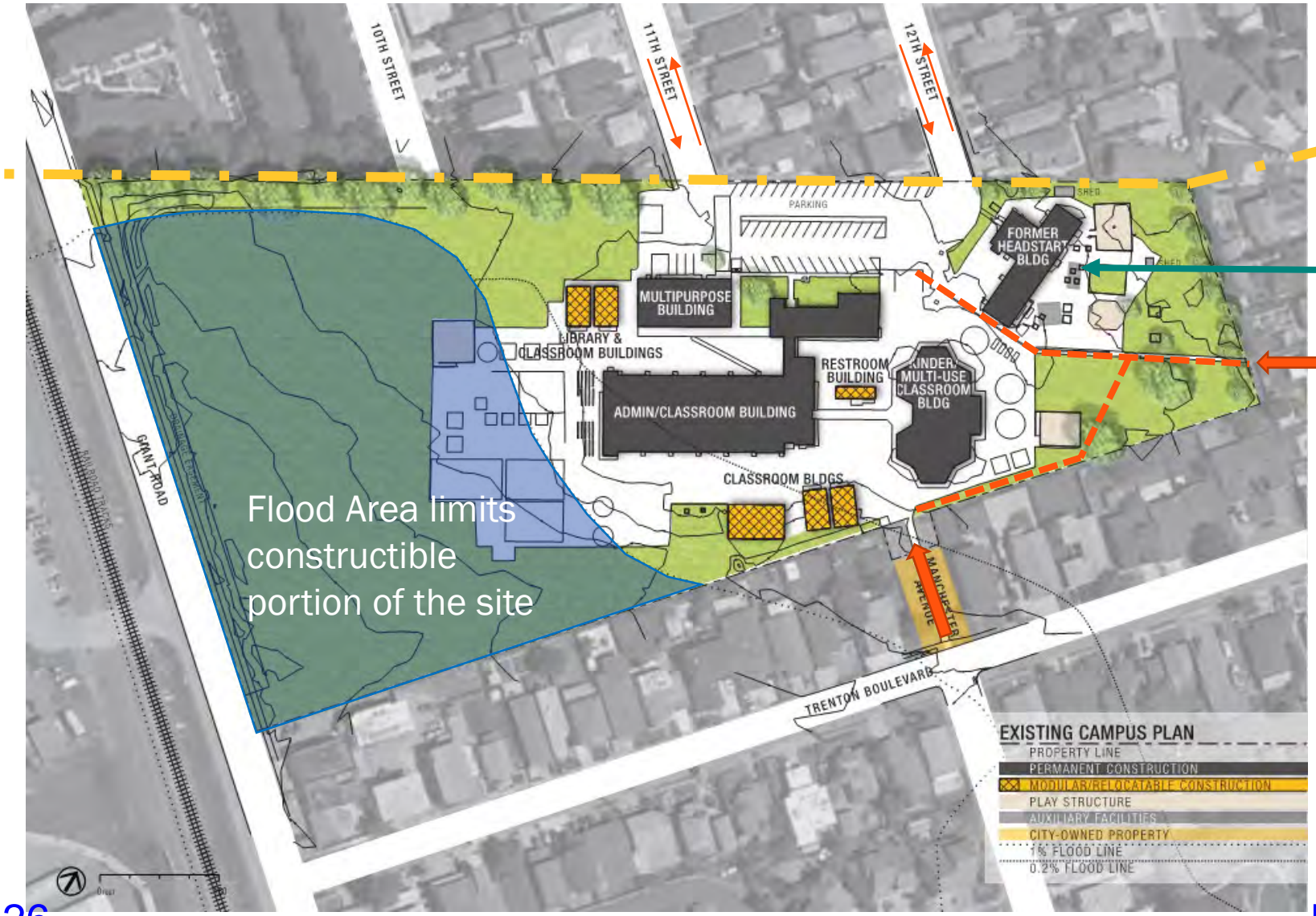
MTi Cost Estimator
Marcene Taylor CPE, LEED AP
NUVIS Landscape
Jim Williams Senior Associate
CSW I ST2 Civil
Kirk Bovitz P.E.
Salas O'Brien Mech'l, Elect'l & Plumbing
John Thomson P.E.
Jeffry Gosal P.E.

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EXISTING SITE

2-way streets that dead end into the only school parking lot and drop-off area

School attendance boundary is at the north edge of the campus



Head start area has been demolished

Community Access Pedestrian Walkway

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REBUILD GOALS

- Simplify the traffic approach to the campus and expand parking and drop – off areas
- Maximize the capacity that could be built without disrupting operations and limiting temporary housing requirements
- Create a flexible learning environment
- Stay within the master plan budget

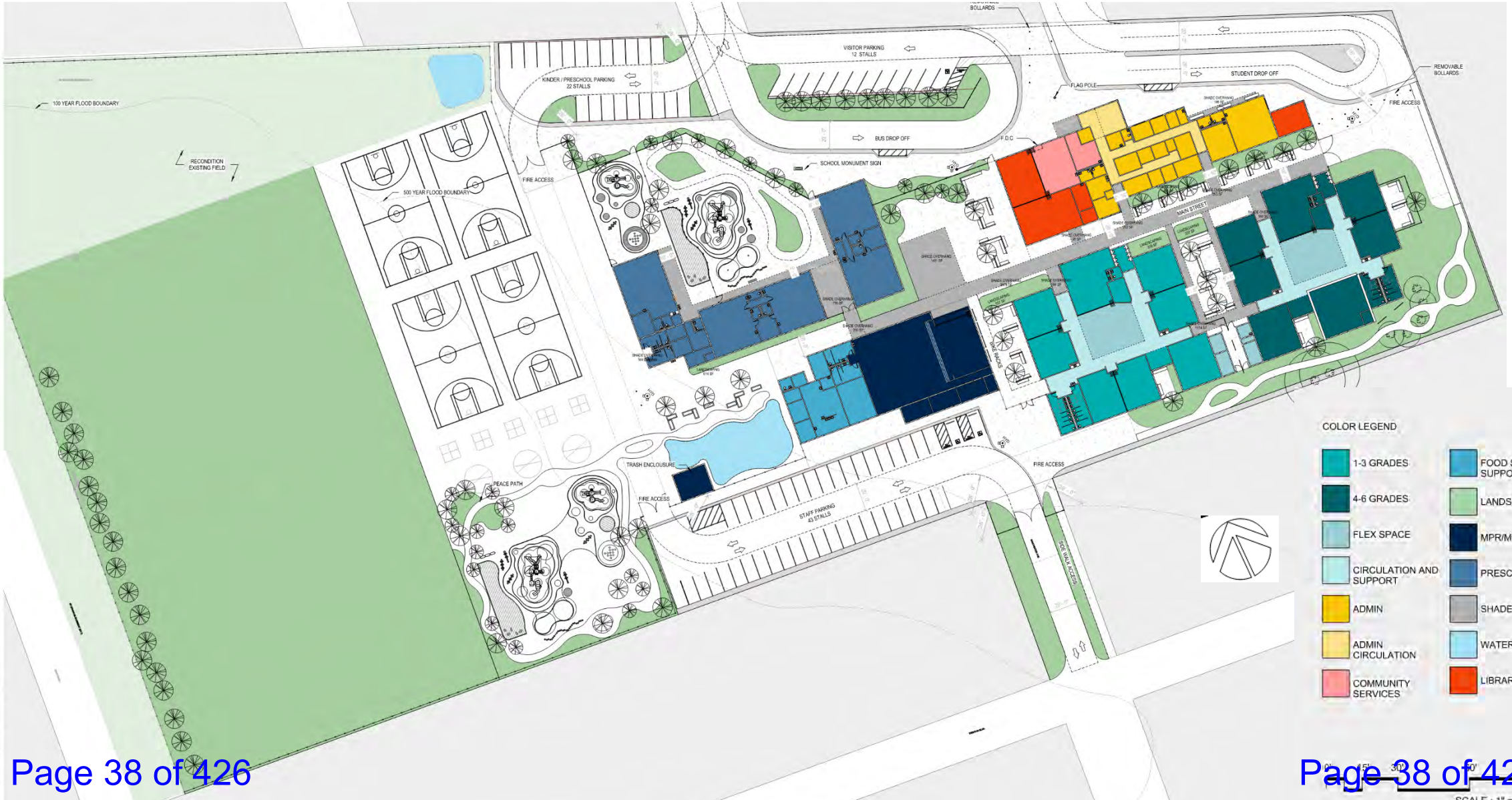
Site Priorities

- One story solution
- Create a “front door”
- Maintain the access from Manchester and Kelley

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LAKE ES SITE PLAN

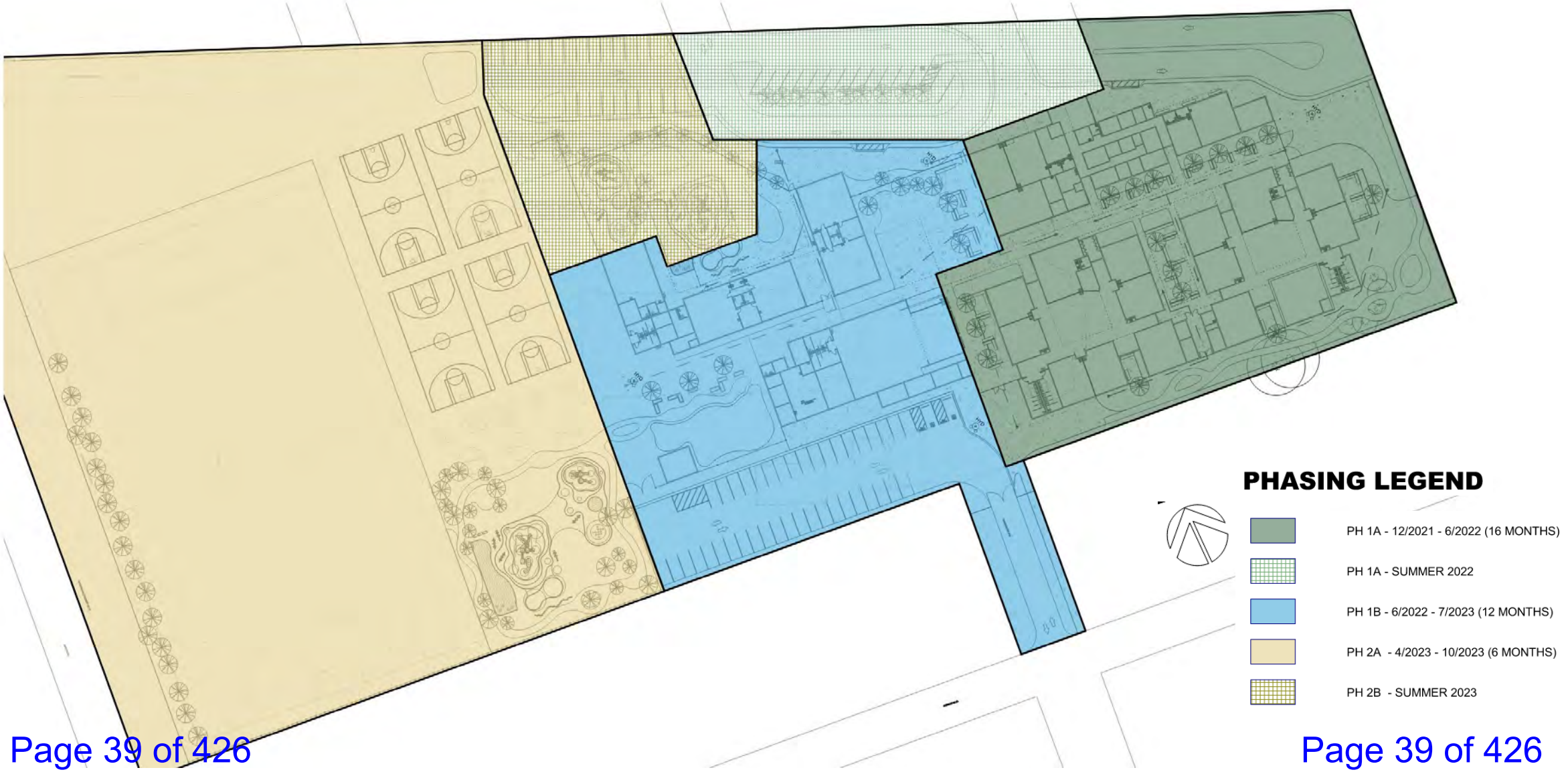
PERKINS EASTMAN
100 Montgomery St., Suite 2300
San Francisco, CA 94104
T. +1 415 926 7900



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PHASING PLAN

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100 Montgomery St., Suite 2300
San Francisco, CA 94104
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BUILDING PLANS

ADMINISTRATION

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COLOR LEGEND

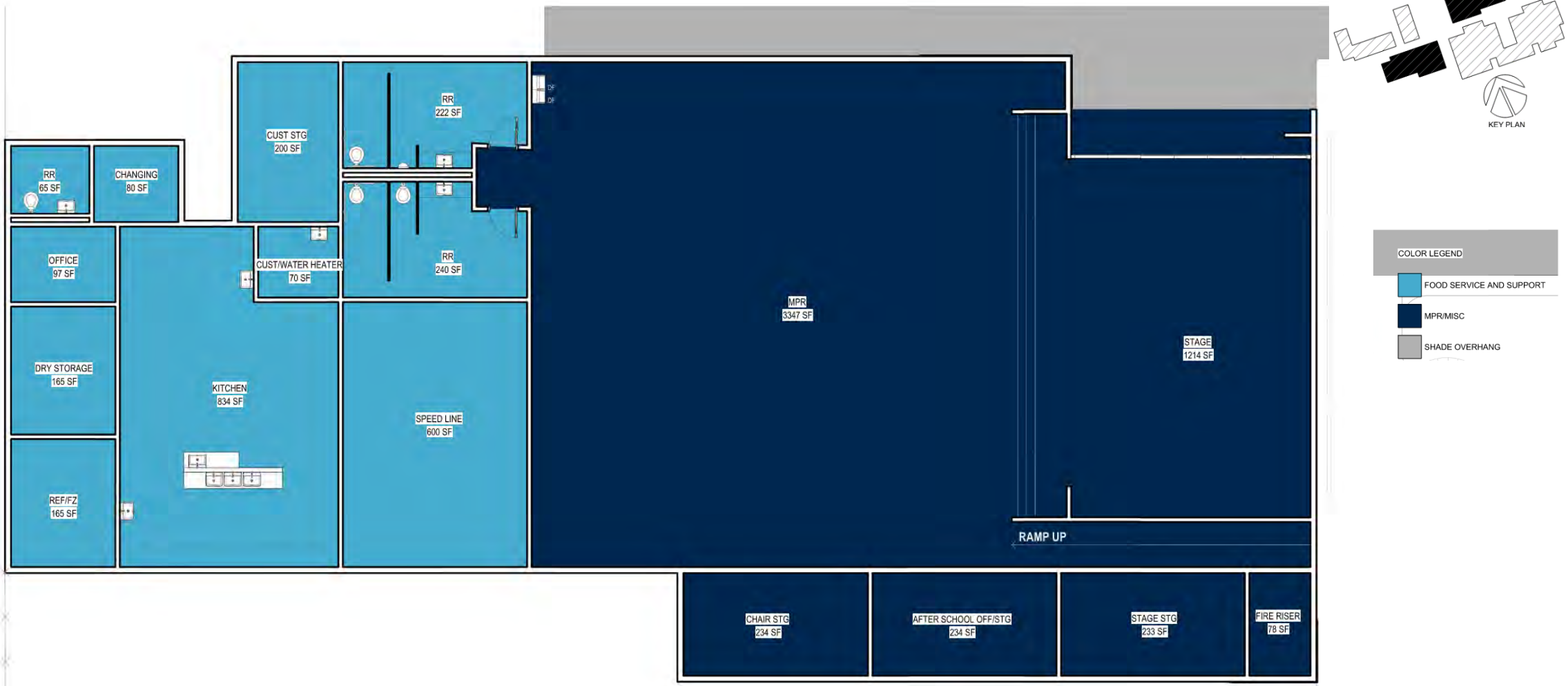
- ADMIN
- ADMIN CIRCULATION
- COMMUNITY SERVICES
- LIBRARY
- SHADE OVERHANG

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BUILDNG PLANS

MULTIPURPOSE ROOM

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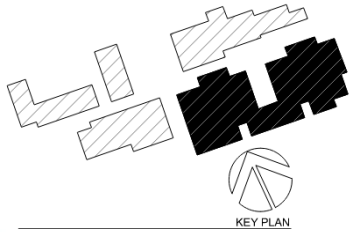
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BUILDING PLANS

CLASSROOM SUITES

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San Francisco, CA 94104
T. +1 415 926 7900





COLOR LEGEND

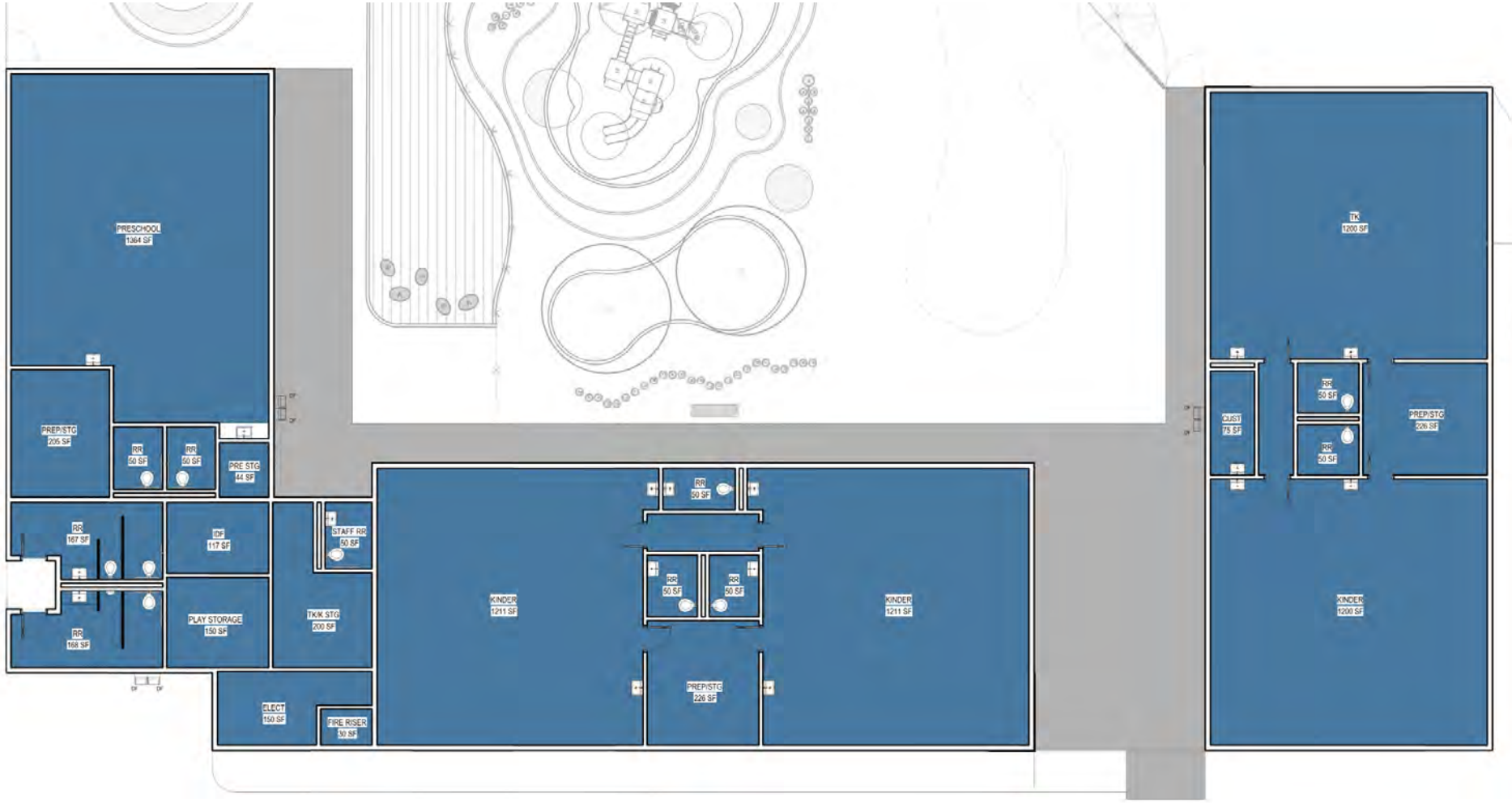
- 1-3 GRADES
- 4-6 GRADES
- CIRCULATION AND SUPPORT
- FLEX SPACE
- SHADE OVERHANG

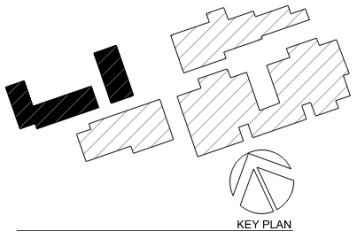
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BUILDING PLANS

PRE-SCHOOL, KINDER, TK

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100 Montgomery St., Suite 2300
San Francisco, CA 94104
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COLOR LEGEND

PRESCHOOL/TK/K

SHADE OVERHANG

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LANDSCAPE PLAN

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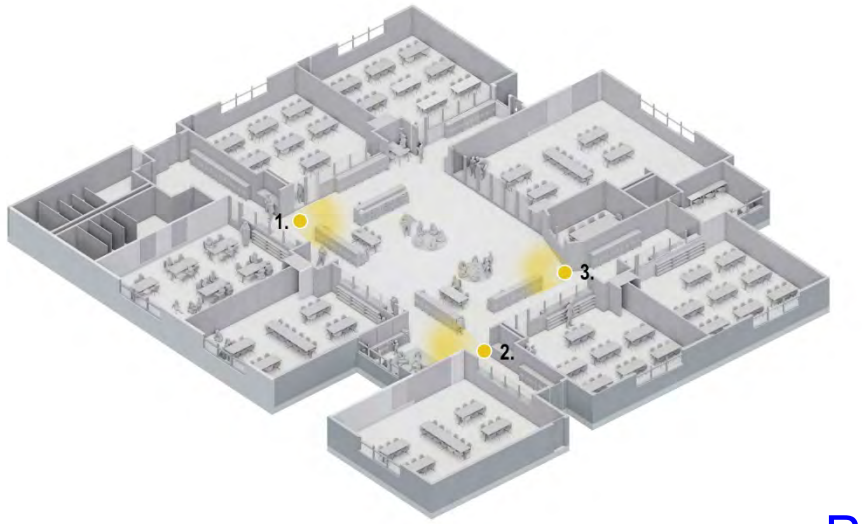
INTERIOR IMAGES

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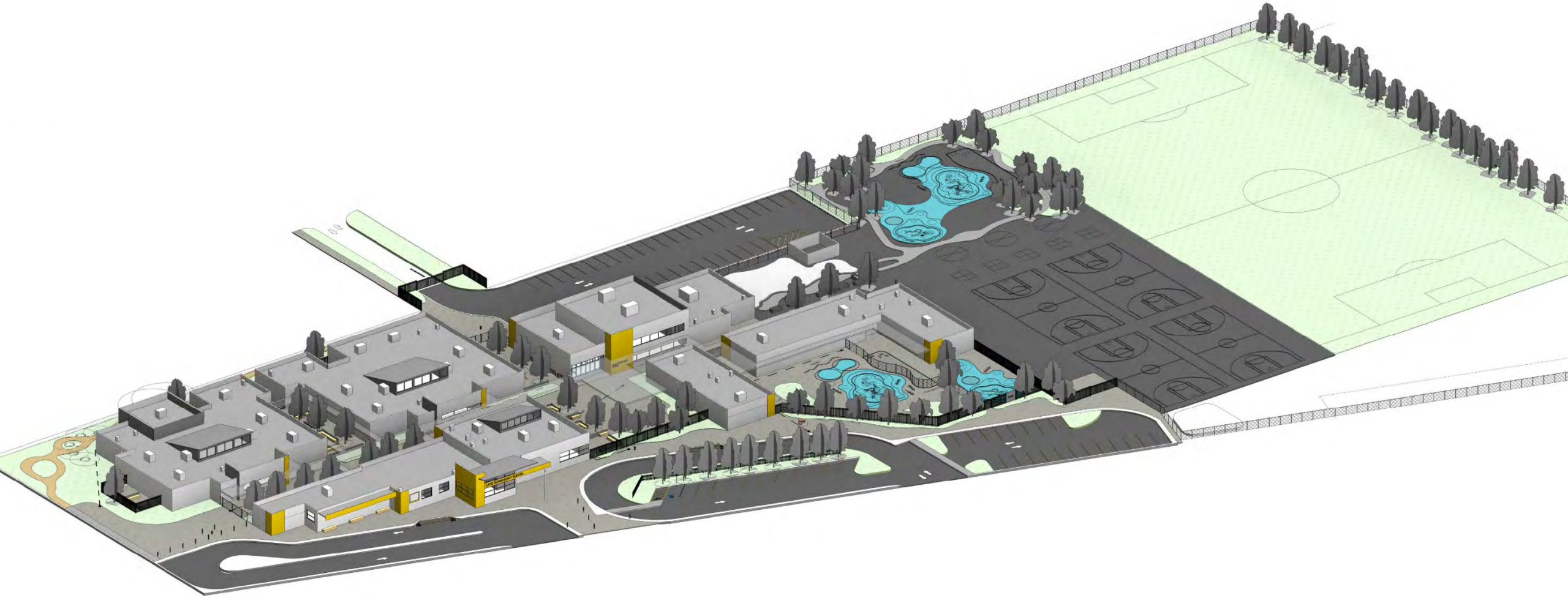




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EXTERIOR IMAGE

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District Facility Standard Documents

October 2020

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Agenda:

1. Review the definition of Educational Specifications and Material & Product Standards
2. Review how the documents work together in the design process
3. Review a summary of what is being updated

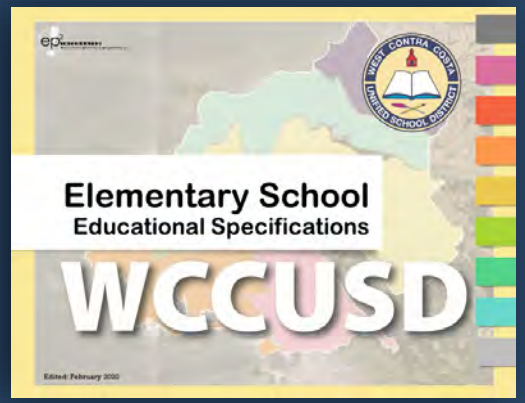
Objective:

- Update the District-wide standard documents before commencing the next round of Critical Needs Projects and the Design Build Team for the Lake Rebuild

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Educational Specifications (Ed Specs)

- An Ed Spec document defines
  - The spaces needed to accommodate the educational program
  - The size of each space
  - What is needed within the spaces (storage, finishes, utilities)
  - How spaces should be organized
- District-Wide Ed Specs form the base to create a Project-Specific Ed Spec



Addressing Misconceptions about the Ed Specifications

✗ Specify the construction method	✓ Designed to allow flexibility
✗ Include architectural features that could increase cost	✓ Define necessary spaces, not architectural details
✗ Increase construction costs over prior specifications	✓ Removed conflicts with material and product standards

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Material and Product Standards (M&P Standards)

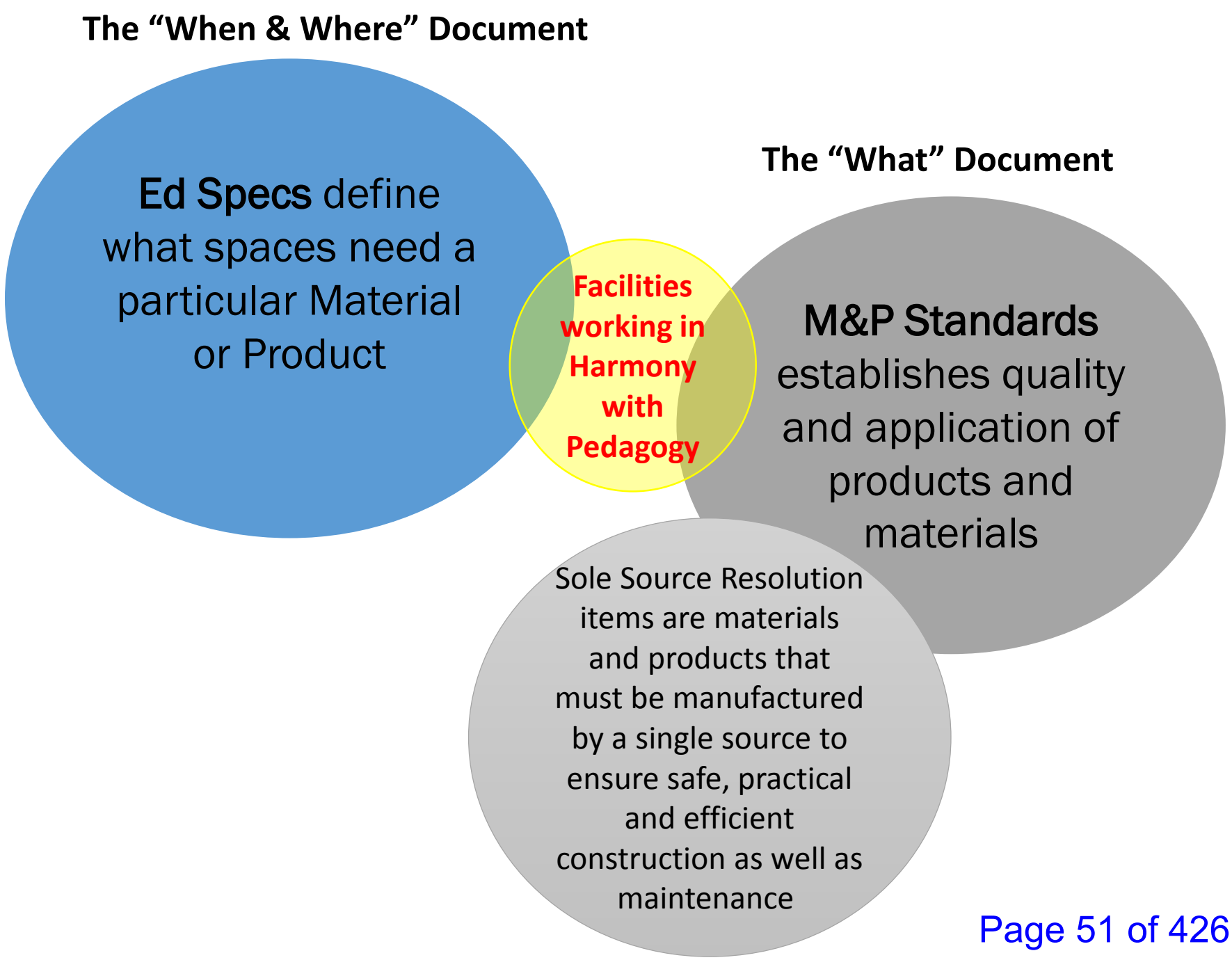


The District defines the performance requirements for materials and products, not the materials themselves. Performance focus creates flexibility by allowing a wider array of products for a given application, and guides material selection for lifecycle costs.

- M&P Standards set a level of quality or specific attributes the District desires in a specific product or material
- M&P Standards are based on performance of a material or product
- Some products and materials are District Standard (DS) and are contained in the **Sole Source Resolution**
- M&P Standards have three companion documents:
  - Waterproofing Guidelines
  - Hardware Standards
  - Technology Standards

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Two Documents a SINGLE objective



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Why Update?

Educational Specifications

Coordinate changes to the products and material standards that affect the Ed Spec

Including more detail to better describe the district's intent as required for Design Build Delivery Method

Material and Products

Since adoption in 2017, products and materials have changed, new ones have been introduced, or others are no longer available

The update has added more descriptive "design guidelines" and "Introductory" text

Adjustments to address changes in Building Code, ADA, and Green Code requirements

Coordinating with technology advancements

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Sole Source Resolution Updates

Items Removed

- Aluminum Windows – changed to a performance based product
- Roll In Refrigerator

Items Added

- Lighting Controls
- Network Cabling
- Roll Thru Refrigerator and Heater
- Additions to the Speed Line Equipment

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Elementary School
Educational Specifications

WCCUSD

Edited: October 2020

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Kindergarten & Pre-School

Learning Support

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Support

General Information

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Kindergarten & Pre-School

Learning Support

PE Playgrounds

Special Education

Support

Introduction

Educational Specifications serve to interpret the educational program and learning objectives into what physical forms would best support these activities. The concept behind educational specification is that the space used for education should allow the students and teachers to accomplish their objective easily versus creating work around solutions to the physical space they are given to use.

This District-Wide Educational Specification Document is a tool that will help create district-wide equity. Future designs or modernizations will be required to meet these guidelines set forth by this document and thereby creating space that can support the educational program of the District.

The Educational Specifications are District-wide facility requirements for all school building designs in the West Contra Costa Unified School District (WCCUSD). During programming of specific school buildings alternatives to these specifications may be discovered. To be considered, the design team must submit a request to the District Facilities Department for approval of any and all alternatives before proceeding with the design. Deviations made by the design team without approval may result in the rejection of design. All re-submittals will be at the expense of the design team.

Photographic Examples

Throughout this document, there are photographic examples of learning spaces. In some cases, students and staff have adapted their physical environment to fit the educational program. The photos are not meant to represent specific architectural solutions, finishes, furniture or designs but to convey a concept.

Educational Specification and Space Check List

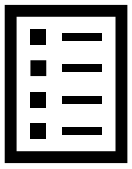
This document, the educational specification, is supported by the Space Check List. The Space Check List defines the type, quantity, and size of spaces and outdoor elements required for an elementary school and is the first place to start. In the Space Check List, begin with the “Start Here” tab which includes input boxes for general requirements of the design. These parameters will contribute to built-in formulas which define sizes and quantities. Additional quantities and square footage sizes that will need completion are highlighted on each tab. These blanks are either site decisions on the selection of teaching stations or need to be based on the design of the buildings or code requirements.

The number of teaching stations will also be calculated based on the answers in the “Start Here” tab. The design team needs to compare the total teaching station number to every space that qualifies as a teaching station to ensure the correct number of spaces are allowed for the desired capacity. These teaching stations include traditional classrooms or flex suites and specialty spaces such as the multipurpose classroom, occupational therapy room, learning center and the teacher lounge. Keeping the balance between the traditional classrooms or flex suites and specialty spaces is important to support hands-on, project-based and active learning. These documents should be considered a menu of spaces and selections should be made from the menu to meet the required number of teaching stations according to the programs.

There are two choices for general learning spaces included in this document: the traditional classroom and the flex suites. Although the flex suites are desired at new facilities, the District Facilities staff and the individual site Councils or Committees will determine the percentage of learning environments that will be flex suites. Modernization projects at elementary schools may or may not have flex suites. This is determined by the District Facilities Staff. There are two tabs in the Space Check List and depending on the determination of the type of learning environment, one or both tabs may be used.

This document describes details on each space in the Space Check List including the use, finishes, and amenities for each space and connections to other spaces. The Material and Product Standards provides additional information on the specific attributes and performances expected from the finishes listed here.

After the programming phase, in schematic design, the “SD” columns should be completed to compare the original programming to the preliminary floor plans. This process would be completed again at the end of design development in the “DD” columns.



Space Check List

The Process

Through input from District Staff, Principals, Site Staff and the community this document was defined. The Steering Committee and Board of Education were instrumental in guiding the direction of this document.

Focus group interviews were conducted to gather the majority of the detailed information. Facility Assessment tours and discussions with faculty, staff and community members during the Long-Range Facilities Master Plan were also instrumental in gathering input about every site, detailing what works well and what aspects of the physical environment made teaching and learning challenging. These various perspectives were brought together, along with industry examples of 21st century learning, to form the WCCUSD District-Wide Educational Specifications. While many of the Educational Specifications space requirements reflect the California Department of Education (CDE) facility space requirements, there are areas that may need CDE confirmation. The design team is responsible for any CDE reviews, and all regulations set forth by the California Building Codes, Americans with Disability Act and any other regulation or code that affects school design in the State of California.

The formation of the West Contra Costa Unified School District Educational Specifications has had the support and input from District Leadership, District Facilities, and the District Educational departments. Working together, these entities have created a dynamic document that defines space for all future District building projects. The participants were instrumental in the creation of a document that defines space that will promote learning, supportive of the staff and are cost sensitive.

Adam Taylor
Akinwale Ajayi
Alex Beltran
Alison Makela
Andrew Mixer
Barbara Jellison
Board of Education
Calvin Miles
Carol Butcher
Caroline King
Citizens' Bond Oversight Committee
Darcy Long
Darlene Almeida
Darrin Zaragoza
Demetrio Gonzalez
Denise VanHook
Devon Gordan
Elizabeth Carmody
Geri Auten
Janet Scott
Jessica Petrilli
Jose DeLeon
Jose Perez
Judy Sanders
Karina Tindol
Kathie VonHusen
Kevin Little
Kibby Kleiman
Krista Jann
Lanire Ajayi
Laurie Roberts
Lisa Jimenez
Lisa LeBlanc
Luis Freese
Marin Trujillo
Mark Bordas
Mary Kadri
Mary Lugton
Mary Phillips
Marylee Stadler-Cabrera
Matt Duffy
Mellissa Truitt
Michelle Harrison
Nia Rashidchi
Nicole Joyner
Patrick Martin
Paul Orr
Rashonda Winston
Renee Lama
Rich Seeber
Ritchie Cook
Robert Evans
Rocio Reyes
Ruby Gonalez
Sheri Camba
Sonya Neely-Johnson
Steve Collins
Steve Webber
Tashaka Merriweather
Tatjana Ravnik
Teodora Ildefonzo-Olmo
Tristan Simbulam
Vincent Meyer

School Environment

Schools are places of learning and an integral part of communities. As such, a school site should exhibit community pride and general good appearance. Opportunities to display school culture and curriculum are welcome additions to the exterior and public areas of the campus. Student ownership is important and is improved by the good upkeep of the site and displays of student work. The design of the exterior and landscaping should consider the schools “curb appeal” and provide an overarching aesthetic of a welcoming and modern-learning environment. The front door shall have a covered by at least a 6’ overhang or other architectural element that provides visitor cover from the weather.

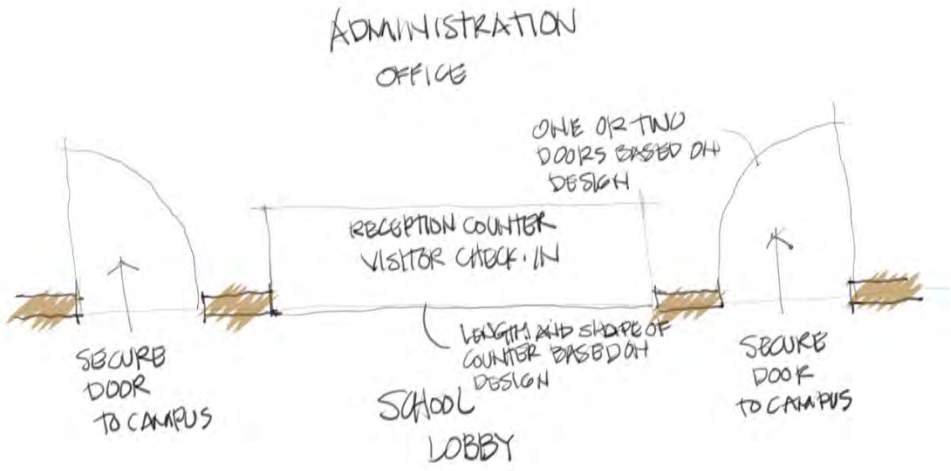
Navigation and circulation through the site and on to the site should be understandable and well-marked with interior or covered walkways at least six feet wide connecting all buildings and exterior doors. Definition of major spaces such as the Multi-Purpose Room, Library, Community Center, and Office should give visitors understanding of where events are held and highlight these areas to students as special environments. Architectural elements should delineate these spaces from the classroom buildings. The school name and mascot should be visible from all major roadways surrounding the school. Parent and bus drop off, and waiting zones need signage and designation both in striping and pole mounted signs.

General Access

The site design should include the ability to supervise the school by providing good lines of sight to all areas of the campus and limit entrances onto the campus. The strategic placement of cameras improves visual supervision. Data lines for cameras should be placed at the front entrance, interior and exterior, along major pathways, at entrance gates, overlooking the parking lots and building entrances. Buildings should be arranged to limit hard to see gaps and provide windows to increase passive observation of all areas.

During the school day, all gates onto campus should be lockable, forcing all visitors to go through the main office to gain entry to the rest of the site. The doors controlling access through the office must have electronic door hardware that allows the door to be unlocked through a button at the reception counter.

After school hours, event spaces should be visible and easily accessible by visitors without needing to access the full campus including the use of restrooms.



Perimeter Fencing

The entire campus perimeter shall be completely secured by 8'-0“ high fencing and/or buildings. Types of fencing and gates are separated into two categories, ornamental fencing at or near the buildings and chain-link around the perimeter of the campus at the hardscape and fields. Ornamental fencing shall be used in all areas around the main buildings and only transition to 1” chain link mesh at the playground and parking lots. Parking lots shall be fully fenced with gates that allow the parking to be closed after hours.

All gates with panic hardware should include closers. Where a pedestrian gate is adjacent to vehicular gate, the pedestrian gate should have a header bar connecting the two sides of the pedestrian gate. This upside down “U“ structure gives additional support to the pole that must support the vehicular gate and limits sagging of the vehicular gate. No electric gates should be used for vehicular gates. The receivers for vehicular gates should be above 5’ to avoid users from placing their hand where the receiver connects.

Vehicular and Pedestrian Safety

Vehicular safety relies on the separation of cars, deliveries, buses, bikes and pedestrians. Designs of exterior access should strive to minimize mixing of the various forms of transportation. Sidewalks, curbs, and fences are effective ways of protecting pedestrians. Provide a logical and smooth traffic flow to facilitate a good system of vehicular drop-off that separates those cars that wish to park. WCCUD only provides bus service to special education students; therefore, the bus drop off area can be minimal in size and should be located near the severely handicapped classrooms, see the Special Education tab for additional information. Some of the general education students access public transportation to get to and from school, so a pedestrian traffic flow from nearby bus stops to a campus entrance should be considered. Bike and board racks need a fully enclosed area for additional security.

Drop off areas must include a wider sidewalk, minimum 8 feet, to allow students to stand and circulate. Covered areas should be provided at the drop off areas from a building overhang or stand-alone structure.

Communication with City, County or CalTrans is needed to discuss street improvements, restricting turning and crosswalks.

Service Area

The service area should be separated from all other traffic and be located near the kitchen and with easy access to the street. The service area must include a dumpster enclosure and a concrete service drive for garbage and delivery trucks. Food service trucks are typically 25 feet long. The service drive must have a direct concrete path to the kitchen door. This path must be wide enough to accommodate a pallet on a pallet jack. If ramps or curves are necessary, the pathway must be wider to allow for the turn radius of the pallet jack. Ideally, the service area would also include 2 to 3 parking spaces for kitchen staff.

The dumpster enclosure must be built to meet city codes and respect the views of the neighbors. The enclosure should be constructed of split-faced concrete masonry units, concrete pad, metal roof, and metal gates. The gates to the enclosure must be solid metal to block the view of the dumpster from the street. A concrete curb should be added inside the enclosure to stop the dumpster from being rolled into the enclosure walls. The enclosure should be large enough for the dumpsters and recycling canisters. Provide a hose bib with hot and cold water inside the enclosure. Provide a drain to the sanitary sewer.

Basis of Design

The mission of the educational specification update is to bring the design requirements back to what is educationally necessary for high-performance next-generation learning. While there are many perspectives on what creates next-generation learning, the list below represents a few interconnecting themes developed during the process.

Above all flexibility – The world is changing fast; learning and teaching styles change; programs that support learning change, so spaces cannot be fixed. All designs should look for opportunities to provide "shells" of rooms that can adapt over time to different interior layouts and different uses. The structural layout should limit the number of barriers to moving walls in the interior of the building. Sheer walls must be restricted to exterior walls and not occur between classrooms and flex learning zones. This flexibility of interior walls should not come at the price of acoustical separation.

Movement – While linked with flexibility, which allows changes over a series of years, movement provides for changes from one activity to the next with ease on a daily and even hourly basis. Making movement easy allows for varied activities, lessons, teaching approaches and personalized learning. For example, students are receiving general instruction then moving into a group activity followed by a full class discussion or check for understanding all within an hour. This short time period change is contrasted to projects that last and reappear throughout the week, month or quarter. Movement opens up the possibility to incorporate creativity, critical thinking, and communication by breaking the restraints that traditional lecture environments place on teachers and students.

Less is more – Technology has become smaller and more portable as well as equipment and furniture. Keeping rooms simple by providing many plugs, robust Wi-Fi and leaving the rest to be mobile is the plan. This lack of fussiness can also expand into the building design and interior finishes by investing money in high impact square footage over architectural statements. The structure and building systems, however, should not be exposed. All exposed building surfaces should be finish grade maintainable surfaces. Eves should be enclosed. Interior horizontal surfaces, such as windowsills, below six feet above the finished floor shall have finished wood or solid surface covering for cleanability. See the Material and Product Standards for approved finish materials.

The design should also provide less in long term operations, maintenance and raw material use. The building and site systems should include the efficient use of water and energy. The building design should maximize daylight harvesting and recycled materials while allowing for the best indoor air quality by limiting the amount of toxic substances.

General Requirements for All Spaces

The following sections of this document describe specific requirements for each type of space within an elementary school; however, there are many common needs that apply to all occupied spaces with limited exceptions. The specific space requirement notes any exceptions to these generalities. The basics include:

- Finishes
- Signage
- Doors
- Acoustics
- Daylighting and Views
- Landscaping
- Systems
- Technology
- Office and Small Group Rooms
- Restrooms & Sinks

Ceilings

Ceilings in all spaces shall not be lower than 9'-0" from the finished floor. Acoustical tile suspended ceiling is standard for all spaces unless noted. Acoustical properties and flexibility should be high priority considerations when making the design choice for all spaces. If ceilings are open and equipment, ductwork, building structure or other items are left exposed, appropriate "black out" paint needs to be provided and approved by the District design committee. Hard ceilings should be limited to where required by code and few other exceptions due to the lack of flexibility.

Walls

Walls, in general, need to be a hard surface, gypsum wall board, painted. Walls in hallways, corridors, multipurpose rooms and other high use areas will have a wall protection system up to 36 or 48 inches. Outside corners of walls in all areas should have additional protection from damage including corner guards. Acoustical and tackable panels should include framing to protect the edges from damage and be covered with wipeable vinyl or silicone coated fabric. Interior hallways, classrooms and office should contain designated tack surfaces that allow for paper placement.

Interior and exterior walls should provide interest to the design of the school. Large wall expanses on the exterior should be broken up by changes in elevation or material and painted with a secondary color to minimize the large mass. Any color change, interior and exterior, must have an expansion joint, edge or other physical delineation.

Marker boards are encouraged in learning spaces and offices and are not just for teachers. Students should be able to access writable surfaces to brainstorm ideas, draw and chart data. Erasable surfaces reduce paper consumption and encourage participation. Look beyond the 4'x8' typical whiteboard to maximize opportunity. Cabinet faces can become whiteboard surfaces. Offices and small group areas can equally benefit from having access to whiteboard surfaces. All whiteboards shall be steel with enamel coating.

At the Elementary Level, tackable surfaces become more than static displays and are used as teaching tools. Sight words, calendars and other charts are used interactively, especially at the younger grades. In primary learning spaces these boards should be placed vertically to allow the tackable surfaces to be at student height and available in many places.

All cabinetry, storage and countertop areas listed in this document are intended to built-in and included in the construction contact. Countertops shall be solid surface. All full height cabinets and lower cabinets should have locks.

Floors

Unless otherwise noted, flooring should be a rubber, marmoleum, or luxury vinyl tile that requires no waxing for regular maintenance. Sealed polish concrete can be optional in large common spaces depending on the design and approval of the Facilities Department.

Provide installed interior walk-off mats at all exterior doors. Any interior transition strip should be mechanically fastened to the subfloor. Exterior depressed walk-off mats should be installed in front of the main doors into the Multi-Purpose Room, Office, Library, and classroom buildings from the playground.

General Requirements for All Spaces – Signage

School Wayfinding and Overall Signage

Wayfinding signage is to be located throughout the site as required by code for accessibility and convenience. A flagpole shoul near the entrance. No vinyl adhesive type signage is acceptable.

All room names and numbers should be coordinated and confirmed with the District in Design Development. Room numbers s the building ID and room number. The classrooms should have whole numbers, while axillary spaces are labeled with sub nur letters.

These holders should allow for a paper insert.

Exterior Sign	Sign Type	Notes
Monument Sign	Electronic Marquee	Provide two-sided electronic marquee on a monument near the main road. Provide power, blocking, and/or foundation at the wall or pedestal. The District Facilities Department to determine location and size.
Parking Signs / Site Signs	Enameled Steel	Provide an “Entrance Only” and “Do Not Enter Exit Only” signs at all one-way parking or drop-off areas. Provide “Loading Zone” signs at drop-off. Provide all signs required by code or agencies such as the fire marshal and utility companies. Provide elevator and area refuge signage as needed, interior or exterior. Provide “No Parking” signs in all fire lanes.
Striping	Traffic grade paving paint	Provide directional arrows in parking and drop off areas. Paint curbs in drop-off and fire lanes. Provide “No Parking” lettering in fire lanes.
School Name and Address	Brushed Aluminum Raised Letters at least 18” High	Provide the full school name and address facing the street.
Community Space Identification	Brushed Aluminum Raised Letters at least 18” High	Provided identification of the Office, Library, Community Room and Multi-Purpose Room at the main exterior doors
Building Identification	Exterior grade vinyl sign	Provide a building sign on each face of the building
Room Numbers and Room Names	Two-color etched exterior grade vinyl with Braille	Include both name and number for all rooms including restrooms use exterior grade adhesive and seal edges

General Requirements for All Spaces – Signage

Interior Signs	Sign Type	Notes
Plaque	Buffed aluminum cast plaque with dark oxide sand-textured background and copy and logo raised and painted	Place in lobby of any full campus rebuild or replacement projects. Mounting to include backing with mechanical attachment Text to include district logo, name of the school, Board Members at the time of completion, Superintendent, contractor, architect and year of completion
Room Numbers and Room Names	two-color etched vinyl with Braille	Include both name and number for all rooms including restrooms. Signs shall be mechanically attached with vandal-resistant hardware. On office and meeting doors, the holders should allow for a paper insert.
Maximum Occupancy Signs	two-color etched vinyl with Braille	The style and color to match the room signs
Evacuation signs	Plastic sleeve to hold 8.5” x 11” paper evacuation maps	Provide an evacuation map at each classroom door or other room with an occupancy load over 20 people

General Requirements for All Spaces - Doors

Exterior Doors

All doors hardware should allow doors to swing open 180 degrees. All doors should have a floor mounted doorstop which is located no closer than 24” from the hinge side of the door. If the door cannot open against the wall due to an obstruction a floor mounted doorstop must be placed before the obstruction. If this floor mounted doorstop is in the path of travel, then a guardrail must be installed to prevent a trip hazard.

General use doors which lead to student spaces must be protected from the weather either by a building overhang, exterior covered walkway or canopy. If a canopy is used, the water should be directed away from the path of travel so students and others do not need to walk through a drip edge. This requirement also applies to the end of the cover walkway system.

Interior Doors

General use interior doors including doors to classrooms, multipurpose room, main office, ganged restrooms, and library which are regularly used by students shall comply with the requirements above for floor mounted doorstops. Staff only doors to ancillary spaces or private office can use doorstops interictal to the closure or more traditional interior solutions. Door closures should be limited to where required by code.

General Requirements for All Spaces - Acoustics

Acoustical performance is vital to a successful educational program. Listening and speaking are key components of language acquisition and understanding. Many research studies have found the importance of good acoustics on learning and comprehension. Additional background noise can make communication difficult and as students become more active in group learning and collaboration the need for sound absorption increases.

All group learning rooms should meet American National Standard Acoustical Performance Criteria, Design Requirements, and Guidelines for Schools, Part 1: Permanent Schools (ANSI/ASA S12.60-2010/Part 1). In areas where waterproof materials are required, this standard may not be attainable; although the design team should make efforts to control sound from exterior noise, adjacent spaces and mechanical units. In large open learning space, noise will travel; however, absorptive material and sloped surfaces should be utilized to increase absorption and limit reverberation. See the Technology standards for information of audio distribution systems.

General Requirements for All Spaces – Daylighting and Views

Many research studies support the need for natural daylight. Especially in the teenage years, exposure to daylight helps set the circadian rhythms so students can be more awake, improve focus and when combined with views reduce eye strain. The benefits go beyond the human factors and extend to the environment by reducing the need for artificial light and reducing energy use. While these benefits are well-established, windows and transparency continue to be difficult in practice leading to users covering the window. The most common reasons for covering the windows are

- Glare and over lighting – Reflective screens and bright white surfaces (i.e. whiteboards and copy paper) make glare and hot spots from different angles in the room throughout the day and seasons, interrupting work and distracting from learning while over lighting washes out projected images
- Heat Gain – Sunlight, heating rooms in the afternoons on southern and western exposures, change the focus from learning to the uncomfortable temperature
- Security – The lack of or difficulty in operating window coverings to accommodate a lock down causes window coverings to remain closed

While these are the most common obstacles, the design team should strive to anticipate and resolve these issues, so natural light is successfully introduced in as many spaces as possible. Architectural features such as light shelves, sunshades or roof overhangs are required on all south and west-facing windows. Roller blinds to allow for security shading are required on every exterior window. Natural light is required in every classroom and preferred in every office and conference room. Classrooms and other learning stations should have a minimum of 50% of the space lit by daylight. Restrooms, locker rooms, and gyms all benefit from natural light where practical. Specialty spaces require natural light, but an increased ability to control and dim the lighting may be required.

Views to the landscaped exterior are calming and can provide passive supervision and should be implemented especially in the interior of the campus. View windows from regularly occupied space to breakout areas, either interior or exterior, are required. The successful use of any breakout space is the ability of staff to see the students while in the main learning space.

Landscaping

Plant selection and ground cover should be appropriate for the school environment. Low maintenance and low water use plants are preferred. Verify that the selection of plant materials does not contain any poisonous or irritating plants, specifically, Fremontodendron californium. Ground covers and plant material should not provide easy to throw materials such as small rocks, seed pods or fruits. Deciduous trees are preferred over trees that drop leaves continually throughout the year. Shrubs and individual plants should be used in any planting around the multipurpose room, kitchen and dumpster areas. No ground cover should be placed in these areas. The final plant list to be approved by the District.

Shade cover should be provided in all playground areas and plazas. Shade trees should be planned on the perimeter of the field areas and outdoor learning environments. Any courtyard or plaza area at the front of the school or between the classrooms should include trees.

Bioswales should be provided where needed for stormwater management. Any cobles or other splash blocks must be grouted into place so that students are unable to remove the stone. If raised bioswales are required due to the depth of the storm system, then seat walls should be created to allow the raised edge to be functional for the students and staff. Any slope in a bio swale should be no greater that 3:1.

Planting near buildings requires measures to prevent water intrusion and damage. All buildings are to have a 12" wide x 6" deep mow strip at their perimeter in planted areas. Verify that irrigation for planted areas adjacent to buildings is designed such that no water hits the building. Provide planted areas adjacent to the buildings with adequate drainage such that no ponding of water occurs. Building foundations must be protected from water infiltration. Planting area edges that are not adjacent to a building should have a raised curb to keep mulch contained.

Planter boxes and seat walls, which are above 18” must include a waterproof coating on the inside to prevent discoloration on the outside of the wall.

See the material and product standards for detailed information about the irrigation system. The system maybe a traditional or two wire system and the district will make that determination during design development. The system must have a flow switch with connection to the Allerton system.

Hard Surfaces

Any asphalt area not adjacent to a concrete sidewalk must have a concrete curb include around any building edges, planting areas, grass spaces, play surfaces, and permeable paving.

Concrete pathways should connect all exterior doors and provide the path of travel throughout the campus. Walkways should be no less than six feet if used by students to access the main entrance to any space. If any item must be embedded than concrete shall be used instead of asphalt. These items could include bike racks, truncated domes or other site feature.

Furniture and Site Walls

Any area with walls or benches that would be used by skateboarders should have a chamfer or other formation to deter skateboarder use.

Trash cans should be provided. The container shall be concrete with a side access doors for easy removal of the liner. The container must have a roof. Provide cans in all outdoor learning areas, table areas, and playgrounds.

Heating, Ventilating and Air Conditioning (HVAC)

Provide HVAC to all rooms. Zoning control locations are subject to approval by the District Facilities Department. Code requirements for specific functional areas may add to the general requirement of providing HVAC. All occupied space needs to be maintained between 68 F and 74 F degrees, including second story spaces.

Provide Energy Management System (EMS) control and passive pressure relief gravity vents that close automatically when the unit is off. Provide on-demand control of ventilation for HVAC connected through the EMS. Entire school HVAC to be able to be shut down from a single location for “Shelter in Place” events (through the EMS).

All code required interlock devices should be hard-wired. Solar or battery-operated monitors are not acceptable.

Water

The design and installation must meet all agency requirements. Provide a water meter at each stand alone building as required by EBMUD. Fire and irrigation will also need a separate service.

Security

A security system should be included on all school sites. The main panel shall be located in the office. Subpanels should be placed in every building and in any location where after-hours use is anticipated. Motion detectors should be placed in all rooms with exterior windows, and door contacts should be provided on every exterior door.

Public Address and Mass Notification System

Every occupied space requires the ability to hear the public address system. Adequate exterior coverage is required in highly populated areas of the campus. Two-way communication is required in learning spaces..

Lighting

Lighting should follow ASHRAE Fundamentals Handbook.

No surface-mounted lighting except in utility spaces

General Requirements for All Spaces - Technology

Designs should reflect the Technology Standards. The general expectation is that wireless access should be available across the school campus including classrooms and common areas such as the multipurpose room and offices.

	Classroom / Large Learning Spaces
Duplex Data Ports, general (CAT 6)	4
Duplex Data Ports, VoIP	1
WiFi access points	1, potential for a second to support outdoor learning area if applicable
Clock	Hard wired to central clock program for synchronized times and bell/chimes
Sound system with speakers, teacher wireless clip-on and handheld microphone	Provide this equipment in rooms over 900sf. System to support both audio from projection and voice reinforcement connect through classroom computer
Short throw wall mounted interactive projector with wireless connection to classroom computers/technology	Provide this equipment in rooms over 900sf. Connect to classroom computer mounted adjacent to the projector on wall. Include wireless capabilities for other classroom technology (chrome books or laptops), provide a minimum of a 100” diagonal at a 16:9 ratio projection surface
Smart televisions with wireless connection to classroom computers/technology	This equipment is for rooms under 900sf.
Intercom system	Two-way emergency communication with red emergency button on a wireless device and on teacher’s microphone

General Spaces Standards – Office and Small Group Rooms

Office and other small rooms on the campus adjust occupants over time depending on funding, staffing priorities, grants, community partnerships and student needs. To build in the most flexibility, any small space should be looked upon as an opportunity to flex between office space, assessment space, conference room, small group instruction rooms or student counseling. As such, the following chart breaks down these rooms by square footage to provide guidance on the requirements for each size of space. Any of these space must be a minimum of nine feet wide in any dimension. Additional "Key Elements" are listed for specific spaces to provide the specialization for the first intended use of each space, if required.

	Open Office Workstation	80-100 SF	120-140 SF	150-200 SF	200-250 SF	250-300 SF
Guest Chairs for office setting	0	1-2	2-3	4-5	N/A	N/A
Chairs for conference/ instructional setting	N/A	2-3	4-5	6-8	8-10	12-14
Whiteboard	0	1	1	1	1	2
Tack Board	0	1	1	1	1	1
Television / Digital Display	0	0	0	1	1	1
Clock	One per open space	0	0	1	1	1
Duplex Data Ports, general (CAT 6)	2	2	2	2	2	2
Duplex Data Ports, VoIP	1	1	1	1	1	1
Duplex Electrical Outlets	2	3	4	4	4	4
WiFi	Yes	Yes	Yes	Yes	Yes	Yes

General Spaces Standards – Restrooms & Sinks

There are a variety of restroom facilities, which are referenced throughout this book and in Space Check List. Finished wall and floor material should be Ceramic Tile. The following chart describes the attributes of each space. A curb should be provided on all toilet room walls, interior and exterior, including the center wall between multi-fixture restrooms.

	Multi-fixture Restrooms	Unisex Student Restrooms	Unisex Staff Restrooms	Family Restrooms	Severally Handicapped Restroom	Sinks not associated with a toilet facility
Urinal	Men's	Preferred but not required	Preferred but not required	No	Yes	No
Mirror and Shelf	No	No	Yes	Yes	Yes	No
Sink and Soap Dispenser	Proportional to toilet and urinal count	Could be inside or if gained outside but adjacent	1 include hot water	1 include hot water	1 include hot water	Yes
Hand Dryers	Yes	Optional	No	No	No	No
Toilet Seat Covers	One outside stalls	Yes	Yes	Yes	Yes	No
Paper Towels	No	Optional	Yes	Yes	Yes	Yes
Changing Table	No	No	No	Child	Adult	No
Hoyer Lift and Shower	No	No	No	No	Yes	No

Provide quick connect hose bib in a recessed stainless steel locked box near lavatory in all multi-fixture restrooms. Multi-fixture restrooms must include one in-wall water shut-off valve which will isolate the lavatories, toilets, urinals and adjacent water fountains. All toilet rooms shall include a clean out and floors shall slope to a floor drain.

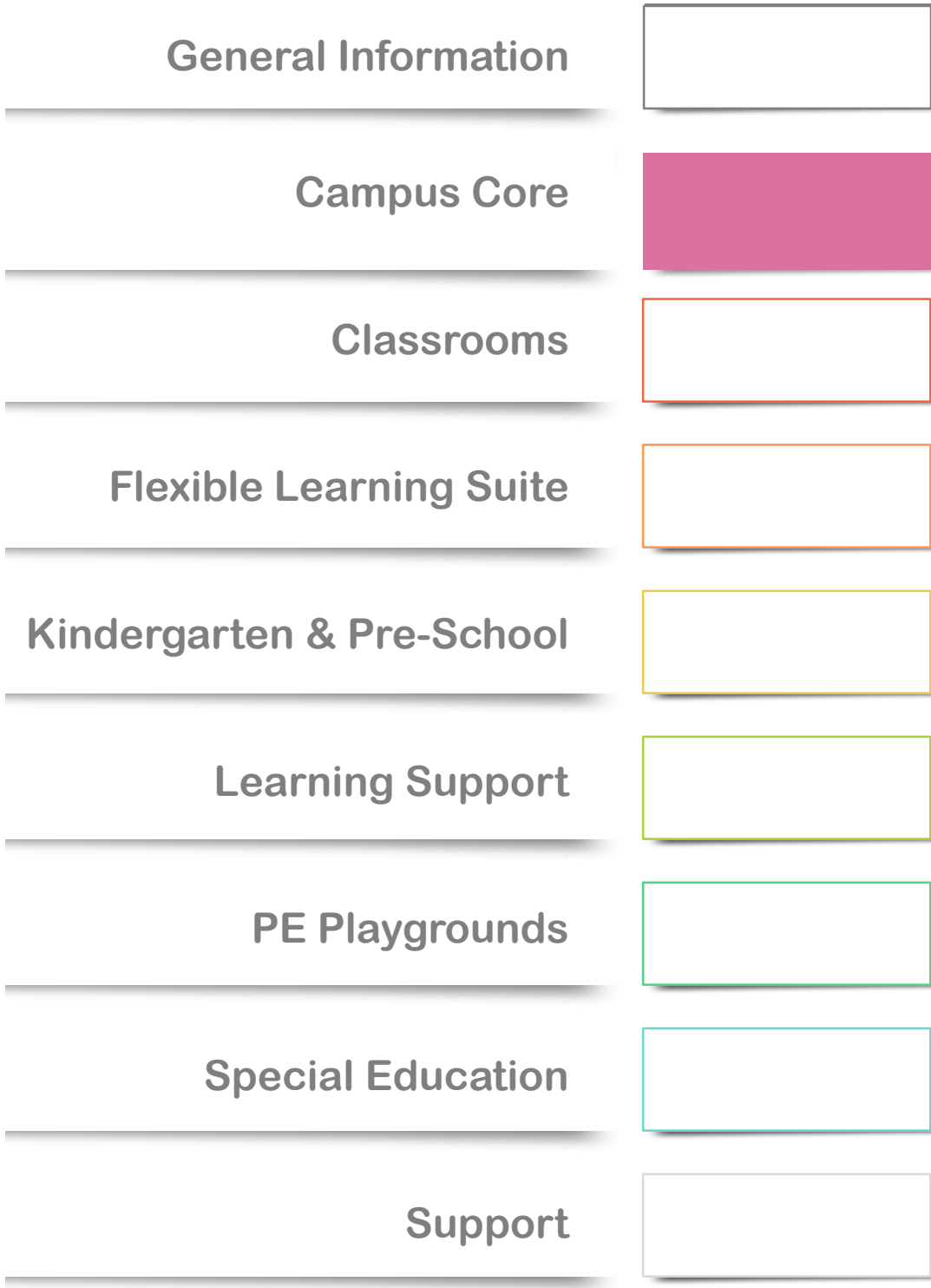
Where sinks are provided within cabinetry, upper cabinets should not be placed directly above the sink area. This allows wall space for paper towels and soap dispenser.

All soap dispenser shall be placed over the sink. In toilet rooms with mirrors the mirror should be placed on a wall adjacent to the sink so the soap dispenser can be placed over the sink.

The Campus Core consists of five major components:

- Administration
- Multiuse Flex office
- Health Office
- Library/Community Center
- Multi-Purpose Room

While each component has individual needs, all support students and have a component of community use. As such, each should be a warm and welcoming atmosphere and be easy to identify and access, especially outside of school hours.



Administration

The Administration component is the front door of the campus. The design should emphasize the main entrance to provide informal wayfinding to this doorway, which during the school day, is the only open access point.

Administrative Lobby

The Administrative Lobby and Reception/Clerical is the campus control point. All desks in the Clerical open office area should be able to see the front door from a seated position. A countertop with access door should separate the reception area from the open office. From this pass-through parents/family member can be directed to the rest of the campus. However, access to the campus should not be through the clerical open space.

The Parent room should be an open welcoming room which looks inviting to enter and is clearly labeled. Storefront or other non-restrictive design elements should express the parent room as a non-restricted place for parents to enter. Access to the Family Restroom should be from the Parent Room or Lobby Space. The parent room should not have access to the main campus without going through the Administration check point.

Reception/Clerical

The Reception/Clerical space is an open office area, which supports the personnel that service the front counter. In addition to the counter, individual workstations are required.

Admin Lobby Key Elements

- ❑ Seating for four
- ❑ Stroller parking
- ❑ Room at the counter for two people
- ❑ Display cases for school memorabilia and student art
- ❑ "Magazine Rack" for paper handouts

Reception/Clerical Key Elements

- ❑ Two staff workstations
- ❑ One volunteer or part-time workstation
- ❑ Free standing Printer, Scanner, Fax – Single electrical outlet with dedicated circuit and data jack
- ❑ Side or back counter area for form assembly, mail sorting
- ❑ Front counter
  - ❑ Storage on clerical side for forms (8.5"x11" clear) and office supplies, include lockable drawers and cabinets
  - ❑ Lower ADA complaint countertop (3') section with chair and knee space on both sides

Principal and Assistant Principal's Office

Use Office Standards. Carpet can be considered for these rooms.

Nurse's Office

The Nurse office needs to be within view of the Reception Area, for front office supervision when nursing staff is not present.

Staff Preparation Room/ Staff Restrooms

The Staff Preparation Room needs to be easily accessed by faculty to collect their mail and make copies. If possible, this access should be easy without having to circulate through multiple office spaces or down long hallways.

Staff restrooms should be adjacent to the Preparation Room and in proximity to the Administration, Multi-Use Flex Office, and Health Services. Use Restroom Standards for interior requirements and accessories.

Records and Storage

The Record Storage Room in proximity to the Reception/Clerical Area. This room's primary purpose is to hold the student files. A shelf can be provided above the files for additional supply storage. This room should also contain lockable storage for keys and vault.

Book Room

The Book Room stores textbooks not in distribution at any given time, teacher manuals, consumables and additional paper supplies. Provide full height metal shelving. This room should be in proximity of the Clerical/Reception Area and Library.

Nurse's Office Key Elements

- ❑ Countertop with lockable upper and lower cabinets
- ❑ Under counter mini-refrigerator with separate freezer (standard size 32.8 Inches (H) x 19.13 Inches (W) x 21.1 Inches (D))
- ❑ One countertop duplex plug with USB jack
- ❑ Sink with hot and cold water
- ❑ Guest Chair
- ❑ Cot
- ❑ Small Workstation, see open Office Standards Cleanable Wall and floor finishes
- ❑ Wheelchair storage
- ❑ In clear view of clerical staff
- ❑ Adjacent to Nurse's Restroom (Use Restroom Standards for interior requirements and accessories.)

Staff Preparation Room Key Elements

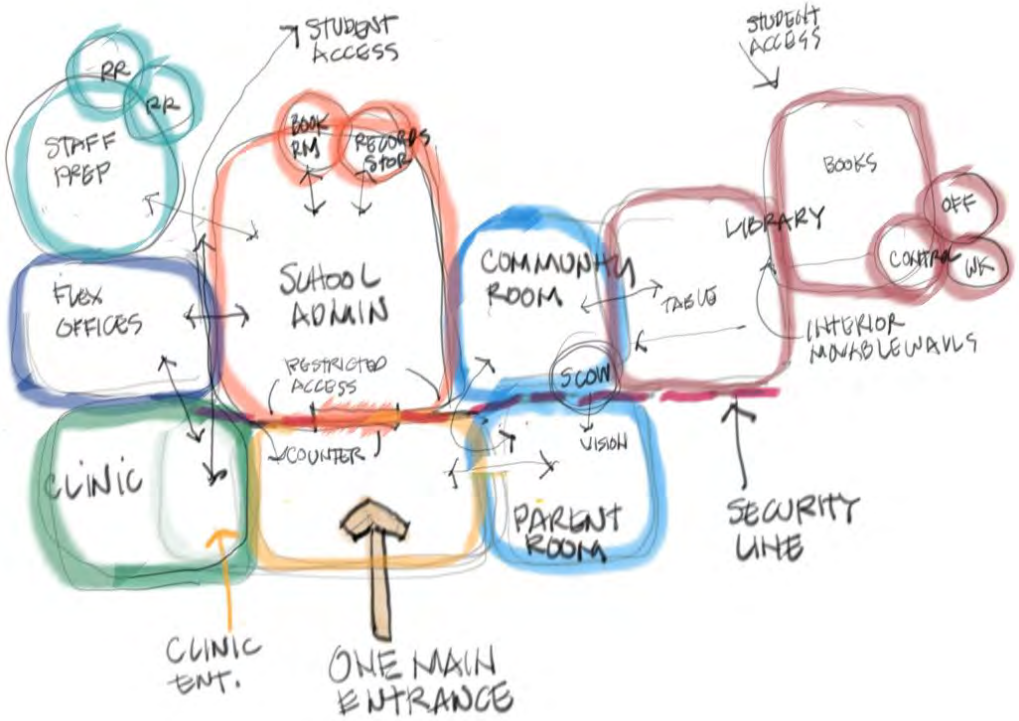
- ❑ Lockable upper and lower cabinets with countertops for paper processing (15 LF minimum)
- ❑ Six duplex outlets, counter level outlets to include USB charging ports
- ❑ Two free standing Printer, Scanner, Fax – Single electrical outlet with dedicated circuit and data jack
- ❑ Mailboxes – Minimum 12x12x6 (clear) with metal label holders for anticipated number of faculty and staff
- ❑ Under mailbox storage for larger packages
- ❑ Sink with Hot and Cold water

Multi-Use Flex Office

The District's Full-Service Community Schools Initiative. The Center brings outside providers into the school to support the needs of the community. Due to the nature of grants, changes in school provided funding and access to outside providers a fixed number of offices is difficult to set. To address the need for flexibility, the Multi-Use Flex Suite was created. This suite of office and small group rooms allows the office staff, special education and outside providers access to shared space which connects to both the formal Administration area and Health Center. As time goes by the assignments of these offices can change and fluctuate depending on funding, special education requirements and the requirements of the community.

While not all communities requires the same level of services, this office area may require specialization depending on the community needs; however, the program described in the Educational Specification is considered the maximum requirements. Before beginning design, confirm with the District Facilities Department on the level of build out and equipment the District is providing in the construction. Additions may be made by the providers for both the Flex Office areas and Health Center.

Use Office Standards with special consideration for acoustical privacy. Carpet can be considered for this area.



Multi-Meeting Observable and Observation Room

One of the small meeting rooms shall have an observation window to allow professionals and parents to observe student behavior from the adjacent observation room.

Shared Storage Room

Provide full height storage shelves.

Health Center

The final layout and design of the Health Center will be subject to input from the outside provider. The Center will be open to the greater community and requires an exterior entrance. During the school day, students will be called directly from class to an office, so a pathway from the classrooms to the offices needs to be accessible to students.

No major circulation paths should separate the Health Center from the Multi-Use Flex Office. The Multi-Use Offices will be used by the Health Center for mental health services. Confirm before beginning design if any of the Multi-Use Offices should be an additional exam, vision or dental rooms. If dental or vision is required, then the square footage of the room should be 200sf. Carpet would not be allowed in an exam, dental or vision rooms.

Exam and Vision Room Key Elements

- ❑ Upper and lower cabinets with integral backsplash countertops
- ❑ Sink with hot and cold water with foot petal operation
- ❑ Five duplex outlets, counter level outlets to include USB charging ports, coordinate with medical equipment and include backing in walls
- ❑ One duplex data ports for phone access
- ❑ Space for a bed and other medical equipment
- ❑ Option for a vision chair, phoroptor and projector

Exam and Dental Room Key Elements (If Required)

- ❑ Upper and lower cabinets with integral backsplash countertops
- ❑ Sink with hot and cold water with foot petal operation
- ❑ Five duplex outlets, counter level outlets to include USB charging ports, coordinate with medical equipment
- ❑ One duplex data ports for phone access
- ❑ Space for a bed (exam room) or chair (dental room) and other medical equipment
- ❑ Dental room will require additional plumbing, air, and vacuum at console treatment unit
- ❑ Dental will require additional backing in ceiling for lighting tracks

Parent Room and SCOW Office

The School Community Outreach Worker (SCOW) is the main staff member supporting the parent center and will host many of the events in the Community Room. Direct access to the Parent Center and proximity to the Community Room is required. Parents should not be allowed to enter the main campus without going through the Administration area check point. Use office standard with a vision panel to the Parent Center.

The Parent Room should be a flexible space which accommodates several functions including

- Small workshops/meetings
- General informal meeting area
- Countertop workspace for assembling packets and preparing other materials
- Storage for parent purchased equipment
- An information resource

Parent Room Key Elements

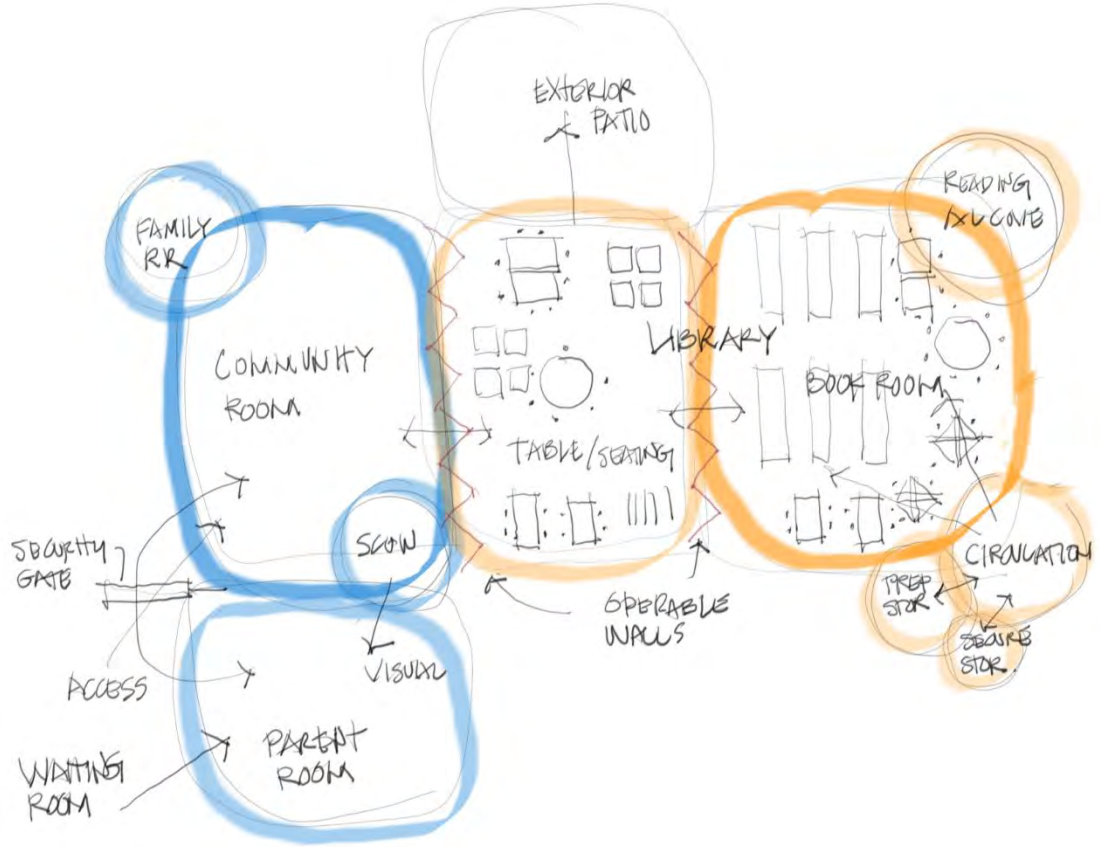
- ❑ Seating for 12 to 15
- ❑ Computer access
- ❑ Digital Display
- ❑ “Magazine Rack” for paper handouts
- ❑ Tack Board
- ❑ White Board
- ❑ Countertop with lockable upper and lower storage cabinets and a sink
- ❑ Electrical Outlets to support a copier/printer, microwave, refrigerator, twelve laptop computers, digital display television and charging of personal devices brought by occupants
- ❑ Refrigerator with ice maker
- ❑ Water connection for refrigerator
- ❑ Option for a VoIP Phone
- ❑ Direct Access to the SCOW Office

Library/Community Center

Currently, the District provides a Librarian at the Elementary Schools one day a week. At some school sites, the Library can operate additional hours using volunteers, parent fund raising or classroom teacher supervision. These additional open hours can consist of students accessing the Library solely to check out books. The development of the Library/Community Center strives to meet many needs by allowing the table space normally associated with the Library to be used either by the Library or as an expansion of the Community Room without affecting the ability of classes to access the book collection and story area.

When the Library is closed or being used only as a book check out, the table area can either be its own breakout space or combined with the community room for larger gatherings. The community room, especially in the evenings, host many activities such as math nights, which can be larger than what can fit in a classroom sized space. During the day, parent university and other parent education programs can be offered.

These spaces then can work in concert or individually, to provide the most utilization possible. Due to the scale of the spaces when all doors are open the ceiling height should average shall be not less than 12' across these three spaces.



Community Room

The Community Room should be a flexible environment to accommodate a variety of meetings and activities. These activities often offer refreshments to participants, so access to a sink and countertop area are important. Flip top tables should be considered to allow the ability to clear the floor area for chair only seating to fit the maximum number of family members or have open space for certain activities.

Exam and Vision Room Key Elements

- ❑ Use standard classroom technology
- ❑ Maximize the extent possible on one wall with a countertop with ADA complaint sink with a bubbler, upper and lower lockable cabinets and three duplex electrical outlets with USB charging ports
- ❑ Six additional duplex plugs
- ❑ Magnetic markerboards and tackable wall panels
- ❑ Electric movable partition to Library Tablespace
- ❑ In proximity to the Parent Room and SCOW Office

Library

Leaving as much of the floor area with moveable furniture and book stacks, as possible, will allow these different activities to take place. Any fixed items should be placed against the wall to maintain a flexible middle area and clear sight lines. Stacks, even along the wall should not exceed four feet in height.

The book collection size should equal approximately 20 volumes per student. At the time of construction, confirm the ratio of physical versus digital volumes and distribution between fiction and non-fiction.

While most technology will be movable and most likely in the hands of students, four computer stations are desired for looking up the collection catalog, printing, and quick internet searches.

The circulation desk provides a dividing line of items free to student access and items which are distributed only by staff and is used for the following functions.

- Checking out books
- Reference Textbooks – One per subject
- Storage for lunch time activities
- Processing books

While books are being checked out, no access control devices should be placed at doors due to maintenance and upkeep that is not supported by operational budgets.

Librarian's Office and Workroom

In addition to the Office Standards, the Office should have view windows to the main Library.

Library Key Elements

- ❑ Circulation Desk
- ❑ Book Stacks
- ❑ Four Computer Stations
- ❑ Story Alcove
- ❑ Office and workroom should have visibility to the main library
- ❑ Electric movable partition to the Library Table Space

Library Table Space Key Elements

- ❑ Group table seating for 36
- ❑ Short-throw interactive wall mounted projector with whiteboard surface sized to meet the maximum size of the projection possible by the equipment

Workroom Key Elements

- ❑ Upper and lower cabinets with countertops for book processing
- ❑ Six duplex outlets, counter level outlets to include USB charging ports
- ❑ Sink with cold water
- ❑ Parking for at least one book cart

Multi-Purpose Room

At the Elementary level, the Multi-Purpose Room is the largest space on campus. The majority of the school day, this room is used for breakfast and lunch dining but can be used for assemblies, large group meetings, after school programs, physical education and school events. Equipment and finishes should be durable and protected to allow use of balls within the spaces. The ceiling height should be no less than 20 feet. The chair storage allows additional chairs for programs to be stored when dining or other activities are using the space. Consider a table selection that can be benches or tabletops to limit the number of extra chairs and the need to put away the tables when assembly seating is desired. For assemblies, the MPR needs to be presentation ready with ceiling mounted projector (rear projection system), sound system, electronic projection screen and acceptable level of acoustical properties and design. Provide three floor boxes to allow flexibility for presenters. Floor boxes should include connection to the audio-visual systems as well as electrical and data receptacles. Access to a stage and outdoor covered dining, expand the flexibility of this space.

The stage should be a formal built-in stage. Include an side curtains and valance and back curtains. Lightbar both in the Multi-Purpose Room and in the stage areas should be installed with appropriate electrical access. The sound system must include microphones, CD player, soundboard with multiple inputs including connection to projector, amplifiers and speakers.





Chair and Table Storage

The Chair and Table Storage needs to be directly accessible from the multipurpose room. The walls in the space need to be covered with sanded 5/8" minimum thickness plywood, full height. The door to this space needs to be wide enough for table and chair carts. The walls should not be encumbered by any equipment.

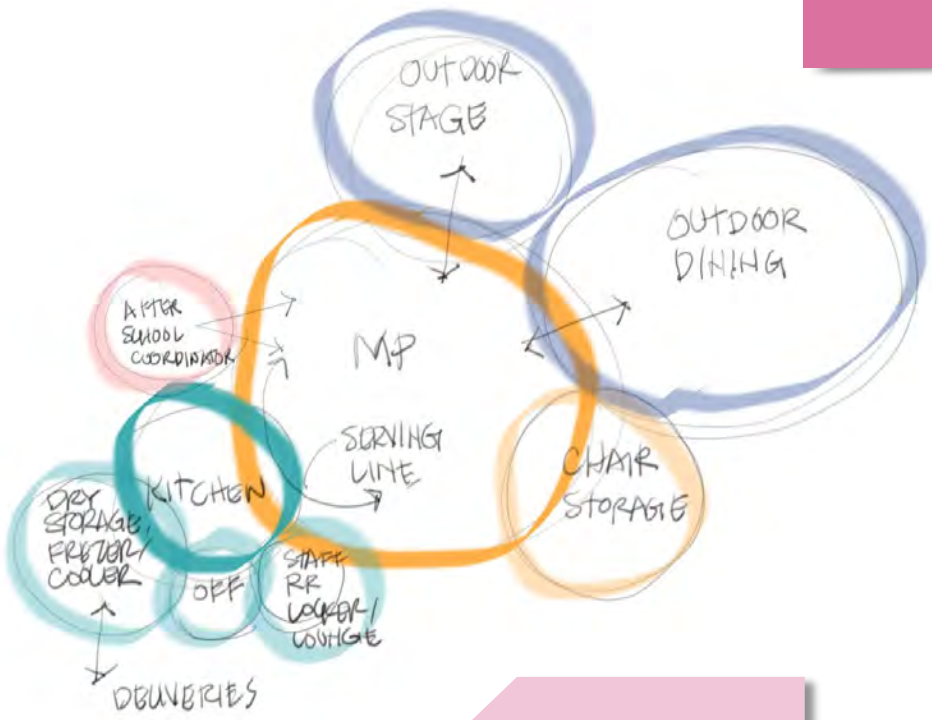
After School Coordinator

This space is an office and storage area for the after school program. It should be directly connected to the multi-purpose room. See Office Standards and provide shelving for storage of equipment and supplies.

Kitchen and Serving Adjacencies

The Kitchen area will contain a walk-in refrigerator, a dry storage area, staff changing area, staff restrooms, and a private office. The lockers shall have a concrete curb with epoxy floor base. The changing area and restroom may be combined into one room.

The serving line shall connect the multipurpose room and the kitchen. The serving area needs to be completely secured from the multi-purpose room when not in use and provide both and entrance and exit for easy movement and efficient flow of students.



Speedline Key Elements

- ❑ Smooth fiberglass reinforced plastic panels on walls and epoxy floor
- ❑ One single door and one double door for entrance and exit to the Multi-Purpose Room with magnetic hold opens
- ❑ Tray shelf
- ❑ (2) Heated cabinets
- ❑ (2) Refrigerated cabinets
- ❑ (2) Cashier stand cabinets
- ❑ Double sided roll-thru lockable on both sides restocking units between the Kitchen and Speedline
  - ❑ (2) Double door refrigerated Cabinet with remote compressor
  - ❑ (1) Double door heated cabinet

Kitchen and Serving

The Kitchen for the Multipurpose Room is a productive area. Today, this kitchen is not a “cooking” kitchen, but preparation and delivery kitchen. All areas, from the delivery of pre-cooked items to the distribution to the students, must be set up for efficiency. The delivery of food comes from the District’s central kitchen by mid-size delivery trucks. The delivery trucks need a convenient transfer area with clear access, separated from both pedestrian and student drop off and large (42”) door access. Once delivered the products will go into the walk-in cooler, free-standing freezer or dry storage room. Kitchen staff will prepare and heat the food for distribution to the students. Delivery to the student is completed through a “speed line” that directly connects to the Multipurpose Room. For every 150 students being served at one time requires a single point of sale. Points of sale require an electrical outlet and a wireless data connection.

In addition to general food service additional opportunities for cooking should be provided. The cooking equipment can be used by food service and by other groups and community depending on site procedures.

The layout of the kitchen should take into consideration the dual nature of the kitchen facility to allow efficient food service every school day while also facilitating after hour use of the cooking area.

Finishes and ventilation are required to meet all health codes. Cooling for the kitchen and service line area should both be separately zoned. The kitchen, due to the large exhaust requirements, can be planned for a temperature range up to 85 degrees. No swamp coolers shall be used to provide cooling.

See the product and material standards for the equipment list. No dishwashers or garbage disposals shall be planned.

The service area should have similar flooring as the multipurpose rooms. Walls should include digital and tackable display surfaces.

Kitchen Key Elements

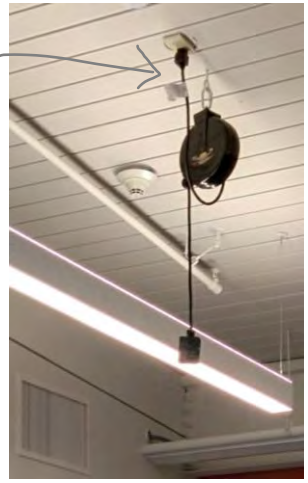
- ❑ Smooth fiberglass reinforced plastic panels on all walls and epoxy floor
- ❑ Air curtains on all required doors and windows
- ❑ Walk-refrigerator with cold storage shelving around the perimeter and space in the middle for rolling carts
- ❑ Handwashing sink (number determined by code)
- ❑ One prep sink
- ❑ One three compartment pot wash sink
- ❑ Ventilation hood(s) as required by code
- ❑ Warming Kitchen Equipment
  - ❑ Refrigerator-Double, roll-in, lockable
  - ❑ Freezer, reach-in, lockable
  - ❑ Single section dual-temp reach-in
  - ❑ Manual can opener
  - ❑ Convection Oven, double deck, roll-in, with (2) roll-in basket dolly
  - ❑ (6) Basket Dolly for (10) pack baskets and basket packs
  - ❑ Stainless Steel Work Table (size based on kitchen size)
  - ❑ Stem Caster wire cart
  - ❑ Dry storage shelving (in dry storage room)
- ❑ Cooking Area / Community Kitchen
  - ❑ Six burner heavy duty gas range with oven
  - ❑ Dual-temp reach-in refrigerator/freezer, lockable
  - ❑ Metal dry storage container
  - ❑ Food prep counter with storage below
  - ❑ Five coat hooks
- ❑ Meet all plumbing requirements for equipment and according code including hot water heater, floor drains, and grease inceptor

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Classrooms

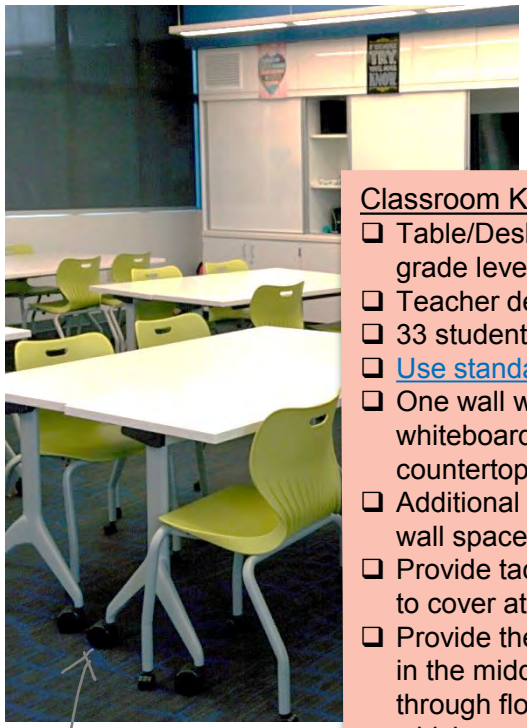
Classrooms will be the primary learning environment within the traditional classroom structure. These rooms need to serve many different activities. Full group discussion, small group work, individual study/testing, direct instruction, and project creation. The room, therefore, needs to be as flexible as possible. Furniture should be on wheels and easily rearrangeable. The tables or desk surfaces should be flat, so they can be pushed together to create an even larger surface. Chairs should roll, swivel, nest or stack. Not every seat needs to be the same. There can be two or three styles of desk/table and chair including options for standing.

Ceiling outlet option



Large markerboard and tackable display surface with pen rail





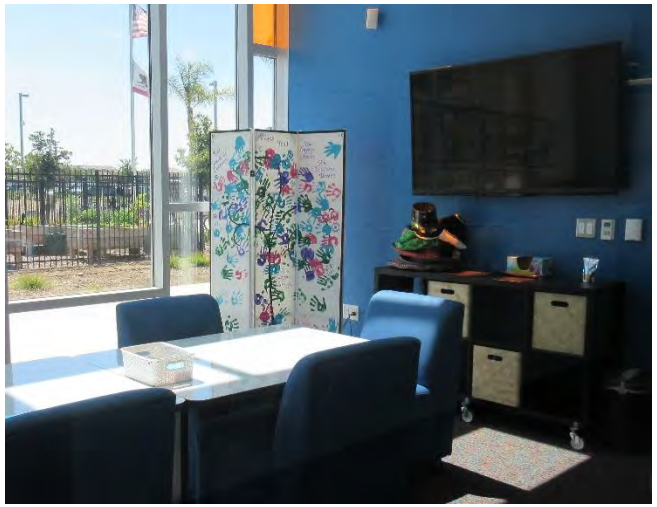
Moveable tables and chairs

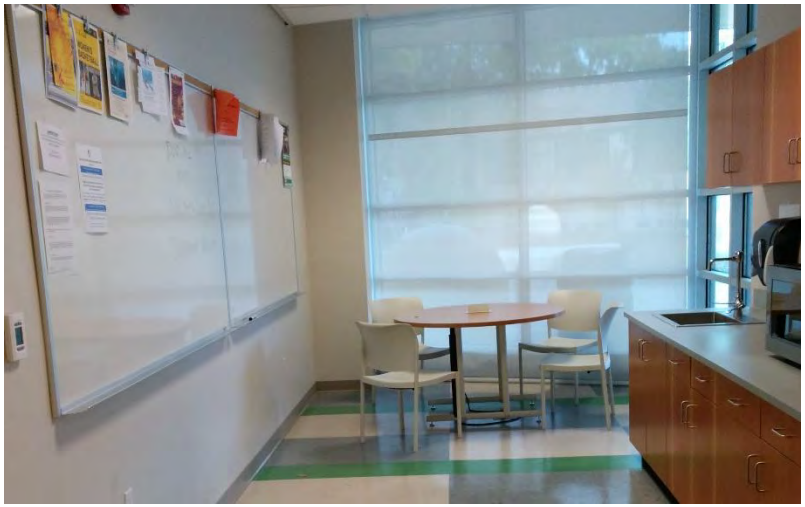
Classroom Key Elements

- ❑ Table/Desks and chairs for class size depending on anticipated grade level (FF&E)
- ❑ Teacher desk and chair (FF&E)
- ❑ 33 student cubbies
- ❑ Use standard classroom technology
- ❑ One wall with a combination of full height (with sliding whiteboards) and upper and lockable lower cabinets with a with countertops and sink with a bubbler.
- ❑ Additional marker board surfaces to cover at least 35% of the wall space
- ❑ Provide tackable surfaces for calendar walls and other displays to cover at least 20% of the wall space
- ❑ Provide the opportunity for electrical access to several locations in the middle of the room. This access can be accomplished through floor boxes or ceiling outlets with an adjacent eye hook, which can structurally support an electrical reel.
- ❑ Ten duplex electrical outlets
- ❑ In proximity to a teacher workstation/collaboration area

Collaboration Spaces

As professionals, the teaching staff should have access to places to communicate with colleagues. These activities are not well suited to be within the classroom environment. Instead, dedicated space should support the teaching staff on a smaller scale than the general workroom. Conferencing space should follow the Office Standards. Provide a single electrical outlet with a dedicated circuit and data jack for large copier/printers, where planned.





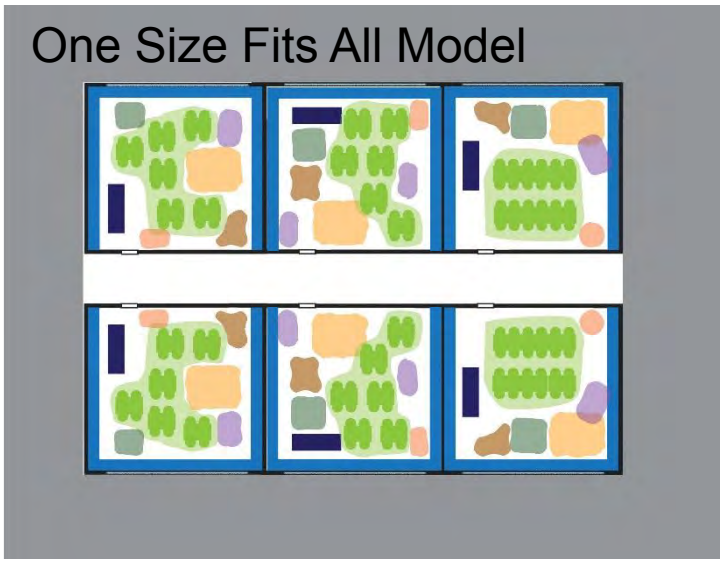
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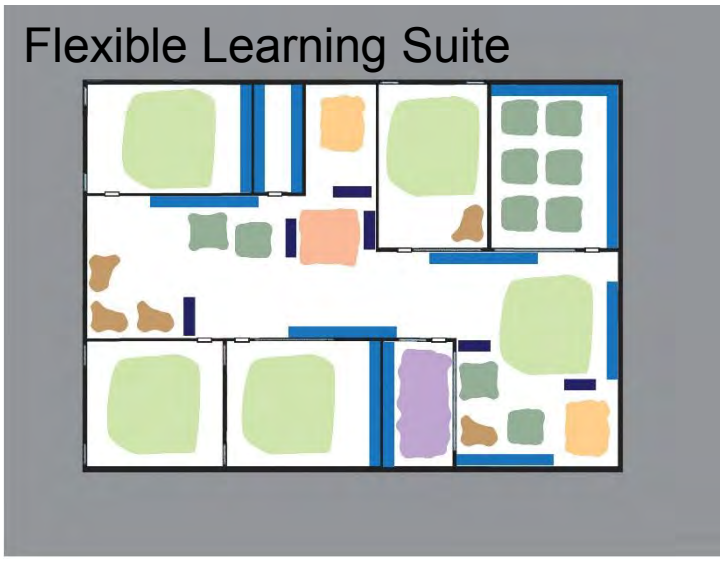
Background

Flexibility and adaptability are a requirement for 21st-century school design because the types of activities students perform change daily and the curriculum is adjusted for students' passions. The question remains, how do we create flexible space in a building that is inherently inflexible?

Many ideas have been tried with movable walls, modular walls and no wall at all. The results were various levels of acoustical intrusion, lack of proper air balancing and inoperable or difficult to move walls that, in the end, were left open or closed. The primary reason these solutions were implemented was to provide flexibility in the size of space offered in a classroom environment. The inherent difficulty with traditional school design is the vast majority of rooms are the same size and layout; therefore, every function must be conformed to a singular space type.

A different perspective to this design problem is providing a variety space types which will allow the flexibility and adaptability to a wider range of activity types, configurations and learning styles. The Flexible Learning Suite breaks the mold of one teacher, one class, and one space model and replaces it with the concept of a group of spaces owned by a group so that each activity can find an appropriate home. Over time new programs, initiatives and partner agencies can find a place that fits versus using the one type of space available.



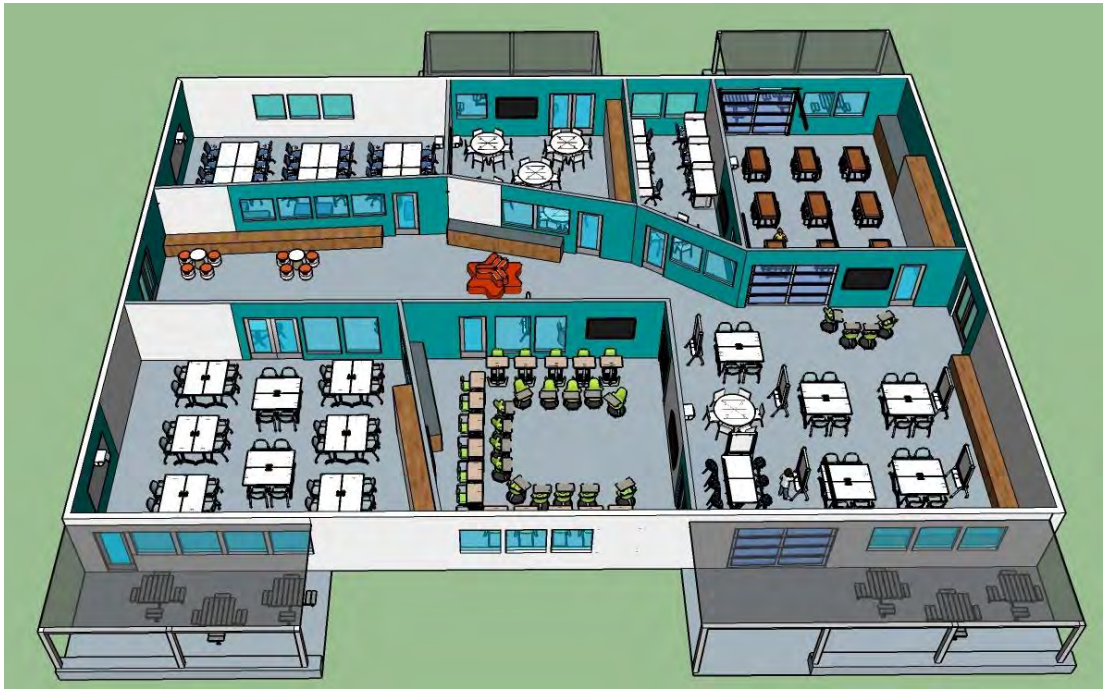


Creating a Suite

A suite can be created for a different number of students and staff, depending on site desire. The components possible within a suite will vary depending on the overall size set for the collection of spaces. In general, sets of six to eight classes can create a manageable suite. The overall size of the suite is based on the traditional classroom model with the addition of the circulation space. Listed below are major components that can be included in the suite. The final qualities and sizes of these spaces will be defined by the architect and District Facilities Department with input from the site committee.

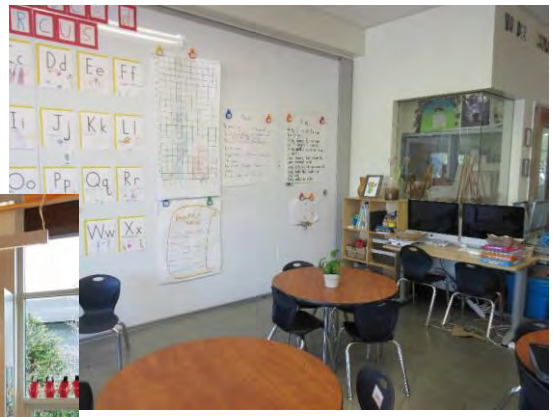
When considering the content of the spaces within the studio, moveable furniture and storage should be implemented as much as possible.

Connections to outdoor spaces are important for expanding the learning environment. Additional breakout areas and messy project space can be accommodated in covered outdoor patios.

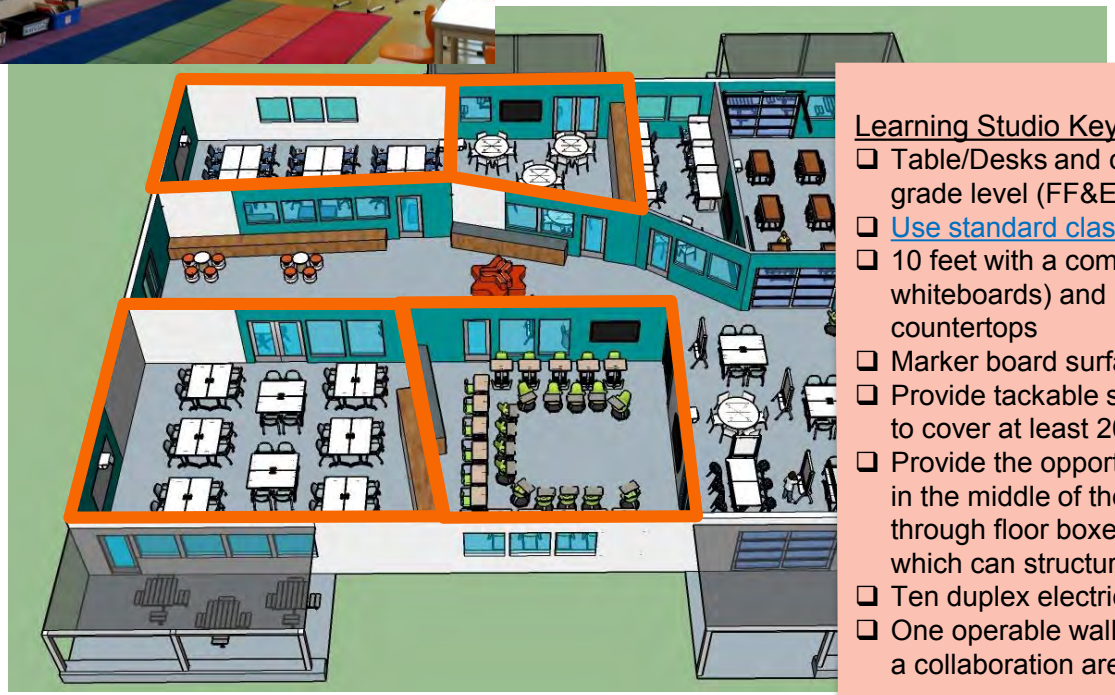


Learning Studio

Learning Studios provide a full class seating between 24 and 32 students. This seating can be individual desks, tables, and chairs or carpet seating (FF&E).







Learning Studio Key Elements

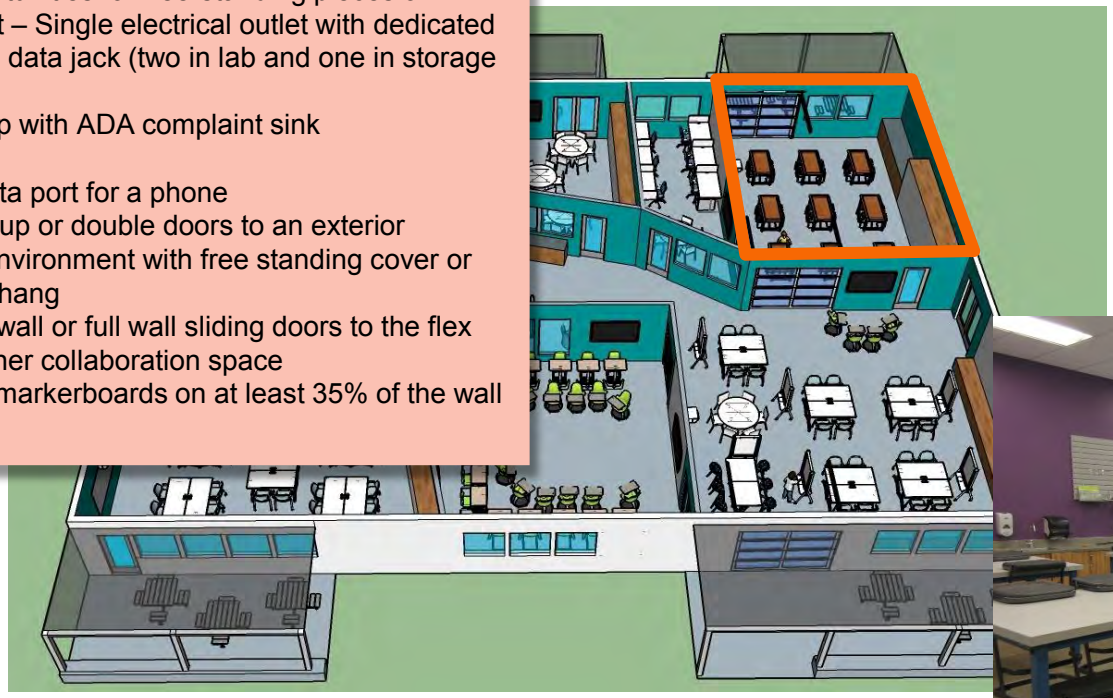
- ❑ Table/Desks and chairs for class size depending on anticipated grade level (FF&E)
- ❑ Use standard classroom technology
- ❑ 10 feet with a combination of full height (with sliding whiteboards) and upper and lockable lower cabinets with countertops
- ❑ Marker board surfaces to cover at least 35% of the wall space
- ❑ Provide tackable surfaces for calendar walls and other displays to cover at least 20% of the wall space
- ❑ Provide the opportunity for electrical access to several locations in the middle of the room. This access can be accomplished through floor boxes or ceiling outlets with an adjacent eye hook, which can structurally support an electrical reel.
- ❑ Ten duplex electrical outlets
- ❑ One operable wall or full wall sliding doors to another studio or a collaboration area

Project Rooms

Project Rooms are spaces where construction, creation and other hands on project-based learning is completed. The room should have supplies accessible for student use; therefore, built-in cabinetry should be provided on one wall of the room, especially to create countertop areas.

Project Room Key Elements

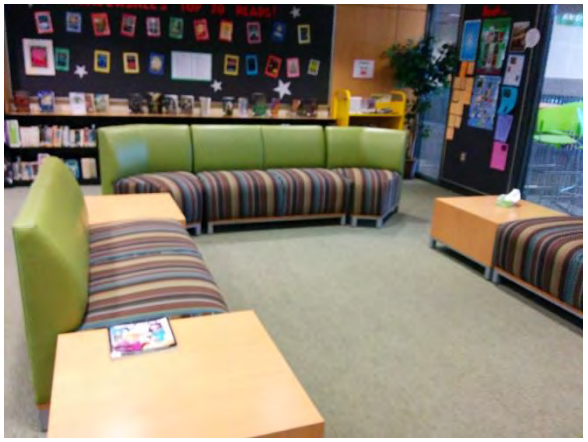
- ❑ Use standard classroom technology
- ❑ Provide the opportunity for electrical access to several locations in the middle of the room. This access can be accomplished through floor boxes or ceiling outlets with an adjacent eye hook, which can structurally support an electrical reel.
- ❑ Minimum of eight duplex outlets
- ❑ Two opportunities for free-standing pieces of equipment – Single electrical outlet with dedicated circuit and data jack (two in lab and one in storage room)
- ❑ Countertop with ADA complaint sink
- ❑ Shop sink
- ❑ Duplex data port for a phone
- ❑ Large roll-up or double doors to an exterior learning environment with free standing cover or large overhang
- ❑ Operable wall or full wall sliding doors to the flex area or other collaboration space
- ❑ Magnetic markerboards on at least 35% of the wall space





Suite Library with Seating

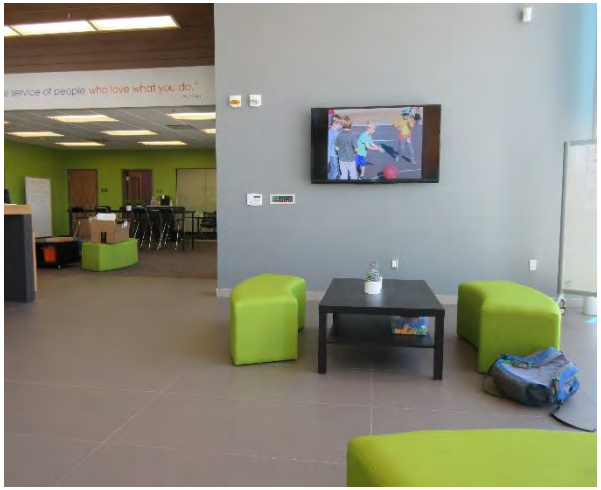
Classroom libraries offer access to books on a day to day basis. These libraries can be an important resource to the learning environment and can live within a suite as a shared resource. The library area also is a great opportunity for informal seating and individual seating (FF&E). Provide built-in or mobile bookshelves.

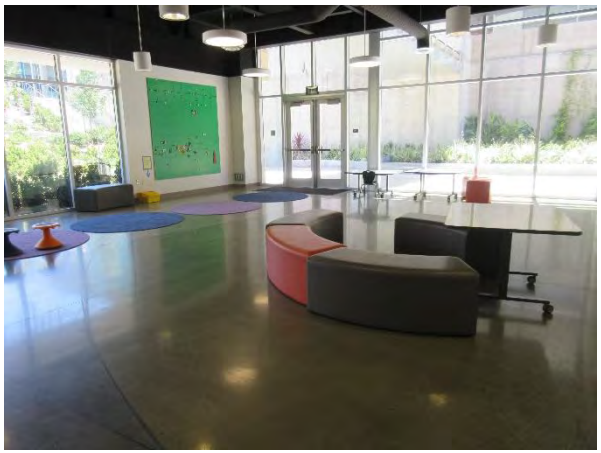




Large Group Flex Area

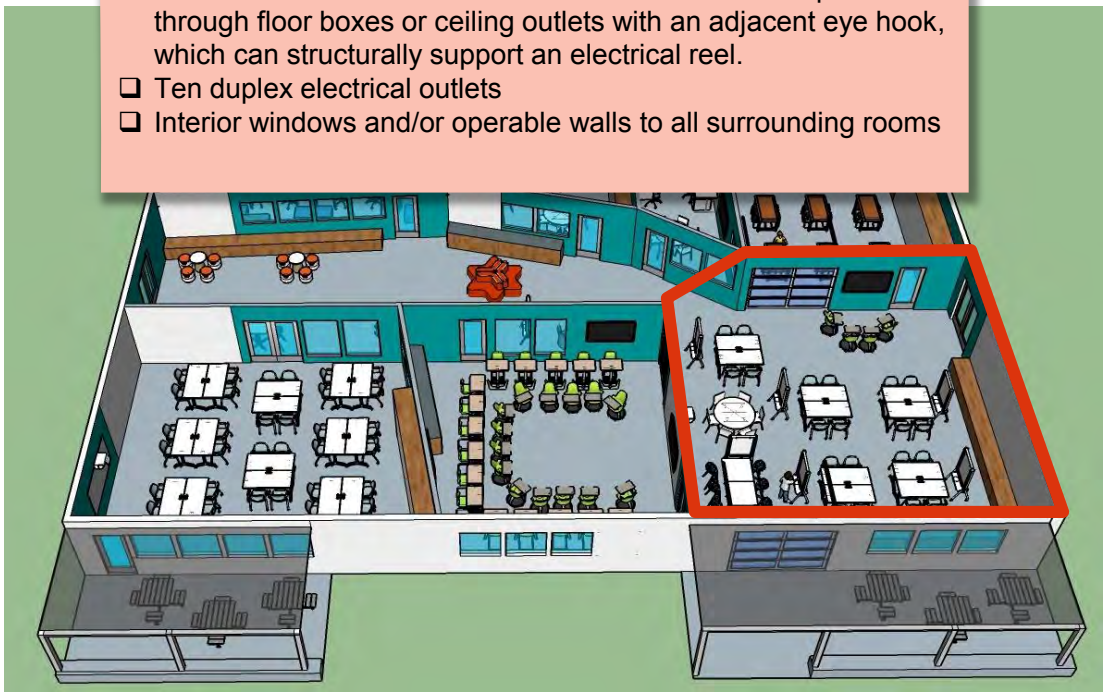
A larger open area provides the ability of more than one class to occupy a space. Movable furniture and more than one projection area can make this space able to support small group activities or a single large group. The tiered seating area is most effective teamed with this space. Access to outdoor learning environments could be adjacent. Large doors could allow the large space to expand even further into the outdoor space. With limited wall space, moveable markerboards can provide writing surfaces and temporary dividers when splitting the space into smaller activity zones.





Flex Area Key Elements

- ❑ Table/Desks and chairs for class size depending on anticipated grade level (FF&E)
- ❑ Use standard classroom technology
- ❑ Provide the opportunity for electrical access to several locations in the middle of the room. This access can be accomplished through floor boxes or ceiling outlets with an adjacent eye hook, which can structurally support an electrical reel.
- ❑ Ten duplex electrical outlets
- ❑ Interior windows and/or operable walls to all surrounding rooms

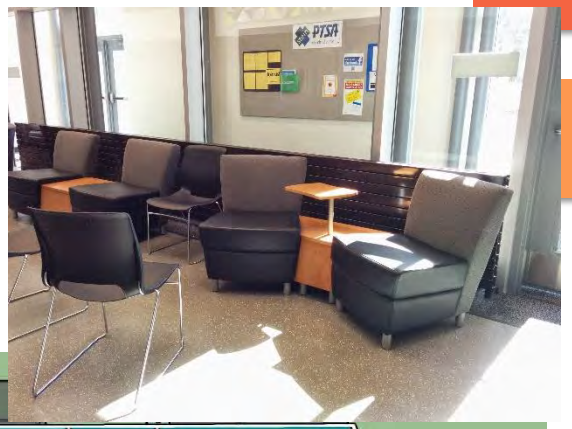


Small Group Areas

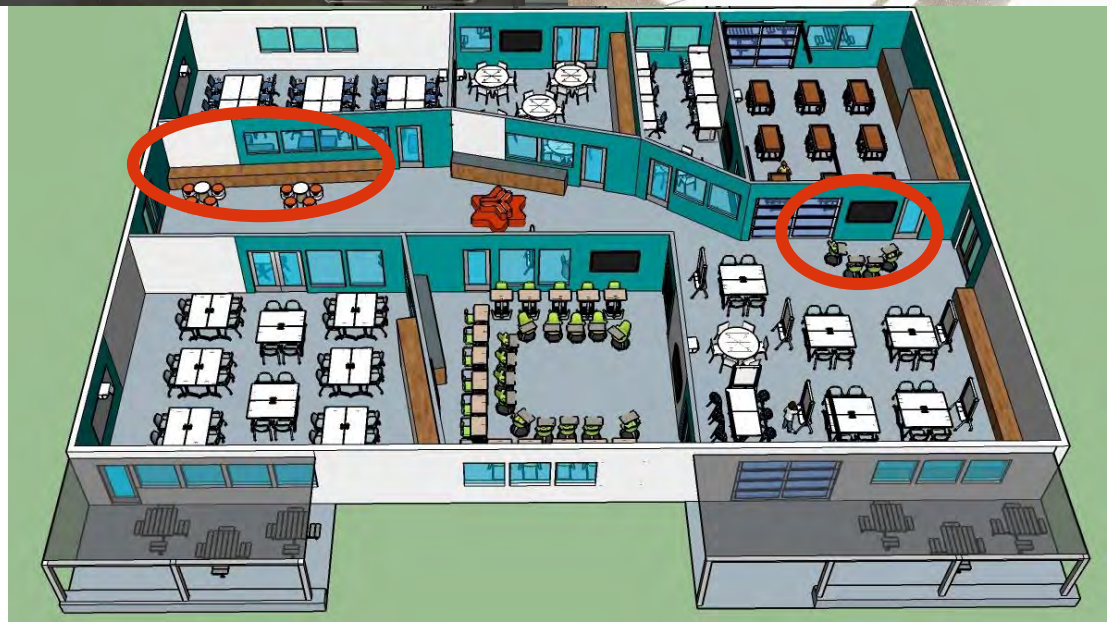
Small Group Areas can provide structure and use to the open areas. These groups can be breakouts from the Learning Studios with students on their own or supported by aids, special education teacher or a team teacher who is pulling a small group from a double class being taught by the other teacher. Providing space for writing and having digital display can further support these group areas.











Individual Study Space and Sinks

Individual Study Space

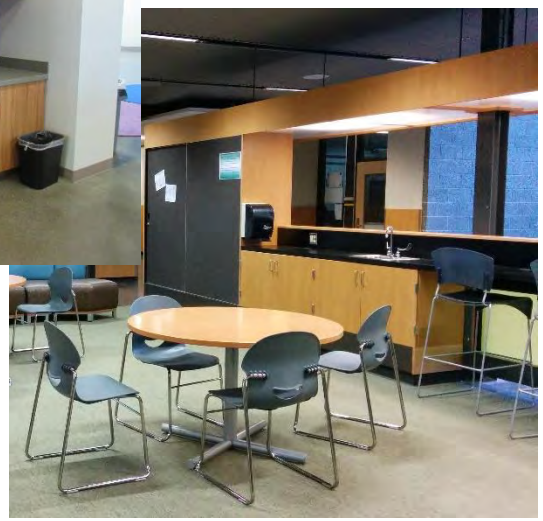
No matter how collaborative the curriculum is, there are times where students will need to withdraw and concentrate on course work. Individual Study Spaces allow for a retreat from the distraction and interaction. These spaces could be both formal or informal. Access to an electrical outlet provides the option for the student to plug in.

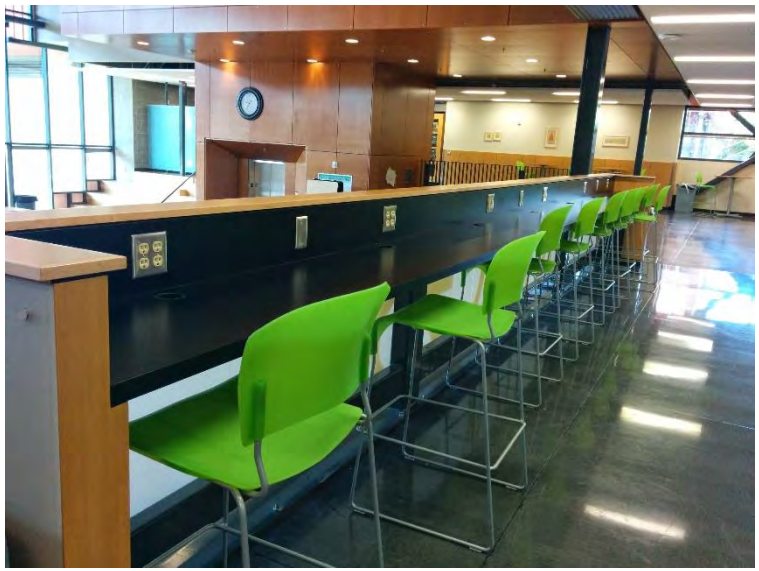


Counter and Sink Space

Within a suite, all rooms do not need to be equipped with a sink, but sinks are important to be able to access within a suite. This function is best suited in the open area. Include at least 5 linear feet of countertop with lockable cabinets and a bubbler.







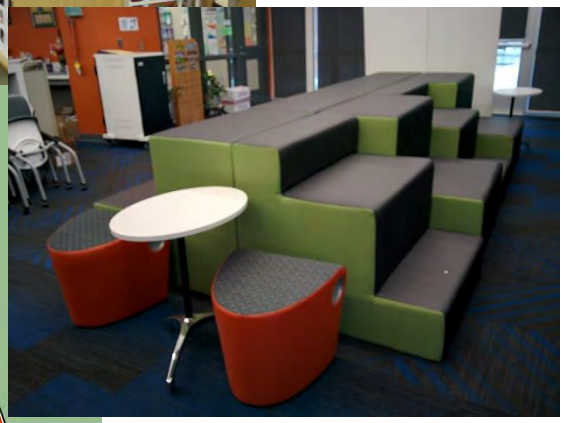
Student Cubbies / Tiered Seating

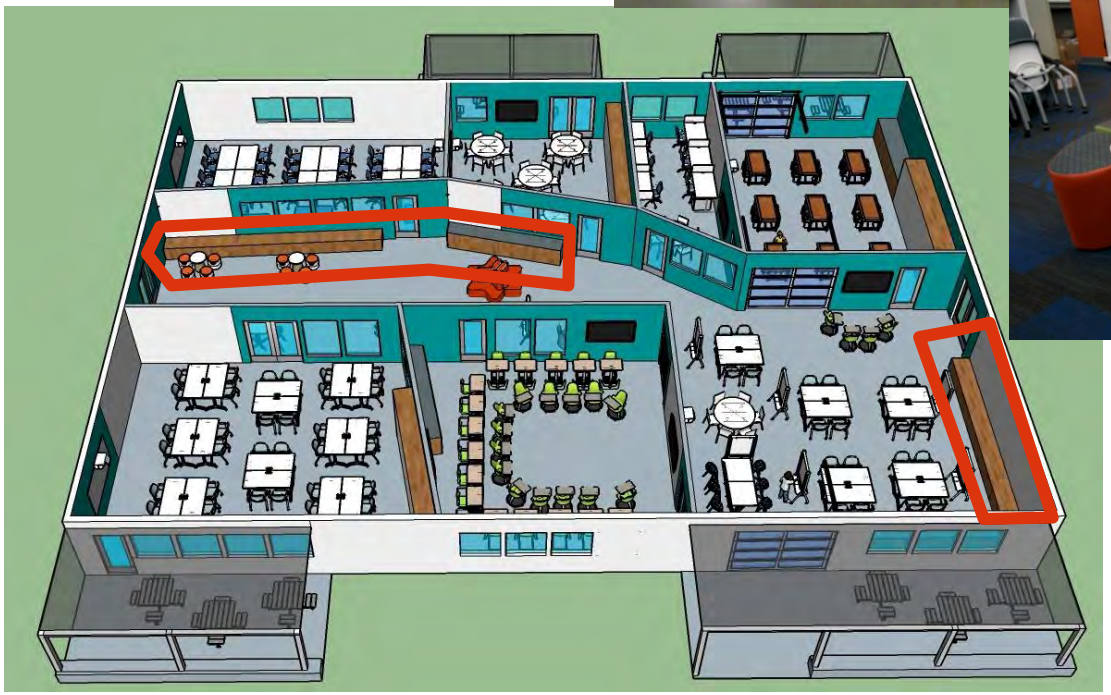
Within a suite, students still need access to an area to put their belongings. This area can also double as seating.

Cubbies can come in a variety of types including cubes, coat hooks or lockable lockers. The placement of the spaces can also be within Learning Studios or in the open area. Provide custom mobile cubbies for each student that are in the suite.

Tiered seating offers the ability to get more students around a central focus point for presentations or role playing activities. Opening or closing activities with the whole suite could also work into an area with tiered seating. This seating could be accomplished with the student cubby system.







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Selecting a Structure

The kindergarten and preschool environments can also select to take a more traditional classroom approach or be designed with the flexible suite. The flexible suite is similar, on a larger scale, to the structure of the early childhood education classrooms by providing centers of activities for students to move around to instead of making one space which attempts to change constantly to meet all needs.

If the flexible suite is selected, then it may need to be modified from the upper grades, especially for preschool to meet licensing requirements. Placement of restrooms and the inclusion of door bells are important considerations. See the Flexible Learning Suite section for information on the design elements which can constitute a suite.

Classroom

The primary instructional space for Preschool, Transitional Kindergarten and Kindergarten is the classroom. Students will often break into various activity zones within the classroom and come back together as a group at either the tables or carpet area. These activity zones include

- Small Group - Kidney table for more directed instruction or exploration tables
- Technology Station – Tablets, computer, and headphones
- Wet Activity Area – Science or art activities at Exploration tables or easels
- Class Library/Reading Corner – Access to books and opportunity for small nook areas or window seats
- Make believe Area – Kitchen, dress-up clothes, tools

Visual display areas at all levels showcase student work and provide an area for rules, schedules, subject background, and inspiration. At this level, visual displays are an integral part of the instruction with interactive charts, calendars and graphs, most commonly associated with the carpet activity zone. Large books are also read to the class at the carpet area and need a location for storage and display.

Classroom Key Elements

- ❑ Student cubbies – 28 at TK and K, confirm number for Pre-School
- ❑ Use standard classroom technology
- ❑ One wall with a combination of full height and upper and lower lockable cabinets with a countertop including one sink at student height and one sink at adult height. Student sink to included a bubbler.
- ❑ Mirror – Do not place mirror over the hand washing sink, an alternative location needs to be selected
- ❑ Additional marker board surfaces
- ❑ Provide tackable surfaces for calendar walls and other displays
- ❑ Provide the opportunity for electrical access to several locations in the middle of the room. This access can be accomplished through floor boxes or ceiling outlets with an adjacent eye hook, which can structurally support an electrical reel.
- ❑ Ten duplex electrical outlets
- ❑ Adjacent to a shared Prep Room and Inside Storage
- ❑ Adjacent to a Student Restroom and playground
- ❑ Door charm which sounds when the exterior door is opened (Preschool only)

Restrooms and Storage

TK and K Student Restrooms

The student restroom should only contain a toilet and toilet paper dispenser. Hand washing sink should be placed in the classroom (not counted as the student height sink in the countertop). Flooring should be tile with tile walls up to four feet.

Playground Restroom

Provide two restrooms with direct access from the playground. These restrooms can be accessed by students while on the playground without having to enter any classrooms. This access is especially important when in the future there are more kindergarten classes than available kindergarten rooms and students on the playground must interrupt another class to use the restroom. Flooring should be tile with tile walls up to four feet.

Preschool Toilet Room

Confirm with licensing requirements to structure the restroom facilities. Flooring should be tile with tile walls up to four feet.

Outside Storage

The outdoor storage can either be within the building or a separate structure. This room shall house outdoor equipment such as balls, tricycles, and other playground equipment when not in use.

Prep Room and Inside Storage

The prep room can either be structured as a shared space between two classrooms or a larger area between four classrooms. If a larger room is selected, then provide a conferencing area for teacher meetings. The inside storage can be similarly clustered if desired.

The prep room should maximize storage and workspace. Teacher desk space should be provided, either two or four, depending on the number of rooms connected to the prep area. Desks are included in FF&E.

Prep room for pre-school must include a desk space, sink with hot and cold water and a refrigerator.

There should be visual access to the classroom space and duplex plugs with USB charging ports above the counter.

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Multi-Use Classroom

This classroom is available for special program space especially in schools where the traditional model is selected when not required for accommodating enrollment. Music, visual arts, maker space, science or advanced technology lab could all be assigned to this room. In the schools where the flexible learning suite is used, this room can be an additional project room that spans between suites.

Music Storage

The music program is a pull-out program for specific students who have signed-up for the program. Music teachers rotate between elementary schools to provide this program. A small storage room provides a space to leave instruments and music stands, so the teacher does not need to transport these items in their car and carry them into the school each week. This storage room should be adjacent to the multiuse classroom or library table space.

Multi-Use Classroom Key Elements

- ❑ Use standard classroom technology
- ❑ Provide the opportunity for electrical access to several locations in the middle of the room. This access can be accomplished through floor boxes or ceiling outlets with an adjacent eye hook, which can structurally support an electrical reel.
- ❑ Minimum of eight duplex outlets
- ❑ Two opportunities for free-standing pieces of equipment – Single electrical outlet with dedicated circuit and data jack (two in lab and one in storage room)
- ❑ Full height Cabinets
- ❑ Upper and lower lockable cabinets with countertop and ADA complaint sink
- ❑ Shop sink
- ❑ Large roll-up or double doors to an exterior learning environment with free standing cover or large overhang
- ❑ Magnetic markerboards on at least 35% of the wall surface

Teacher Lounge and Restrooms

Teacher Lounge

The teacher lounge should be designed as a standard traditional classroom for flexibility when the enrollment fluctuates. To accommodate the teacher lounge function, two additional single electrical outlets with a dedicated circuit and data jack should be provided to support a refrigerator with an ice maker and the potential for a free-standing printer. Centrally locate this facility.

Parent Room Key Elements

- ❑ Seating for 30
- ❑ Computer access
- ❑ Digital Display
- ❑ "Magazine Rack" for paper handouts
- ❑ Tack Board
- ❑ White Board
- ❑ Countertop with lockable upper and lower storage cabinets and a sink including hot water and 2 built in microwaves
- ❑ Electrical Outlets to support 2 microwaves, refrigerator, digital display television and charging of personal devices brought by occupants
- ❑ Refrigerator with ice maker
- ❑ Water connection for refrigerator
- ❑ Option for a VoIP Phone

Student and Staff Restrooms

If using a suite design, each suite should contain both student and staff restrooms. In a traditional model student and staff restrooms should be located in several locations for easy access. For either design one set of student restrooms must be provided within visual site of the playground and not have a double door access to the interior of the school. The Multi-Purpose Room must also have a set of restrooms. Staff restrooms need to be distributed around the campus at the same interval as student restrooms.

All staff restroom should be unisex. Student restrooms shall be ganged.

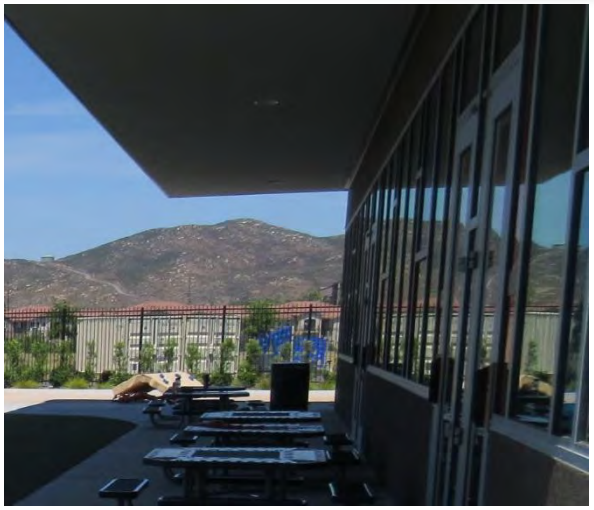
Use Restroom Standards for interior requirements and accessories.

Drinking fountains must be provided to meet code and in every major area of the campus including the playgrounds, learning suites and multi-purpose room. Bottle fillers with replaceable water filters must be provided in the multi-purpose room.

Outdoor Learning Environments & Garden

Outdoor Learning Environments

Expanding the classroom environments outdoors provides additional space at a lower cost. It also allows students to experience a different space and fresh air. Define the environment with planter boxes, seat walls, landscaping or benches. Providing greenery near these areas creates a calming effect when students are in the space and when seen from the classroom or learning studio. Covering the space extends the number of days that it can be used during the year. The climate throughout the District varies widely. Consider if a warm sunny area or a shady, breezy space would be desirable for most of the school year. When being designed, consider typical wind direction to prevent a wind tunnel effect. Provide opportunities for supervision from surrounding classrooms or studios to ensure these spaces can be used.





Garden

Designate an area on campus that can support a garden. This space should have good access to sunlight. Provide a hose bib to this location. Where garden programs are in place, provide raised beds, fencing with gate and tool shed.



General Information

Campus Core

Classrooms

Flexible Learning Suite

Kindergarten & Pre-School

Learning Support

PE Playgrounds

Special Education

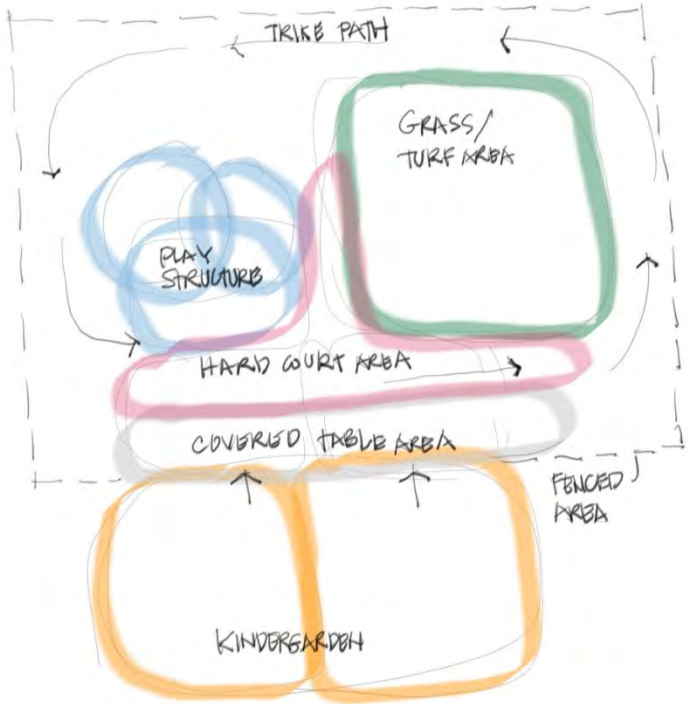
Support

Pre-School and Kindergarten Playground

The major playground components include hard surface play area, covered hard surface activity area, play equipment area and grass or turf area.

Shade from a covered area must be provided within both the pre-school and kindergarten playgrounds over a portion of the hard surface. Elements in the hard surface area are typically but are not limited to:

- Tricycle path
- Large circle
- Hopscotch
- Tether ball
- Four square
- Shapes with letters and numbers
- Table seating
- Drinking fountain



Access to the grass may be limited during wet weather so the hard surface area should be placed closer to the doors. The tricycle path should run along the edge of the playground to provide the largest circle. Confirm sizes of all elements to comply with preschool licensing. Play equipment should be placed on a rubberized surface and include a shade structure or interictal canopy which covers the majority of the structure.



The playground area should be enclosed. Provide an entrance gate to the kindergarten and pre-school areas to allow for a separate drop-off and different dismissal times. An outside drinking fountain shall be available within the fenced area for both the kindergarten and preschool playgrounds.

Pre-School and Kindergarten Playground – Play Structure

The preschool and kindergarten play structures should include playground elements are age appropriate including

- Shop counter
- Ship wheel
- Talking tube
- Slides
- Shade cover
- Stepping stones/artificial logs
- Climbing element
- Balance beam

Grades 1-6 Playground

The major playground components include hard surface play area, play equipment area and grass or turf area. The play area should also include some shady areas for hot days. A shade structure should be provided over or as an interictal part of the play structure and cover a majority of the structure. The hard surface area should also include shade. Access to restrooms and drinking fountains with bottle filler should also be provided without having to enter the learning suite. Ideally, the play area should be adjacent to the multi-purpose room. And in proximity to the primary learning environment. The Outdoor Equipment Storage Room shall be adjacent to the play areas for storage of balls, goals, cones and other playground equipment.

Hard Surface Play Area may be divided into lower and upper grades. All elements should be dimensioned on plans and confirmed with the site committee and District Facilities Staff

Elements in the hard surface are typically but are not limited to:

- Hopscotch
- Tetherball
- Foursquare
- Large Circle
- Line Up Numbers
- Basketball
- Volleyball
- Handball courts with ball walls

The blacktop should include at least 3 colors for striping and fill areas. At least one quarter of the blacktop should be painting with a color surface.

Grades 1-6 Playground

Provide a play structure should meet the all the major play requirements for students. These include

- Balancing – Provide a balance beam, steppingstone pedestals, and wobble bridge
- Brachiating – Provide traditional monkey bars or another form of stationary element. Spinning overhead wheels and balls or disks attached to poles or chains are not acceptable elements
- Climbing – provide at least 4 climbing elements such as ladders, rock walls, or cable structure. At least one of these structures should be large enough to provide the opportunity for both horizontal as well as vertical climbing opportunities.
- Spinning – Provide a least one element that allows students to spin
- Sliding – Provide a double or triple slide off a single platform and at least one additional slide. Both slide elements must be at least 5 feet high. If an additional slide is provided, it can be any size.
- Swinging – Provide the ability for students to swing, however, do not provide a traditional swing set. Ziplines are also prohibited.
- Additional Elements – Provide a speaking tube. Also, provide a cozy spot or semi-protected areas such as crawling tubes or cozy dome.

Fall protection, where required, should be a rubberized material. Wood or sand material for fall safety is strictly prohibited and, on existing sites, removal and disposal of this material needs to be specified. The overall shape of the safety mat shall be rectangular in shape where adjacent to turf areas.

Turf is preferred over grass at all sites. On sites where the recommended size of the turf area in the Space Check List is not possible due to site restraints, then turf is required for the amount of space which can be provided. In-fill material for turf must not be rubber. Because these fields are not for competition, provide a shorter blade length.

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Program and General Requirements

Special education offers different programs to support the needs of students. Not all programs are offered at every school site. The minimum requirement for every campus is to have a Learning Center and a classroom capable of supporting the Occupational Therapy (OT) program. Office and small group locations for speech teacher and psychologist are located in the Multi-Use Flex Office. Most schools will also have at least one Non-Severely Handicapped Room (NHS) although the designation of these rooms only affects capacity, the design is the same as a general classroom or learning studio. Severely Handicapped (SH) are offered throughout the District at all levels at strategic sites, at least one should be built at every school. Final quantity is based on the number of students recorded in the Space Check List on the Start Here Tab. Architects should confirm that all SH students are in 1-6 for a manual change to the Space Check List if preschool through kindergarten SH programs is planned.

In all of the special education spaces, the ability for the rooms to broken down into smaller learning environments is essential to the individualized instruction. Environments will vary based on the program; however, the arrangement of electrical outlets, data access points, white boards and tackable surfaces should respond to compartmentalizing the room. Furniture and equipment will be different than general classrooms even if the built environment is the same as the general classroom. Confirm these items with District before completion of the design.

Learning Center & OT

Learning Center

Learning Centers augment core subject instruction for a student who requires additional assistances. Students that use the Learning Center are in the standard classroom for more than 50 percent of their day and stop into the Learning Center for specialized and supporting instruction and test proctoring. Uses of the room include:

- Interventions
- One on ones
- Group work
- Testing
- Student individual computer work
- Individual Education Plan Meetings (IEP)
- Staff training

In general, this room should mirror a standard classroom with limited exceptions. Due to some students needing a less stimulating environment, transparency to major circulation paths should be limited. Wall panels when placed vertically should alternate between marker board material and tackable surface at four-foot intervals. The Learning Center should be centrally located for easy access by all grade level students.

Occupational Therapy (OT)

OT rooms provide motor skills and sensory development. Many different shape mats and large manipulatives fill the room. Because hopping and other louder activities can occur in these rooms, they need to be planned on the ground floor in schools with a second story. In general, this room should mirror a standard classroom with limited exceptions. Provide three large eye hooks attached to ceiling structural beams to support suspended swings and other equipment designed for a weight load of 500 pounds. Hooks must be below the finished ceiling and allow for spinning and swinging activities. Coordinate with the Occupational Therapist. Ceiling mounted electrical reels may be reduced in number to limit interface with these hooks.

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Support Functions

All support spaces are utility spaces where finish selection should be made for durability. Flooring shall be sealed concrete unless the District approves the alternative. All walls should be taped and sealed gypsum wall board and FRP in wet areas. All walls where shelving could be placed, provide blocking in walls, excluding electrical and technology rooms. Provide ventilation as required by code but avoid louvers below 6' if possible. Provide at least one duplex plug in each storage area. Windows are not desired in any of these spaces. If the area is wet, provide a 6" curb. Ceilings should be gypsum in all support spaces.

Storage Areas

The Storage Areas support the education program supplies, such as shipments of paper, extra furniture, and bulk supplies. All walls should contain backing to attach metal shelving.

Central Custodial Storage and Office

The Central Custodial Storage and Office should include the requirements for a general office with the addition of full height storage shelves for supplies and cleaning products. Include a stainless steel mop rack over the floor sink. FRP shall be used around the mop sink. This room should be placed near a delivery drop-off area and preferably near the MPR.

Satellite Custodial Rooms

Satellite Custodial Rooms should be provided in each building on every floor. Include a stainless steel mop rack over floor sink and upper shelves above the cart storage. FRP shall be used around the mop sink. Door should swing out to allow the cart to be easily parked within the space.

MDF and IDF Rooms

See Technology Standards for room requirements and spacing. Confirm that all voltage equipment can be accommodated including the data network, bell clock intercom, security, and fire panel.

Central Electrical and Satellite Electrical Rooms

Maintain three feet clear in front of all panels and do not block with door.

Elementary Space Check List

WCCUSD

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Sample Check List

This printed document contains a sample check list. This list uses hypothetical capacity number to display the results of the formulas built into the spread sheet. The quantities and square footage listed are only applicable to this sample and will change based on the design capacity of a project, when it is implemented. The working check list is maintained by the District Facilities Department. They will create a project specific check list at the beginning of each project.

General Information

School Name	**Sample**

Maximum Design Capacity (TK-6)	500
TK and K Capacity	95
Class Size (Leave Cell Blank if Grade is Not Offered)	
TK	24
K	24
1st	24
2nd	24
3rd	24
4th	33
5th	33
6th	33
Average Class Size	27.375
# of SH Students	0
# of NSH Students	0
# of Lunches	2
Assumed % of Students Purchasing School Lunch Items	80%

Required Teaching Stations (TK-6)	23

Required # of Point of Sale for Food Services	2

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Summary

School: Sample

Learning Suite	Ed Spec # of teaching station	Ed Spec Net Square Feet	Ed Spec Exterior Square Feet	SD # of teaching station	SD Net Square Feet	SD Exterior Square Feet	DD # of teaching station	DD Net Square Feet	DD Exterior Square Feet
Campus Core	0	14,985	2,200	0	0	0	0	0	0
Flex Suite	15	16,958		0	0		0	0	
Kindergarten & Pre-School++	4	7,496		0	0		0	0	
Learning Support	2	3,550	2,550	0	0	0	0	0	0
Physical Education/Athletics	0	150	18,750	0	0	0	0	0	0
Special Education	2	1,920	0	0	0	0	0	0	0
Support	0	2,530	23,700	0	0	0	0	0	0
Total	**23**	**47,589**	**47,200**	**0**	**0**	**0**	**0**	**0**	**0**
Maximum Grossing Factor (12%)		**5,711**							
Total Building SF		**53,300**			**0**			**0**	

Teaching Stations Required	**23**	**23**	**23**
Deficit or Surplus	0	(23)	(23)

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Campus Core

School: Sample

	Ed Spec				SD				DD			
Administration	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Admin Lobby		1	200	200								
Reception/Clerical		1	300	300								
Principal's Office		1	150	150								
VP Office		1	120	120								
Nurse's Office		1	95	95								
Nurse's Restroom		1	62	62								
Staff Preparation Room		1	450	450								
Staff Restroom		2	80	160								
Records and Storage		1	80	80								
Book Room		1	450	450								

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Campus Core

School: Sample

	Ed Spec				SD				DD			
Multi-Use Flex Office	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Multi-Use Office		1	100	100								
Community Services Coord.		1	100	100								
Multi-Use Meeting - One on One		3	90	270								
Multi-Use Meeting - Small Group		2	200	400								
Multi-Use Meeting - Observable		1	200	200								
Observation Room		1	50	50								
Storage/Shared -After School/Playworks		1	100	100								
Health Services	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Exam Room/Vision		1	250	250								
Student Restroom		1	64	64								
File Room/Equipment		1	30	30								

Campus Core

School: Sample

	Ed Spec				SD				DD			
Library / Community Center	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Parent Room		1	410	410								
SCOW Office		1	90	90								
Family Restroom		2	80	160								
Community Room		1	900	900								
Library Table Space		1	900	900								
Library Stack Space / Story Alcove / Circulation Desk		1	1,200	1,200								
Prep-Storage Room		1	200	200								
Secure Storage		1	100	100								

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Campus Core

School: Sample

	Ed Spec				SD				DD			
Multi-Purpose Room	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Student Dining*		1	3,500	3,500								
Stage		1	1,200	1,200								
Stage Storage		1	200	200								
After School Coord.		1	100									
Chair / Table Storage		1	200	200								
Restrooms+		2	150	300								
Kitchen		1	840	840								
Speed Line*		2	300	600								
Office		1	80	80								
Changing Room		1	80	80								
Staff Restroom		1	64	64								
Walk-in Refrigerator / Freezer		1	165	165								
Dry Storage		1	165	165								
Total	0			14,985	0			0	0			0

Campus Core

School: Sample

	Ed Spec				SD				DD			
	Ed Spec - Exterior				SD - Exterior				DD - Exterior			
	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total
Library Exterior Patio		1	450	450								
Outdoor Covered Dining*		1	1,750	1,750								
Quad												
Kitchen Delivery/Service												
Total				2,200				0				0

\+ Quantity is driven by Code Requirements

* Quantity is calculated using a formula which is connected to the "Start Here" tab

Restroom Facilities - Quantity should reflect the # of occupancy

Cells to be completed by Architect or District Representative (Site Specific)

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Classrooms

School: Sample

	Ed Spec				SD				DD			
Classrooms	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Classrooms*	15	15	960	14,400								
Collaboration Spaces/ Small Groups*		Design Driven		300								
Total	15			14,700	0			0	0			0

\+ Quantity is driven by Code Requirements

* Quantity is calculated using a formula which is connected to the "Start Here" tab

Restroom Facilities - Quantity should reflect the # of occupancy

Flexible Learning Suite

School: Sample

	Ed Spec				SD				DD			
Flex Suite	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Learning Studios	10	10	820	8,200								
Project Room	3	3	960	2,880								
Large Group Flex Area	2	2	1,200	2,400								
Individual Study Space		6	70	420								
Small Group Areas		3	150	450								
Counter and Sink Space		3	36	108								
Suite Library with Seating		3	200	600								
Student Cubbies/Tiered Seating		15	30	450								
Staff Desk Space		3	350	1,050								
Conference / Collaboration Room		2	200	400								
Total	15			16,958	0			0	0			0
Maximum SF for Suites*	15			16,950	15			16,950	15			16,950
Deficit or Surplus	0			-8	15			16,950	15			16,950

Maximum SF for Suites if Kindergarten/Pre-School is also using Flex Suite Design	19			24,446	19			24,446	19			24,446
	4			7,488	19			24,446	19			24,446

\+ Quantity is driven by Code Requirements

* Quantity is calculated using a formula which is connected to the "Start Here" tab

Restroom Facilities - Quantity should reflect the # of occupancy

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Kindergarten and Pre-School

School: Sample

	Ed Spec				SD				DD			
Kindergarten/TK (Traditional)	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Classroom*	4	4	1,200	4,800								
Student Restroom*		4	50	200								
Inside Storage*		2	80	160								
Prep Room*		2	150	300								
Staff Restroom		1	64	64								
Playground Restroom		2	64	128								
Outside Storage*		1	200	200								
Preschool (If offered)	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Classroom		1	1,200	1,200								
Student Restroom*		2	50	100								
Inside Storage*		1	80	80								
Prep Room*		1	150	150								
Staff Restroom		1	64	64								
Outside Storage*		1	50	50								
Total	4			7,496	0			0	0			0

\+ Quantity is driven by Code Requirements

* Quantity is calculated using a formula which is connected to the "Start Here" tab

Restroom Facilities - Quantity should reflect the # of occupancy

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Learning Support

School: Sample

	Ed Spec				SD				DD			
Learning Support	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Multi-Use Classroom	1	1	1,200	1,200								
Music Storage		1	60	60								
Teacher Lounge	1	1	960	960								
Staff Restrooms+		3	70	210								
Student Restrooms+		8	140	1,120								
Total	2			3,550	0			0	0			0

	Ed Spec - Exterior				SD - Exterior				DD - Exterior			
Exterior Learning Spaces	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Outdoor Learning - Small Group		3	450	1,350								
Outdoor Learning - Large Group		1	1,200	1,200								
Garden		1		0								
Total				2,550				0				0

\+ Quantity is driven by Code Requirements

* Quantity is calculated using a formula which is connected to the "Start Here" tab

Restroom Facilities - Quantity should reflect the # of occupancy

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PE Playground

School: Sample

	Ed Spec				Ed Spec				Ed Spec			
Main Building	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
P.E. Outside Equipment Storage		1	150	150								
Total	0			150	0			0	0			0

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	Ed Spec - Exterior				SD - Exterior				DD - Exterior			
Main Play Area	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Blacktop *		1	8,750	8,750								
Covered Blacktop				0								
Play Structure		1		0								
Multi-Use Turf Field*		1	10,000	10,000								
Kindergarten/ TK / Pre-School												
Blacktop (Minimum)*			3,325	0								
Covered Blacktop				0								
Play Structure				0								
Multi-Use Turf Field (Minimum)*			3,800	0								
Total				18,750				0				0

\+ Quantity is driven by Code Requirements

* Quantity is calculated using a formula which is connected to the "Start Here" tab

Restroom Facilities - Quantity should reflect the # of occupancy

Cells to be completed by Architect or District Representative (Site Specific)

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Special Education

School: Sample

Special Education	Ed Spec				SD				DD			
	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total
Learning Center	1	1	960	960								
NSH Classroom		Use General Classroom										
Occupational Therapy	1	1	960	960								

Support

School: Sample

	Ed Spec				SD				DD			
	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total
Storage Areas		1	120	120								
Central Custodial Storage/Office		1	200	200								
Satellite Custodial		5	70	350								
Central Electrical		1	160	160								
MDF Room		1	200	200								
IDF Rooms		5	150	750								
Satellite Electrical		5	150	750								
Total	0			2,530	0			0	0			0

	Ed Spec - Exterior				SD - Exterior				DD-Exterior			
	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total
Visitor Parking		10	300	3,000								
Staff Parking*		69	300	20,700								
Bus Drop-Off												
Parent Drop-Off												
Total	0			23,700	0			0	0			0

\+ Quantity is driven by Code Requirements

* Quantity is calculated using a formula which is connected to the "Start Here" tab

Restroom Facilities - Quantity should reflect the # of occupancy

Cells to be completed by Architect or District Representative (Site Specific)

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Material and Product Standards

October 2020

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INTRODUCTION

ALL DESIGN BUILD ENTITIES (DBE), ARCHITECTS, CONSULTANTS, SUB-CONSULTANTS and SUB-CONTRACTORS are required to READ and FOLLOW these STANDARDS and DESIGN GUIDELINES FOR ALL PROJECTS Designed and Built for the West Contra Unified School District

This document defines West Contra Costa Unified School District's material and products standards, for ALL design and construction projects. In the case of renovation/modernization, coordination with the existing systems in place may govern; this document will assist where there are not similar existing systems, or where the District would like to change a material or product to a District standard. By providing clear and straightforward material and product standards the District's goal is to minimize obstacles in providing what the District considers qualitative direction to those involved in designing and constructing facilities in the District.

This document contains two levels of District preferences. The first level is the NO SUBSTITUTION District Standard or "DS." The Board of Education has approved these items as "sole source." (West Contra Costa Unified School District Resolution 17-0607) . The second level is the “AR” designation or Approval Required. The DBE, Architect or Consultant is at liberty to pursue alternative products but must bring the material or products to the District for approval before proceeding with inclusion into the design. The DBE, Architect or Consultant will be required to show why the District should change the material or product. This proof would include a cost-benefit analysis.

This document follows the CSI (Construction Specifications Institute) format. Divisions with the DS or AR designation are included, while other CSI divisions may apply to a construction project, these are strictly the responsibility of the DBE, Architect or Consultant. The District has focused on identifying only the material and products that are critical for maintaining continuity and stocking of material and products to ensure intended life-cycle and long term maintenance. The DBE, Architect or Consultant are expected to synthesize these district standards and provide early feedback to the District on any conflicts and constraints.

The following reference documents are necessary for coordination and continuity:
- The District Facilities Master Plan
- Educational Facilities Specifications (General and project specific)
- Technology Plan (most recent)
- District Hardware Standards
- Sole Source Resolution
- Waterproofing Standards

Design guidelines and objectives described herein is significantly important, yet it is just one aspect of what it takes to achieve a successful project. A truly successful project is one where project goals are identified early on and where the interdependencies of all building systems are coordinated concurrently from the planning and programming phase. Further, all design objectives: accessible, aesthetics, cost effective, functional/operational, historic preservation, productive, secure/safe, and sustainable and their interrelationships must be understood, evaluated, and appropriately applied. Each of these design objectives is presented in the context of the others throughout the Material and Product Standards.

Consistent Terminology: Terms and abbreviations used in the plans/specifications shall be defined. Please check to ensure that these definitions are compatible with the definitions used in your contract. For example, some specifications use the phrase "contract documents" while others use "plans and specifications" which means the same thing.
Correct Identification of Roles and Responsibilities: The specifications identify two or more parties, i.e. Owner, contractor, Inspector of Record, Testing Lab, etc. For all specifications make sure the roles and responsibilities of all parties are defined.

North Arrow and Legend: All sheets should have a north arrow and a legend to define symbols. All disciplines should orient in the same direction.
All Electronic Plan Reviews will need to include District representation

DIVISION 03 CONCRETE AND REINFORCING

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	03	33316	ARCHITECTURAL CONCRETE	N/A	N/A	N/A	Mix design to be reviewed and approved by District	Architectural concrete is required on 2nd floor and above, and for both floor and curbs at all restrooms on all levels. No Gypcrete or other similar products will be approved		ALL
AR	03	31513	CONCRETE WATERSTOPS	N/A	GRACE, ADCOR, SIKA USA OR EQUAL	ADCOR JOINT PROTECTION	SELF-ADHESIVE	Application required for sealing cold joints, joints between slabs and retaining walls, etc. Type needs to be appropriate for the condition.	N/A	ALL
AR	03	33510	POLISHED CONCRETE	N/A	N/A	N/A	Grind: Level A Cream Level Surface Cracking: All surface cracking shall be filled and ground level. Gloss: Level 3, semi-gloss, 800 grit, Slip Resistance 0.6 Polished Concrete Floor Finishing: Water-based dye (non-reactive penetrating stain) Penetrating Liquid Floor Treatments: Clear waterborne solution of inorganic silicate or siliconate materials and proprietary components; odorless; that penetrates,	District to be consulted on the use of Polished Concrete.	Concrete Polishing Council, a specialty council of the American Society of Concrete Contractors.	ALL
AR	03	33900	CURING AND SEALING COMPOUND CONCRETE	N/A	WR Meadows, or Equal	SEALTIGHT #1100	ASTM C 309, Type 1, Class B, non dissipating, certified by curing compound manufacturer to not interfere with bonding of floor covering.	Water-based concrete curing compound for use on interior, exterior and horizontal concrete surfaces. Product should dissipate within four weeks in preparation for the installation of paint, resilient tile or flooring.		ALL

DIVISION 04 MASONRY

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	04	42223.29	Split Face Concrete Unit Masonry	N/A	N/A	N/A	N/A	Split Face Concrete Unit Masonry can be for trash enclosure structures, and other project areas upon approval of the District. Smooth faced, non colored CMU are not acceptable unless dressed with another exterior finish.	N/A	E/M/H

DIVISION 05 METALS

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	05	55113	METAL PAN STAIRS	Metal Pan Stairs	N/A	N/A	All risers, subtread pans, and sub platforms to be from steel sheet of thickness needed comply with performance requirements, but not less than 0.067 inch. All finished treads to be Concrete-filled, and a Cast-in stair nosings, see item below. Railings are to be stainless steel. Final design and finish to be approved by District.	At all interior and exterior stairs. Concrete finish on treads to be approved by District	N/A	E/M/H
AR	05	55213	METAL FABRICATIONS	Exterior Pipe Handrail	N/A	N/A	All Exterior Handrails Designs are required to be galvanized pipe. Galvanized after Fabrication. No field welding allowed. Design of Handrail and component parts are subject to approval by the District. Anchorage of Handrails must be reviewed and approved by District. See Waterproofing Standards.	Do not paint.	N/A	E/M/H
AR	05	55213	METAL FABRICATIONS	Interior Pipe Handrail	N/A	N/A	All Interior Handrails are required to be Stainless Steel. No field welding allowed. Design of Handrail and component parts are subject to approval by the District. Anchorage of Handrails must be reviewed and approved by the District.	Do not paint.	N/A	E/M/H
AR	05	55516	STAIR NOSINGS	STAIR NOSING	Wooster Products, Inc. or Approved Equal	Supergrit	Extruded aluminum base with satin lacquered finish, with a anti-slip filler.	Required at all interior and exterior steps or stairs		E/M/H

DIVISION 06 WOOD, PLASTICS & COMPOSITES

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	6	61100	WOOD FRAMING	N/A	N/A	N/A	N/A	Provide adequate clearances for any penetrations through framing. At all pipes where fluid flows provide isolators or sticky-back felt between the piping and the framing and/or structure to eliminate direct contact.		
AR	6	61600	SHEATHING	N/A	N/A	N/A	N/A	Provide either Plywood or Oriented Strand Board (OSB). No particle board.		
AR	6	61626	UNDERLAYMENT	N/A	N/A	N/A	N/A	Provide either Plywood or Oriented Strand Board (OSB). No particle board.		
AR	6	64100	Architectural Wood Casework	All Casework	N/A	N/A	All casework to be Institutional grade. Locks to be provided at all cabinet drawers and slides, to be Olympus, with Schlage IC Cores.	This is required for all cabinets, shelves, storage, and other items required by the Educational Specifications. All Hinges, drawer slides, and other mechanisms to be reviewed and approved by the District. All casework designs and finishes to be approved by the District. Shelving to be metal strip lock style shelf bracket	Provide all cabinet designs and construction in accordance with North American Architectural Woodwork Standards (NAAWS). NAAWS Standards Reference for basic design: Section Section 10 Custom Grade. WI Certified.	E/M/H
AR	6	64100	Architectural Wood Casework	Science, Laboratory Case Work	N/A	N/A	All casework to be institutional grade. Cabinet tops to be Phenolic	All Science Laboratory casework design is subject to review and approval of the District. Material and products will depend on the functional uses within the Laboratory. Refer to Educational Specifications for additional location and use requirements.	NAAWS Standards Reference for basic design: Section 10 and Annex 10D Requirements for Laboratory Casework. WI Certified.	M/H
AR	6	64600	WOOD TRIM	Interior Windows	N/A	N/A	Provide wood window stool and apron at all windows	Wood stool and apron to be stain grade and finished with semi gloss enamel paint or varnish. Design to be approved by the District	N/A	E/M/H
AR	6	64629	WOOD TRIM	Wood Fascia and Soffits	Woodtone or approved equal	Real Trim	N/A	Design and color for all exterior trim and casing of windows to be approved by District	N/A	E/M/H
AR	6	66116	Solid Surfacing Fabrications	Cabinet Tops and Counters	Wilsonart, or approved equal	Surfaces for Education	Solid surface description	All casework cabinet tops and counters to be solid surface with integral rolled edge and splash. Design details and colors to be approved by District	N/A	E/M/H

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary / Middle/ High
AR	07	71353	BELOW GRADE SHEET WATERPROOFING	Below Grade Sheet Waterproofing	Grace Construction Products or Approved Equal	Preprufe 300R Membrane	Integrally bonded sheet waterproofing membrane; high density polyethylene film.	Required at elevator pits or below grade utility chase areas. See District Waterproofing Standards for Sample of Specific application.	N/A	E/M/H
AR	07	71326	BELOW GRADE SHEET WATERPROOFING	Below Grade Sheet Waterproofing	Grace Construction Products or Approved Equal	Bituthene 3000, Preprufe 800 XP	Cold rubberized asphalt waterproof membrane. Surfaces should be structurally sound and free of voids, spalled areas, loose aggregate and sharp protrusions. Remove contaminants such as grease, oil and wax from exposed surfaces. Remove dust, dirt, loose stone and debris.	See District Waterproofing Standards for Sample of specific application. For use at exterior elevated walkway with a concrete topping slab - no habitable space underneath.	N/A	E/M/H
AR	07	72500	2 PLY DRAINABLE WEATHER RESISTANT BARRIER	Weather Barriers, WRB	Henry Hydrotex, or approved equal	N/A	N/A	See District Waterproofing Standards for Sample of specific application.	N/A	E/M/H
AR	07	72616	FLUID APPLIED AIR BARRIER ACCESSORY	Drainage Ventilation Composite Sheet	Cosella -Dorken Products,Keene Driwall, or Equal	N/A	3-dimensional rainscreen membrane with drainage and ventilation channels.	See District Waterproofing Standards for Sample of specific application.	N/A	E/M/H
AR	07	72616	BELOW GRADE VAPOR RETARDERS	Below Slab Vapor Barrier	Stego Industries LLC	Stego Wrap	15 mil	See District Waterproofing Standards for Sample of specific application.	N/A	E/M/H
AR	07	72726	FLUID APPLIED AIR BARRIER	Vapor Permeable Fluid Applied Air Barrier	GCP AT, Carlisle, Prosoco, or approved equal	Perm-A-Barrier VPL 50	Synthetic rubber, cold-vulcanized, fluid applied air and vapor barrier membrane. It cures to form a resilient monolithic elastomeric sheet.	See District Waterproofing Standards for Sample of specific application.	N/A	E/M/H
AR	07	73113	ASPHALT ROOFING SHINGLES	Shingles	CertainTeed, Owens Corning or approved equal	Presidential	Use Energy Star compliant roofing. 30 year warranty and commensurate useful service life.	This is required on all slope roos over 3/12 in pitch.	N/A	E/M/H
AR	07	74626	FIBER CEMENT SIDING SYSTEM	Fiber Cement Siding	James Hardie Company, or approved equal	N/A	Trim, siding and sheet goods fabricated from cellulose fiber-reinforced ground sand and Portland cement.	Used as a substitute for redwood or cedar siding. Recommend not using embossed wood grains or other patterns, which become 'dated' in appearance.	N/A	E/M/H
AR	07	75216	MODIFIED BITUMINOUS SHEET ROOFING	SBS 2-Ply Mod-Bit Roofing	Soprema, or Garland, or approved equivalent.	N/A	SBS 2-ply Modified Bituminous Sheet Roofing with PMMA Liquid-Applied Reinforced Coating with embedded marble chips.	This is required on all low slope roof areas.	30 year warranty.	E/M/H
AR	07	76200	SHEET METAL FLASHING AND TRIM	Flashing	N/A	N/A	Type 316 stainless steel	Use stainless steel for all exterior flashing and trim. 22 gauge minimum. Only where prefinished roofing is used, the flashing and gutter assemblies shall be made of the same material.	All Sheet Metal Flashing and Trim must have a 30 year warranty.	E/M/H
AR	07	77123	GUTTERS AND DOWNSPOUTS	Gutters	N/A	N/A	Gutters: Type 316 stainless steel with potable water interior coating. Downspouts: ASTM A53, Grade B, Schedule 40 galvanized steel pipe, standard weight.	Connect to the site storm drain system to avoid water sheeting across walks and playgrounds, include cleanout. Downspont needs to be structurally supported vertically from a building, structure or post.	N/A	E/M/H

DIVISION 07 THERMAL & MOISTURE PROTECTION

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary / Middle/ High*
AR	07	77616	ROOF DECKING PAVERS	Roof deck pavers	Hanover Architectural Products	N/A	N/A	Required at all areas of low slope roofs where access it required for maintenance and or pedestrian circulation.	N/A	E/M/H

DIVISION 08 OPENINGS

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	08	81200	METAL FRAMES	Hollow Metal Frames, Exterior	N/A	N/A	16 gauge Custom commercial security grade, fully welded. Conform to requirements of ANSI A250.8. Fire rated door and frame construction to conform to UL 9 and UL 10C.	Typical all exterior openings, unless approved by District. Installed exterior frame and door assembly to be weather tight.	HMMA 862 "Guide Specifications for Commercial Security Hollow Metal Doors and Frames"	E/M/H
AR	08	81200	METAL FRAMES	Hollow Metal Frames, Interior	N/A	N/A	Custom commercial grade, fully welded. Submit Certificate NRCC-ENV-05-E from the Non-residential Compliance Manual documenting compliance with the CBC, California Building Code, California Code of Regulations (CCR), Title 24, Part 6, Section 110, Table 110.6-A and 110-6.B.	Typical at all interior locations unless approved by District.	HMMA 861 "Guide Specifications for Commercial Hollow Metal Doors and Frames"	E/M/H
AR	08	81200	WOOD FRAMES	Frames, Fire-Rated	N/A	N/A	N/A	All new construction, provide metal frames. At retrofits, remodels and some modernizations, and only upon approval of District. Architect to verify fire-rating of existing wood frames .	NA	E/M/H
AR	08	81300	METAL DOORS	Hollow Metal Doors, Exterior	N/A	N/A	Custom, commercial security grade, fully welded.	Provide Metal doors at all door openings except at locations listed below that are to receive Wood Doors	HMMA 862 "Guide Specifications for Commercial Security Hollow Metal Doors and Frames"	E/M/H
AR	08	81300	METAL DOORS	Hollow Metal Doors, Interior	N/A	N/A	Custom, commercial security grade, fully welded.	Only when needed for fire rating.	HMMA 861 "Guide Specifications for Commercial Hollow Metal Doors and Frames"	E/M/H
AR	08	81400	WOOD DOORS	Flush Wood Doors	N/A	N/A	Flush Face Solid Core. PC-HPDL-5 unless otherwise required. All Doors to be Stain Grade	District requires at all Interior locations except where metal doors are used listed above. Wood doors are used at studios, offices, meeting rooms, and other educational spaces.	Woodwork Institute "North American Architectural Woodwork Standards" Section 09 Doors Custom Grade	E/M/H
AR	08	83300	COILING DOORS AND COUNTERTOPS	Coiling Doors and Grilles	N/A	N/A	Painted finish for galvanized steel; coated finish for aluminum. STC Rating of 32.	To be used at Kitchen to MPR, or any other service door area. Review the use of manual or power-operated coiling doors with the District.	NA	E/M/H
AR	08	83600	PANEL DOORS	Single Panel and Multi panel doors	Modern Fold or Hufcor, or approved equal	Acoustical Seal Model by Modernfold, Encore, with a minimum STC rating of 50	Marker Board or Tack Board on both sides of each panel to be coordinated with room layout and functions.	Use this door type at openings between learning spaces. Door panel size and operational system to be reviewed and approved by District. Percentage of white board and tack board to be approved by District	NA	E/M/H
AR	08	83213	SLIDING ALUMINUM GLASS DOORS	Single and multi panel doors	Arcadia, Kawneer Company, or approved equal	Arcadia Thermal Shield, Multi Slide Door	Product must be STC (50) Rated for use as an opening to other spaces or to collaboration or circulation spaces	Use this door type at openings between rooms or to collaboration and circulation spaces. And other spaces as stated in Ed Specifications and approved by District	NA	E/M/H
AR	08	83300	ROLLING DOOR	Roll up Doors	Cookson or approved Equal		Aluminum, insulated, with a STC rating of no less than 30.	Use in areas that call for access to the exterior for outdoor learning, or in areas for service to the building. Relites in the door need to be reviewed and approved by the District.	N/A	E/M/H
AR	08	84100	ENTRANCES AND STOREFRONTS, CURTAIN WALL	N/A	Arcadia, Kawneer or Approved Equal	Arcadia Thermal Shield	Finish: Clear Anodized. Glass shall be no lower than 36" to finished floor. STC rated at 50 minimum	District allows storefront systems at main entrances to MPR, Administration, and other District approved areas when presented during design.	N/A	E/M/H

DIVISION 08 OPENINGS

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	08	85113	WINDOWS	Exterior Windows	EFCO, Kawneer Company, Arcadia, or approved equal		Hollow Metal and Aluminum Framed windows, clear anodized finish. Sills shall have a continuous slope to the exterior. Weep flaps to be constructed of the same finish as the windows. Mitered sash corners will not be acceptable. All operable windows shall be awning style.	To be used at all windows except where there is storefront. No windows should be located below 18" to exterior or interior finished floor surface. District requires that every room with windows that at least two of them be operable.		E/M/H
DS	08	87100	DOOR Handle and Lock Hardware	N/A	Locks and Keying System:Allegion-Schlage, No Exceptions	Locks and Keying System ND Series, ANSI A156.2 Series 4000 Grade 1	N/A	Refer to District Hardware Standards	N/A	E/M/H
AR	08	87100	Door Hardware Other than Handles and Locks	All Hardware except Door Handles and Locks	Varies	N/A	N/A	Refer to District Hardware Standards	N/A	E/M/H

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DIVISION 09 FINISHES

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	09	92400	CEMENT PLASTER	System	Non-Proprietary	N/A	Three-coat traditional 7/8" cementitious system per PSDM. Lath shall meet ASTM C993 weight. Cement Plaster Finish: Hard trowelled, smooth trowel finish. Integral color	District requires an approval of control joint layouts prior to application. All control joints to be, at a minimum, compliant with ASTM C 1063 and PSDM. District requires a "mock up" of the proposed Finish for approval prior to application. Colors to be approved by the District	PSDM Plaster and Drywall Systems Manual	E/M/H
AR		92000	PLASTER ASSEMBLIES	Rainscreen. Drainage / Ventilation Composite Sheet	Driwall, Stc-O-Flex, or approved equal	N/A	N/A	Use at all stucco walls, no exceptions. See waterproofing details	N/A	E/M/H
AR	09	92236.23	METAL LATH	Self-furring metal lath	Structa Wire Corp Megalath, Phillips, Amico or approved equal	Structalath	Lath to be self-furring welded wire lath.	See Waterproofing Standards	N/A	
AR	09	92200	SUPPORTS FOR PLASTER	J Bead	Stockton or approved equal	J-B J Bead	Standard plaster stop/casing beam for terminating stucco	All metal exposed to the weather is to be Stainless Steel. See Waterproofing Standandards	N/A	E/M/H
AR	09	92900	GYPSUM BOARD (High Impact)	High Impact	N/A	N/A	Mesh reinforced gypsum board. Dense core. Soft Body Impact per ASTM C 1629 Level 3.	Install on all corridor walls or walls subject to high impact, such as Multipurpose Rooms, Athletic facilities, locker rooms, and other areas to determined in design and approved by the District. Install to 6" above suspended ceiling height.	N/A	E/M/H
AR	09	93013	TILE	Floor Tile	Dal Tile & American Olean, or Approved Equal		Unglazed colorbody porcelain tile.	District requires tile approval of all colors. Tile and grout color is to minimize appearance of soil. Colors in standard price groups (groups 1-3). Tile selection shall accommodate slope to drain. Tile selection shall accommodate grout width not to exceed 1/16 inch.	Master Grade Certificate required.	E/M/H
AR	09	93013	TILE	Wall Tile	Dal Tile & American Olean, or Approved Equal	Daltile Modern Dimensions	Ceramic Tile. Tile selection shall accommodate grout width not to exceed 1/16 inch.	District requires approval of tile colors. Include at least two colors in a pattern for the wall. Tile and grout color is to minimize appearance of soil. Colors in standard price groups (Groups 1-3).	Master Grade Certificate required.	E/M/H
AR	09	93013	GROUT	GROUT	Custom Building Products, or Approved Equal	Prism Ultimate Performance Grout	N/A	District requires tile approval of all colors. Tile and grout color is to minimize appearance of soil. Colors in standard price groups. All grout needs to be Epoxy.	Standards ANSI A118.6 and 7; ANSI A108.10 and A118.7	
AR	09	95000	ACOUSTICAL CEILINGS	Ceiling Tiles	Armstrong or Approved Equal	School Zone Fine Fissured	Minimum NRC 0.90 Square Lay-In.	Use at classroom and other educational spaces.	ANSI S12.60	E/M/H

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DIVISION 09 FINISHES

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	09	95000	ACOUSTICAL CEILINGS	Ceiling Tiles	Armstrong or Approved Equal	Optima	School one Fine Fissured only comes in 2x2 size.	Use at office & library ceilings.	ANSI S12.60	E/M/H
AR	09	9500	ACOUSTICAL CEILINGS	Ceiling Tiles	Armstrong or Approved Equal	ULTIMA Health Zone High NRC		Use at Nurses and other wet area.		
AR	09	96466	WOOD FLOORING	Stage and wood floors other than sports	N/A	N/A	3/4 inch by 3/4 inch vertical grain Maple flooring applied directly over wood sheathing.	Use at performance floors where resilience is not required. Do not place floor clean outs in wood flooring. No Pre-finished Products will be approved	N/A	E/M/H
AR	09	96466	WOOD ATHLETIC FLOORING	Sport venues	MFMA listed	N/A	Strip flooring type, MFMA-RL Second Grade or Better. Anchored wood Sleeper system. Meet DIN 18032, part 2. Under-floor ventilation system.	District requires Strip flooring in all competition gymnasiums. Post supports, sports layouts and logos are to be approved by District. No Pre-finished Products will be approved.	DIN 18032 part 2	M/H
AR	09	96466	WOOD ATHLETIC FLOORING	Dance	N/A	N/A	Strip flooring type, 3/34" thick, MFMA-RL Second Grade or Better. Floating type, resilient pad system. Meet DIN 18032, part 2.	District requires Strip Flooring in all Dance Studios. No Pre-finished Products will be approved.	DIN 18032 part 2	M/H
AR	09	96513	RESILIENT BASE AND ACCESSORIES	Base and Accessories	N/A	N/A	ASTM F 1861 Type TS: rubber, vulcanized thermoset.	Test moisture in concrete and glue used to apply tile for compatibility	ASTM F 1861	E/M/H
AR	09	96519	RESILIENT FLOORING	Marmoleum Composition Tile	Forbo or Approved Equal	mct	UV cured finish. Heterogeneous linoleum tile made primarily of natural materials consisting of linseed oil, wood flour, and rosin binders, mixed and calendared onto a polyester backing. Pattern and color shall extend throughout total thickness of material. Thickness: 0.1 inch. Sheet Goods are acceptable upon approval of District, provided they meet minimum thickness above.	Review with Owner prior to use. Use 'no-wax' maintenance techniques. Review resilient flooring selection with District. Use the adhesives which meet the vapor-emissions testing requirements. Design Team is to create a pattern with 3 or more colors, District to review and approve design.	N/A	E/M/H
AR	09	96519	RESILIENT FLOORING	Luxury Vinyl Tile	Armstrong	Natural Creations	A layered construction consisting of a UV-cured polyurethane finish, embossed clear vinyl wear layer, protecting a high-fidelity print layer on a solid vinyl backing coated with a pressure sensitive, releasable adhesive. Sheet Goods are acceptable upon approval of District, provided they meet minimum thickness.	Use 'no-wax' maintenance techniques. Review resilient flooring selection with District. Use the adhesives which meet the vapor-emissions testing requirements. Design Team is to create a pattern with 3 or more colors, District to review and approve design.	N/A	E/M/H

DIVISION 09 FINISHES

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	09	96519	RESILIENT FLOORING	Rubber Tile	Nora, Mondo, Roppe, Tarkett/Johnsonite or approved equal	N/A	Thickness: 3 mm min (includes 3 mm, 0.12 inch, 1/8 inch, 3.5 mm, 0.14 inch). Texture: Smooth, hammered, sealskin. Pattern: Marble or fleck Colors: choose from least expensive price group. Sheet goods are acceptable provided they meet minimum thickness above.	Use 'no-wax' maintenance techniques. Review resilient flooring selection with District. Use the adhesives which meet the vapor-emissions testing requirements. Design Team is to create a pattern with 3 or more colors, District to review and approve design.	N/A	E/M/H
AR	09	96566	RESILIENT ATHLETIC FLOORING	Faux Wood cushioned athletic floor, or approved equal	Connor	SportGrain	Cushioned Vinyl Flooring with wood pattern. cushion thickness: 5-7 mm Vinyl Thickness: 2 mm min	Use Only where District approves and needed for function of space	N/A	E/M
AR	09	96723	RESINOUS FLOORING	Epoxy Floor, Heat-Tolerant	Dexotec, or approved equal	N/A	1/4 inch thick fluid applied quatrzchip urethane floor and base with epoxy top coat and antimicrobial properties. Three-component, integral troweled mortar base consisting of urethane resin, curing agent, and silica aggregate.	Traffic grey is not allowed as final finish.	N/A	E/M/H
AR	09	96816	CARPETING	Carpet, Broadloom or Tile	N/A	N/A	Yarn Type: Nylon Type 6,6. Dye Process: 100% Solution Dyed. Lifetime Warranty against raveling. Lifetime warranty against static buildup. CRI Green Label Plus NSF/ANSI 140 Certified Gold. Nylon Fibers with applied soil resistance and antimicrobial treatment.	Use the adhesives and product which meet the vapor-emissions testing requirements. Design Team is to create a pattern with 2 or more colors, District to review and approve design. Monolithic design not acceptable for plank size carpet.	CRI Carpet and Rug Institute	E/M/H
AR	09	97200	WALLCOVERING	Vinyl Wallcovering	N/A	N/A	All wallcovering needs to be installed over a solid backer board.NFPA 255 Class A NFPA 286 Corner Burn: Pass ANSI 342	Apply to areas that are not Tackboard, or white board that require washable wall covering. Prior approval of walls to receive wallcovering to be approved by District	ANSI 342	E/M/H
AR		98400	ACOUSTIC ROOM COMPONENTS	Acoustical wall panel	Lamvin, or Approved Equal	Eco Sonic I Acoustical Panels	Panels, composed of-inch, 6-7 lb. density rigid fiberglass core (with no added urea-formaldehyde) with chemically hardened edges. The panel covering shall be fabric and all edges wrapped a minimum I-112 inches to the back of the panel. All acoustical wall treatment must have a solid backer board.	To be used to accomplish acoustical standards	N/A	E/M/H

DIVISION 09 FINISHES

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	09	99113	PAINTING	Exterior Painting	Benjamin Moore, Dunn-Edwards, Sherwin-Williams, or approved equal	N/A	All painted surfaces to be primed. Two coats are required after prime coat. Intermediate coat to be match color of top coat. Wood or wood containing products are to be primed on all sides and cut ends.	To be applied to exterior materials that are to receive paint. No paint to be applied to galvanized handrails, stainless steel, or factory finished products. District requires approval of all paint and finish colors, initially selected by the Architect from the manufacturer's entire range of standard and custom color selections and special colors selected to match or compliment the colors of other materials, equipment, or components which comprise the work. Exterior paint design shall include at least four colors. Avoid light colors at height and locations where students hands and feet have frequent access. Exterior door frame and door color should wrap to interior surface.	N/A	E/M/H
AR	09	92123	PAINTING	Interior Painting	Benjamin Moore, Dunn-Edwards, Sherwin-Williams, or approved equal		Acrylic is required where paint it scheduled. All painted surfaces to be primed. Two coats are required after prime coat. Intermediate coat to be match color of top coat. Wood or wood containing products are to be primed on all sides and cut ends. Eggshell or greater sheen on gypsum, semi gloss on trim	To be applied to all interior material, except noted items such as galvanized handrails or factory finished products. Stainless Steel, do not paint. District requires approval of all paint and finish colors, initially selected by the Architect from the manufacturer's entire range of standard and custom color selections and special colors selected to match or compliment the colors of other materials, equipment, or components which comprise the work.	N/A	E/M/H
AR	99623	Graffiti-Resistant Coatings	Anti-Graffiti Coating	GSS Coatings, Monochem, US Coatings, or Approved Equal	GSS-10, Permashield Premium, Anti-Graffiti Protection System, or Approved Equal	N/A	District requires application at all CMU Walls only. District to approve locations	N/A		E/M/H

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DIVISION 10 SPECIALTIES

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	10	101123	FIXED TACKBOARDS	Tackable Wall Board Systems	N/A	N/A	Vinyl Wallcovering factory-applied to 1/2 inch x 4 foot wide industrial insulation board, ironed and prime coated, meeting ASTM C208. Minimize openings.	Tackboards to be applied on walls where indicated in the Educational Specifications 4' x 8' unit with aluminum frame unless multiple panels are mounted adjacent one another than the framing should occur around the group of boards. Panels must be mounted with z-clips for ease of replacement.	N/A	E/M/H
AR	10	101400	SIGNAGE	Exterior Signs	N/A	N/A	Brushed Aluminum or Stainless Steel.	See Educational Specifications for locations	N/A	E/M/H
AR	10	101400	SIGNAGE	Interior Signs	N/A	N/A	Interior-rated acrylic.	See Educational Specifications for locations	N/A	E/M/H
AR	10	101400	SIGNAGE	Interior Signs, Administration Areas	N/A	N/A	Interior-rated acrylic.	See Educational Specifications for locations	N/A	E/M/H
DS	10	101463	ELECTRONIC MESSAGE SIGNAGE	Electronic Marquee	Stewart Signs, No Exceptions	LED School Signs	Electronic signage to be operational through a web based application. Besides operational cables, provide two (2) CAT6a cables 1-1/4" conduit for future.	Provide either wall or free standing, installation to be approved by District	N/A	E/M/H
AR	10	102113	TOILET COMPARTMENTS	Solid Color Reinforced Composite from Mfg.	Bobrick, or Approved Equal	Sierra Series 1092 overhead braced	Provide a full range of colors for the Districts selection	Use stainless steel continuous butts & hinges and institutional hardware. Specify backing plate detail with through bolts/sex bolts. All partition doors to have door stops at the top and bottom of each panel. Do not use urinal screens. At the high school level, only use for panels at stall doors. All other separations to be constructed with full tile walls.	N/A	E/M/H
AR	10	102113	TOILET COMPARTMENTS	Custom	N/A	N/A	Stalls to be enclosed on three sides with solid construction. Hollow Metal Doors per Division 8. Provide backing plate detail with through bolts/sex-bolt.	Applies where there is a single stall in a restroom	N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Toilet Tissue, Multi-Roll, Recessed	Bobrick or Approved Equal	B-3888	Satin-finish stainless steel unit and dispensing mechanism. Unit needs to hold two rolls up to 5 1⁄4" (133mm) diameter (1800 sheets). Theft-resistant, heavy-duty spindles.	All dispensers to be lockable	N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Toilet Tissue, Surface Mounted	Bobrick or Approved Equal	B-2888	Satin-finish stainless steel unit with stainless steel dispensing mechanism.	All dispensers are to be lockable	N/A	E/M/H

DIVISION 10 SPECIALTIES

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	10	102813	TOILET ACCESSORIES	Foam Soap Dispenser, Surface Mounted	Technical Concepts, or Approved Equal	Model # 750382	Stainless steel.		N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Toilet Seat Cover Dispenser	Bobrick, or Approved Equal	B-221	Commercial Toilet Seat Cover Dispenser, Surface-Mounted, Stainless Steel	See Educational Specification "General Spaces Standards – Restrooms & Sinks"	N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Sanitary Napkin Disposal	Bobrick or Approved Equal	B-3544	ASI #0473	Provide at every female restroom location, and gender neutral restrooms	N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Sanitary Napkin , recessed	Bobrick or Approved Equal	B-352	ASI #464	Provide at all student female restrooms, and gender neutral restrooms	N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Hand Dryer, Electric	Bobrick or Approved Equal	B-7125 InstaDry™ High Speed Dryer	N/A	Provide the appropriate number, no less than one, per restroom based on occupancy level Plan for drivers to be simi obsessed with a stainless steel plate below fixture	N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Shower Curtain Rod	Bobrick or Approved Equal	B-6107 x 72 ClassicSeries®	N/A	N/A	N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Shower Curtain Hook	Bobrick or Approved Equal	B 204-1 Standard Shower Curtain Hook	N/A	N/A	N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Changing Station	Koala or approved equal	N/A	Koala is purchased through the Bobrick company	Use in restrooms which are accessed by community	N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Folding Shower Seat	Bobrick, or Approved Equal		Shower Curtain Hook	See Educational Specification "General Spaces Standards – Restrooms & Sinks"	N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Clothes Hook	Bobrick, or Approved Equal	B-983	Surface-mounted vertical design. (Koala Model KB111-SSWM)	Provide in each restroom stall	N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Grab Bars	Bobrick, or Approved Equal	B-6806.99, B-5837	Recessed-mounted horizontal design. (Koala Model KB110-SSRE)	Provide all grab bars as determined for access and at lengths to meet code requirements	N/A	E/M/H
AR	10	102813	TOILET ACCESSORIES	Mop Rack, Shelf	Bobrick, or Approved Equal	B-239	N/A	Provide at all Janitorial and maintenance rooms.	N/A	E/M/H
AR	10	104100	SAFETY SPECIALTIES	EMERGENCY ACCESS AND KEY CABINETS	Knox Box, and Padlock	3200 Series	Hinged door. Heavy duty. Heavy duty padlock with stainless steel shackle, designed for securing perimeter or fire access gate.	Locate in Administration, Location to be Approved By District. All Locations to be approved by local Fire Department.	N/A	E/M/H
AR	10	105113	METAL LOCKERS	Student Lockers	Lyon or approved equal	Quite Lockers, single and double tiered	Integrated locks, 5 combinations. All standard Lockers to be 15" wide, an 12" deep	Double tier and single tier lockers use to be discussed and approved by District.	N/A	M/H
AR	10	105113	METAL LOCKERS	Athletic Locker	Lyon or approved equal	N/A	Padlocks on all Athletic lockers	Locate Athletic Lockers in District Approved Locations	N/A	M/H
AR	10	107500	FLAGPOLE	Flagpoles	Playworks, or Approved Equal		Aluminum flagpoles with heat-treated seamless 6063-T6 tubing to withstands winds of 160 MPH. Clear anodized aluminum and lockable compartments.	District to approve location of Flagpole. See Educational Specifications for Height	N/A	E/M/H

DIVISION 11 EQUIPMENT

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	11	111616	SAFES	Safe	Sentry or approved equal	N/A	fire-rated, bolt-to-floor. Mechanical function - not electrical. 4 cubic feet minimum.	See Educational Specifications. Final location to be approved by District	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	GENERAL	N/A	N/A	City of Richmond, Waste Water Department, requests no garbage disposals due to difficulty in processing solid waste materials.	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Hand Sinks	Aero Manufacturing	HSD	Stainless steel wall mount 10 inch wide x 14 inch front-to-back x 5 inch deep with 8 inch splash gooseneck splash mount faucet, P-Trap, lever waste, wrist handles and overflow. NSF.	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Manual Can Opener	Edlund	S-11	Manual can opener with cast stainless steel base, removable blade assembly, dishwasher safe, NSF.	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Pre-Rinse Faucet Unit	T & S Brass	B-0133 with B0107 spray valve with B-0044-H flex stainless steel hose	35 1/2 inch high x 15 inch overhang, x 8 1/4 inch clearance, 18 inch riser	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Pot Filler	T & S Brass	B-0610	Kettle and pot assembly with vacuum breaker, 68 inch long. 1/2 inch wide flexible stainless steel hose, mixing valve, lever handles with squeeze valve and hook nozzle.	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Pot Washer	Metcraft Inc.		Polished stainless steel, floor mounted 168 inch long x 30 inch wide complete with all dispensing, drainage systems and controls.	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Laundry Sink	Aero Manufacturing	2F1-2424	Size as required for project installation.	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Small Grease Exhaust Hood	Greenheck	GXFW Type 1	Size as required for project installation.	N/A	N/A	E/M/H

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	11	114000	FOODSERVICE EQUIPMENT	Large Grease Exhaust Hood	Greenheck	GHFQ Type 1	one section 216 inch long x 60 inch wide x 24 inch high, UL listed, with fire damper, NSF, Type 1 high efficiency baffle filter face supply wall canopy with fire control system.	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Stainless Steel Hood Closure Panels	N/A	N/A	20 ga. Closure from top of exhaust hood to finish ceiling, and trim at ceiling and walls, finish to match hoods.	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Stainless Steel Tray Shelf	N/A	N/A	12 inch wide x 36 inch long 20 ga. on 14 ga. wall brackets.	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Stainless Steel Wall Flashing	N/A	N/A	20 ga to 54 inches above top of base, behind all hot and wet areas.	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Stainless Steel Corner Guards	N/A	N/A	14 ga 2 inch x 2 inch x approx. 49 inches long.	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Stainless Steel Work Tables, Mobile	N/A	N/A	60 inches long x 30 inches wide with undershelf and 20 inch x 20 inch drawer mounted to the left side near hand sink, with four 5 inch diameter heavy duty non-marking casters	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Stainless Steel Work Tables, Mobile ADA	N/A	N/A	84 inches long, similar to above. ADA compliant.	N/A	N/A	E/M/H
AR	11	114000	FOODSERVICE EQUIPMENT	Stem Caster Carts	Metro	A456EC	Adjustable stem caster wire carts 21 inches wide x 48 inches long x 69 inches high with four shelves, posts, split sleeves, donut bumpers, chrome shelves and posts, with 5 inch polyurethane swivel casters all with brakes, 900 pound capacity.	N/A	N/A	E/M/H
AR	11	114100	FOOD STORAGE EQUIPMENT	Air Doors	Mars	NHV 42	One pair unheated, high impact type, 42 inch long, with door-operated microswitch. NSF.	N/A	N/A	E/M/H
AR	11	114100	FOOD STORAGE EQUIPMENT	Walk In Freezer	Koolstar, RMI Econocold, Pacific Refrigerator Co, Thermalite	N/A	10' 2" long x 8' 6" wide x 9' clear inside, with 3' x 6'8" with entry/exit door hardware with cam lift and spring assisted self-closing hinges	N/A	N/A	M/H

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DIVISION 11 EQUIPMENT

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	11	114100	FOOD STORAGE EQUIPMENT	Walk In Cooler	Koolstar, RMI Econocold, Pacific Refrigerator Co, Thermalite	N/A	10' 10" long x 8' 6" wide x 9' clear inside, with 3' x 6'8" with entry/exit door hardware with cam lift and spring assisted self-closing hinges	N/A	N/A	E/M/H
AR	11	114100	FOOD STORAGE EQUIPMENT	Freezer Strip Door	Aleco	440042 Clear-Flex II	Freezer secondary door assembly of 6 inch wide 0.060 replaceable clear nylon strips.	N/A	N/A	E/M/H
AR	11	114100	FOOD SERVICE EQUIPMENT	Mobile Wire Shelving Units	GA Systems	Speed Line, Model ED336	Mobile, dry, non-heated with heated display unit on top.	N/A	N/A	E/M/H
DS	11	114100	FOOD SERVICE EQUIPMENT	Mobile Refrigerated Speed Line Cabinets with Baskets	GA Systems	Speedee-Serv Speed Line Model EF336-EDSN6336G Basket C436	Modular style self-service refrigerated cabinets with slide/lift-off lids. #B13262 baskets 25-7/8 in x 13-1/4 inch x 2-3/8 inch stainless steel.	N/A	N/A	E/M/H
DS	11	114100	FOOD SERVICE EQUIPMENT	Mobile Heated Speed Line Cabinet	GA Systems	Speedee-Serv Speedlines Model EC536-EDSN6336G	31 inches long x 36 inches wide x 34 inches high, stainless steel, with holding capacity of 15 B13262 baskets.	N/A	N/A	E/M/H
DS			FOOD SERVICE EQUIPMENT	Mobile Freezer Cabinet	GA Systems	Speedee-Serve Speedline F336 Modular with DSN36 guard	31 inches long x 36 inches wide x 34 inches high, modular self-service style, stainless steel, with holding capacity of 15 B13262 baskets.			
DS	11	114400	FOOD SERVICE EQUIPMENT	Mobile Cash Stand with Locking Cash Drawer	GA Systems	Speedee-Serve Speedline D336 Modular with Shelf	31 inches long x 36 inches wide x 34 inches high, stainless steel drawer assembly and cabinet base with 18 gauge undershelf.	N/A	N/A	E/M/H
AR	11	114400	FOOD SERVICE EQUIPMENT	Gas Range	Montague	136-5 Legend	36 inch wide heavy duty open burner type, stainless steel front and side, adjustable legs	N/A	N/A	E/M/H

DIVISION 11 EQUIPMENT

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	11	114400	FOOD SERVICE EQUIPMENT	Gas Convection Oven	Montague	2-115B Vectaire	Convection Oven, Baker depth, thermostatic controls, single speed fan, top and bottom vertical opening doors with windows, stainless steel construction, 3 inch high deflector 6 inch adjustable legs, gas pressure regulator. Non-computer controls.	N/A	N/A	E/M/H
AR	11	114600	FOOD SERVICE EQUIPMENT	Mobile Kiosk Cart with Umbrellas	Beverage Air	N/A	78 inches long x 30 1/2 deep x 54 inches high with 7 1/2 foot folding umbrella mounted to center of cart, with two food wells and 18 ga. SS undershelf on 5 inch diameter plate-type casters, with brakes, and top display shelf.	The district is moving past specifying equipment manufactured by True Mfg due to inconsistent performance, Typical.	N/A	E/M/H
DS	11	114600	FOOD SERVICE EQUIPMENT	Heated Cabinet, Double Door Roll-Thru with dollies and trays	Beverage Air	N/A	2-section, each section 34 1/2 inch deep 27CF for 27 inch x 29 inch deep x 66 inch high carts with stainless steel door with cam-lift hinging, lock, digital thermometer, and stainless steel ramp.	N/A	N/A	E/M/H
DS	11	114600	FOOD SERVICE EQUIPMENT	Refrigerator Cabinet, Double Door Roll-Thru with dollies and trays	Beverage Air	N/A	2-section 75 cubic foot top mount, 300 series stainless steel exterior and interior, four stainless steel doors with cam hinging lock, digital thermometer and stainless steel ramps.	N/A	N/A	E/M/H
AR	11	114600	FOOD SERVICE EQUIPMENT	Reach-In Refrigerator	Beverage Air	N/A	56 CF 34 1/4 inch deep, stainless steel, with two-hinged doors with lock, digital thermometer, and nine sets of trays for each section, leg mounted.	N/A	N/A	E/M/H
AR	11	114600	FOOD SERVICE EQUIPMENT	Dual Temperature Refrigerator/ Freezer	Beverage Air	N/A	13 CF capacity each section, refrigerator up and freezer down, stainless steel, provide legs with seismic mount.	N/A	N/A	E/M/H
AR	11	114600	FOOD SERVICE EQUIPMENT	Heated Cabinets, Roll-In	Beverage Air	N/A	Two-section, 34 1/2 inch deep 27CF for 27 inch x 29 inch deep x 66 inch high carts with stainless steel door with cam-lift hinging, lock, digital thermometer, and stainless steel ramp.	N/A	N/A	M/H

DIVISION 11 EQUIPMENT

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	11	114600	FOOD SERVICE EQUIPMENT	Stainless Steel Serving Counter	N/A	Make to same size and configuration as adjacent units.	14 ga. 34 inch x 36 inch long x 38 inch high, with 16 ga. Under-shelf and master-keyed locking cash drawer assembly, including electric receptacles for POS stations.	N/A	N/A	E/M/H
AR	11	114601	FOOD SERVICE EQUIPMENT	Stainless Steel Cashier's Serving Counter	N/A	include heavy-duty non-marking casters with brakes and electric receptacles in counter top for power and data lines.	14 ga. 34 inch wide x approx 120 inches long x 38 inches high, with 16 ga. Undershelf.	N/A	N/A	E/M/H
AR	11	114602	FOOD SERVICE EQUIPMENT	Mobile Milk Coolers	Beverage Air	SM58N	Refrigerated milk storage units with oversized forced-air refrigeration system with 2 sliding self-service doors with stainless steel drop front and 'hold-open' flui-up tops, with white laminate exterior and white aluminum lined interior, standard floor racks and clean-out drains. Capacity: 12 milk crates.	The district is moving past specifying equipment manufactured by True Mfg due to inconsistent performance.	N/A	E/M/H
AR	11	114603	FOOD SERVICE EQUIPMENT	Heated Cabinets, Mobile	Vulcan	VHP7	Insulated, bottom mount forced-air heat system, universal slides for 24 - 12 x 20 inch or 12 18 inch x 26 inch pans at 3 1/2 inch spacing, slides adjustable in 1 1/2 inch increments and 5 inch swivel casters with brakes.	Also Metro approved equal.	N/A	M/H
AR	11	114700	FOOD SERVICE EQUIPMENT	Ice Maker, Cube Style	Manitowoc	N/A	Air Cooled self-contained condenser stainless steel, makes half-dice size cubes		N/A	E/M/H
AR	11	114700	FOOD SERVICE EQUIPMENT	Ice Bin	Manitowoc	N/A	Top hinged front-opening door, approx. 710 pound storage capacity	N/A	N/A	E/M/H
AR	11	114700	FOOD SERVICE EQUIPMENT	Ice Maker, Water Filter	Everpure	EV9324-02 Insurice 2000	1/2 micron precoat filtration, sized for most low flow cuber ice machines less than 1200 pounds per day, flaker less than 2,500 lbs per day	N/A	N/A	E/M/H
AR	11	116133	RIGGING SYSTEMS AND CONTROLS	Rigging Hardware	JR Clancy Inc., Tru-Roll Inc., Protech Theatrical Systems or approved equal	N/A	Framework and mounting for sheaves, blocks, tee bars, arbors, ropes, rope clips, pipe battens, outrigger lights, and motor winches for adjusting light arboars.	See Educational Specifications for further requirements	N/A	M/H

DIVISION 11 EQUIPMENT

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	11	116133	RIGGING SYSTEMS AND CONTROLS	Traverse Tracks and Related Hardware	Automatic Devices Co., Tru-Roll Inc., H & H Specialties or approved equal	N/A	3 inch x 3 inch x 14 gauge track operated bi-parting, with pulleys and ball bearings and non-stretch 1/2 inch sash cord.	See Educational Specifications for further requirements	N/A	M/H
AR	11	116143	STAGE CURTAINS	Curtain Machines and tracks	Automatic Devices Co., Tru-Roll Inc., H & H Specialties or approved equal	N/A	Floor-mounted drum-drive operator, 1/2 HP, 208v, 3 inch x 3 inch x 14 gauge traverse track bi-parting, with pulleys and ball bearings and non-stretch 1/2 inch sash cord, with operating controls and limit switches.	See Educational Specifications for further requirements	N/A	E/M/H
AR	11	116143	STAGE CURTAINS	Curtain Materials	KM Fabrics, Inc. or approved equal	N/A	Cotton Velour, 32 ounce, flame-resistance treated, if required.	Front curtains only. See Educational Specifications	N/A	E/M/H
AR	11	116143	STAGE CURTAINS	Curtain Materials	KM Fabrics, Inc., JB Martin, Frankel Associates,Rose Brand or approved equal	N/A	Cotton Velour, 20 ounce with opaque denim lining flame-resistance treated.	This for wings and back curtains. See Educational Specifications	N/A	E/M/H
AR	11	119513	KILNS	Kilns	N/A	N/A	Electric operation. Coordinate power disconnect voltage. Coordinate exhausting of heat. Lockable emergency shutoff.	See Educational Specifications. Final location to be approved by District	N/A	M/H
AR	11	116643	INTERIOR SCOREBOARDS	Athletic Signs	Daktronics, or approved equal	N/A	N/A	Coordinate with District sports that need to be included. Location to be approved by District	N/A	M/H
AR	11	116843	EXTERIOR SCOREBOARDS	Athletic Signs	Daktronics or approved equal	N/A	N/A	Coordinate with District sports that need to be included. Location to be approved by District	N/A	M/H
AR	11	116623	BASKETBALL EQUIPMENT	Ceiling Suspended Forward Fold Backstop	Porter or approved equal	N/A	Vertical lift backboard with rectangular glass and electric winch	See Educational Specifications for further requirements	N/A	M/H

DIVISION 12 FURNISHINGS

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	12	123553	LABORATORY/ SPECIALTY CASEWORK	Lab Casework	N/A	N/A	Phenolic faced, seismic shelf lips on all laboratory shelving and other storage cabinets where spillage and breakage of contents are of a concern. Do not use these lips for normal book storage shelves. Epoxy Resin countertop. Per SEFA recommended practices.	N/A	WI Section 10 Annex 10D Requirements for Laboratory Casework. WI Certified. WI inspection required.	M/H
AR	12	123553	LABORATORY/ SPECIALTY CASEWORK	Casework	N/A	N/A	Institutional grade attachments.	N/A	WI Section Section 10 Custom Grade. WI Certified. WI inspection required.	E/M/H
AR	12	123553	LABORATORY/ SPECIALTY CASEWORK	Hinges	Rockford Process	374 or 376	Institutional Hinges for Overlay doors, 2-3/4" five knuckle with hospital tips and 2-5/8" extended side panel wing	N/A	N/A	E/M/H
AR	12	123553	LABORATORY/ SPECIALTY CASEWORK	Drawer slides, 200 lb capacity	Accuride	3640A	Side mount load capacity up to 200 lbs. per pair with drawer width of 42", Adapter rail mount/disconnect	N/A	N/A	E/M/H
AR	12	123553	LABORATORY/ SPECIALTY CASEWORK	Drawer slides, 350 lb capacity	Accuride	7957	Heavy-duty slide series Up to 350 lb. handed lever disconnect	N/A	N/A	E/M/H
AR	12	123553	LABORATORY/ SPECIALTY CASEWORK	Drawer slides, 500 lb capacity	Accuride	9301	Load Rating: up to 500, Non-disconnect	N/A	N/A	E/M/H
AR	12	122413	ROLLER WINDOW SHADES	Window Shades	Draper Inc., Hunter Douglas Contract, MechoShade Systems, Inc or Approved Equal	N/A	Blinds are to be manual, except at clerestory windows or windows that are above 8 feet from finish floor, then then need to be electronically controlled by a key lock switch. Light-Filtering Fabric : Woven Fabric, stain and resistant. Type: 76% PVC and 24% polyester.	Provide Window Blinds at all windows in all buildings below 8 feet above finish floor. Provide blinds at all windows above 8 feet windows that need to be shaded due to site orientation. All MPR's must have blinds on all windows, and they need to be electronically controlled	N/A	E/M/H

DIVISION 13 SPECIAL CONSTRUCTION

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	13	133133	Framed Fabric Structures	Shade Structure	USASHADE and Fabric Structures, or approved Equal	N/A	Design size and final shape to be approved by the District	Provide in areas as defined in Educational Specifications for shade areas. All locations to be approved by the District	N/A	E/M/H

DIVISION 14 ELEVATORS

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	14	142423	ELEVATOR	Hydraulic Passenger Elevator	Thyssen Krupp Elevator Co. or Approved Equal	N/A	No Painted doors, polished stainless steel. Interior of CAB finish to be approved by District	Provide keyed call button at all stop levels and phone service for emergency to administration.	N/A	E/M/H
AR	14	144100	PEOPLE LIFT	Counterbalanced People Lift	Hoyer, or Approved Equal	N/A	N/A	Required in SH rest rooms	N/A	E/M/H
AR	14	144100	WHEELCHAIR LIFT	Wheelchair Lift	Access Industries, Concord Elevator, Garaventa Accessibility or Approved Equal	Access Industries, Porch Lift PL-S	Capacity to be 750 LBS with static load safety factor of five. Rated Speed to be 17 feet/minute. Nominal platform size to be 49 3/8" x 51" Open configuration	Wheelchair to operate without an attendant	N/A	E/M/H

DIVISION 21 FIRE SUPPRESSION SYSTEM

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	21	210000	FIRE SUPPRESSION	Sprinkler Head Protection	Sprinkguard or Approved Equal	Threadguard	N/A	Provide at all fire sprinler heads that are exposed and not in a finished ceiling or other finished area	N/A	E/M/H

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DIVISION 22 PLUMBING

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	22	221316	SANITARY WASTE AND VENT PIPING	Wye with Cleanout	N/A	N/A	N/A	Where two waste lines come to a common vent, install a wye (Y) with cleanout near. Additionally, provide a cleanout and stainless access door in wall. Location to be reviewed approved by the District.	N/A	E/M/H
AR	22	224200	PLUMBING	Recessed Box, Hose Bibb	Acorn, or Approved Equal	8200-1	Stainless Steel Recessed Box with Door and Wall Flange.	See Educational Specifications for Locations	N/A	E/M/H
AR	22	224216	PLUMBING	FLoor Sinks	Fiat or approved equal	MSB-2424 White; with 889-CC Mop Hanger an dE-88-AA Stainless Steel Bumper Guard	Molded Stone, with Chicago Fixtures	District requires that all janitorial rooms have a Floor Mop Sink with Hot and Cold Water. Provide Mop hanger and bumper guard at all locations	N/A	E/M/H
AR	22	224213.13	PLUMBING	Water Closets - Wall Mount	American Standard, Kohler or Approved Equal	American Standard 2859.128.020	Manual Flush	Use wall mount in all staff and student restrooms.	N/A	E/M/H
AR	22	224216.13	PLUMBING	Lavatory	Elkay, American Standard, Kohler, or Approved Equal with a Chicago Faucet or Approved Equal	Elkay DRKAD2217601 Single Bowl, single Faucet ADA Drop in Sink. Chicago Faucet Similar to #333-336COLDABCP	Single in-cabinet sink. Single faucet.	Use in classroom install in a countertop. Size of under counter opening must allow front approach for wheelchair access for any grade above kindergarten.	N/A	E/M/H
AR	22	224216.13	PLUMBING	Lavatory	Acorn or approved Equal with Sloan or approved Equal faucet	Acorn Series 3400. Size and exact Model number to be determined based on number of Lavatory Stations Required Sloan 5wHW8 Electronic Faucet	Multi-station Lavatory.	Lavatory to be used all ganged student restrooms where multiple sinks are required	N/A	E/M/H

DIVISION 22 PLUMBING

DS/AR	Div	CSI No.	Spec Section Name	Product Type	Basis of Design Manuf.	Basis of Design Model	Product Description	Design Guideline	Standards	Elementary/ Middle/ High
AR	22	224216.13	PLUMBING	Lavatory	American Standard, or Approved Equal	American Standard 0356.066.020, Single Faucet Location Sloan 5WHW8 electronic faucet	Electronic metering faucets. Industrial grade	Lavatory and Faucet to be used only in single use toilet rooms where there is no cabinet	N/A	E/M/H
AR	22	224213.16	PLUMBING	Urinals	American Standard, Kohler with Sloan flushometer or Approved Equal	Vitreous china, water saving, white. Flush Valve to be lever handle	N/A	Urinals to be used in all multi fixture mens toilet rooms	N/A	E/M/H
AR	22	224200	PLUMBING	High Efficiency Toilet and Carrier System	ZURN, or Approved Equal	EcoVantage toilet and EZCarry. Mechanical flush valve: Z6000AV-HET.	Evacuates waste 50 feet.	To be used at all restrooms	N/A	E/M/H
AR	22	224700	DRINKING FOUNTAINS	Interior Drinking Fountain and bottle filler	Haws or Approved Equal	N/A	Stainless steel, institutional grade.	Provide industrial-grade water bottle filler at interior drinking fountains.	N/A	E/M/H
AR	22	224700	DRINKING FOUNTAINS and BOTTLE FILLERS	Exterior Drinking Fountain and Bottle Fillers	Haws or Approved Equal	N/A	High Low industrial grade, rated for exterior use	See Educational Specifications for Locations	N/A	E/M/H
AR	22	224239	COMMERCIAL FAUCETS	Hose Bibb	Arrowhead Brass, or Approved Equal	35CLF and 35PLF	N/A	See Educational Specifications for Locations	N/A	E/M/H
AR	22	221000	WATER, VENT AND CD PIPING	N/A	N/A	N/A	N/A	The District requires that all plumbing pipe under slabs to be Cast Iron. All piping is to be isolated with acoustical isolators such as the Hubbard Holdrite Silencer System. Alternatively, felt or rubber (E.g. Cooper B-line B1999 Vibra-Cushion) may be wrapped around the pipe to eliminate direct contact. Applies to all pipes where fluid flows and especially important at locations directly adjacent to noise-sensitive spaces.	N/A	E/M/H
AR	22	220000	Plumbing	Floor Drains	Zurn, J.R. Smith or approved equal	N/A	N/A	Provide floor drains that are flush with adjacent flooring. Location to be approved by District	N/A	E/M/H

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DIVISION 22 PLUMBING

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	22	220000	Plumbing	Wall and Floor Cleanouts	Zurn, J.R. Smith or approved equal	N/A	N/A	Clean outs to be located in floor. Except Wood Floors. If clean outs are to be located in wall, District needs to approve. All cleanout locations need to be approved by District.	N/A	E/M/H
AR	22	220000	Plumbing	Water Hammer Arrestor	Watts or approved equal	N/A	N/A	Provide Hammer Arrestors at locations of flush valves, single handle faucets, dishwashers and all locations that have fast closing positive shut-off valves or solenoid valves.	N/A	E/M/H

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DIVISION 23 HEATING, VENTILATING, & AIR CONDITIONING

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	23	230000	HEATING, VENTILATING, AND AIR CONDITIONING	HVAC,System, Acoustics	N/A	N/A	N/A	Acceptable Noise Collefinencts: Small Conference Rooms NC 30-35; Small Private Offices, Libraries NC30-35; General Offices NC 35-40; and Computer Rooms NC 40-50. Follow ANSI S12.60,Part 1 for classrooms	N/A	E/M/H
DS	23	230900	ENERGY MANAGEMENT CONTROLS	Site EMS for HVAC	Alerton Technologies, no exceptions	BACTalk Series	N/A	No exceptions will be considered. This is an Board approved District Standard	N/A	E/M/H
AR	23	233416	CENTRIFUGAL HVAC FANS	Exhaust Fans	N/A	N/A	All exhaust shall be direct drive/ beltless drive.	N/A	N/A	E/M/H
AR	23	233416	CENTRIFUGAL HVAC FANS	In line Ceiling Mounted Exhaust Fan	Greenheck, or approved equal		Beltless direct drive exhaust fan with backdraft damper.	N/A	N/A	E/M/H
AR	23	233416	CENTRIFUGAL HVAC FANS	Chemistry Lab Fume Hood exhaust	Greenheck, or approved equal	N/A	Direct drive.	N/A	N/A	E/M/H
AR	23	233416	CENTRIFUGAL HVAC FANS	Gravity Relief Ventilator	Vibro Acoustics, or approved equal	N/A	Sound Attenuation	N/A	N/A	E/M/H
AR	23	233513	DUST COLLECTION SYSTEM	Dust collection system	Stern Vent, or approved equal	N/A	N/A	N/A	N/A	E/M/H
AR	23	238000	DECENTRALIZED HVAC EQUIPMENT	High Efficiency Rooftop Gas Packaged A/C Unit	Carrier, or Approved Equal		Complete with 2 inch filters, time delay relay, stainless steel heat exchanger, condenser coil corrosion resistant coating	For new construction only in locations such as library, computer, and media rooms. District to approve locations and configuration of ductwork	N/A	E/M/H
AR	23	238000	DECENTRALIZED HVAC EQUIPMENT	N/A	Carrier or Approved Equal	N/A	All spaces to be heated and cooled. All spaces need to have control on unit operation.	To be located in all Learning Spaces. Condenser units to be located on roofs where possible, District to approve all locations. HVAC units to be above ceiling, or in attic. District to approve any multi room usage of a single unit. Controls must be located in all rooms. District to approve locations and configuration of ductwork	N/A	E/M/H
AR	23	238000	BUILDING AUTOMATION AND CONTROL	Interlock Operation	N/A	N/A	N/A	Hard wire HVAC interlocks for operable windows, per energy code requirements	N/A	E/M/H

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	26	260000	ELECTRICAL	N/A	N/A	N/A	N/A	In all cases if there is a data outlet there needs to be a Power outlet.	N/A	E/M/H
AR	26	260000	ELECTRICAL	N/A	N/A	N/A	N/A	Multi-function copiers require two data ports, one power outlet on dedicated circuit, labeled accordingly.	N/A	E/M/H
AR	26	260000	ELECTRICAL	N/A	N/A	N/A	N/A	All outlet and switch boxes at sound-rated assemblies should have putty pads. No back to back outlets or switches allowed. All switch and outlet locations to be approved by District. See Educational Specifications	N/A	E/M/H
DS	26	260926	LIGHTING CONTROL	Lighting Controls Panelboards	Lutron	Quantum Series	Bi-level switching, daylighting, occupancy sensors in classrooms	All spaces to have bi-level switching, daylighting controls, and occupancy sensors. If a new system at an existing campus, tie into existing lighting control panel.	N/A	E/M/H
AR	26	261800	PANELBOARDS/SWITCHBOARDS	Panels/Switch boards	N/A	N/A	Copper Busses	N/A	N/A	E/M/H
AR	26	265100	INTERIOR LIGHTING	Interior Light Fixtures	N/A	N/A	LED luminaires	Mount pendant fixtures 1/3 down from ceiling, 2/3 up from floor. Final location to be approved by District. Coordinate light fixtures, with all ceiling other ceiling apparatuses, such as ceiling mounted projectors and exit signs.	N/A	E/M/H
AR	26	265200	EXTERIOR LIGHTING	Exterior Lighting Fixtures	N/A	N/A	Wall lights where possible.	All light locations to be reviewed and approved by District	N/A	E/M/H
AR	26	26000	ELECTRICAL	Floor Boxes	LeGrand,or Approved Equal		N/A	Use of floor mounted boxes are to reviewed and approved by District.	N/A	E/M/H

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DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR			EMERGENCY POWER SYSTEMS	Backup Power	Myers Centralized Inverters for Emergency Lighting or approved equal	Myers Power Products Fast Transfer Emergency Inverters, Ie Series for LED Lighting, or approved Equal	N/A	Location to be approved by District	N/A	E/M/H

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DIVISION 27 COMMUNICATIONS

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
DS	27	272000	DATA COMMUNICATIONS	Voice over IP	Cisco, No Exceptions	Catalyst, No Exceptions	N/A	This is a Board approved District standard, no exceptions	N/A	E/M/H
DS	27	272000	DATA COMMUNICATIONS	Switches and Routers	Cisco, No Exceptions	N/A	N/A	This is a Board approved District standard, no exceptions	N/A	E/M/H
DS	27	272000	DATA COMMUNICATIONS	Wireless Access Points	Cisco, No Exceptions	N/A	N/A	This is a Board approved District standard, no exceptions	N/A	E/M/H
DS	27	272000	DATA COMMUNICATIONS	Network Cabling Manufacturer	Belden	N/A	N/A	This is a Board approved District standard, no exceptions	N/A	E/M/H
DS	27	272000	DATA COMMUNICATIONS	Uninterruptible Power System Manufacturer	APC, No Exceptions	N/A	N/A	This is a Board approved District standard, no exceptions	N/A	E/M/H
DS	27	272000	DATA COMMUNICATIONS	Network equipment cabinet	APC, No Exceptions	N/A	N/A	This is a Board approved District standard, no exceptions	N/A	E/M/H
DS	27	275116	PUBLIC ADDRESS AND MASS NOTIFICATION SYSTEMS and CLOCKS	Paging System	Bogen, No Exceptions	Quantum	Flush mounted for clock/speaker. Provide product information for vertical clock/speaker combo. Provide wiring destination schedule for each circuit	This is a Board approved District standard, no exceptions	N/A	E/M/H
AR	27	274000	AUDIO-VISUAL COMMUNICATIONS	Cabinets	N/A	N/A	N/A	Location for cabinets to house Audio Visual Components are to be coordinated with the District	N/A	E/M/H

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DIVISION 28 ELECTRONIC SAFETY & SECURITY

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
DS	28	282300	ACCESS CONTROL & VIDEO SURVEILLANCE	System	Gentec, No Exceptions	Unified Access Control and Security Video System, No Exceptions	N/A	There will be no exceptions this a Board approved District Standard This is to include control systems, camera and storage	N/A	E/M/H
DS	28	283000	DETECTION AND ALARM SYSTEM	Main Panel	Honeywell Intrusion, No Exceptions	Ademco	N/A	There will be no exceptions this a Board approved District Standard	N/A	E/M/H
DS	28	283100	FIRE ALARM SYSTEM	Fire Alarm Control Panel (FACP)	Gamewell Velociti Series 3 Detectors by Honeywell, No Exceptions	E3 Series	N/A	There will be no exceptions this a Board approved District Standard	N/A	E/M/H

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DIVISION 32 EXTERIOR IMPROVEMENTS

DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
AR	32	321813	SYNTHETIC GRASS SURFACING	Synthetic Grass, Elementary Playgrounds	N/A	N/A	Synthetic grass surfacing, no black crumb rubber is allowed for product "infill"	Provide in areas as identified in the Educational Specifications.	N/A	E/M
AR	32	323119	ORNAMENTAL METAL	Ornamental Metal, System	N/A	N/A	Galvanized after fabrication. Gates to support 400 LBS Plus	Ornamental Metal fencing and gates are to be used at the "Front" of the school. Design and exact location is to be approved by the District. Finish Colors to be approved by the District. See Educational Specifications	N/A	E/M/H
AR	32	323113	CHAIN LINK FENCING	Chain Link Fencing	N/A	N/A	Line Posts: 2" NPS Steel Pipe; Corner and Terminal Posts: 3" NPS Steel Pipe; Gate posts: minimum 3" NPS Steel Posts, sized for load; Top and Bottom Rails: 1 1/4" inch NPS; Fabric: 2" diamond mesh steel wire interwoven, 9 gage thick, with top and bottom selvage knuckle end closed; Caps: cast steel or malleable iron; Tension wire: 7 gauge single strand. All gates to be sized appropriately for use and function.	Provide at all perimeters of campus and internal campus areas not designated to be ornamental . Heights vary and set to appropriate height for location. Gate locations to be approved by District	N/A	E/M/H
AR	32	323111	AUTOMATIC GATES	Automatic gates	N/A	N/A	Rails to be located in out-of-reach areas for safety. The U-shaped receiver to be located outside of reach areas for safety, welded chains and IC core padlocks should be provided.	Use of Automatic Gates to be approved by District.	N/A	E/M/H
AR	32	328000	IRRIGATION SYSTEMS	General	N/A	N/A	N/A	The District standard for all campuses is for landscapes that incorporate water and energy conservation methods	N/A	E/M/H

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DS/AR	*Div*	*CSI No.*	*Spec Section Name*	*Product Type*	*Basis of Design Manuf.*	*Basis of Design Model*	*Product Description*	*Design Guideline*	*Standards*	*Elementary/ Middle/ High*
DS	32	328000	IRRIGATION SYSTEMS	Master Control System	Rainmaster, no substitution allowed	N/A	Controller to include: Data line to controller, surge protection, on-off switch, exterior GFI outlet, 20% extra capacity, control valve with flow meter and bypass. System to include all necessary assemblies for specific project. This would include at a minimum: 1. Master Control Valve - With flow meter. Sized for specific installation 2. Backflow preventer and Enclosure - Vandal resistant cover in green 3. Booster Pump - If needed for the system to function properly 4. Quick Couplers - One per valve grouping, every 200 feet maximum. Install in 9 inch round brooks or carson valve box 5. Spray Heads - Rainbird 1800 SAM PRS Pop-up spray heads with VPC caps 6. Rotors - Toro 340 Rotor Rainbird 700S Hunter I-Series. Toro 570Z 6 inch in turf.	Provide laminated chart showing 'as-builts' at each controller. Position controller to face field or irrigated area. district to approve location Design all spray heads directed away from buildings as that no over-spray contacts any part of a building.	N/A	E/M/H
DS	32	328000	IRRIGATION SYSTEMS	Controller Enclosure and Lock	VTI Products, non subsitution allowed	N/A	Controller Enclosure and Cabinet , Stainless Steel, Top Mount Strong Box with Lock	N/A	N/A	E/M/H

West Contra Costa Unified School District

RESOLUTION NO. XY

RESOLUTION OF THE GOVERNING BOARD OF WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT DESIGNATING SPECIFIC MATERIAL(S), PRODUCT(S), THING(S), OR SERVICE(S) FOR USE ON PUBLIC WORKS PROJECTS PURSUANT TO PUBLIC CONTRACT CODE SECTION 3400

WHEREAS, the West Contra Costa Unified School District ("District") is engaged in a district-wide capital outlay program to renovate, repair, modernize and construct new facilities ("Construction Program") in order to create suitable educational facilities for all of the students and staff of the District; and

WHEREAS, the District has considered the benefits of requiring certain material(s), product(s), thing(s), or service(s) to be specified for use in its Construction Program; and

WHEREAS, pursuant California Public Contract Code section 3400 ("PCC §3400"), the District intends to specifically list and/or designate in its invitation to bid or requests for proposals, certain material(s), product(s), thing(s), or service(s) identified by the District ("Designated Products"); and

WHEREAS, PCC §3400 (c) (1) provides that the District may specify Designated Products in its specification for bids or requests for proposals in connection with the construction, alteration, or repair of public works upon a finding by the District's Governing Board that the Designated Products are listed in order that a field test or experiment be made to determine the product's suitability for future use; and

WHEREAS, PCC §3400 (c) (2) provides that the District may specify the Designated Products in its specifications for bids or requests for proposals in connection with the construction, alteration, or repair of public works upon a finding by the District's Governing Board that the Designated Products are listed for the purpose of matching other products in use on a particular public improvement either completed or in the course of completion; and

WHEREAS, the District intends to specify the Designated Products as the only acceptable material(s), product(s), thing(s), or service(s) for use on Construction Program projects in order:

(1) That a field test or experiment be made to determine the Designated Products' suitability for future use;
or
(2) To match other product(s) in use on other District public improvement(s) either completed or in the course of completion; and

WHEREAS, the use of the Designated Products is necessary because:

- The District will avoid potential significant costs by conducting field tests of certain Designated Products to determine their suitability and compatibility with other material(s), product(s), thing(s), or service(s) already in use at District sites, prior to those Designated Products' future use at other sites;

- The District has incurred significant costs to train its employees to service and maintain specific current product(s) and system(s) throughout District campuses.

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- The ongoing maintenance, repair, and other work that District staff and/or service providers will have to perform on those product(s) or system(s) will be simplified, more efficient, and less costly if those persons do not have to seek re-training or innumerable additional trainings, to service different and varied product(s) and system(s).

- The warranties and guarantees for the Designated Products will be easier to coordinate, track, and service in the years to come if they are with the same manufacturers / vendors of the particular product(s) or system(s).

- The District would save substantial costs by implementing uniform system(s) and installing uniform product(s) throughout the District, thereby facilitating uniform maintenance procedures, engineering specifications, and overall system and product reliability.

- The District anticipates future construction, alteration, modernization of existing school sites to, among other things, replace and/or upgrade system(s) at those sites.

- It would be beneficial to the District to have and use uniform parts and materials throughout the system(s) in use at its existing projects and sites.

WHEREAS, the District will endeavor to list, whenever feasible, more than one product or system when more than one product or system is acceptable and the above conditions are sufficiently satisfied; and

WHEREAS, the District has previously adopted District standards for material(s), product(s), thing(s), or service(s) for use in the District's Construction Program in Resolution Nos. 69-1617 (collectively "Prior Designated Products"); and

WHEREAS, the District intends that all Prior Designed Products be superseded and replaced by the designated material(s), product(s), thing(s), or service(s) specified for use in the District's Construction Program contained in this Resolution and set forth in Exhibit "A."

NOW THEREFORE, the Governing Board of the West Contra Costa Unified School District hereby resolves, determines, and finds the following:

1. That the foregoing recitals are true.

2. The District has already incurred significant costs to train its employees to service and maintain specific current product(s) and system(s) throughout District campuses.

3. The ongoing maintenance, repair, and other work that District staff and/or service providers will have to perform on those Designated Products will be simplified, more efficient, and less costly if those persons do not have to seek re-training or innumerable additional trainings for different and varied product(s) and system(s).

4. The warranties and guarantees for Designated Products will be easier to coordinate, track, and service in the years to come if they are with the same manufacturers / vendors of the particular product(s) or system(s).

5. The District would save significant costs by implementing uniform system(s) and installing uniform product(s) throughout the District, facilitating maintenance, engineering and overall reliability.

6. The District anticipates as part of its Construction Program, future construction, alteration, modernization of existing school sites to, among other things, replace and/or upgrade system(s) at its sites.

7. It would be beneficial to the District to have and use uniform parts and materials throughout the system(s) in use at its existing projects and sites.

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8. The District will endeavor to list, whenever feasible, more than one product or system when more than one product or system is acceptable and the above conditions are sufficiently satisfied.

9. That some of the Designated Products listed in **Exhibit "A"** are the only acceptable material(s), product(s), thing(s), or service(s) for use on projects in the Construction Program, because, as indicated in the listing of that Designated Product, the District is conducting a field test or experiment to determine the suitability of the material(s), product(s), thing(s), or service(s) for future use.

10. That the remaining Designated Products listed in **Exhibit "A"** are the only acceptable material(s), product(s), thing(s), or service(s) for use on projects in the Construction Program, because, as indicated in the listing of that Designated Product, the Designated Products match other product(s) in use on other District public improvement(s) either completed or in the course of completion.

11. That the District shall list in its invitation(s) to bid bids or requests for proposals for the District's public works projects, the Designated Products listed in **Exhibit "A"** as the only acceptable material(s), product(s), thing(s), or service(s) for use on the District's Construction Program.

12. That the District's Superintendent, or the Superintendent's designee, is authorized pursuant to this Resolution to take any action that is necessary to complete the procedures necessary to carry out, give effect to, and comply with the terms and intent of this Resolution.

13. This Resolution shall take effect upon its adoption.

APPROVED, PASSED AND ADOPTED by the Governing Board of the West Contra Costa Unified School District on this 21 day of October 2020, by the following vote:

AYES: _____
NOES: _____
ABSENT: _____
ABSTAIN: _____

_____
President, Governing Board
West Contra Costa Unified School District

ATTEST:

_____
Secretary, Governing Board
West Contra Costa Unified School District

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Exhibit "A"

1. HARDWARE

A. District's Exterior Keying System
- **Manufacturer: Allegion-Schlage**
- **Model: Primus**

The District intends to match these products and systems with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

B. Finish Hardware Locksets, Mortise
- **Manufacturer: Allegion-Schlage**
- **Model: Vandlgard Lever Type 17**

The District intends to match these products and systems with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

C. Finish Hardware Locksets, Cylindrical
- **Manufacturer: Allegion-Schlage**
- **Model: ND Series, Sparta Style**

The District intends to match these products and systems with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

2. ELECTRONIC MESSAGE SIGNAGE

A. **Electronic Marquee**

- **Manufacturer: Stewart Signs**
- **Model or Series: LED School Signs**

The District intends to match these products and systems with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

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3. ENERGY MANAGEMENT CONTROLS

A. **EMS, HVAC and Outdoor Lighting**

- **Manufacturer: Alerton Technologies**
- **Model or Series: BACTalk Series**

The District intends to match these products and systems with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

4. DATA COMMUNICATIONS

A. **Voice Over IP**

- **Manufacturer: Cisco**
- **Model or Series: Catalyst**

The District intends to match these products and systems with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

B. **Switches, Hubs and Routers**

- **Manufacturer: Cisco**

The District intends to match these products and systems with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

C. **Wireless Access Points**

- **Manufacturer: Cisco**

The District intends to match these products and systems with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

D. **Network Cabling**

- **Manufacturer: Belden**

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ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

E. **Uninterruptible Power System**

- **Manufacturer: APC**

The District intends to conduct a field test / experiment to determine if these material(s), product(s), thing(s), or services(s) are suitable for future use in the Construction Program and if they are compatible with those already existing in use. The District is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

F. **Network Equipment Cabinet**

- **Manufacturer: APC**

The District intends to conduct a field test / experiment to determine if these material(s), product(s), thing(s), or services(s) are suitable for future use in the Construction Program and if they are compatible with those already existing in use. The District is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

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5. ACCESS CONTROL AND VIDEO SURVEILLANCE

- **Manufacturer: Genetec**
- **Model or Series: Unified Access Control & Security Video System**

The District intends to match these products and systems with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

6. DETECTION AND ALARM SYSTEM

A. **Main Panel**

- **Manufacturer: Honeywell**
- **Model or Series: Ademco**

The District intends to match these products and systems with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and

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a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

7. FIRE ALARM SYSTEM

- **Manufacturer: Gamewell**
- **Model or Series: E3**

The District intends to match these products and systems with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

8. IRRIGATION SYSTEMS

A. **Irrigation Controllers**
- **Manufacturer: Rainmaster**
- **Model or Series: Master Control System**

The District intends to match new landscape planting irrigation systems and products with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these systems throughout the District. The ever-increasing cost and coordination of varied systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of systems to facilitate more control and cost containment in keeping the systems operational.

B. **Controller Enclosure and Lock**
- **Manufacturer: VTI Products**
- **Model or Series: Strong Box SB16SS**

The District intends to match new landscape planting irrigation systems and products with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these systems throughout the District. The ever-increasing cost and coordination of varied systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of systems to facilitate more control and cost containment in keeping the systems operational.

9. PAGING SYSTEM

A. **Public Address, Mass Notification Systems and Clocks**
- **Manufacturer: Bogen**
- **Model: Quantum**

The District intends to match these products and systems with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these products and systems throughout the District. The ever-increasing cost and coordination of varied products and systems with a limited maintenance personnel staff and

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a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

10. FOOD SERVICE EQUIPMENT

A. **Speed line hot, cold and freezer cabinets and mobile cash stand manufactured by the following manufacturer:**

- **Manufacturer: GA Systems, Inc.**
- **Model or Series: Speedee-Ser-Series**

The District intends to match Food Service Equipment and systems and products with those already existing in use, and is endeavoring to better coordinate the training, maintenance, and repair of these systems throughout the District. The ever-increasing cost and coordination of varied systems with a limited maintenance personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of systems to facilitate more control and cost containment in keeping the systems operational.

B. **Roll-thru Heating and Refrigeration units**

- **Manufacturer: Beverage Air**

The District is endeavoring to better coordinate the training, maintenance, and repair of this product and systems throughout the District. The ever-Increasing cost and coordination of varied products and systems with a limited maintenance" personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

11. Lighting Controls

A. Lighting Control Panel Boards

- **Manufacturer: Lutron**
- **Model or Series: Quantum Series**

The District is endeavoring to better coordinate the training, maintenance, and repair of this product and systems throughout the District. The ever-Increasing cost and coordination of varied products and systems with a limited maintenance" personnel staff and a limited budget for outside vendors, requires the District to limit variance in these types of products and systems to facilitate more control and cost containment in keeping the products and systems operational.

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Lake Rebuild
Educational Specifications

Edited: October 2020

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Introduction

Educational Specifications serve to interpret the educational program and learning objectives into what physical forms would best support these activities. The concept behind educational specification is that the space used for education should allow the students and teachers to accomplish their objective easily versus creating work around solutions to the physical space they are given to use.

This District-Wide Educational Specification Document is a tool that will help create district-wide equity. Future designs or modernizations will be required to meet these guidelines set forth by this document and thereby creating space that can support the educational program of the District.

The Educational Specifications are District-wide facility requirements for all school building designs in the West Contra Costa Unified School District (WCCUSD). During programming of specific school buildings alternatives to these specifications may be discovered. To be considered, the design team must submit a request to the District Facilities Department for approval of any and all alternatives before proceeding with the design. Deviations made by the design team without approval may result in the rejection of design. All re-submittals will be at the expense of the design team.

Photographic Examples

Throughout this document, there are photographic examples of learning spaces. In some cases, students and staff have adapted their physical environment to fit the educational program. The photos are not meant to represent specific architectural solutions, finishes, furniture or designs but to convey a concept.

Introduction

Lake Rebuild

Lake elementary was constructed in the 1950s and 1960s. The building systems are well the past their useful life, and the building's physical arrangement offers little flexibility. Through the 2016 Long Range Facility Master Plan, Lake was identified for a full replacement of the campus. The new campus is to sized to accommodate 470 students. See Check List for specific quantities of each space type and square footage requirements. Additional information Lake Rebuild information can be found in the Basis of Design documents.

Specific goals for Lake Rebuild are:

- Simplify the traffic approach to the campus and expand parking and drop – off areas
- Maximize the capacity that could be built without disrupting operations and limiting temporary housing requirements
- Create a flexible learning environment
- Stay within the master plan budget
- One story solution
- Create a “front door”
- Maintain access from Manchester and Kelley



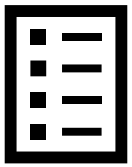


Educational Specification and Space Check List

This document, the educational specification, is supported by the Space Check List. The Space Check List defines the type, quantity, and size of spaces and outdoor elements required for the Lake Rebuild. The number of teaching stations have been calculated.

This document describes details on each space in the Space Check List including the use, finishes, and amenities for each space and connections to other spaces. The Material and Product Standards provides additional information on the specific attributes and performances expected from the finishes listed here.

After the programming phase, in schematic design, the “SD” columns should be completed to compare the original programming to the preliminary floor plans. This process would be completed again at the end of design development in the “DD” columns.



Space Check List

The Process for the District-Wide Ed Spec

Through input from District Staff, Principals, Site Staff and the community this document was defined. The Steering Committee and Board of Education were instrumental in guiding the direction of this document.

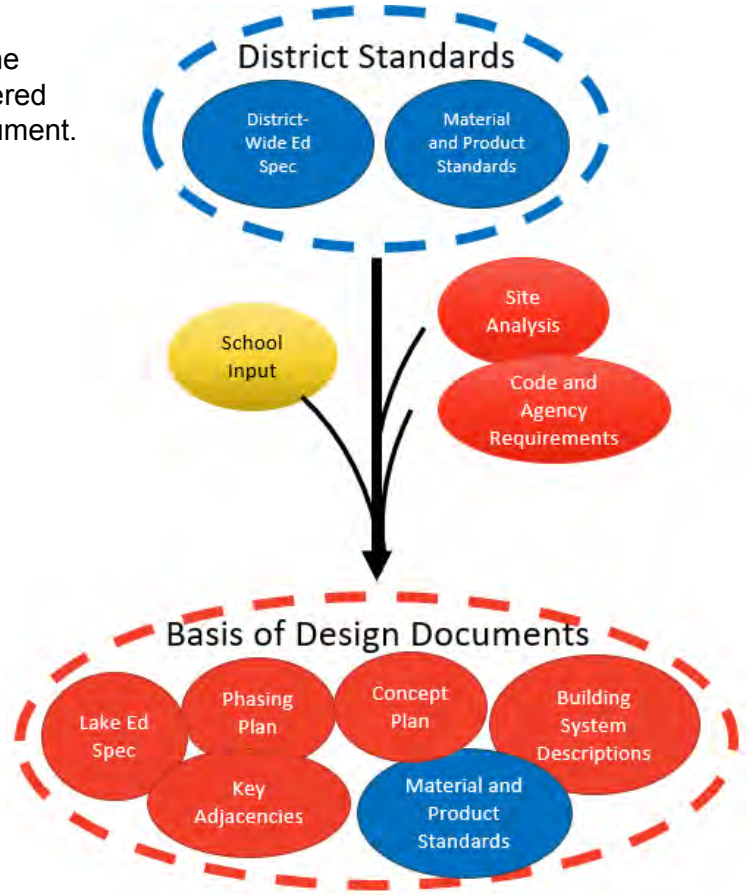
Focus group interviews were conducted to gather the majority of the detailed information. Facility Assessment tours and discussions with faculty, staff and community members during the Long-Range Facilities Master Plan were also instrumental in gathering input about every site, detailing what works well and what aspects of the physical environment made teaching and learning challenging. These various perspectives were brought together, along with industry examples of 21st century learning, to form the WCCUSD District-Wide Educational Specifications. While many of the Educational Specifications space requirements reflect the California Department of Education (CDE) facility space requirements, there are areas that may need CDE confirmation. The design team is responsible for any CDE reviews, and all regulations set forth by the California Building Codes, Americans with Disability Act and any other regulation or code that affects school design in the State of California.

The formation of the West Contra Costa Unified School District Educational Specifications has had the support and input from District Leadership, District Facilities, and the District Educational departments. Working together, these entities have created a dynamic document that defines space for all future District building projects. The participants were instrumental in the creation of a document that defines space that will promote learning, supportive of the staff and are cost sensitive.

Adam Taylor
Akinwale Ajayi
Alex Beltran
Alison Makela
Andrew Mixer
Barbara Jellison
Board of Education
Calvin Miles
Carol Butcher
Caroline King
Citizens' Bond Oversight Committee
Darcy Long
Darlene Almeida
Darrin Zaragoza
Demetrio Gonzalez
Denise VanHook
Devon Gordan
Elizabeth Carmody
Geri Auten
Janet Scott
Jessica Petrilli
Jose DeLeon
Jose Perez
Judy Sanders
Karina Tindol
Kathie VonHusen
Kevin Little
Kibby Kleiman
Krista Jann
Lanire Ajayi
Laurie Roberts
Lisa Jimenez
Lisa LeBlanc
Luis Freese
Marin Trujillo
Mark Bordas
Mary Kadri
Mary Lugton
Mary Phillips
Marylee Stadler-Cabrera
Matt Duffy
Mellissa Truitt
Michelle Harrison
Nia Rashidchi
Nicole Joyner
Patrick Martin
Paul Orr
Rashonda Winston
Renee Lama
Rich Seeber
Ritchie Cook
Robert Evans
Rocio Reyes
Ruby Gonalez
Sheri Camba
Sonya Neely-Johnson
Steve Collins
Steve Webber
Tashaka Merriweather
Tatjana Ravnik
Teodora Ildefonzo-Olmo
Tristan Simbulam
Vincent Meyer

The Process for the Lake Rebuild

The Lake Rebuild process has been structured around creating the Basis of Design documents needed for the Design-Build Process. The Bridging Architect started with the District-Wide Educational Specifications and Material and Product Standards and gathered additional Lake specific information created the bridging documents, including this document.



Participation in the creation of the Basis of Design included:

Lake ES / District Representatives

Kenneth Bonner	Principal
Jeannie Williams	Vice Principal
Karen Rodriguez	Secretary
Katherine Garcia	Dir. Beacon
Adelina Abril	Teacher, Gr. K
Michelle Douglas	Teacher, Gr. 3
Gretchen English	Teacher, Gr. 6
Robert Gerson	Teacher, Gr. 5
Dominic Moody	Teacher, Gr. 3
Tesla Moreno	SS Council
Angela Perry	Teacher, Gr. 2
Josephina Publico	
Brenda Rankin	SS Council
Joyce Yoon	Teacher, Gr. TK
Nemesis Vasquez-Jimenez	Teach, Gr. 4
Alison Makela	Deeper Learning
Luis Freese	Associate Superintendent
Ellen Mejia Hooper	Facilities Planning
Melissa Payne	Contracts

San Pablo Agencies

Jill Mercurio	Dir. City Engineer,
Sarah Kolarik	Environ. Program Analyst
Allan Panganiban	Senior Civil Engineer
Jimmy Zhou	Assistant Engineer
Steve Rupnow	Fire Inspector, CCC Fire Protection District

Design Team

Perkins Eastman Planning and Design
Brian Dougherty FAIA, LEED AP
Lance Kutz AIA, NCARB
Kim Coffeen AIA, LEED AP, ALEP
Kathryn Wagner AIA, LEED AP BD+C
Leah Lock LEED Green Assoc.
Alejandro Viteri
Olivia Law
Bryan Tranbarger LEED Green Assoc.

MTi Cost Estimator
Marcene Taylor CPE, LEED AP

NUVIS Landscape
Jim Williams Senior Associate

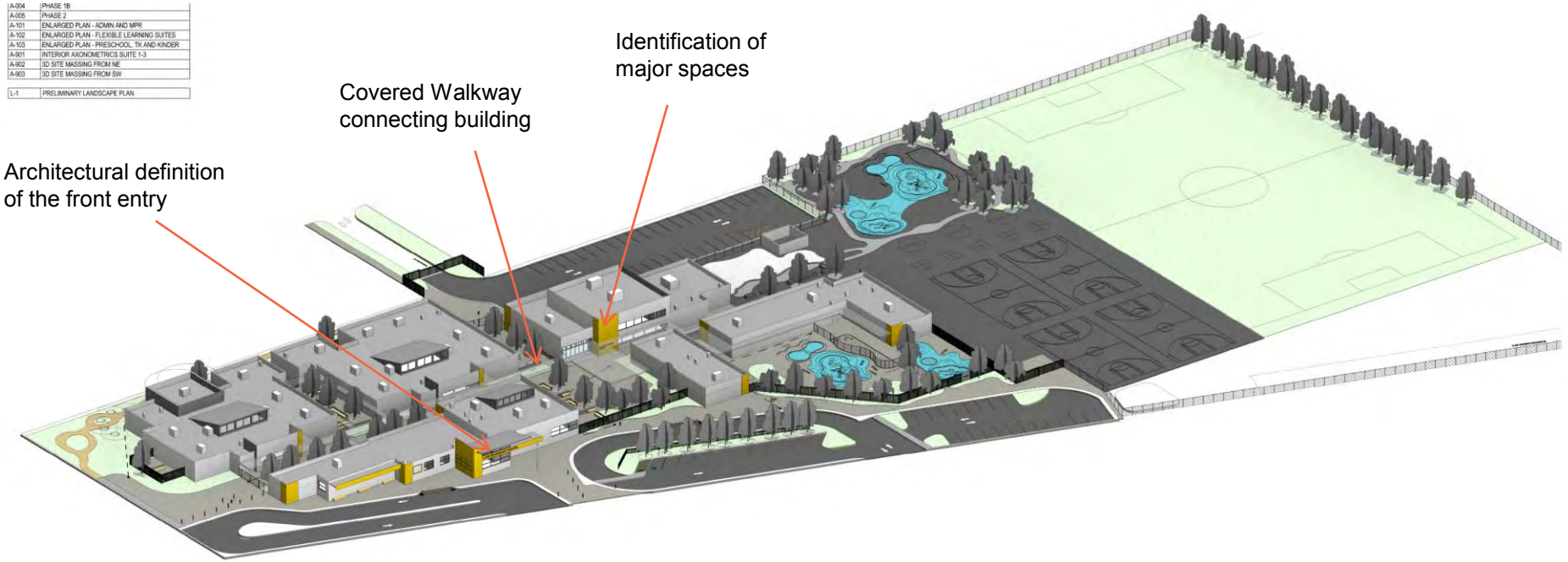
CSW I ST2 Civil
Kirk Bovitz P.E.

Salas O'Brien Mech'l, Elect'l & Plumbing
John Thomson P.E.
Jeffry Gosal P.E.

School Environment

Schools are places of learning and an integral part of communities. As such, a school site should exhibit community pride and general good appearance. Opportunities to display school culture and curriculum are welcome additions to the exterior and public areas of the campus. Student ownership is important and is improved by the good upkeep of the site and displays of student work. The design of the exterior and landscaping should consider the schools “curb appeal” and provide an overarching aesthetic of a welcoming and modern-learning environment. The front door shall have a covered by at least a 6’ overhang or other architectural element that provides visitor cover from the weather.

Navigation and circulation through the site and on to the site should be understandable and well-marked with interior or covered walkways at least six feet wide connecting all buildings and exterior doors. Definition of major spaces such as the Multi-Purpose Room, Library, Community Center, and Office should give visitors understanding of where events are held and highlight these areas to students as special environments. Architectural elements should delineate these spaces from the classroom buildings. The school name and mascot should be visible from all major roadways surrounding the school. Parent and bus drop off, and waiting zones need signage and designation both in striping and pole mounted signs.

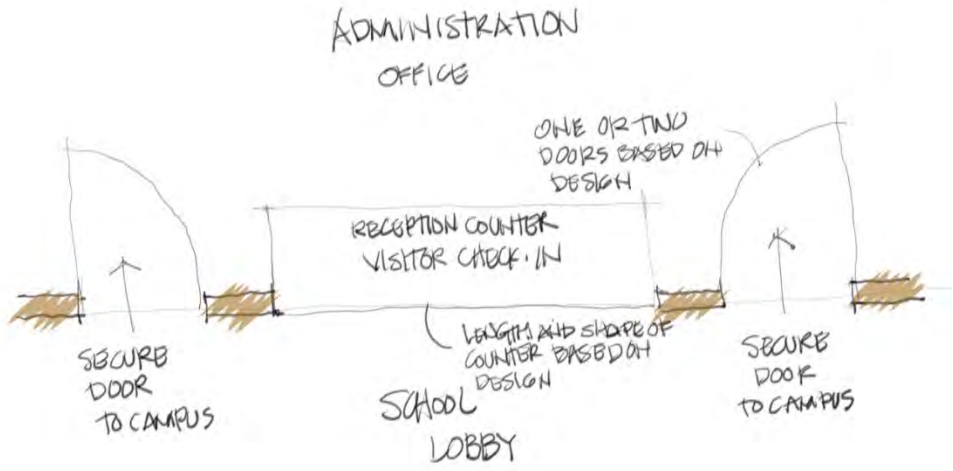


General Access

The site design should include the ability to supervise the school by providing good lines of sight to all areas of the campus and limit entrances onto the campus. The strategic placement of cameras improves visual supervision. Data lines for cameras should be placed at the front entrance, interior and exterior, along major pathways, at entrance gates, overlooking the parking lots and building entrances. Buildings should be arranged to limit hard to see gaps and provide windows to increase passive observation of all areas.

During the school day, all gates onto campus should be lockable, forcing all visitors to go through the main office to gain entry to the rest of the site. The doors controlling access through the office must have electronic door hardware that allows the door to be unlocked through a button at the reception counter.

After school hours, event spaces should be visible and easily accessible by visitors without needing to access the full campus including the use of restrooms.



Perimeter Fencing

The entire campus perimeter shall be completely secured by 8'-0“ high fencing and/or buildings. Types of fencing and gates are separated into two categories, ornamental fencing at or near the buildings and chain-link around the perimeter of the campus at the hardscape and fields. Ornamental fencing shall be used in all areas around the main buildings and only transition to 1” chain link mesh at the playground and parking lots. Parking lots shall be fully fenced with gates that allow the parking to be closed after hours.

All gates with panic hardware should include closers. Where a pedestrian gate is adjacent to vehicular gate, the pedestrian gate should have a header bar connecting the two sides of the pedestrian gate. This upside down “U“ structure gives additional support to the pole that must support the vehicular gate and limits sagging of the vehicular gate. No electric gates should be used for vehicular gates. The receivers for vehicular gates should be above 5’ to avoid users from placing their hand where the receiver connects.

Vehicular and Pedestrian Safety

Vehicular safety relies on the separation of cars, deliveries, buses, bikes and pedestrians. Designs of exterior access should strive to minimize mixing of the various forms of transportation. Sidewalks, curbs, and fences are effective ways of protecting pedestrians. Provide a logical and smooth traffic flow to facilitate a good system of vehicular drop-off that separates those cars that wish to park. WCCUD only provides bus service to special education students; therefore, the bus drop off area can be minimal in size and should be located near the severely handicapped classrooms, see the Special Education tab for additional information. Some of the general education students access public transportation to get to and from school, so a pedestrian traffic flow from nearby bus stops to a campus entrance should be considered. Bike and board racks need a fully enclosed area for additional security.

Drop off areas must include a wider sidewalk, minimum 8 feet, to allow students to stand and circulate. Covered areas should be provided at the drop off areas from a building overhang or stand-alone structure.

Communication with City, County or CalTrans is needed to discuss street improvements, restricting turning and crosswalks.

Service Area

The service area should be separated from all other traffic and be located near the kitchen and with easy access to the street. The service area must include a dumpster enclosure and a concrete service drive for garbage and delivery trucks. Food service trucks are typically 25 feet long. The service drive must have a direct concrete path to the kitchen door. This path must be wide enough to accommodate a pallet on a pallet jack. If ramps or curves are necessary, the pathway must be wider to allow for the turn radius of the pallet jack. Ideally, the service area would also include 2 to 3 parking spaces for kitchen staff.

The dumpster enclosure must be built to meet city codes and respect the views of the neighbors. The enclosure should be constructed of split-faced concrete masonry units, concrete pad, metal roof, and metal gates. The gates to the enclosure must be solid metal to block the view of the dumpster from the street. A concrete curb should be added inside the enclosure to stop the dumpster from being rolled into the enclosure walls. The enclosure should be large enough for the dumpsters and recycling canisters. Provide a hose bib with hot and cold water inside the enclosure. Provide a drain to the sanitary sewer.

Basis of Design

The mission of the educational specification update is to bring the design requirements back to what is educationally necessary for high-performance next-generation learning. While there are many perspectives on what creates next-generation learning, the list below represents a few interconnecting themes developed during the process.

Above all flexibility – The world is changing fast; learning and teaching styles change; programs that support learning change, so spaces cannot be fixed. All designs should look for opportunities to provide "shells" of rooms that can adapt over time to different interior layouts and different uses. The structural layout should limit the number of barriers to moving walls in the interior of the building. Sheer walls must be restricted to exterior walls and not occur between classrooms and flex learning zones. This flexibility of interior walls should not come at the price of acoustical separation.

Movement – While linked with flexibility, which allows changes over a series of years, movement provides for changes from one activity to the next with ease on a daily and even hourly basis. Making movement easy allows for varied activities, lessons, teaching approaches and personalized learning. For example, students are receiving general instruction then moving into a group activity followed by a full class discussion or check for understanding all within an hour. This short time period change is contrasted to projects that last and reappear throughout the week, month or quarter. Movement opens up the possibility to incorporate creativity, critical thinking, and communication by breaking the restraints that traditional lecture environments place on teachers and students.

Less is more – Technology has become smaller and more portable as well as equipment and furniture. Keeping rooms simple by providing many plugs, robust Wi-Fi and leaving the rest to be mobile is the plan. This lack of fussiness can also expand into the building design and interior finishes by investing money in high impact square footage over architectural statements. The structure and building systems, however, should not be exposed. All exposed building surfaces should be finish grade maintainable surfaces. Eves should be enclosed. Interior horizontal surfaces, such as windowsills, below six feet above the finished floor shall have finished wood or solid surface covering for cleanability. See the Material and Product Standards for approved finish materials.

The design should also provide less in long term operations, maintenance and raw material use. The building and site systems should include the efficient use of water and energy. The building design should maximize daylight harvesting and recycled materials while allowing for the best indoor air quality by limiting the amount of toxic substances.

General Requirements for All Spaces

The following sections of this document describe specific requirements for each type of space within an elementary school; however, there are many common needs that apply to all occupied spaces with limited exceptions. The specific space requirement notes any exceptions to these generalities. The basics include:

- Finishes
- Signage
- Doors
- Acoustics
- Daylighting and Views
- Landscaping
- Systems
- Technology
- Office and Small Group Rooms
- Restrooms & Sinks

Ceilings

Ceilings in all spaces shall not be lower than 9'-0" from the finished floor. Acoustical tile suspended ceiling is standard for all spaces unless noted. Acoustical properties and flexibility should be high priority considerations when making the design choice for all spaces. If ceilings are open and equipment, ductwork, building structure or other items are left exposed, appropriate "black out" paint needs to be provided and approved by the District design committee. Hard ceilings should be limited to where required by code and few other exceptions due to the lack of flexibility.

Walls

Walls, in general, need to be a hard surface, gypsum wall board, painted. Walls in hallways, corridors, multipurpose rooms and other high use areas will have a wall protection system up to 36 or 48 inches. Outside corners of walls in all areas should have additional protection from damage including corner guards. Acoustical and tackable panels should include framing to protect the edges from damage and be covered with wipeable vinyl or silicone coated fabric. Interior hallways, classrooms and office should contain designated tack surfaces that allow for paper placement.

Interior and exterior walls should provide interest to the design of the school. Large wall expanses on the exterior should be broken up by changes in elevation or material and painted with a secondary color to minimize the large mass. Any color change, interior and exterior, must have an expansion joint, edge or other physical delineation.

Marker boards are encouraged in learning spaces and offices and are not just for teachers. Students should be able to access writable surfaces to brainstorm ideas, draw and chart data. Erasable surfaces reduce paper consumption and encourage participation. Look beyond the 4'x8' typical whiteboard to maximize opportunity. Cabinet faces can become whiteboard surfaces. Offices and small group areas can equally benefit from having access to whiteboard surfaces. All whiteboards shall be steel with enamel coating.

At the Elementary Level, tackable surfaces become more than static displays and are used as teaching tools. Sight words, calendars and other charts are used interactively, especially at the younger grades. In primary learning spaces these boards should be placed vertically to allow the tackable surfaces to be at student height and available in many places.

All cabinetry, storage and countertop areas listed in this document are intended to built-in and included in the construction contact. Countertops shall be solid surface. All full height cabinets and lower cabinets should have locks.

Floors

Unless otherwise noted, flooring should be a rubber, marmoleum, or luxury vinyl tile that requires no waxing for regular maintenance. Sealed polish concrete can be optional in large common spaces depending on the design and approval of the Facilities Department.

Provide installed interior walk-off mats at all exterior doors. Any interior transition strip should be mechanically fastened to the subfloor. Exterior depressed walk-off mats should be installed in front of the main doors into the Multi-Purpose Room, Office, Library, and classroom buildings from the playground.

General Requirements for All Spaces – Signage

School Wayfinding and Overall Signage
Wayfinding signage is to be located throughout the site as required by code for accessibility and convenience. A flagpole shoul
near the entrance. No vinyl adhesive type signage is acceptable.

All room names and numbers should be coordinated and confirmed with the District in Design Development. Room numbers s
the building ID and room number. The classrooms should have whole numbers, while axillary spaces are labeled with sub nur
letters.

These holders should allow for a paper insert.

Exterior Sign	Sign Type	Notes
Monument Sign	Electronic Marquee	Provide two-sided electronic marquee on a monument near the main road. Provide power, blocking, and/or foundation at the wall or pedestal. The District Facilities Department to determine location and size.
Parking Signs / Site Signs	Enameled Steel	Provide an “Entrance Only” and “Do Not Enter Exit Only” signs at all one-way parking or drop-off areas. Provide “Loading Zone” signs at drop-off. Provide all signs required by code or agencies such as the fire marshal and utility companies. Provide elevator and area refuge signage as needed, interior or exterior. Provide “No Parking” signs in all fire lanes.
Striping	Traffic grade paving paint	Provide directional arrows in parking and drop off areas. Paint curbs in drop-off and fire lanes. Provide “No Parking” lettering in fire lanes.
School Name and Address	Brushed Aluminum Raised Letters at least 18” High	Provide the full school name and address facing the street.
Community Space Identification	Brushed Aluminum Raised Letters at least 18” High	Provided identification of the Office, Library, Community Room and Multi-Purpose Room at the main exterior doors
Building Identification	Exterior grade vinyl	Provide on each building face, size to be approved by fire agency
Room Numbers and Room Names	Two-color etched exterior grade vinyl with Braille	Include both name and number for all rooms including restrooms use exterior grade adhesive and seal edges

General Requirements for All Spaces – Signage

Interior Signs	Sign Type	Notes
Plaque	Buffed aluminum cast plaque with dark oxide sand-textured background and copy and logo raised and painted	Place in lobby of any full campus rebuild or replacement projects. Mounting to include backing with mechanical attachment Text to include district logo, name of the school, Board Members at the time of completion, Superintendent, contractor, architect and year of completion
Room Numbers and Room Names	two-color etched vinyl with Braille	Include both name and number for all rooms including restrooms. Signs shall be mechanically attached with vandal-resistant hardware. On office and meeting doors, the holders should allow for a paper insert.
Maximum Occupancy Signs	two-color etched vinyl with Braille	The style and color to match the room signs
Evacuation signs	Plastic sleeve to hold 8.5” x 11” paper evacuation maps	Provide an evacuation map at each classroom door or other room with an occupancy load over 20 people

General Requirements for All Spaces - Doors

Exterior Doors

All doors hardware should allow doors to swing open 180 degrees. All doors should have a floor mounted doorstop which is located no closer than 24” from the hinge side of the door. If the door cannot open against the wall due to an obstruction a floor mounted doorstop must be placed before the obstruction. If this floor mounted doorstop is in the path of travel, then a guardrail must be installed to prevent a trip hazard.

General use doors which lead to student spaces must be protected from the weather either by a building overhang, exterior covered walkway or canopy. If a canopy is used, the water should be directed away from the path of travel so students and others do not need to walk through a drip edge. This requirement also applies to the end of the cover walkway system.

Interior Doors

General use interior doors including doors to classrooms, multipurpose room, main office, ganged restrooms, and library which are regularly used by students shall comply with the requirements above for floor mounted doorstops. Staff only doors to ancillary spaces or private office can use doorstops interictal to the closure or more traditional interior solutions. Door closures should be limited to where required by code.

General Requirements for All Spaces - Acoustics

Acoustical performance is vital to a successful educational program. Listening and speaking are key components of language acquisition and understanding. Many research studies have found the importance of good acoustics on learning and comprehension. Additional background noise can make communication difficult and as students become more active in group learning and collaboration the need for sound absorption increases.

All group learning rooms should meet American National Standard Acoustical Performance Criteria, Design Requirements, and Guidelines for Schools, Part 1: Permanent Schools (ANSI/ASA S12.60-2010/Part 1). In areas where waterproof materials are required, this standard may not be attainable; although the design team should make efforts to control sound from exterior noise, adjacent spaces and mechanical units. In large open learning space, noise will travel; however, absorptive material and sloped surfaces should be utilized to increase absorption and limit reverberation. See the Technology standards for information of audio distribution systems.

General Requirements for All Spaces – Daylighting and Views

Many research studies support the need for natural daylight. Especially in the teenage years, exposure to daylight helps set the circadian rhythms so students can be more awake, improve focus and when combined with views reduce eye strain. The benefits go beyond the human factors and extend to the environment by reducing the need for artificial light and reducing energy use. While these benefits are well-established, windows and transparency continue to be difficult in practice leading to users covering the window. The most common reasons for covering the windows are

- Glare and over lighting – Reflective screens and bright white surfaces (i.e. whiteboards and copy paper) make glare and hot spots from different angles in the room throughout the day and seasons, interrupting work and distracting from learning while over lighting washes out projected images
- Heat Gain – Sunlight, heating rooms in the afternoons on southern and western exposures, change the focus from learning to the uncomfortable temperature
- Security – The lack of or difficulty in operating window coverings to accommodate a lock down causes window coverings to remain closed

While these are the most common obstacles, the design team should strive to anticipate and resolve these issues, so natural light is successfully introduced in as many spaces as possible. Architectural features such as light shelves, sunshades or roof overhangs are required on all south and west-facing windows. Roller blinds to allow for security shading are required on every exterior window. Natural light is required in every classroom and preferred in every office and conference room. Classrooms and other learning stations should have a minimum of 50% of the space lit by daylight. Restrooms, locker rooms, and gyms all benefit from natural light where practical. Specialty spaces require natural light, but an increased ability to control and dim the lighting may be required.

Views to the landscaped exterior are calming and can provide passive supervision and should be implemented especially in the interior of the campus. View windows from regularly occupied space to breakout areas, either interior or exterior, are required. The successful use of any breakout space is the ability of staff to see the students while in the main learning space.

Landscaping

Plant selection and ground cover should be appropriate for the school environment. Low maintenance and low water use plants are preferred. Verify that the selection of plant materials does not contain any poisonous or irritating plants, specifically, Fremontodendron californium. Ground covers and plant material should not provide easy to throw materials such as small rocks, seed pods or fruits. Deciduous trees are preferred over trees that drop leaves continually throughout the year. Shrubs and individual plants should be used in any planting around the multipurpose room, kitchen and dumpster areas. No ground cover should be placed in these areas. The final plant list to be approved by the District.

Shade cover should be provided in all playground areas and plazas. Shade trees should be planned on the perimeter of the field areas and outdoor learning environments. Any courtyard or plaza area at the front of the school or between the classrooms should include trees.

Bioswales should be provided where needed for stormwater management. Any cobles or other splash blocks must be grouted into place so that students are unable to remove the stone. If raised bioswales are required due to the depth of the storm system, then seat walls should be created to allow the raised edge to be functional for the students and staff. Any slope in a bio swale should be no greater that 3:1.

Planting near buildings requires measures to prevent water intrusion and damage. All buildings are to have a 12" wide x 6" deep mow strip at their perimeter in planted areas. Verify that irrigation for planted areas adjacent to buildings is designed such that no water hits the building. Provide planted areas adjacent to the buildings with adequate drainage such that no ponding of water occurs. Building foundations must be protected from water infiltration. Planting area edges that are not adjacent to a building should have a raised curb to keep mulch contained.

Planter boxes and seat walls, which are above 18” must include a waterproof coating on the inside to prevent discoloration on the outside of the wall.

See the material and product standards for detailed information about the irrigation system. The system maybe a traditional or two wire system and the district will make that determination during design development. The system must have a flow switch with connection to the Allerton system.

Hard Surfaces

Any asphalt area not adjacent to a concrete sidewalk must have a concrete curb include around any building edges, planting areas, grass spaces, play surfaces, and permeable paving.

Concrete pathways should connect all exterior doors and provide the path of travel throughout the campus. Walkways should be no less than six feet if used by students to access the main entrance to any space. If any item must be embedded than concrete shall be used instead of asphalt. These items could include bike racks, truncated domes or other site feature.

Furniture and Site Walls

Any area with walls or benches that would be used by skateboarders should have a chamfer or other formation to deter skateboarder use.

Trash cans should be provided. The container shall be concrete with a side access doors for easy removal of the liner. The container must have a roof. Provide cans in all outdoor learning areas, table areas, and playgrounds.

Heating, Ventilating and Air Conditioning (HVAC)

Provide HVAC to all rooms. Zoning control locations are subject to approval by the District Facilities Department. Code requirements for specific functional areas may add to the general requirement of providing HVAC. All occupied space needs to be maintained between 68 F and 74 F degrees, including second story spaces.

Provide Energy Management System (EMS) control and passive pressure relief gravity vents that close automatically when the unit is off. Provide on-demand control of ventilation for HVAC connected through the EMS. Entire school HVAC to be able to be shut down from a single location for “Shelter in Place” events (through the EMS).

All code required interlock devices should be hard-wired. Solar or battery-operated monitors are not acceptable.

Water

The design and installation must meet all agency requirements. Provide a water meter at each stand alone building as required by EBMUD. Fire and irrigation will also need a separate service.

Security

A security system should be included on all school sites. The main panel shall be located in the office. Subpanels should be placed in every building and in any location where after-hours use is anticipated. Motion detectors should be placed in all rooms with exterior windows, and door contacts should be provided on every exterior door.

Public Address and Mass Notification System

Every occupied space requires the ability to hear the public address system. Adequate exterior coverage is required in highly populated areas of the campus. Two-way communication is required in learning spaces..

Lighting

See the basis of design for specific details on lighting levels.

No surface-mounted lighting except in utility spaces, Kitchens and student restrooms (vandal resistance fixture)

General Requirements for All Spaces - Technology

Designs should reflect the Technology Standards. The general expectation is that wireless access should be available across the school campus including classrooms and common areas such as the multipurpose room and offices.

	Classroom / Large Learning Spaces
Duplex Data Ports, general (CAT 6)	4
Duplex Data Ports, VoIP	1
WiFi access points	1, potential for a second to support outdoor learning area if applicable
Clock	Hard wired to central clock program for synchronized times and bell/chimes
Sound system with speakers, teacher wireless clip-on and handheld microphone	Provide this equipment in rooms over 900sf. System to support both audio from projection and voice reinforcement connect through classroom computer
Short throw wall mounted interactive projector with wireless connection to classroom computers/technology	Provide this equipment in rooms over 900sf. Connect to classroom computer mounted adjacent to the projector on wall. Include wireless capabilities for other classroom technology (chrome books or laptops), provide a minimum of a 100” diagonal at a 16:9 ratio projection surface
Smart televisions with wireless connection to classroom computers/technology	This equipment is for rooms under 900sf.
Intercom system	Two-way emergency communication with red emergency button on a wireless device and on teacher’s microphone

General Spaces Standards – Office and Small Group Rooms

Office and other small rooms on the campus adjust occupants over time depending on funding, staffing priorities, grants, community partnerships and student needs. To build in the most flexibility, any small space should be looked upon as an opportunity to flex between office space, assessment space, conference room, small group instruction rooms or student counseling. As such, the following chart breaks down these rooms by square footage to provide guidance on the requirements for each size of space. Any of these space must be a minimum of nine feet wide in any dimension. Additional "Key Elements" are listed for specific spaces to provide the specialization for the first intended use of each space, if required.

	Open Office Workstation	80-100 SF	120-140 SF	150-200 SF	200-250 SF	250-300 SF
Guest Chairs for office setting	0	1-2	2-3	4-5	N/A	N/A
Chairs for conference/ instructional setting	N/A	2-3	4-5	6-8	8-10	12-14
Whiteboard	0	1	1	1	1	2
Tack Board	0	1	1	1	1	1
Television / Digital Display	0	0	0	1	1	1
Clock	One per open space	0	0	1	1	1
Duplex Data Ports, general (CAT 6)	2	2	2	2	2	2
Duplex Data Ports, VoIP	1	1	1	1	1	1
Duplex Electrical Outlets	2	3	4	4	4	4
WiFi	Yes	Yes	Yes	Yes	Yes	Yes

General Spaces Standards – Restrooms & Sinks

There are a variety of restroom facilities, which are referenced throughout this book and in Space Check List. Finished wall and floor material should be Ceramic Tile. The following chart describes the attributes of each space. A curb should be provided on all toilet room walls, interior and exterior, including the center wall between multi-fixture restrooms.

	Multi-fixture Restrooms	Unisex Student Restrooms	Unisex Staff Restrooms	Family Restrooms	Severally Handicapped Restroom	Sinks not associated with a toilet facility
Urinal	Men's	Preferred but not required	Preferred but not required	No	Yes	No
Mirror and Shelf	No	No	Yes	Yes	Yes	No
Sink and Soap Dispenser	Proportional to toilet and urinal count	Could be inside or if gained outside but adjacent	1 include hot water	1 include hot water	1 include hot water	Yes
Hand Dryers	Yes	Optional	No	No	No	No
Toilet Seat Covers	One outside stalls	Yes	Yes	Yes	Yes	No
Paper Towels	No	Optional	Yes	Yes	Yes	Yes
Changing Table	No	No	No	Child	Adult	No
Hoyer Lift and Shower	No	No	No	No	Yes	No

Provide quick connect hose bib in a recessed stainless steel locked box near lavatory in all multi-fixture restrooms. Multi-fixture restrooms must include one in-wall water shut-off valve which will isolate the lavatories, toilets, urinals and adjacent water fountains. All toilet rooms shall include a clean out and floors shall slope to a floor drain.

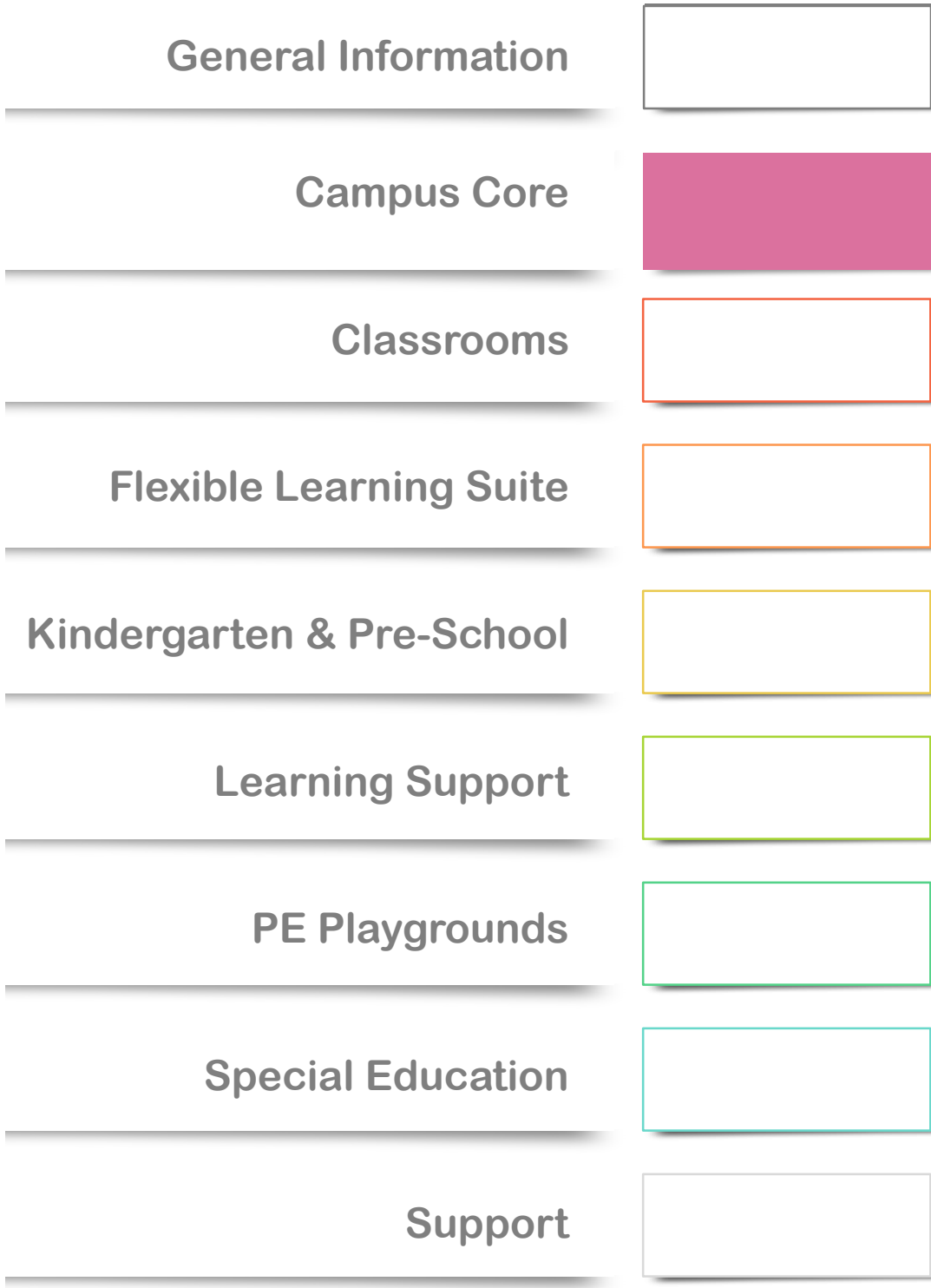
Where sinks are provided within cabinetry, upper cabinets should not be placed directly above the sink area. This allows wall space for paper towels and soap dispenser.

All soap dispenser shall be placed over the sink. In toilet rooms with mirrors the mirror should be placed on a wall adjacent to the sink so the soap dispenser can be placed over the sink.

The Campus Core consists of five major components:

- Administration
- Multiuse Flex office
- Health Office
- Library/Community Center
- Multi-Purpose Room

While each component has individual needs, all support students and have a component of community use. As such, each should be a warm and welcoming atmosphere and be easy to identify and access, especially outside of school hours.



Administration

The Administration component is the front door of the campus. The design should emphasize the main entrance to provide informal wayfinding to this doorway, which during the school day, is the only open access point.

Administrative Lobby

The Administrative Lobby and Reception/Clerical is the campus control point. All desks in the Clerical open office area should be able to see the front door from a seated position. A countertop with access door should separate the reception area from the open office. From this pass-through parents/family member can be directed to the rest of the campus. However, access to the campus should not be through the clerical open space.

The Parent room should be an open welcoming room which looks inviting to enter and is clearly labeled. Storefront or other non-restrictive design elements should express the parent room as a non-restricted place for parents to enter. Access to the Family Restroom should be from the Parent Room or Lobby Space. The parent room should not have access to the main campus without going through the Administration check point.

Reception/Clerical

The Reception/Clerical space is an open office area, which supports the personnel that service the front counter. In addition to the counter, individual workstations are required.

Admin Lobby Key Elements

- ❑ Seating for four
- ❑ Stroller parking
- ❑ Room at the counter for two people
- ❑ Display cases for school memorabilia and student art
- ❑ "Magazine Rack" for paper handouts

Reception/Clerical Key Elements

- ❑ Two staff workstations
- ❑ One volunteer or part-time workstation
- ❑ Free standing Printer, Scanner, Fax – Single electrical outlet with dedicated circuit and data jack
- ❑ Side or back counter area for form assembly, mail sorting
- ❑ Front counter
  - ❑ Storage on clerical side for forms (8.5"x11" clear) and office supplies, include lockable drawers and cabinets
  - ❑ Lower ADA complaint countertop (3') section with chair and knee space on both sides

Principal and Assistant Principal's Office

Use Office Standards. Carpet can be considered for these rooms.

Nurse's Office

The Nurse office needs to be within view of the Reception Area, for front office supervision when nursing staff is not present.

Staff Preparation Room/ Staff Restrooms

The Staff Preparation Room needs to be easily accessed by faculty to collect their mail and make copies. If possible, this access should be easy without having to circulate through multiple office spaces or down long hallways.

Staff restrooms should be adjacent to the Preparation Room and in proximity to the Administration, Multi-Use Flex Office, and Health Services. Use Restroom Standards for interior requirements and accessories.

Records and Storage

The Record Storage Room in proximity to the Reception/Clerical Area. This room's primary purpose is to hold the student files. A shelf can be provided above the files for additional supply storage. This room should also contain lockable storage for keys and vault.

Book Room

The Book Room stores textbooks not in distribution at any given time, teacher manuals, consumables and additional paper supplies. Provide full height metal shelving. This room should be in proximity of the Clerical/Reception Area and Library.

Nurse's Office Key Elements

- ❑ Countertop with lockable upper and lower cabinets
- ❑ Under counter mini-refrigerator with separate freezer (standard size 32.8 Inches (H) x 19.13 Inches (W) x 21.1 Inches (D))
- ❑ One countertop duplex plug with USB jack
- ❑ Sink with hot and cold water
- ❑ Guest Chair
- ❑ Cot
- ❑ Small Workstation, see open Office Standards Cleanable Wall and floor finishes
- ❑ Wheelchair storage
- ❑ In clear view of clerical staff
- ❑ Adjacent to Nurse's Restroom (Use Restroom Standards for interior requirements and accessories.)

Staff Preparation Room Key Elements

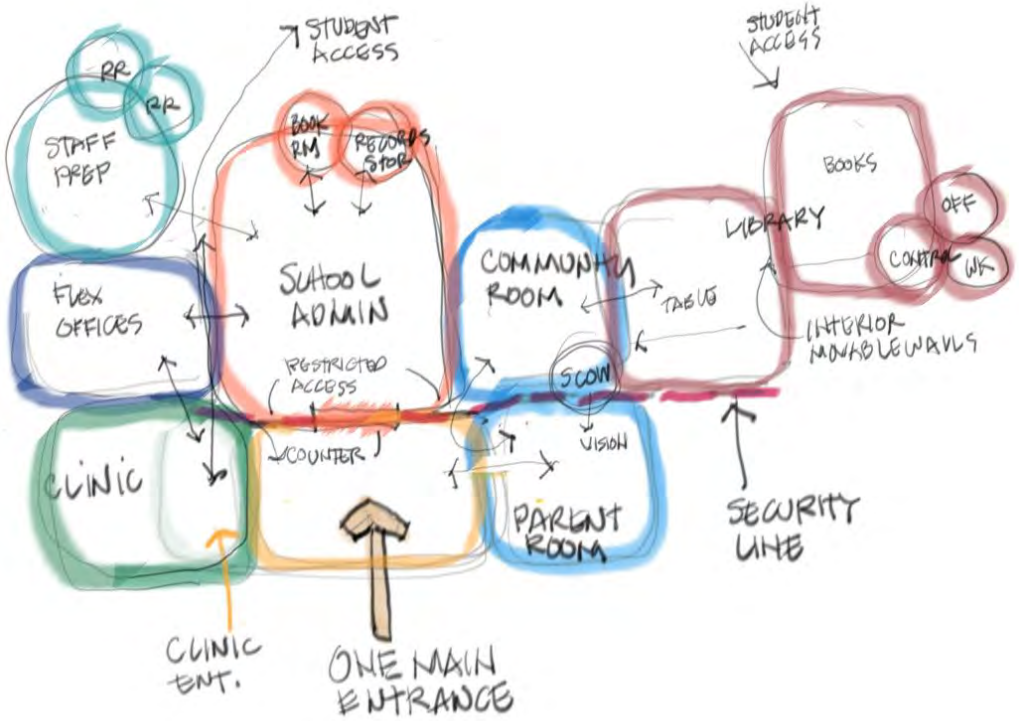
- ❑ Lockable upper and lower cabinets with countertops for paper processing (15 LF minimum)
- ❑ Six duplex outlets, counter level outlets to include USB charging ports
- ❑ Two free standing Printer, Scanner, Fax – Single electrical outlet with dedicated circuit and data jack
- ❑ Mailboxes – Minimum 12x12x6 (clear) with metal label holders for anticipated number of faculty and staff
- ❑ Under mailbox storage for larger packages
- ❑ Sink with Hot and Cold water

Multi-Use Flex Office

The District's Full-Service Community Schools Initiative. The Center brings outside providers into the school to support the needs of the community. Due to the nature of grants, changes in school provided funding and access to outside providers a fixed number of offices is difficult to set. To address the need for flexibility, the Multi-Use Flex Suite was created. This suite of office and small group rooms allows the office staff, special education and outside providers access to shared space which connects to both the formal Administration area and Health Center. As time goes by the assignments of these offices can change and fluctuate depending on funding, special education requirements and the requirements of the community.

While not all communities requires the same level of services, this office area may require specialization depending on the community needs; however, the program described in the Educational Specification is considered the maximum requirements. Before beginning design, confirm with the District Facilities Department on the level of build out and equipment the District is providing in the construction. Additions may be made by the providers for both the Flex Office areas and Health Center.

Use Office Standards with special consideration for acoustical privacy. Carpet can be considered for this area.



Multi-Meeting Observable and Observation Room

One of the small meeting rooms shall have an observation window to allow professionals and parents to observe student behavior from the adjacent observation room.

Shared Storage Room

Provide full height storage shelves.

Health Center

The final layout and design of the Health Center will be subject to input from the outside provider. The Center will be open to the greater community and requires an exterior entrance. During the school day, students will be called directly from class to an office, so a pathway from the classrooms to the offices needs to be accessible to students.

No major circulation paths should separate the Health Center from the Multi-Use Flex Office. The Multi-Use Offices will be used by the Health Center for mental health services. Confirm before beginning design if any of the Multi-Use Offices should be an additional exam, vision or dental rooms. If dental or vision is required, then the square footage of the room should be 200sf. Carpet would not be allowed in an exam, dental or vision rooms.

Exam and Vision Room Key Elements

- ❑ Upper and lower cabinets with integral backsplash countertops
- ❑ Sink with hot and cold water with foot petal operation
- ❑ Five duplex outlets, counter level outlets to include USB charging ports, coordinate with medical equipment and include backing in walls
- ❑ One duplex data ports for phone access
- ❑ Space for a bed and other medical equipment
- ❑ Option for a vision chair, phoroptor and projector

Exam and Dental Room Key Elements (If Required)

- ❑ Upper and lower cabinets with integral backsplash countertops
- ❑ Sink with hot and cold water with foot petal operation
- ❑ Five duplex outlets, counter level outlets to include USB charging ports, coordinate with medical equipment
- ❑ One duplex data ports for phone access
- ❑ Space for a bed (exam room) or chair (dental room) and other medical equipment
- ❑ Dental room will require additional plumbing, air, and vacuum at console treatment unit
- ❑ Dental will require additional backing in ceiling for lighting tracks

Parent Room and SCOW Office

The School Community Outreach Worker (SCOW) is the main staff member supporting the parent center and will host many of the events in the Community Room. Direct access to the Parent Center and proximity to the Community Room is required. Parents should not be allowed to enter the main campus without going through the Administration area check point. Use office standard with a vision panel to the Parent Center.

The Parent Room should be a flexible space which accommodates several functions including

- Small workshops/meetings
- General informal meeting area
- Countertop workspace for assembling packets and preparing other materials
- Storage for parent purchased equipment
- An information resource

Parent Room Key Elements

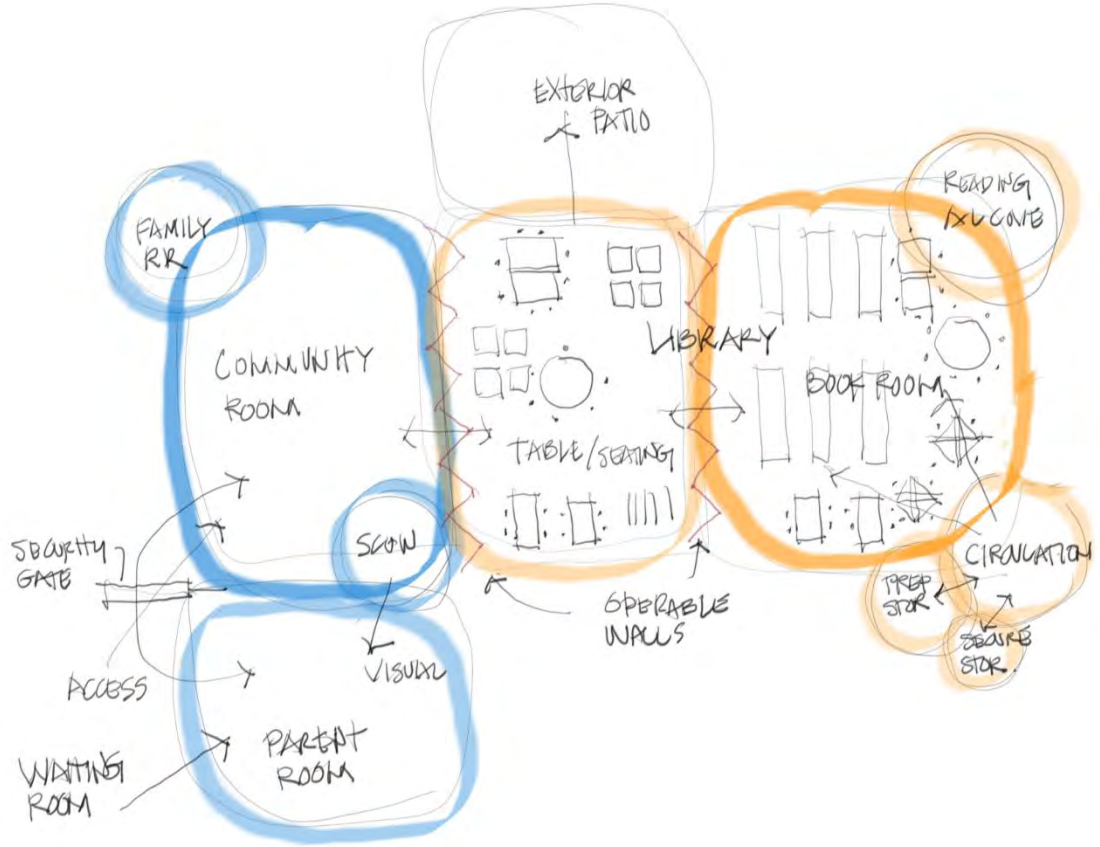
- ❑ Seating for 12 to 15
- ❑ Computer access
- ❑ Digital Display
- ❑ “Magazine Rack” for paper handouts
- ❑ Tack Board
- ❑ White Board
- ❑ Countertop with lockable upper and lower storage cabinets and a sink
- ❑ Electrical Outlets to support a copier/printer, microwave, refrigerator, twelve laptop computers, digital display television and charging of personal devices brought by occupants
- ❑ Refrigerator with ice maker
- ❑ Water connection for refrigerator
- ❑ Option for a VoIP Phone
- ❑ Direct Access to the SCOW Office

Library/Community Center

Currently, the District provides a Librarian at the Elementary Schools one day a week. At some school sites, the Library can operate additional hours using volunteers, parent fund raising or classroom teacher supervision. These additional open hours can consist of students accessing the Library solely to check out books. The development of the Library/Community Center strives to meet many needs by allowing the table space normally associated with the Library to be used either by the Library or as an expansion of the Community Room without affecting the ability of classes to access the book collection and story area.

When the Library is closed or being used only as a book check out, the table area can either be its own breakout space or combined with the community room for larger gatherings. The community room, especially in the evenings, host many activities such as math nights, which can be larger than what can fit in a classroom sized space. During the day, parent university and other parent education programs can be offered.

These spaces then can work in concert or individually, to provide the most utilization possible. Due to the scale of the spaces when all doors are open the ceiling height should average shall be not less than 12' across these three spaces.



Community Room

The Community Room should be a flexible environment to accommodate a variety of meetings and activities. These activities often offer refreshments to participants, so access to a sink and countertop area are important. Flip top tables should be considered to allow the ability to clear the floor area for chair only seating to fit the maximum number of family members or have open space for certain activities.

Exam and Vision Room Key Elements

- ❑ Use standard classroom technology
- ❑ Maximize the extent possible on one wall with a countertop with ADA complaint sink with a bubbler, upper and lower lockable cabinets and three duplex electrical outlets with USB charging ports
- ❑ Six additional duplex plugs
- ❑ Magnetic markerboards and tackable wall panels
- ❑ Electric movable partition to Library Tablespace
- ❑ In proximity to the Parent Room and SCOW Office

Library

Leaving as much of the floor area with moveable furniture and book stacks, as possible, will allow these different activities to take place. Any fixed items should be placed against the wall to maintain a flexible middle area and clear sight lines. Stacks, even along the wall should not exceed four feet in height.

The book collection size should equal approximately 20 volumes per student. At the time of construction, confirm the ratio of physical versus digital volumes and distribution between fiction and non-fiction.

While most technology will be movable and most likely in the hands of students, four computer stations are desired for looking up the collection catalog, printing, and quick internet searches.

The circulation desk provides a dividing line of items free to student access and items which are distributed only by staff and is used for the following functions.

- Checking out books
- Reference Textbooks – One per subject
- Storage for lunch time activities
- Processing books

While books are being checked out, no access control devices should be placed at doors due to maintenance and upkeep that is not supported by operational budgets.

Librarian's Office and Workroom

In addition to the Office Standards, the Office should have view windows to the main Library.

Library Key Elements

- ❑ Circulation Desk
- ❑ Book Stacks
- ❑ Four Computer Stations
- ❑ Story Alcove
- ❑ Office and workroom should have visibility to the main library
- ❑ Electric movable partition to the Library Table Space

Library Table Space Key Elements

- ❑ Group table seating for 36
- ❑ Short-throw interactive wall mounted projector with whiteboard surface sized to meet the maximum size of the projection possible by the equipment

Workroom Key Elements

- ❑ Upper and lower cabinets with countertops for book processing
- ❑ Six duplex outlets, counter level outlets to include USB charging ports
- ❑ Sink with cold water
- ❑ Parking for at least one book cart

Multi-Purpose Room

At the Elementary level, the Multi-Purpose Room is the largest space on campus. The majority of the school day, this room is used for breakfast and lunch dining but can be used for assemblies, large group meetings, after school programs, physical education and school events. Equipment and finishes should be durable and protected to allow use of balls within the spaces. The ceiling height should be no less than 20 feet. The chair storage allows additional chairs for programs to be stored when dining or other activities are using the space. Consider a table selection that can be benches or tabletops to limit the number of extra chairs and the need to put away the tables when assembly seating is desired. For assemblies, the MPR needs to be presentation ready with ceiling mounted projector (rear projection system), sound system, electronic projection screen and acceptable level of acoustical properties and design. Provide three floor boxes to allow flexibility for presenters. Floor boxes should include connection to the audio-visual systems as well as electrical and data receptacles. Access to a stage and outdoor covered dining, expand the flexibility of this space.

The stage should be a formal built-in stage. Include an side curtains and valance and back curtains. Lightbar both in the Multi-Purpose Room and in the stage areas should be installed with appropriate electrical access. The sound system must include microphones, CD player, soundboard with multiple inputs including connection to projector, amplifiers and speakers.





Multi-Purpose Room and Support Spaces

Chair and Table Storage

The Chair and Table Storage needs to be directly accessible from the multipurpose room. The walls in the space need to be covered with sanded 5/8" minimum thickness plywood, full height. The door to this space needs to be wide enough for table and chair carts. The walls should not be encumbered by any equipment.

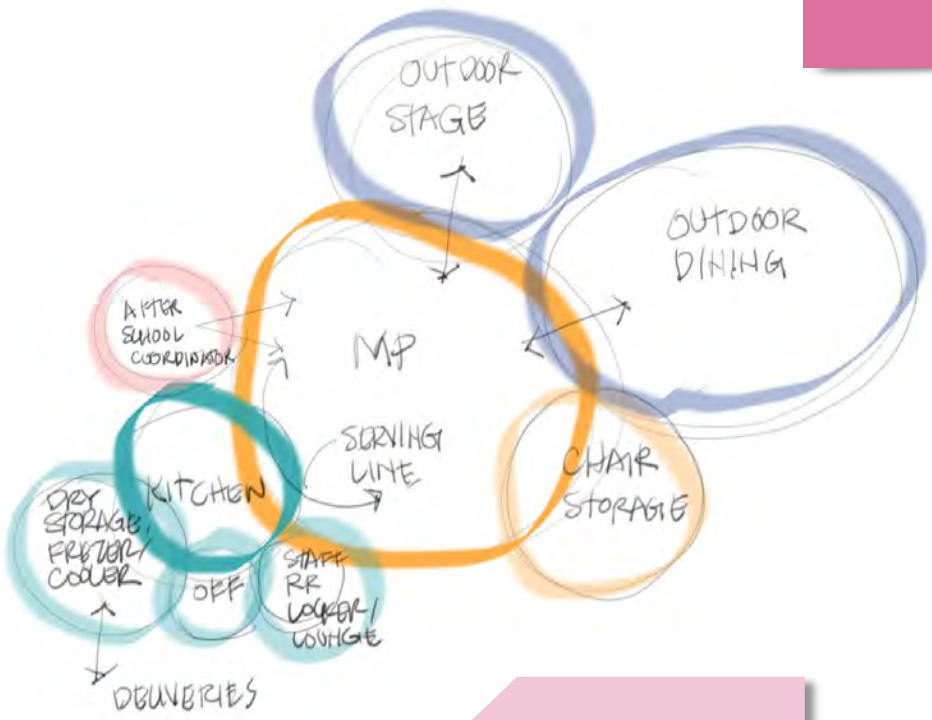
After School Coordinator

This space is an office and storage area for the after school program. It should be directly connected to the multi-purpose room. See Office Standards and provide shelving for storage of equipment and supplies.

Kitchen and Serving Adjacencies

The Kitchen area will contain a walk-in refrigerator, a dry storage area, staff changing area, staff restrooms, and a private office. The lockers shall have a concrete curb with epoxy floor base. The changing area and restroom may be combined into one room.

The serving line shall connect the multipurpose room and the kitchen. The serving area needs to be completely secured from the multi-purpose room when not in use and provide both and entrance and exit for easy movement and efficient flow of students.



Speedline Key Elements

- ❑ Smooth fiberglass reinforced plastic panels on walls and epoxy floor
- ❑ One single door and one double door for entrance and exit to the Multi-Purpose Room with magnetic hold opens
- ❑ Tray shelf
- ❑ (2) Heated cabinets
- ❑ (2) Refrigerated cabinets
- ❑ (2) Cashier stand cabinets
- ❑ Double sided roll-thru lockable on both sides restocking units between the Kitchen and Speedline
  - ❑ (2) Double door refrigerated Cabinet with remote compressor
  - ❑ (1) Double door heated cabinet

Kitchen and Serving

The Kitchen for the Multipurpose Room is a productive area. Today, this kitchen is not a “cooking” kitchen, but preparation and delivery kitchen. All areas, from the delivery of pre-cooked items to the distribution to the students, must be set up for efficiency. The delivery of food comes from the District’s central kitchen by mid-size delivery trucks. The delivery trucks need a convenient transfer area with clear access, separated from both pedestrian and student drop off and large (42”) door access. Once delivered the products will go into the walk-in cooler, free-standing freezer or dry storage room. Kitchen staff will prepare and heat the food for distribution to the students. Delivery to the student is completed through a “speed line” that directly connects to the Multipurpose Room. For every 150 students being served at one time requires a single point of sale. Points of sale require an electrical outlet and a wireless data connection.

In addition to general food service additional opportunities for cooking should be provided. The cooking equipment can be used by food service and by other groups and community depending on site procedures.

The layout of the kitchen should take into consideration the dual nature of the kitchen facility to allow efficient food service every school day while also facilitating after hour use of the cooking area.

Finishes and ventilation are required to meet all health codes. Cooling for the kitchen and service line area should both be separately zoned. The kitchen, due to the large exhaust requirements, can be planned for a temperature range up to 85 degrees. No swamp coolers shall be used to provide cooling.

See the product and material standards for the equipment list. No dishwashers or garbage disposals shall be planned.

The service area should have similar flooring as the multipurpose rooms. Walls should include digital and tackable display surfaces.

Kitchen Key Elements

- ❑ Smooth fiberglass reinforced plastic panels on all walls and epoxy floor
- ❑ Air curtains on all required doors and windows
- ❑ Walk-refrigerator with cold storage shelving around the perimeter and space in the middle for rolling carts
- ❑ Handwashing sink (number determined by code)
- ❑ One prep sink
- ❑ One three compartment pot wash sink
- ❑ Ventilation hood(s) as required by code
- ❑ Warming Kitchen Equipment
  - ❑ Refrigerator-Double, roll-in, lockable
  - ❑ Freezer, reach-in, lockable
  - ❑ Single section dual-temp reach-in
  - ❑ Manual can opener
  - ❑ Convection Oven, double deck, roll-in, with (2) roll-in basket dolly
  - ❑ (6) Basket Dolly for (10) pack baskets and basket packs
  - ❑ Stainless Steel Work Table (size based on kitchen size)
  - ❑ Stem Caster wire cart
  - ❑ Dry storage shelving (in dry storage room)
- ❑ Cooking Area / Community Kitchen
  - ❑ Six burner heavy duty gas range with oven
  - ❑ Dual-temp reach-in refrigerator/freezer, lockable
  - ❑ Metal dry storage container
  - ❑ Food prep counter with storage below
  - ❑ Five coat hooks
- ❑ Meet all plumbing requirements for equipment and according code including hot water heater, floor drains, and grease inceptor

General Information

Campus Core

Classrooms

Flexible Learning Suite

Kindergarten & Pre-School

Learning Support

PE Playgrounds

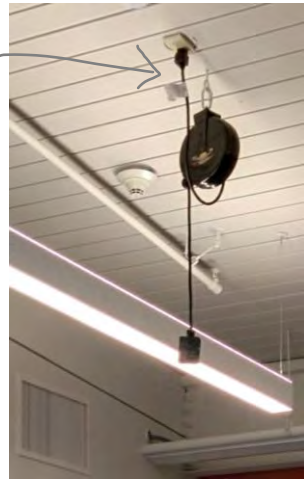
Special Education

Support

Classrooms

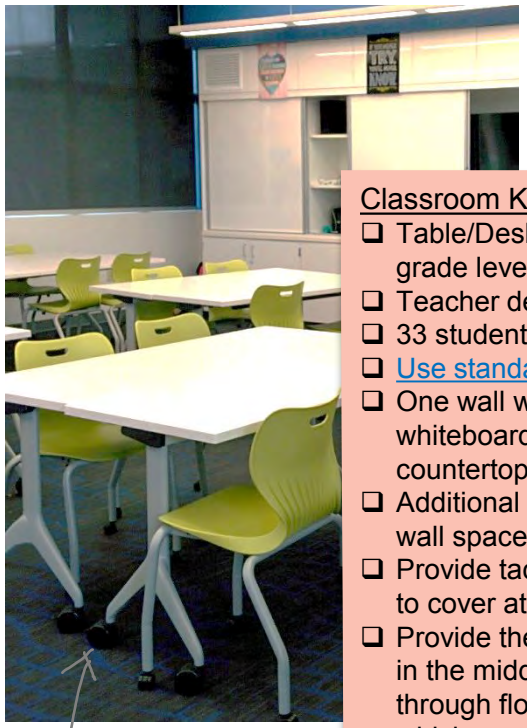
Classrooms will be the primary learning environment within the traditional classroom structure. These rooms need to serve many different activities. Full group discussion, small group work, individual study/testing, direct instruction, and project creation. The room, therefore, needs to be as flexible as possible. Furniture should be on wheels and easily rearrangeable. The tables or desk surfaces should be flat, so they can be pushed together to create an even larger surface. Chairs should roll, swivel, nest or stack. Not every seat needs to be the same. There can be two or three styles of desk/table and chair including options for standing.

Ceiling outlet option



Large markerboard and tackable display surface with pen rail





Moveable tables and chairs

Classroom Key Elements

- ❑ Table/Desks and chairs for class size depending on anticipated grade level (FF&E)
- ❑ Teacher desk and chair (FF&E)
- ❑ 33 student cubbies
- ❑ Use standard classroom technology
- ❑ One wall with a combination of full height (with sliding whiteboards) and upper and lockable lower cabinets with a with countertops and sink with a bubbler.
- ❑ Additional marker board surfaces to cover at least 35% of the wall space
- ❑ Provide tackable surfaces for calendar walls and other displays to cover at least 20% of the wall space
- ❑ Provide the opportunity for electrical access to several locations in the middle of the room. This access can be accomplished through floor boxes or ceiling outlets with an adjacent eye hook, which can structurally support an electrical reel.
- ❑ Ten duplex electrical outlets
- ❑ In proximity to a teacher workstation/collaboration area

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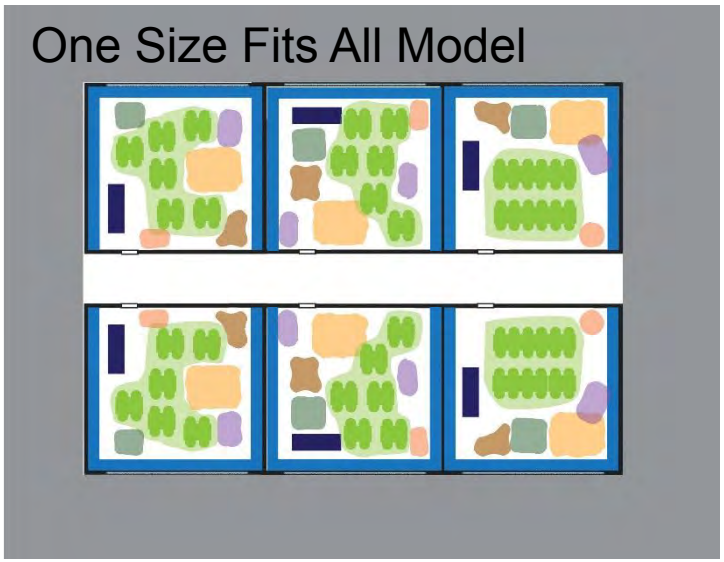
Support

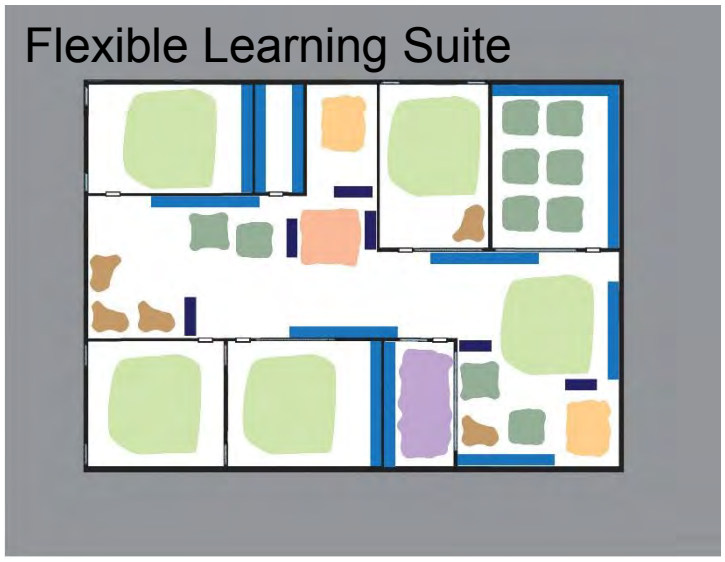
Background

Flexibility and adaptability are a requirement for 21st-century school design because the types of activities students perform change daily and the curriculum is adjusted for students' passions. The question remains, how do we create flexible space in a building that is inherently inflexible?

Many ideas have been tried with movable walls, modular walls and no wall at all. The results were various levels of acoustical intrusion, lack of proper air balancing and inoperable or difficult to move walls that, in the end, were left open or closed. The primary reason these solutions were implemented was to provide flexibility in the size of space offered in a classroom environment. The inherent difficulty with traditional school design is the vast majority of rooms are the same size and layout; therefore, every function must be conformed to a singular space type.

A different perspective to this design problem is providing a variety space types which will allow the flexibility and adaptability to a wider range of activity types, configurations and learning styles. The Flexible Learning Suite breaks the mold of one teacher, one class, and one space model and replaces it with the concept of a group of spaces owned by a group so that each activity can find an appropriate home. Over time new programs, initiatives and partner agencies can find a place that fits versus using the one type of space available.



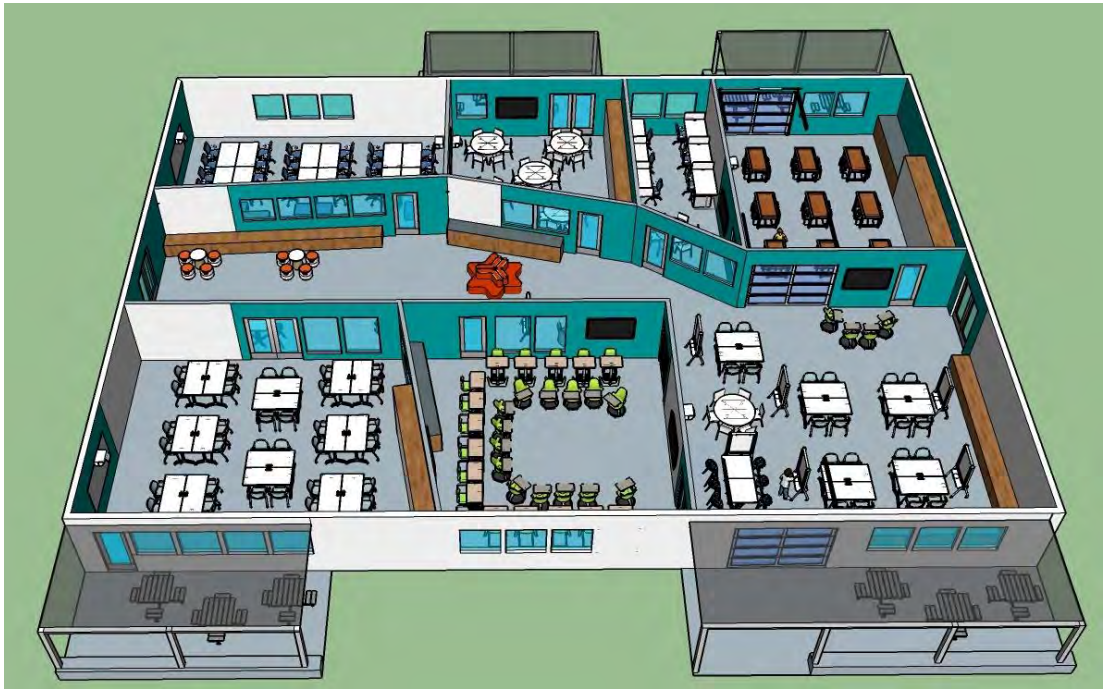


Creating a Suite

A suite can be created for a different number of students and staff, depending on site desire. The components possible within a suite will vary depending on the overall size set for the collection of spaces. In general, sets of six to eight classes can create a manageable suite. The overall size of the suite is based on the traditional classroom model with the addition of the circulation space. Listed below are major components that can be included in the suite. The final qualities and sizes of these spaces will be defined by the architect and District Facilities Department with input from the site committee.

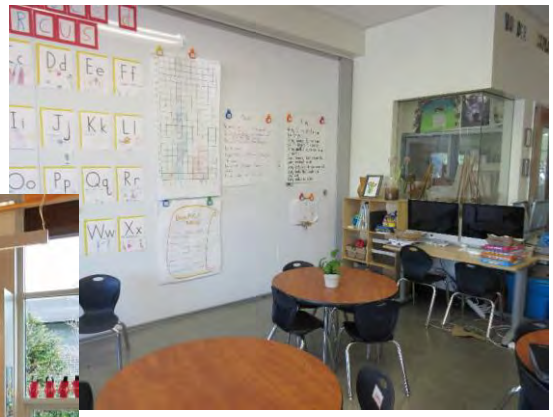
When considering the content of the spaces within the studio, moveable furniture and storage should be implemented as much as possible.

Connections to outdoor spaces are important for expanding the learning environment. Additional breakout areas and messy project space can be accommodated in covered outdoor patios.

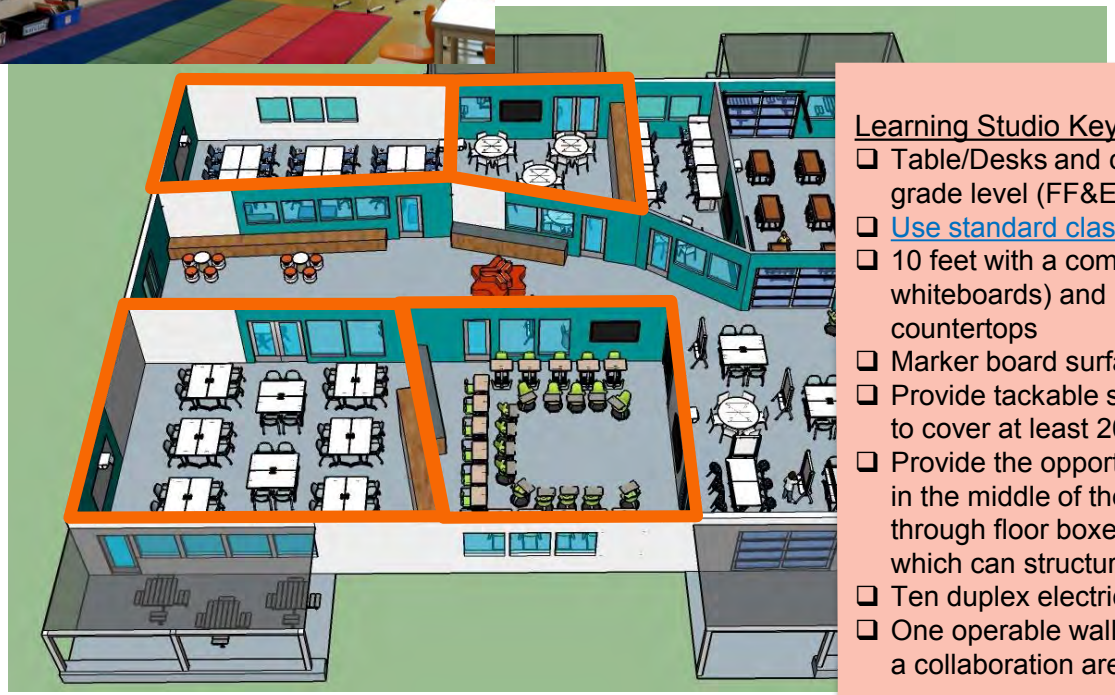


Learning Studio

Learning Studios provide a full class seating between 24 and 32 students. This seating can be individual desks, tables, and chairs or carpet seating (FF&E).







Learning Studio Key Elements

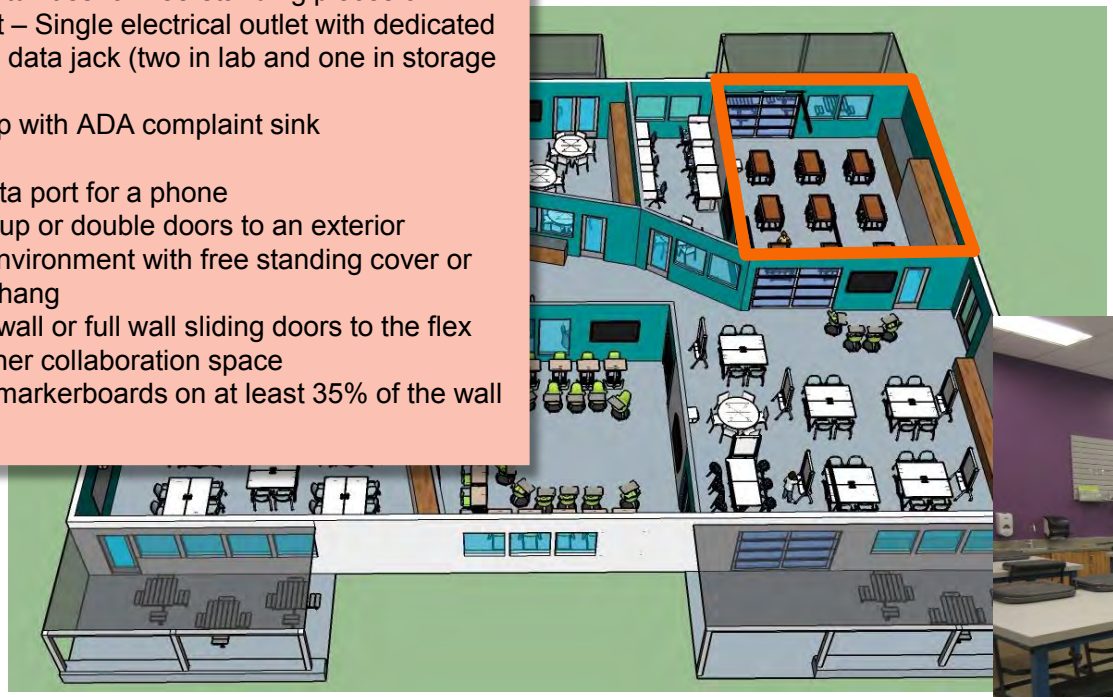
- ❑ Table/Desks and chairs for class size depending on anticipated grade level (FF&E)
- ❑ Use standard classroom technology
- ❑ 10 feet with a combination of full height (with sliding whiteboards) and upper and lockable lower cabinets with countertops
- ❑ Marker board surfaces to cover at least 35% of the wall space
- ❑ Provide tackable surfaces for calendar walls and other displays to cover at least 20% of the wall space
- ❑ Provide the opportunity for electrical access to several locations in the middle of the room. This access can be accomplished through floor boxes or ceiling outlets with an adjacent eye hook, which can structurally support an electrical reel.
- ❑ Ten duplex electrical outlets
- ❑ One operable wall or full wall sliding doors to another studio or a collaboration area

Project Rooms

Project Rooms are spaces where construction, creation and other hands on project-based learning is completed. The room should have supplies accessible for student use; therefore, built-in cabinetry should be provided on one wall of the room, especially to create countertop areas.

Project Room Key Elements

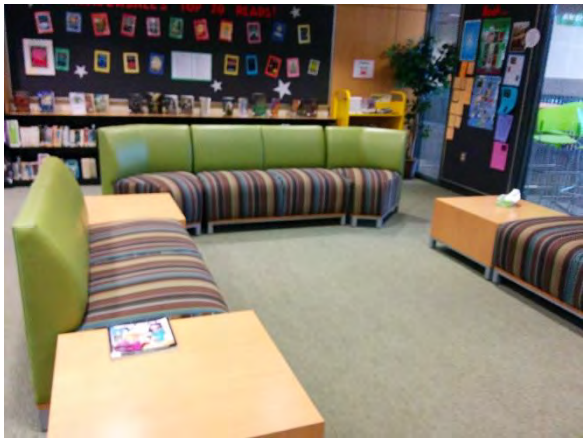
- ❑ Use standard classroom technology
- ❑ Provide the opportunity for electrical access to several locations in the middle of the room. This access can be accomplished through floor boxes or ceiling outlets with an adjacent eye hook, which can structurally support an electrical reel.
- ❑ Minimum of eight duplex outlets
- ❑ Two opportunities for free-standing pieces of equipment – Single electrical outlet with dedicated circuit and data jack (two in lab and one in storage room)
- ❑ Countertop with ADA complaint sink
- ❑ Shop sink
- ❑ Duplex data port for a phone
- ❑ Large roll-up or double doors to an exterior learning environment with free standing cover or large overhang
- ❑ Operable wall or full wall sliding doors to the flex area or other collaboration space
- ❑ Magnetic markerboards on at least 35% of the wall space





Suite Library with Seating

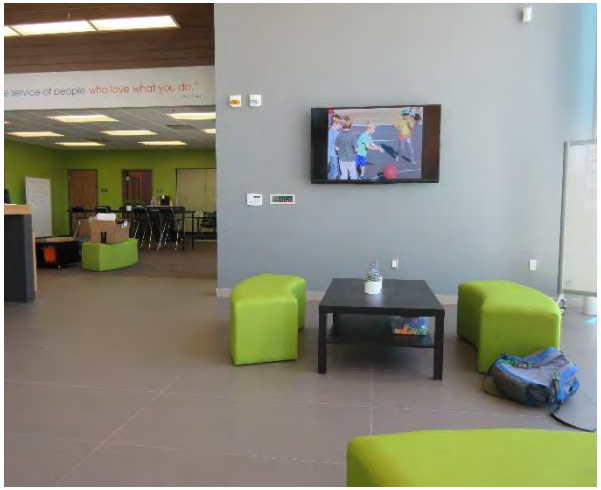
Classroom libraries offer access to books on a day to day basis. These libraries can be an important resource to the learning environment and can live within a suite as a shared resource. The library area also is a great opportunity for informal seating and individual seating (FF&E). Provide built-in or mobile bookshelves.

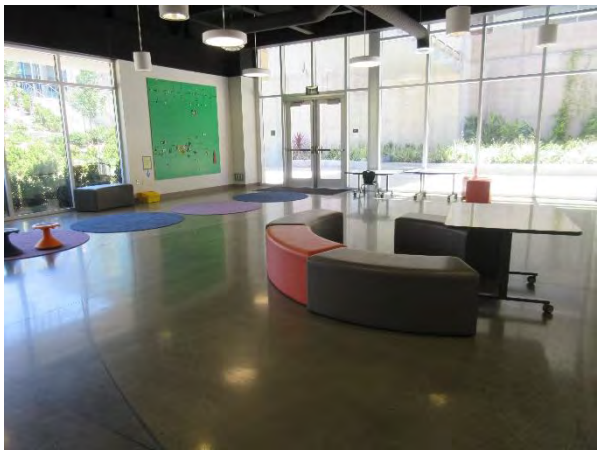




Large Group Flex Area

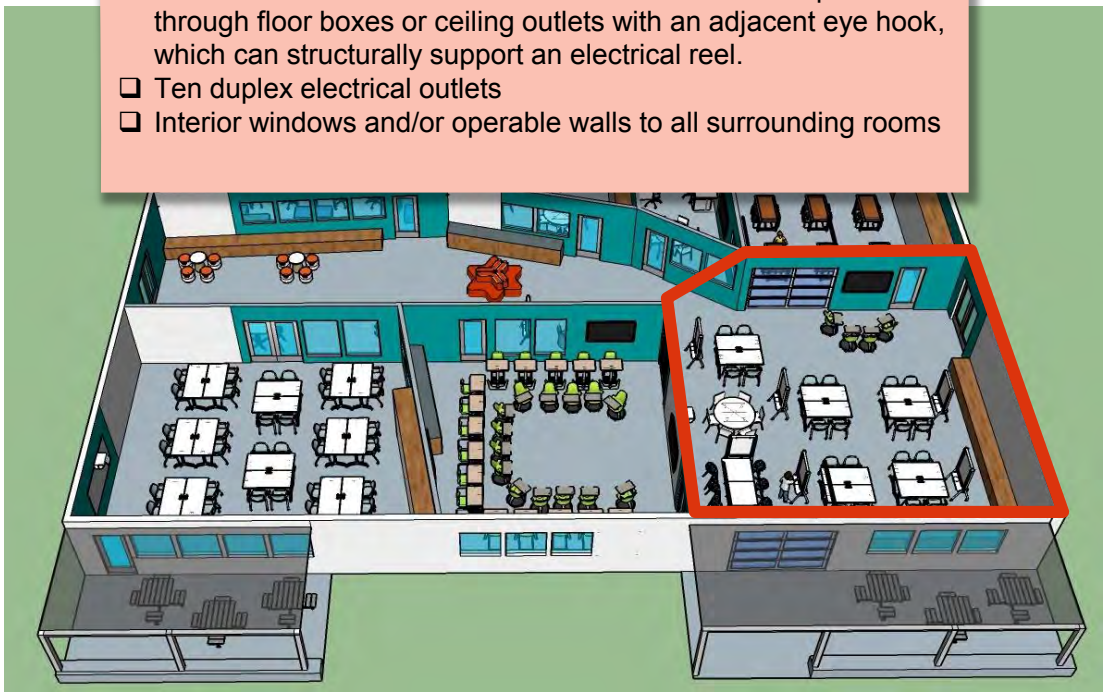
A larger open area provides the ability of more than one class to occupy a space. Movable furniture and more than one projection area can make this space able to support small group activities or a single large group. The tiered seating area is most effective teamed with this space. Access to outdoor learning environments could be adjacent. Large doors could allow the large space to expand even further into the outdoor space. With limited wall space, moveable markerboards can provide writing surfaces and temporary dividers when splitting the space into smaller activity zones.





Flex Area Key Elements

- ❑ Table/Desks and chairs for class size depending on anticipated grade level (FF&E)
- ❑ Use standard classroom technology
- ❑ Provide the opportunity for electrical access to several locations in the middle of the room. This access can be accomplished through floor boxes or ceiling outlets with an adjacent eye hook, which can structurally support an electrical reel.
- ❑ Ten duplex electrical outlets
- ❑ Interior windows and/or operable walls to all surrounding rooms

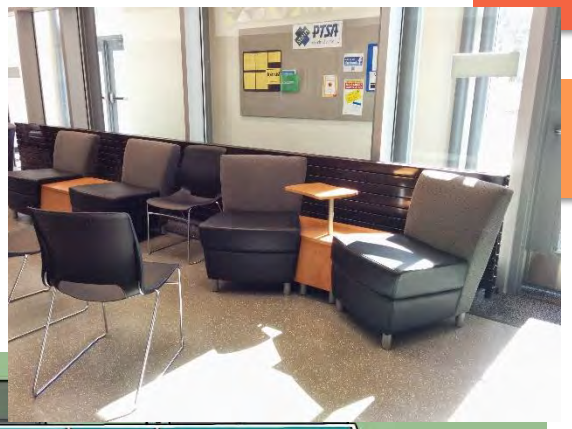


Small Group Areas

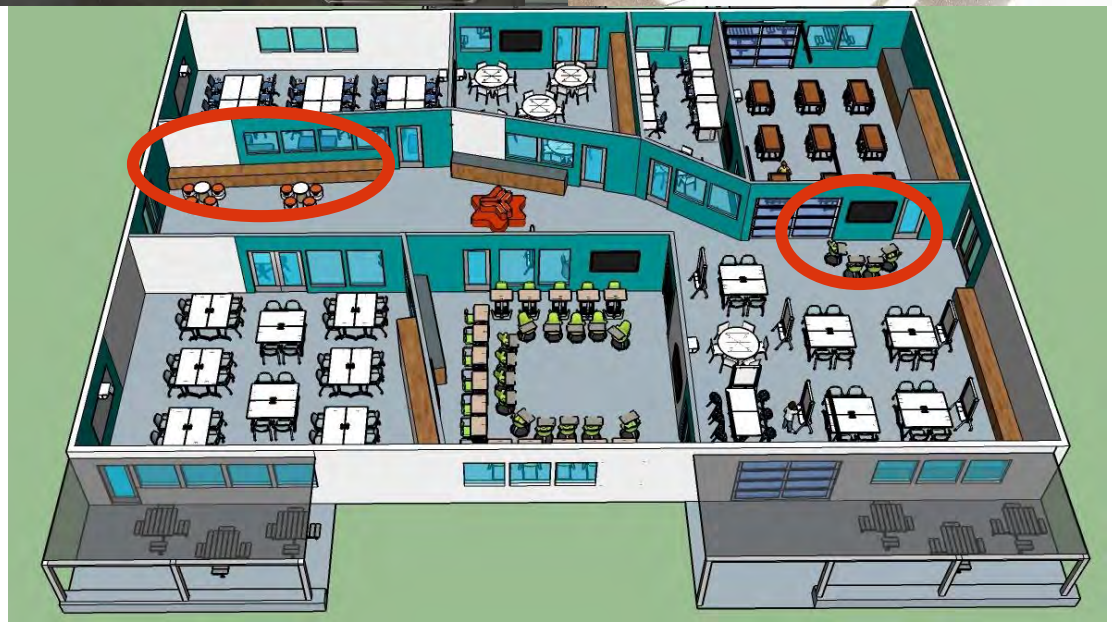
Small Group Areas can provide structure and use to the open areas. These groups can be breakouts from the Learning Studios with students on their own or supported by aids, special education teacher or a team teacher who is pulling a small group from a double class being taught by the other teacher. Providing space for writing and having digital display can further support these group areas.











Individual Study Space and Sinks

Individual Study Space

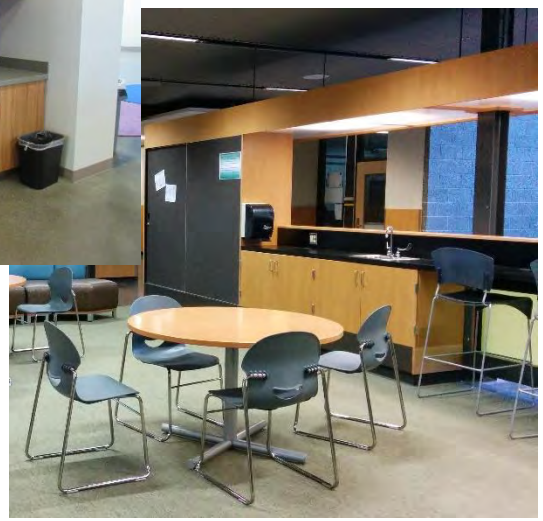
No matter how collaborative the curriculum is, there are times where students will need to withdraw and concentrate on course work. Individual Study Spaces allow for a retreat from the distraction and interaction. These spaces could be both formal or informal. Access to an electrical outlet provides the option for the student to plug in.

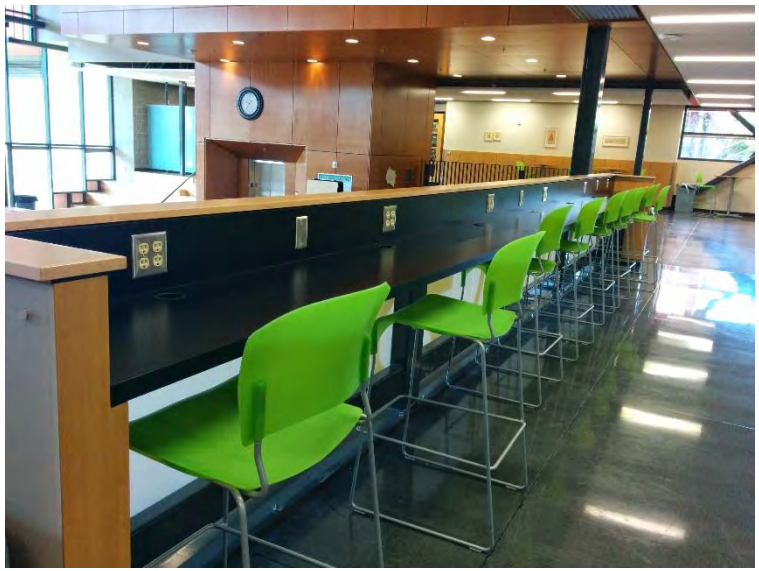


Counter and Sink Space

Within a suite, all rooms do not need to be equipped with a sink, but sinks are important to be able to access within a suite. This function is best suited in the open area. Include at least 5 linear feet of countertop with lockable cabinets and a bubbler.







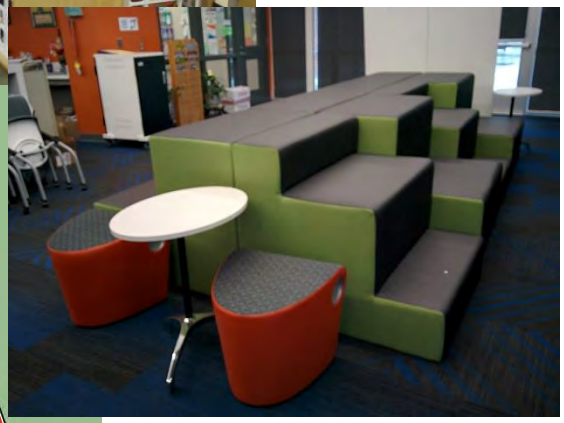
Student Cubbies / Tiered Seating

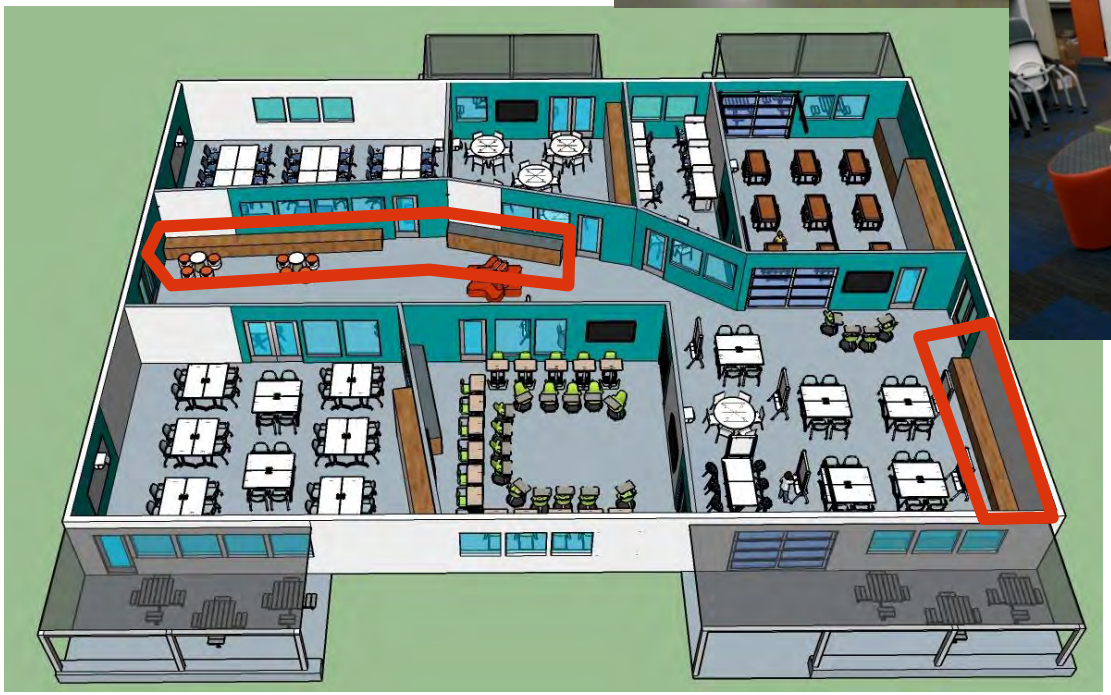
Within a suite, students still need access to an area to put their belongings. This area can also double as seating.

Cubbies can come in a variety of types including cubes, coat hooks or lockable lockers. The placement of the spaces can also be within Learning Studios or in the open area. Provide custom mobile cubbies for each student that are in the suite.

Tiered seating offers the ability to get more students around a central focus point for presentations or role playing activities. Opening or closing activities with the whole suite could also work into an area with tiered seating. This seating could be accomplished with the student cubby system.







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Classroom

The primary instructional space for Preschool, Transitional Kindergarten and Kindergarten is the classroom. Students will often break into various activity zones within the classroom and come back together as a group at either the tables or carpet area. These activity zones include

- Small Group - Kidney table for more directed instruction or exploration tables
- Technology Station – Tablets, computer, and headphones
- Wet Activity Area – Science or art activities at Exploration tables or easels
- Class Library/Reading Corner – Access to books and opportunity for small nook areas or window seats
- Make believe Area – Kitchen, dress-up clothes, tools

Visual display areas at all levels showcase student work and provide an area for rules, schedules, subject background, and inspiration. At this level, visual displays are an integral part of the instruction with interactive charts, calendars and graphs, most commonly associated with the carpet activity zone. Large books are also read to the class at the carpet area and need a location for storage and display.

Classroom Key Elements

- ❑ Student cubbies – 28 at TK and K, confirm number for Pre-School
- ❑ Use standard classroom technology
- ❑ One wall with a combination of full height and upper and lower lockable cabinets with a countertop including one sink at student height and one sink at adult height. Student sink to included a bubbler.
- ❑ Mirror – Do not place mirror over the hand washing sink, an alternative location needs to be selected
- ❑ Additional marker board surfaces
- ❑ Provide tackable surfaces for calendar walls and other displays
- ❑ Provide the opportunity for electrical access to several locations in the middle of the room. This access can be accomplished through floor boxes or ceiling outlets with an adjacent eye hook, which can structurally support an electrical reel.
- ❑ Ten duplex electrical outlets
- ❑ Adjacent to a shared Prep Room and Inside Storage
- ❑ Adjacent to a Student Restroom and playground
- ❑ Door charm which sounds when the exterior door is opened (Preschool only)

Restrooms and Storage

TK and K Student Restrooms

The student restroom should only contain a toilet and toilet paper dispenser. Hand washing sink should be placed in the classroom (not counted as the student height sink in the countertop). Flooring should be tile with tile walls up to four feet.

Playground Restroom

Provide two restrooms with direct access from the playground. These restrooms can be accessed by students while on the playground without having to enter any classrooms. This access is especially important when in the future there are more kindergarten classes than available kindergarten rooms and students on the playground must interrupt another class to use the restroom. Flooring should be tile with tile walls up to four feet.

Preschool Toilet Room

Confirm with licensing requirements to structure the restroom facilities. Flooring should be tile with tile walls up to four feet.

Outside Storage

The outdoor storage can either be within the building or a separate structure. This room shall house outdoor equipment such as balls, tricycles, and other playground equipment when not in use.

Prep Room and Inside Storage

The prep room can either be structured as a shared space between two classrooms or a larger area between four classrooms. If a larger room is selected, then provide a conferencing area for teacher meetings. The inside storage can be similarly clustered if desired.

The prep room should maximize storage and workspace. Teacher desk space should be provided, either two or four, depending on the number of rooms connected to the prep area. Desks are included in FF&E.

Prep room for pre-school must include a desk space, sink with hot and cold water and a refrigerator.

There should be visual access to the classroom space and duplex plugs with USB charging ports above the counter.

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Multi-Use Classroom

This classroom is available for special program space especially in schools where the traditional model is selected when not required for accommodating enrollment. Music, visual arts, maker space, science or advanced technology lab could all be assigned to this room. In the schools where the flexible learning suite is used, this room can be an additional project room that spans between suites.

Music Storage

The music program is a pull-out program for specific students who have signed-up for the program. Music teachers rotate between elementary schools to provide this program. A small storage room provides a space to leave instruments and music stands, so the teacher does not need to transport these items in their car and carry them into the school each week. This storage room should be adjacent to the multiuse classroom or library table space.

Multi-Use Classroom Key Elements

- ❑ Use standard classroom technology
- ❑ Provide the opportunity for electrical access to several locations in the middle of the room. This access can be accomplished through floor boxes or ceiling outlets with an adjacent eye hook, which can structurally support an electrical reel.
- ❑ Minimum of eight duplex outlets
- ❑ Two opportunities for free-standing pieces of equipment – Single electrical outlet with dedicated circuit and data jack (two in lab and one in storage room)
- ❑ Full height Cabinets
- ❑ Upper and lower lockable cabinets with countertop and ADA complaint sink
- ❑ Shop sink
- ❑ Large roll-up or double doors to an exterior learning environment with free standing cover or large overhang
- ❑ Magnetic markerboards on at least 35% of the wall surface

Teacher Lounge and Restrooms

Teacher Lounge

The teacher lounge should be designed as a standard traditional classroom for flexibility when the enrollment fluctuates. To accommodate the teacher lounge function, two additional single electrical outlets with a dedicated circuit and data jack should be provided to support a refrigerator with an ice maker and the potential for a free-standing printer. Centrally locate this facility.

Parent Room Key Elements

- ❑ Seating for 30
- ❑ Computer access
- ❑ Digital Display
- ❑ "Magazine Rack" for paper handouts
- ❑ Tack Board
- ❑ White Board
- ❑ Countertop with lockable upper and lower storage cabinets and a sink including hot water and 2 built in microwaves
- ❑ Electrical Outlets to support 2 microwaves, refrigerator, digital display television and charging of personal devices brought by occupants
- ❑ Refrigerator with ice maker
- ❑ Water connection for refrigerator
- ❑ Option for a VoIP Phone

Student and Staff Restrooms

If using a suite design, each suite should contain both student and staff restrooms. In a traditional model student and staff restrooms should be located in several locations for easy access. For either design one set of student restrooms must be provided within visual site of the playground and not have a double door access to the interior of the school. The Multi-Purpose Room must also have a set of restrooms. Staff restrooms need to be distributed around the campus at the same interval as student restrooms.

All staff restroom should be unisex. Student restrooms shall be ganged.

Use Restroom Standards for interior requirements and accessories.

Drinking fountains must be provided to meet code and in every major area of the campus including the playgrounds, learning suites and multi-purpose room. Bottle fillers with replaceable water filters must be provided in the multi-purpose room.

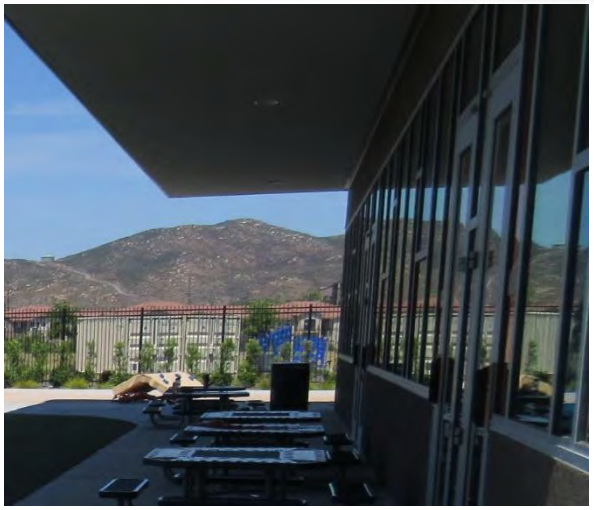
Outdoor Learning Environments & Garden

Outdoor Learning Environments

Expanding the classroom environments outdoors provides additional space at a lower cost. It also allows students to experience a different space and fresh air. Define the environment with planter boxes, seat walls, landscaping or benches. Providing greenery near these areas creates a calming effect when students are in the space and when seen from the classroom or learning studio. Covering the space extends the number of days that it can be used during the year. The climate throughout the District varies widely. Consider if a warm sunny area or a shady, breezy space would be desirable for most of the school year. When being designed, consider typical wind direction to prevent a wind tunnel effect. Provide opportunities for supervision from surrounding classrooms or studios to ensure these spaces can be used.

Garden

Designate an area on campus that can support a garden. This space should have good access to sunlight. Provide a hose bib to this location. Where garden programs are in place, provide raised beds, fencing with gate and tool shed.







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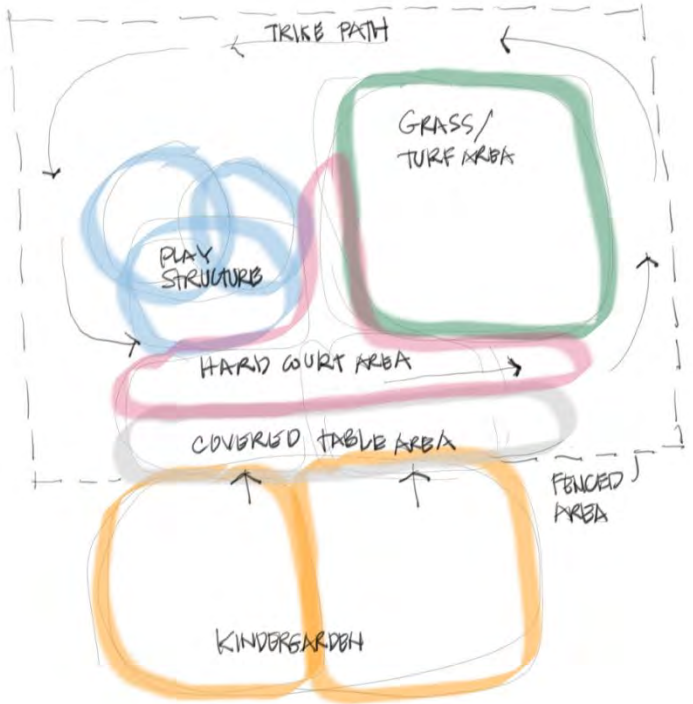
Support

Pre-School and Kindergarten Playground

The major playground components include hard surface play area, covered hard surface activity area, play equipment area and grass or turf area.

Shade from a covered area must be provided within both the pre-school and kindergarten playgrounds over a portion of the hard surface. Elements in the hard surface area are typically but are not limited to:

- Tricycle path
- Large circle
- Hopscotch
- Tether ball
- Four square
- Shapes with letters and numbers
- Table seating
- Drinking fountain



Access to the grass may be limited during wet weather so the hard surface area should be placed closer to the doors. The tricycle path should run along the edge of the playground to provide the largest circle. Confirm sizes of all elements to comply with preschool licensing. Play equipment should be placed on a rubberized surface and include a shade structure or interictal canopy which covers the majority of the structure.

The playground area should be enclosed. Provide an entrance gate to the kindergarten and pre-school areas to allow for a separate drop-off and different dismissal times. An outside drinking fountain shall be available within the fenced area for both the kindergarten and preschool playgrounds.



Pre-School and Kindergarten Playground – Play Structure

The preschool and kindergarten play structures should include playground elements are age appropriate including

- Shop counter
- Ship wheel
- Talking tube
- Slides
- Shade cover
- Stepping stones/artificial logs
- Climbing element
- Balance beam

Grades 1-6 Playground

The major playground components include hard surface play area, play equipment area and grass or turf area. The play area should also include some shady areas for hot days. A shade structure should be provided over or as an interictal part of the play structure and cover a majority of the structure. The hard surface area should also include shade. Access to restrooms and drinking fountains with bottle filler should also be provided without having to enter the learning suite. Ideally, the play area should be adjacent to the multi-purpose room. And in proximity to the primary learning environment. The Outdoor Equipment Storage Room shall be adjacent to the play areas for storage of balls, goals, cones and other playground equipment.

Hard Surface Play Area may be divided into lower and upper grades. All elements should be dimensioned on plans and confirmed with the site committee and District Facilities Staff

Elements in the hard surface are typically but are not limited to:

- Hopscotch
- Tetherball
- Foursquare
- Large Circle
- Line Up Numbers
- Basketball
- Volleyball
- Handball courts with ball walls

The blacktop should include at least 3 colors for striping and fill areas. At least one quarter of the blacktop should be painting with a color surface.

Grades 1-6 Playground

Provide a play structure should meet the all the major play requirements for students. These include

- Balancing – Provide a balance beam, steppingstone pedestals, and wobble bridge
- Brachiating – Provide traditional monkey bars or another form of stationary element. Spinning overhead wheels and balls or disks attached to poles or chains are not acceptable elements
- Climbing – provide at least 4 climbing elements such as ladders, rock walls, or cable structure. At least one of these structures should be large enough to provide the opportunity for both horizontal as well as vertical climbing opportunities.
- Spinning – Provide a least one element that allows students to spin
- Sliding – Provide a double or triple slide off a single platform and at least one additional slide. Both slide elements must be at least 5 feet high. If an additional slide is provided, it can be any size.
- Swinging – Provide the ability for students to swing, however, do not provide a traditional swing set. Ziplines are also prohibited.
- Additional Elements – Provide a speaking tube. Also, provide a cozy spot or semi-protected areas such as crawling tubes or cozy dome.

Fall protection, where required, should be a rubberized material. Wood or sand material for fall safety is strictly prohibited and, on existing sites, removal and disposal of this material needs to be specified. The overall shape of the safety mat shall be rectangular in shape where adjacent to turf areas.

Turf is preferred over grass at all sites. On sites where the recommended size of the turf area in the Space Check List is not possible due to site restraints, then turf is required for the amount of space which can be provided. In-fill material for turf must not be rubber. Because these fields are not for competition, provide a shorter blade length.

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Program and General Requirements

Special education offers different programs to support the needs of students. Not all programs are offered at every school site. The minimum requirement for every campus is to have a Learning Center and a classroom capable of supporting the Occupational Therapy (OT) program. Office and small group locations for speech teacher and psychologist are located in the Multi-Use Flex Office. Most schools will also have at least one Non-Severely Handicapped Room (NHS) although the designation of these rooms only affects capacity, the design is the same as a general classroom or learning studio. Severely Handicapped (SH) are offered throughout the District at all levels at strategic sites, at least one should be built at every school. Final quantity is based on the number of students recorded in the Space Check List on the Start Here Tab. Architects should confirm that all SH students are in 1-6 for a manual change to the Space Check List if preschool through kindergarten SH programs is planned.

In all of the special education spaces, the ability for the rooms to broken down into smaller learning environments is essential to the individualized instruction. Environments will vary based on the program; however, the arrangement of electrical outlets, data access points, white boards and tackable surfaces should respond to compartmentalizing the room. Furniture and equipment will be different than general classrooms even if the built environment is the same as the general classroom. Confirm these items with District before completion of the design.

Learning Center & OT

Learning Center

Learning Centers augment core subject instruction for a student who requires additional assistances. Students that use the Learning Center are in the standard classroom for more than 50 percent of their day and stop into the Learning Center for specialized and supporting instruction and test proctoring. Uses of the room include:

- Interventions
- One on ones
- Group work
- Testing
- Student individual computer work
- Individual Education Plan Meetings (IEP)
- Staff training

In general, this room should mirror a standard classroom with limited exceptions. Due to some students needing a less stimulating environment, transparency to major circulation paths should be limited. Wall panels when placed vertically should alternate between marker board material and tackable surface at four-foot intervals. The Learning Center should be centrally located for easy access by all grade level students.

Occupational Therapy (OT)

OT rooms provide motor skills and sensory development. Many different shape mats and large manipulatives fill the room. Because hopping and other louder activities can occur in these rooms, they need to be planned on the ground floor in schools with a second story. In general, this room should mirror a standard classroom with limited exceptions. Provide three large eye hooks attached to ceiling structural beams to support suspended swings and other equipment designed for a weight load of 500 pounds. Hooks must be below the finished ceiling and allow for spinning and swinging activities. Coordinate with the Occupational Therapist. Ceiling mounted electrical reels may be reduced in number to limit interface with these hooks.

General Information
Campus Core
Classrooms
Flexible Learning Suite
Kindergarten & Pre-School
Learning Support
PE Playgrounds
Special Education
Support

Support Functions

All support spaces are utility spaces where finish selection should be made for durability. Flooring shall be sealed concrete unless the District approves the alternative. All walls should be taped and sealed gypsum wall board and FRP in wet areas. All walls where shelving could be placed, provide blocking in walls, excluding electrical and technology rooms. Provide ventilation as required by code but avoid louvers below 6' if possible. Provide at least one duplex plug in each storage area. Windows are not desired in any of these spaces. If the area is wet, provide a 6" curb. Ceilings should be gypsum in all support spaces.

Storage Areas

The Storage Areas support the education program supplies, such as shipments of paper, extra furniture, and bulk supplies. All walls should contain backing to attach metal shelving.

Central Custodial Storage and Office

The Central Custodial Storage and Office should include the requirements for a general office with the addition of full height storage shelves for supplies and cleaning products. Include a stainless steel mop rack over the floor sink. FRP shall be used around the mop sink. This room should be placed near a delivery drop-off area and preferably near the MPR.

Satellite Custodial Rooms

Satellite Custodial Rooms should be provided in each building on every floor. Include a stainless steel mop rack over floor sink and upper shelves above the cart storage. FRP shall be used around the mop sink. Door should swing out to allow the cart to be easily parked within the space.

MDF and IDF Rooms

See Technology Standards for room requirements and spacing. Confirm that all voltage equipment can be accommodated including the data network, bell clock intercom, security, and fire panel.

Central Electrical and Satellite Electrical Rooms

Maintain three feet clear in front of all panels and do not block with door.

Lake Rebuild Space Check List

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Summary

School: Lake ES - Updated 10/2/2020

	Ed Spec			SD			DD		
Learning Suite	# of teaching station	Net Square Feet	Exterior Square Feet	# of teaching station	Net Square Feet	Exterior Square Feet	# of teaching station	Net Square Feet	Exterior Square Feet
Campus Core	0	14,639	2,113	0	0	0	0	0	0
Flex Suite	14	15,384		0			0	0	
TK, Kindergarten & Pre-School	4	7,375		0	0		0	0	
Learning Support	2	3,410	2,550	0	0	0	0	0	0
Physical Education/Athletics	0	150	17,813	0	0	0	0	0	0
Special Education	2	1,920	0	0	0	0	0	0	0
Support	0	1,680	22,800	0	0	0	0	0	0
Total	**22**	**44,558**	**45,275**	**0**	**0**	**0**	**0**	**0**	**0**
Grossing Factor (19.5%)		**8,689**							
Total Building SF		**53,247**			**0**			**0**	

Teaching Stations Required	**22**	**22**	**22**
Deficit or Surplus	0	(22)	(22)

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Campus Core

School: Lake ES - Updated 10/2/2020

	Ed Spec				SD				DD			
Administration	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Admin Lobby		1	200	200								
Reception/Clerical		1	300	300								
Principal's Office		1	150	150								
VP Office		1	120	120								
Nurse's Office		1	120	120								
Nurse's Restroom		1	60	60								
Staff Preparation Room		1	450	450								
Staff Restroom		1	80	80								
Records and Storage		1	80	80								
Book Room		1	450	450								
Multi-Use Flex Office	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Multi-Use Office		3	100	300								
Beacon Director		1	100	100								
Multi-Use Meeting - Small Group		3	200	600								
Multi-Use Meeting - Observable		1	200	200								
Observation Room		1	50	50								

Campus Core

School: Lake ES - Updated 10/2/2020

	Ed Spec				SD				DD			
Library / Community Center	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Parent Room		1	410	410								
SCOW Office		1	90	90								
Family Restroom		2	80	160								
Community Room		1	900	900								
Library Table Space		1	900	900								
Library Stack Space / Story Alcove / Circulation Desk		1	1,200	1,200								
Prep-Storage Room		1	200	200								
Secure Storage		1	100	100								
Multi-Purpose Room	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Student Dining*		1	3,325	3,325								
Stage		1	1,200	1,200								
Stage Storage		1	200	200								
After School Coord.		1	200	200								
Chair / Table Storage		1	200	200								
Restrooms+		2	150	300								
Kitchen		1	840	840								
Speed Line*		2	300	600								
Office		1	80	80								
Changing Room		1	80	80								
Staff Restroom		1	64	64								
Walk-in Refrigerator / Freezer		1	165	165								
Dry Storage		1	165	165								
Total	0			14,639	0			0	0			0

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Campus Core

School: Lake ES - Updated 10/2/2020

	Ed Spec				SD				DD			
	Ed Spec - Exterior				SD - Exterior				DD - Exterior			
	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total
Library Exterior Patio		1	450	450								
Outdoor Covered Dining*		1	1,663	1,663								
Quad**												
Kitchen Delivery/Service**												
Total				2,113				0				0

**	Refer to proposed site plan
+	Quantity is driven by Code Requirements
*	Quantity is calculated using a formula which is connected to the "Start Here" tab
	Restroom Facilities - Quantity should reflect the # of occupancy
	Cells to be completed by Architect or District Representative (Site Specific)

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Flexible Learning Suite

School: Lake ES - Updated 10/2/2020

	Ed Spec				SD				DD			
Flex Suite	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Learning Studios	10	10	820	8,200								
Project Room	2	2	960	1,920								
Large Group Flex Area	2	2	1,200	2,400								
Individual Study Space		6	70	420								
Small Group Areas		4	150	600								
Counter and Sink Space		4	54	216								
Suite Library with Seating		2	200	400								
Student Cubbies/Tiered Seating		16	30	480								
Staff Desk Space		2	174	348								
Conference / Collaboration Room		2	200	400								
Total	14			15,384	0			0	0			0
Maximum SF for Suites*	14			15,820	14			15,820	14			15,820
Deficit or Surplus	0			436	14			15,820	14			15,820

** Refer to proposed site plan
+ Quantity is driven by Code Requirements
* Quantity is calculated using a formula which is connected to the "Start Here" tab
Restroom Facilities - Quantity should reflect the # of occupancy

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TK, Kindergarten and Pre-School

School: Lake ES - Updated 10/2/2020

	Ed Spec				SD				DD			
Kindergarten/TK (Traditional)	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Classroom*	4	4	1,200	4,800								
Student Restroom*		4	50	200								
Inside Storage*		2	80	160								
Prep Room*		2	150	300								
Staff Restroom		1	70	70								
Playground Restroom		1	65	65								
Outside Storage*		1	200	200								
Preschool	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Classroom		1	1,200	1,200								
Student Restroom*		2	50	100								
Inside Storage*		1	80	80								
Prep Room*		1	150	150								
Staff Restroom		0	64	0								
Outside Storage*		1	50	50								
Total	4			7,375	0			0	0			0

** Refer to proposed site plan

\+ Quantity is driven by Code Requirements

* Quantity is calculated using a formula which is connected to the "Start Here" tab

Restroom Facilities - Quantity should reflect the # of occupancy

Learning Support

School: Lake ES - Updated 10/2/2020

	Ed Spec				SD				DD			
Learning Support	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Multi-Use Classroom	1	1	1,200	1,200								
Music Storage		1	60	60								
Teacher Lounge	1	1	960	960								
Staff Restrooms+		1	70	70								
Student Restrooms+		8	140	1,120								
Total	2			3,410	0				0			0

	Ed Spec - Exterior				SD - Exterior				DD - Exterior			
Exterior Learning Spaces	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Outdoor Learning - Small Group **		3	450	1,350								
Outdoor Learning - Large Group **		1	1,200	1,200								
Garden **		1		0								
Total				2,550				0				0

**	Refer to proposed site plan
+	Quantity is driven by Code Requirements
*	Quantity is calculated using a formula which is connected to the "Start Here" tab
	Restroom Facilities - Quantity should reflect the # of occupancy

PE Playground

School: Lake ES - Updated 10/2/2020

	Ed Spec				Ed Spec				Ed Spec			
Main Building	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
P.E. Outside Equipment Storage		1	150	150								
Field Restrooms (Boys/Girls)		1	450	450								
Total	0			150	0				0			0

	Ed Spec - Exterior				SD - Exterior				DD - Exterior			
Main Play Area	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**	**Teaching Station**	**Qnty**	**Size**	**Total**
Blacktop *, **		1	8,313	8,313								
Covered Blacktop				0								
Play Structure **		2		0								
Multi-Use Turf Field*, **		1	9,500	9,500								
Kindergarten/ TK / Pre-School												
Blacktop (Minimum)*, **			3,325	0								
Covered Blacktop				0								
Play Structure		2		0								
Multi-Use Turf Field (Minimum)*, **			3,800	0								
Total				17,813				0				0

**	Refer to proposed site plan
+	Quantity is driven by Code Requirements
*	Quantity is calculated using a formula which is connected to the "Start Here" tab
	Restroom Facilities - Quantity should reflect the # of occupancy
	Cells to be completed by Architect or District Representative (Site Specific)

Special Education

School: Lake ES - Updated 10/2/2020

Special Education	Ed Spec				SD				DD			
	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total
Learning Center	1	1	960	960								
Occupational Therapy	1	1	960	960								
Total	2			1,920	0			0	0			0

**	Refer to proposed site plan
+	Quantity is driven by Code Requirements
*	Quantity is calculated using a formula which is connected to the "Start Here" tab
	Restroom Facilities - Quantity should reflect the # of occupancy
	Cells to be completed by Architect or District Representative (Site Specific)

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Support

School: Lake ES - Updated 10/2/2020

	Ed Spec				SD				DD			
	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total
Storage Areas		1	120	120								
Central Custodial Storage/Office		1	200	200								
Fire Riser Room		4	30	120								
Satellite Custodial		4	70	280								
Central Electrical		1	160	160								
MDF Room		1	200	200								
IDF Rooms		2	150	300								
Satellite Electrical		2	150	300								
Total	0			1,680	0			0	0			0

	Ed Spec - Exterior				SD - Exterior				DD-Exterior			
	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total	Teaching Station	Qnty	Size	Total
Visitor Parking **		10	300	3,000								
Staff Parking*' **		66	300	19,800								
Bus Drop-Off												
Parent Drop-Off												
Total	0			22,800	0			0	0			0

** Refer to proposed site plan

\+ Quantity is driven by Code Requirements

* Quantity is calculated using a formula which is connected to the "Start Here" tab

Restroom Facilities - Quantity should reflect the # of occupancy

Cells to be completed by Architect or District Representative (Site Specific)

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Consolidated Budget Status Report

Budgets versus Commitments and Expenditures for multiple Projects

Budget vs. Commitments and Expenditures

Fund 21 and Fund 35

Data as of 09/30/2020

	Budget	Commitments			Expenditures	
School/Project Name	Total Budget	Total Commitments	% Budget Commited	Remaining Against Budget	Total Expenditures	% Budget Spent
1 Bayview Elementary School						
Legacy Project	19,850,802	19,850,802	100.0%	-	19,850,802	100.0%
	19,850,802	***19,850,802***	***100.0%***	***-***	***19,850,802***	***100.0%***
1 Cameron						
* Critical Needs	1,300,000	-	0.0%	1,300,000	-	0.0%
Legacy Project	122,195	122,195	100.0%	-	122,195	100.0%
	1,422,195	***122,195***	***8.6%***	***1,300,000***	***122,195***	***8.6%***
1 Castro Elementary School						
Legacy Project	620,944	620,944	100.0%	-	620,944	100.0%
	620,944	***620,944***	***100.0%***	***-***	***620,944***	***100.0%***
1 Chavez Elementary School						
Critical Needs	72,847	72,847	100.0%	-	72,847	100.0%
Legacy Project	985,387	985,387	100.0%	-	985,387	100.0%
	1,058,234	***1,058,234***	***100.0%***	***-***	***1,058,234***	***100.0%***
1 Collins Elementary School						
* Critical Needs	3,500,000	-	0.0%	3,500,000	-	0.0%
Legacy Project	1,638,871	1,638,871	100.0%	-	1,638,871	100.0%
	5,138,871	***1,638,871***	***31.9%***	***3,500,000***	***1,638,871***	***31.9%***
1 Coronado Elementary School						
Legacy Project	43,022,627	43,022,627	100.0%	-	43,022,627	100.0%
	43,022,627	***43,022,627***	***100.0%***	***-***	***43,022,627***	***100.0%***
1 Dover Elementary School						
Legacy Project	35,095,267	35,095,267	100.0%	-	35,095,267	100.0%
	35,095,267	***35,095,267***	***100.0%***	***-***	***35,095,267***	***100.0%***
1 Downer Elementary School						
Legacy Project	33,415,902	33,415,902	100.0%	-	33,415,902	100.0%
	33,415,902	***33,415,902***	***100.0%***	***-***	***33,415,902***	***100.0%***
1 El Sobrante Elementary School						
Legacy Project	536,231	536,231	100.0%	-	536,231	100.0%
	536,231	***536,231***	***100.0%***	***-***	***536,231***	***100.0%***
1 Ellerhorst Elementary School						
Legacy Project	13,931,806	13,931,806	100.0%	-	13,931,806	100.0%
	13,931,806	***13,931,806***	***100.0%***	***-***	***13,931,806***	***100.0%***
1 Fairmont Elementary School						
* Critical Needs	3,000,000	2,328,893	77.6%	671,107	1,561,047	52.0%
Legacy Project	3,864,259	3,864,259	100.0%	-	3,864,259	100.0%
	6,864,259	***6,193,151***	***90.2%***	***671,107***	***5,425,306***	***79.0%***
1 Ford Elementary School						
Legacy Project	30,817,526	30,817,526	100.0%	-	30,817,526	100.0%
	30,817,526	***30,817,526***	***100.0%***	***-***	***30,817,526***	***100.0%***
1 Grant Elementary School						
Critical Needs	211,467	211,467	100.0%	-	211,467	100.0%
Legacy Project	1,944,098	1,944,098	100.0%	-	1,944,098	100.0%
	2,155,565	***2,155,565***	***100.0%***	***-***	***2,155,565***	***100.0%***
1 Hanna Ranch Elementary School						
Legacy Project	783,349	783,349	100.0%	-	783,349	100.0%
	783,349	***783,349***	***100.0%***	***-***	***783,349***	***100.0%***
1 Harbour Way						
Legacy Project	121,944	121,944	100.0%	-	121,944	100.0%
	121,944	***121,944***	***100.0%***	***-***	***121,944***	***100.0%***

Consolidated Budget Status Report

Budgets versus Commitments and Expenditures for multiple Projects

Budget vs. Commitments and Expenditures

Fund 21 and Fund 35

Data as of 09/30/2020

	Budget	Commitments			Expenditures	
School/Project Name	Total Budget	Total Commitments	% Budget Commited	Remaining Against Budget	Total Expenditures	% Budget Spent
1 Harding Elementary School						
Legacy Project	22,632,446	22,632,446	100.0%	-	22,632,446	100.0%
	22,632,446	***22,632,446***	***100.0%***	***-***	***22,632,446***	***100.0%***
1 Harmon Knolls						
Critical Needs	406,946	406,946	100.0%	-	406,946	100.0%
Soil Testing	41,489	41,489	100.0%	-	41,489	100.0%
	448,435	***448,435***	***100.0%***	***-***	***448,435***	***100.0%***
1 Highland Elementary School						
* Water & Power Upgrade	747,125	-	0.0%	747,125	-	0.0%
Critical Needs	52,875	52,875	100.0%	-	52,875	100.0%
Legacy Project	1,879,839	1,879,839	100.0%	-	1,879,839	100.0%
	2,679,839	***1,932,714***	***72.1%***	***747,125***	***1,932,714***	***72.1%***
1 Kensington Elementary School						
Legacy Project	19,343,892	19,343,892	100.0%	-	19,343,892	100.0%
	19,343,892	***19,343,892***	***100.0%***	***-***	***19,343,892***	***100.0%***
1 King Elementary School						
Legacy Project	25,342,166	25,342,166	100.0%	-	25,342,166	100.0%
	25,342,166	***25,342,166***	***100.0%***	***-***	***25,342,166***	***100.0%***
1 Lake Elementary School						
* Campus Replacement	65,600,000	176,019	0.3%	65,423,981	142,119	0.2%
Legacy Project	1,500,322	1,500,322	100.0%	-	1,500,322	100.0%
Portable Demolition	147,501	147,501	100.0%	-	147,501	100.0%
	67,247,823	***1,823,842***	***2.7%***	***65,423,981***	***1,789,942***	***2.7%***
1 Lincoln Elementary School						
Legacy Project	17,676,561	17,676,561	100.0%	-	17,676,561	100.0%
	17,676,561	***17,676,561***	***100.0%***	***-***	***17,676,561***	***100.0%***
1 Lupine Hills Elementary School						
Legacy Project	15,395,678	15,395,678	100.0%	-	15,395,678	100.0%
	15,395,678	***15,395,678***	***100.0%***	***-***	***15,395,678***	***100.0%***
1 Madera Elementary School						
Legacy Project	12,233,801	12,233,801	100.0%	-	12,233,801	100.0%
	12,233,801	***12,233,801***	***100.0%***	***-***	***12,233,801***	***100.0%***
1 Michelle Obama School						
* Campus Replacement	40,300,000	39,601,358	98.3%	698,642	36,310,362	90.1%
Legacy Project	3,829,324	3,829,324	100.0%	-	3,829,324	100.0%
	44,129,324	***43,430,682***	***98.4%***	***698,642***	***40,139,686***	***91.0%***
1 Mira Vista K-8						
Legacy Project	16,651,130	16,651,130	100.0%	-	16,651,130	100.0%
	16,651,130	***16,651,130***	***100.0%***	***-***	***16,651,130***	***100.0%***
1 Montalvin K-8						
Additional New Classrooms	4,028,011	4,028,011	100.0%	-	4,028,011	100.0%
Legacy Project	12,763,017	12,763,017	100.0%	-	12,763,017	100.0%
	16,791,028	***16,791,028***	***100.0%***	***-***	***16,791,028***	***100.0%***
1 Murphy Elementary School						
Legacy Project	15,619,655	15,619,655	100.0%	-	15,619,655	100.0%
	15,619,655	***15,619,655***	***100.0%***	***-***	***15,619,655***	***100.0%***
1 Nystrom Elementary School						
Classroom Renovation	30,233,455	30,233,455	100.0%	-	30,233,455	100.0%
Demo Portable and Sitework	518,285	518,285	100.0%	-	518,285	100.0%
Legacy Project	5,442,234	5,442,234	100.0%	-	5,442,234	100.0%

Consolidated Budget Status Report

Budgets versus Commitments and Expenditures for multiple Projects

Budget vs. Commitments and Expenditures

Fund 21 and Fund 35

Data as of 09/30/2020

	Budget	Commitments			Expenditures	
School/Project Name	Total Budget	Total Commitments	% Budget Commited	Remaining Against Budget	Total Expenditures	% Budget Spent
Multi-purpose Room	11,606,839	11,606,839	100.0%	-	11,606,839	100.0%
	47,800,813	***47,800,813***	***100.0%***	***-***	***47,800,813***	***100.0%***
1 Ohlone Elementary School						
Classroom and Admin Building	24,508,510	24,508,510	100.0%	-	24,508,510	100.0%
Critical Needs	623,885	623,885	100.0%	-	623,885	100.0%
Legacy Project	3,962,598	3,962,598	100.0%	-	3,962,598	100.0%
Portable Removal and Playground	5,397,758	5,397,758	100.0%	-	5,397,758	100.0%
	34,492,752	***34,492,752***	***100.0%***	***-***	***34,492,752***	***100.0%***
1 Olinda Elementary School						
Critical Needs	793,247	793,247	100.0%	-	793,247	100.0%
Legacy Project	1,286,942	1,286,942	100.0%	-	1,286,942	100.0%
	2,080,188	***2,080,188***	***100.0%***	***-***	***2,080,188***	***100.0%***
1 Peres K-8						
Legacy Project	21,424,293	21,424,293	100.0%	-	21,424,293	100.0%
	21,424,293	***21,424,293***	***100.0%***	***-***	***21,424,293***	***100.0%***
1 RCP Charter School						
Legacy Project	4,415,204	4,415,204	100.0%	-	4,415,204	100.0%
	4,415,204	***4,415,204***	***100.0%***	***-***	***4,415,204***	***100.0%***
1 Riverside Elementary School						
* Critical Needs	6,900,000	299,540	4.3%	6,600,460	130,220	1.9%
Legacy Project	14,611,005	14,611,005	100.0%	-	14,611,005	100.0%
	21,511,005	***14,910,545***	***69.3%***	***6,600,460***	***14,741,225***	***68.5%***
1 Seaview Elementary School						
Legacy Project	499,116	499,116	100.0%	-	499,116	100.0%
	499,116	***499,116***	***100.0%***	***-***	***499,116***	***100.0%***
1 Shannon Elementary School						
* Critical Needs	7,100,000	-	0.0%	7,100,000	-	0.0%
Legacy Project	1,555,163	1,555,163	100.0%	-	1,555,163	100.0%
	8,655,163	***1,555,163***	***18.0%***	***7,100,000***	***1,555,163***	***18.0%***
1 Sheldon Elementary School						
Legacy Project	15,102,837	15,102,837	100.0%	-	15,102,837	100.0%
	15,102,837	***15,102,837***	***100.0%***	***-***	***15,102,837***	***100.0%***
1 Stege Elementary School						
* Critical Needs	2,900,000	35,900	1.2%	2,864,100	35,900	1.2%
Legacy Project	3,445,886	3,445,886	100.0%	-	3,445,886	100.0%
	6,345,886	***3,481,786***	***54.9%***	***2,864,100***	***3,481,786***	***54.9%***
1 Stewart K-8						
Legacy Project	16,737,037	16,737,037	100.0%	-	16,737,037	100.0%
	16,737,037	***16,737,037***	***100.0%***	***-***	***16,737,037***	***100.0%***
1 Tara Hills Elementary School						
Legacy Project	14,975,067	14,975,067	100.0%	-	14,975,067	100.0%
	14,975,067	***14,975,067***	***100.0%***	***-***	***14,975,067***	***100.0%***
1 TLC Elementary School						
Legacy Project	116,673	116,673	100.0%	-	116,673	100.0%
	116,673	***116,673***	***100.0%***	***-***	***116,673***	***100.0%***
1 Valley View Elementary School						
Critical Needs	1,091,447	1,091,447	100.0%	-	1,091,447	100.0%
Existing Campus Demo	33,096	33,096	100.0%	-	33,096	100.0%
Legacy Project	3,908,093	3,908,093	100.0%	-	3,908,093	100.0%
Portables	5,189,726	5,189,726	100.0%	-	5,189,726	100.0%

Consolidated Budget Status Report

Budgets versus Commitments and Expenditures for multiple Projects

Budget vs. Commitments and Expenditures

Fund 21 and Fund 35

Data as of 09/30/2020

	Budget	Commitments			Expenditures	
School/Project Name	Total Budget	Total Commitments	% Budget Commited	Remaining Against Budget	Total Expenditures	% Budget Spent
	10,222,362	***10,222,362***	***100.0%***	***-***	***10,222,362***	***100.0%***
1 Verde K-8						
Legacy Project	16,065,870	16,065,870	100.0%	-	16,065,870	100.0%
	16,065,870	***16,065,870***	***100.0%***	***-***	***16,065,870***	***100.0%***
1 Washington Elementary School						
Legacy Project	15,322,847	15,322,847	100.0%	-	15,322,847	100.0%
	15,322,847	***15,322,847***	***100.0%***	***-***	***15,322,847***	***100.0%***
1 West Hercules						
Legacy Project	56,847	56,847	100.0%	-	56,847	100.0%
	56,847	***56,847***	***100.0%***	***-***	***56,847***	***100.0%***
2 Adams Middle School						
Legacy Project	691,211	691,211	100.0%	-	691,211	100.0%
	691,211	***691,211***	***100.0%***	***-***	***691,211***	***100.0%***
2 Crespi Middle School						
* Critical Needs	5,300,000	5,026,010	94.8%	273,990	4,973,021	93.8%
Legacy Project	1,245,896	1,245,896	100.0%	-	1,245,896	100.0%
	6,545,896	***6,271,906***	***95.8%***	***273,990***	***6,218,916***	***95.0%***
2 DeJean Middle School						
Legacy Project	381,209	381,209	100.0%	-	381,209	100.0%
	381,209	***381,209***	***100.0%***	***-***	***381,209***	***100.0%***
2 Helms Middle School						
Legacy Project	83,432,888	83,432,888	100.0%	-	83,432,888	100.0%
	83,432,888	***83,432,888***	***100.0%***	***-***	***83,432,888***	***100.0%***
2 Hercules Middle School						
Legacy Project	699,000	699,000	100.0%	-	699,000	100.0%
	699,000	***699,000***	***100.0%***	***-***	***699,000***	***100.0%***
2 Korematsu Middle School						
* New Buildings	53,439,076	52,979,318	99.1%	459,758	52,714,188	98.6%
Legacy Project	19,943,103	19,943,103	100.0%	-	19,943,103	100.0%
	73,382,179	***72,922,421***	***99.4%***	***459,758***	***72,657,291***	***99.0%***
2 Pinole Middle School						
Legacy Project	56,689,430	56,689,430	100.0%	-	56,689,430	100.0%
	56,689,430	***56,689,430***	***100.0%***	***-***	***56,689,430***	***100.0%***
3 De Anza High School						
Legacy Project	132,236,248	132,236,248	100.0%	-	132,236,248	100.0%
	132,236,248	***132,236,248***	***100.0%***	***-***	***132,236,248***	***100.0%***
3 DELTA NSS						
Legacy Project	152,226	152,226	100.0%	-	152,226	100.0%
	152,226	***152,226***	***100.0%***	***-***	***152,226***	***100.0%***
3 El Cerrito High School						
Legacy Project	128,477,500	128,477,500	100.0%	-	128,477,500	100.0%
Stadium	18,372,605	18,372,605	100.0%	-	18,372,605	100.0%
	146,850,105	***146,850,105***	***100.0%***	***-***	***146,850,105***	***100.0%***
3 Greenwood High School						
Legacy Project	79,583,607	79,583,607	100.0%	-	79,583,607	100.0%
	79,583,607	***79,583,607***	***100.0%***	***-***	***79,583,607***	***100.0%***
3 Hercules High School						
* Critical Needs	14,700,000	-	0.0%	14,700,000	-	0.0%
Legacy Project	3,295,019	3,295,019	100.0%	-	3,295,019	100.0%
	17,995,019	***3,295,019***	***18.3%***	***14,700,000***	***3,295,019***	***18.3%***

Consolidated Budget Status Report

Budgets versus Commitments and Expenditures for multiple Projects

Budget vs. Commitments and Expenditures

Fund 21 and Fund 35

Data as of 09/30/2020

	Budget	Commitments			Expenditures	
School/Project Name	Total Budget	Total Commitments	% Budget Commited	Remaining Against Budget	Total Expenditures	% Budget Spent
3 KAPPA NSS						
Legacy Project	109,831	109,831	100.0%	-	109,831	100.0%
	109,831	***109,831***	***100.0%***	***-***	***109,831***	***100.0%***
3 Kennedy High School						
* Critical Needs	12,200,000	-	0.0%	12,200,000	-	0.0%
Legacy Project	33,854,981	33,854,981	100.0%	-	33,854,981	100.0%
	46,054,981	***33,854,981***	***73.5%***	***12,200,000***	***33,854,981***	***73.5%***
3 North Campus High School						
Legacy Project	205,450	205,450	100.0%	-	205,450	100.0%
	205,450	***205,450***	***100.0%***	***-***	***205,450***	***100.0%***
3 OMEGA NSS						
Legacy Project	118,313	118,313	100.0%	-	118,313	100.0%
	118,313	***118,313***	***100.0%***	***-***	***118,313***	***100.0%***
3 Pinole Valley High School						
* Campus Replacement	154,556,889	154,111,689	99.7%	445,200	154,056,807	99.7%
* Fields/Sitework	19,184,130	207,860	1.1%	18,976,270	207,860	1.1%
* Interim Campus Demo	3,628,013	3,625,096	99.9%	2,917	3,625,096	99.9%
* Site Design	17,942,716	17,935,214	100.0%	7,502	17,268,532	96.2%
Detention Basin and Paving	3,517,521	3,517,521	100.0%	-	3,517,521	100.0%
Existing Building Demolition	2,511,397	2,511,397	100.0%	-	2,511,397	100.0%
Hillside Stabilization	2,199,821	2,199,821	100.0%	-	2,199,821	100.0%
Interim Campus	8,796,248	8,796,248	100.0%	-	8,796,248	100.0%
Legacy Furniture & Equipment	36,520	36,520	100.0%	-	36,520	100.0%
Legacy Program Cost	696,938	696,938	100.0%	-	696,938	100.0%
Legacy Restroom Renovation	167,601	167,601	100.0%	-	167,601	100.0%
Legacy Technology	37,165	37,165	100.0%	-	37,165	100.0%
Legacy Track	1,676,771	1,676,771	100.0%	-	1,676,771	100.0%
Off Site Parking and Traffic	1,240,584	1,240,584	100.0%	-	1,240,584	100.0%
Video Surveillance System	357,268	357,268	100.0%	-	357,268	100.0%
	216,549,580	***197,117,692***	***91.0%***	***19,431,888***	***196,396,128***	***90.7%***
3 Richmond High School						
* Gym and Seismic Classroom	21,000,000	20,707,181	98.6%	292,819	12,299,116	58.6%
Legacy Project	21,622,087	21,622,087	100.0%	-	21,622,087	100.0%
	42,622,087	***42,329,269***	***99.3%***	***292,819***	***33,921,203***	***79.6%***
3 SIGMA NSS						
Legacy Project	110,949	110,949	100.0%	-	110,949	100.0%
	110,949	***110,949***	***100.0%***	***-***	***110,949***	***100.0%***
3 Vista High School						
Legacy Project	7,236,543	7,236,543	100.0%	-	7,236,543	100.0%
	7,236,543	***7,236,543***	***100.0%***	***-***	***7,236,543***	***100.0%***
4 Technology						
* Infrastructure	15,004,976	14,299,306	95.3%	705,670	14,299,306	95.3%
Computer Common Core	3,903,858	3,903,858	100.0%	-	3,903,858	100.0%
District Network Backbone	568,416	568,416	100.0%	-	568,416	100.0%
IT Data Center	1,400,746	1,400,746	100.0%	-	1,400,746	100.0%
Teacher Equipment	112,360	112,360	100.0%	-	112,360	100.0%
Tech Communication	1,130,966	1,130,966	100.0%	-	1,130,966	100.0%
Technology Equipment	1,885,661	1,885,661	100.0%	-	1,885,661	100.0%
Technology Wireless	10,993,016	10,993,016	100.0%	-	10,993,016	100.0%
	35,000,000	***34,294,330***	***98.0%***	***705,670***	***34,294,330***	***98.0%***

Consolidated Budget Status Report

Budgets versus Commitments and Expenditures for multiple Projects

Budget vs. Commitments and Expenditures

Fund 21 and Fund 35

Data as of 09/30/2020

	Budget	Commitments			Expenditures	
School/Project Name	Total Budget	Total Commitments	% Budget Commited	Remaining Against Budget	Total Expenditures	% Budget Spent
4 Central						
District Support	54,739,766	53,968,196	98.6%	771,570	52,875,695	96.6%
Program Coordination	48,091,868	46,897,311	97.5%	1,194,557	46,114,471	95.9%
	102,831,634	***100,865,507***	***98.1%***	***1,966,128***	***98,990,166***	***96.3%***
Totals	***1,756,329,646***	***1,617,393,978***	***92.1%***	***138,935,668***	***1,601,808,826***	***91.2%***

Note 1: * Site Projects are under planning, construction or in closeout.
Note 2: 1 School Name - Elementary school site name
Note 3: 2 School Name - Middle school site name
Note 4: 3 School Name - High school site name
Note 5: 4 Central/Program Name
Note 6: BOE approved supplemental fund for Michelle Obama school: Fund 25 of $1.75M and Fund 01 MRAD of $0.85M on 6/26/19
Note 7: BOE approved supplemental fund for Richmond HS: Fund 40 of $1M on 11/06/19
Note 8: BOE approved supplemental fund for Michelle Obama school: Fund 25 of $2M on 06/24/20
Note 9: BOE approved supplemental fund for Richmond HS: Fund 40 of $0.6M on 09/09/20
Note 10: 2016 FMP budget for Hercules MS & Hercules HS is combined and reported under Hercules HS
Note 11: Measure 1998E is not covered under Proposition 39 regulations for school bonds, and is not ordinarily reported in the Bond Program expenditure reports. The following report shows Measure 1998E projects by site with state funded DeJean middle school project.

Measure 1998E Project						
DeJean Middle School	36,836,215.33	36,836,215.33	100.0%	-	36,836,215.33	100.0%
1998E Project	*23,994,285.33*	*23,994,285.33*	*100.0%*	-	*23,994,285.33*	*100.0%*
State Fund Project	*12,841,930.00*	*12,841,930.00*	*100.0%*	-	*12,841,930.00*	*100.0%*
Pinole Valley High School	190,570.61	190,570.61	100.0%	-	190,570.61	100.0%
Central Program Coordination	16,276,517.57	16,276,517.57	100.0%	-	16,276,517.57	100.0%
Total	***53,303,303.51***	***53,303,303.51***	***100.0%***	***-***	***53,303,303.51***	***100.0%***

Consolidated Budget Status Report

Budgets versus Commitments and Expenditures for multiple Projects

Budget vs. Commitments and Expenditures

2016 MASTER PLAN PROJECT

Fund 21 and Fund 35

Data as of 09/30/2020

School/Project Name	Budget			Commitments			Expenditures	
	Original Budget	Approved Budget Changes	Total Budget	Total Commitments	% Budget Commited	Remaining Against Budget	Total Expenditures	% Budget Spent
1 Cameron								
* Critical Needs	1,300,000	-	1,300,000	-	0.0%	1,300,000	-	0.0%
	1,300,000	***-***	***1,300,000***	***-***	***0.0%***	***1,300,000***	***-***	***0.0%***
1 Chavez Elementary School								
Critical Needs	600,000	(527,153)	72,847	72,847	100.0%	-	72,847	100.0%
	600,000	***(527,153)***	***72,847***	***72,847***	***100.0%***	***-***	***72,847***	***100.0%***
1 Collins Elementary School								
* Critical Needs	3,500,000	-	3,500,000	-	0.0%	3,500,000	-	0.0%
	3,500,000	***-***	***3,500,000***	***-***	***0.0%***	***3,500,000***	***-***	***0.0%***
1 Fairmont Elementary School								
* Critical Needs	3,000,000	-	3,000,000	2,328,893	77.6%	671,107	1,561,047	52.0%
	3,000,000	***-***	***3,000,000***	***2,328,893***	***77.6%***	***671,107***	***1,561,047***	***52.0%***
1 Grant Elementary School								
Critical Needs	900,000	(688,533)	211,467	211,467	100.0%	-	211,467	100.0%
	900,000	***(688,533)***	***211,467***	***211,467***	***100.0%***	***-***	***211,467***	***100.0%***
1 Harmon Knolls								
Critical Needs	200,000	206,946	406,946	406,946	100.0%	-	406,946	100.0%
Soil Testing	100,000	(58,511)	41,489	41,489	100.0%	-	41,489	100.0%
	300,000	***148,435***	***448,435***	***448,435***	***100.0%***	***-***	***448,435***	***100.0%***
1 Highland Elementary School								
* Water & Power Upgrade	-	747,125	747,125	-	0.0%	747,125	-	0.0%
Critical Needs	800,000	(747,125)	52,875	52,875	100.0%	-	52,875	100.0%
	800,000	***-***	***800,000***	***52,875***	***6.6%***	***747,125***	***52,875***	***6.6%***
1 Lake Elementary School								
* Campus Replacement	65,600,000	-	65,600,000	176,019	0.3%	65,423,981	142,119	0.2%
Portable Demolition	500,000	(352,499)	147,501	147,501	100.0%	-	147,501	100.0%
	66,100,000	***(352,499)***	***65,747,501***	***323,520***	***0.5%***	***65,423,981***	***289,620***	***0.4%***
1 Michelle Obama School								
* Campus Replacement	40,300,000	-	40,300,000	39,601,358	98.3%	698,642	36,310,362	90.1%
	40,300,000	***-***	***40,300,000***	***39,601,358***	***98.3%***	***698,642***	***36,310,362***	***90.1%***
1 Ohlone Elementary School								
Critical Needs	800,000	(176,115)	623,885	623,885	100.0%	-	623,885	100.0%
	800,000	***(176,115)***	***623,885***	***623,885***	***100.0%***	***-***	***623,885***	***100.0%***
1 Olinda Elementary School								
Critical Needs	1,000,000	(206,753)	793,247	793,247	100.0%	-	793,247	100.0%
	1,000,000	***(206,753)***	***793,247***	***793,247***	***100.0%***	***-***	***793,247***	***100.0%***
1 Riverside Elementary School								
* Critical Needs	6,900,000	-	6,900,000	299,540	4.3%	6,600,460	130,220	1.9%
	6,900,000	***-***	***6,900,000***	***299,540***	***4.3%***	***6,600,460***	***130,220***	***1.9%***
1 Shannon Elementary School								
* Critical Needs	7,100,000	-	7,100,000	-	0.0%	7,100,000	-	0.0%
	7,100,000	***-***	***7,100,000***	***-***	***0.0%***	***7,100,000***	***-***	***0.0%***
1 Stege Elementary School								
* Critical Needs	2,900,000	-	2,900,000	35,900	1.2%	2,864,100	35,900	1.2%
	2,900,000	***-***	***2,900,000***	***35,900***	***1.2%***	***2,864,100***	***35,900***	***1.2%***
1 Valley View Elementary School								
Critical Needs	1,000,000	91,447	1,091,447	1,091,447	100.0%	-	1,091,447	100.0%
	1,000,000	***91,447***	***1,091,447***	***1,091,447***	***100.0%***	***-***	***1,091,447***	***100.0%***
2 Crespi Middle School								
* Critical Needs	3,100,000	2,200,000	5,300,000	5,026,010	94.8%	273,990	4,973,021	93.8%
	3,100,000	***2,200,000***	***5,300,000***	***5,026,010***	***94.8%***	***273,990***	***4,973,021***	***93.8%***

Consolidated Budget Status Report

Budgets versus Commitments and Expenditures for multiple Projects

Budget vs. Commitments and Expenditures

2016 MASTER PLAN PROJECT

Fund 21 and Fund 35

Data as of 09/30/2020

School/Project Name	Budget			Commitments			Expenditures	
	Original Budget	Approved Budget Changes	Total Budget	Total Commitments	% Budget Commited	Remaining Against Budget	Total Expenditures	% Budget Spent
3 Hercules High School								
* Critical Needs	14,700,000	-	14,700,000	-	0.0%	14,700,000	-	0.0%
	14,700,000	***-***	***14,700,000***	***-***	***0.0%***	***14,700,000***	***-***	***0.0%***
3 Kennedy High School								
* Critical Needs	12,200,000	-	12,200,000	-	0.0%	12,200,000	-	0.0%
	12,200,000	***-***	***12,200,000***	***-***	***0.0%***	***12,200,000***	***-***	***0.0%***
3 Richmond High School								
* Gym and Seismic Classroom	15,100,000	5,900,000	21,000,000	20,707,181	98.6%	292,819	12,299,116	58.6%
	15,100,000	***5,900,000***	***21,000,000***	***20,707,181***	***98.6%***	***292,819***	***12,299,116***	***58.6%***
4 Central								
Program Coordination (Ed Specs & School Size)	200,000	-	200,000	148,128	74.1%	51,872	148,128	74.1%
	200,000	***-***	***200,000***	***148,128***	***74.1%***	***51,872***	***148,128***	***74.1%***
Totals	***181,800,000***	***6,388,828***	***188,188,828***	***71,764,733***	***38.1%***	***116,424,095***	***59,041,615***	***31.4%***

Note 1: * Site Projects are under planning, construction or in closeout.
Note 2: 1 School Name - Elementary school site name
Note 3: 2 School Name - Middle school site name
Note 4: 3 School Name - High school site name
Note 5: 4 Central/Program Name
Note 6: BOE approved supplemental fund for Michelle Obama school: Fund 25 of $1.75M and Fund 01 MRAD of $0.85M on 6/26/19
Note 7: BOE approved supplemental fund for Richmond HS: Fund 40 of $1M on 11/06/19
Note 8: BOE approved supplemental fund for Michelle Obama school: Fund 25 of $2M on 06/24/20
Note 9: BOE approved supplemental fund for Richmond HS: Fund 40 of $0.6M on 09/09/20
Note 10: 2016 FMP budget for Hercules MS & Hercules HS is combined and reported under Hercules HS

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WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
Bond Program Spending to Date by Site
Data as of 09/30/2020

Updated 10/06/2020

Site Name	Original Budget *	Board Approved Budget 07/29/20	Expended FY 99-01 thru FY 19-20	Expended FY 20-21 Jul-Sep	Expended Total thru 09/30/20	Committed Balance as of 09/30/20	Budget Balance as of 09/30/20	Notes
BAYVIEW	**17,732,392**	**19,850,802**	19,850,802	-	**19,850,802**	**-**	**-**	Footnote 1
CHAVEZ	**1,339,784**	**1,058,234**	1,058,234	-	**1,058,234**	**-**	**-**	Footnote 1
COLLINS	**993,294**	**5,138,871**	1,638,871	-	**1,638,871**	**-**	**3,500,000**	Footnote 3
CORONADO	**11,278,047**	**43,022,627**	43,022,627	-	**43,022,627**	**-**	**-**	Footnote 1
DOVER	**13,070,243**	**35,095,267**	35,095,267	-	**35,095,267**	**-**	**-**	Footnote 1
DOWNER	**28,819,079**	**33,415,902**	33,415,902	-	**33,415,902**	**-**	**-**	Footnote 1
ELLERHORST	**11,238,341**	**13,931,806**	13,931,806	-	**13,931,806**	**-**	**-**	Footnote 1
FAIRMONT	**10,971,356**	**6,864,259**	4,809,942	615,363	**5,425,306**	**767,846**	**671,107**	Footnote 3
FORD	**11,839,322**	**30,817,526**	30,817,526	-	**30,817,526**	**-**	**-**	Footnote 1
GRANT	**1,409,600**	**2,155,565**	2,155,565	-	**2,155,565**	**-**	**-**	Footnote 1
HANNA RANCH	**680,923**	**783,349**	783,349	-	**783,349**	**-**	**-**	Footnote 1
HARDING	**15,574,211**	**22,632,446**	22,632,446	-	**22,632,446**	**-**	**-**	Footnote 1
HARMON KNOLLS	**-**	**448,435**	448,435	-	**448,435**	**-**	**-**	Footnote 1
HIGHLAND	**13,504,714**	**2,679,839**	1,932,714	-	**1,932,714**	**-**	**747,125**	Footnote 3
KENSINGTON	**16,397,920**	**19,343,892**	19,343,892	-	**19,343,892**	**-**	**-**	Footnote 1
KING	**16,688,732**	**25,342,166**	25,342,166	-	**25,342,166**	**-**	**-**	Footnote 1
LAKE	**822,657**	**67,247,823**	1,745,473	44,469	**1,789,942**	**33,900**	**65,423,981**	Footnote 3
LINCOLN	**15,225,821**	**17,676,561**	17,676,561	-	**17,676,561**	**-**	**-**	Footnote 1
LUPINE HILLS	**16,111,242**	**15,395,678**	15,395,678	-	**15,395,678**	**-**	**-**	Footnote 1
MADERA	**11,088,764**	**12,233,801**	12,233,801	-	**12,233,801**	**-**	**-**	Footnote 1
MICHELLE OBAMA**	**13,673,885**	**44,129,324**	37,302,187	2,837,499	**40,139,686**	**3,290,996**	**698,642**	Footnote 3
MIRA VISTA	**13,928,364**	**16,651,130**	16,651,130	-	**16,651,130**	**-**	**-**	Footnote 1
MONTALVIN	**15,904,716**	**16,791,028**	16,791,028	-	**16,791,028**	**-**	**-**	Footnote 1
MURPHY	**13,554,495**	**15,619,655**	15,619,655	-	**15,619,655**	**-**	**-**	Footnote 1
NYSTROM	**20,999,690**	**47,800,813**	47,800,813	-	**47,800,813**	**-**	**(0)**	Footnote 1
OHLONE	**14,174,928**	**34,492,752**	34,492,752	-	**34,492,752**	**-**	**-**	Footnote 1
OLINDA	**1,170,596**	**2,080,188**	2,080,188	-	**2,080,188**	**-**	**-**	Footnote 1
PERES	**19,752,789**	**21,424,293**	21,424,293	-	**21,424,293**	**-**	**-**	Footnote 1
RIVERSIDE	**13,439,831**	**21,511,005**	14,741,225	-	**14,741,225**	**169,320**	**6,600,460**	Footnote 3
SHANNON	**1,157,736**	**8,655,163**	1,555,163	-	**1,555,163**	**-**	**7,100,000**	Footnote 3
SHELDON	**14,968,745**	**15,102,837**	15,102,837	-	**15,102,837**	**-**	**-**	Footnote 1
STEGE	**13,000,749**	**6,345,886**	3,481,786	-	**3,481,786**	**-**	**2,864,100**	Footnote 3
STEWART	**12,710,427**	**16,737,037**	16,737,037	-	**16,737,037**	**-**	**-**	Footnote 1
TARA HILLS	**14,160,935**	**14,975,067**	14,975,067	-	**14,975,067**	**-**	**-**	Footnote 1
VALLEY VIEW	**11,117,405**	**10,222,362**	10,222,362	-	**10,222,362**	**-**	**-**	Footnote 1
VERDE	**15,709,690**	**16,065,870**	16,065,870	-	**16,065,870**	**-**	**-**	Footnote 1
WASHINGTON	**14,051,720**	**15,322,847**	15,322,847	-	**15,322,847**	**-**	**-**	Footnote 1
Elementary Total	**438,263,142**	**699,062,105**	**603,697,297**	**3,497,331**	**607,194,628**	**4,262,062**	**87,605,415**	
CRESPI MS	**1,205,711**	**6,545,896**	6,218,766	150	**6,218,916**	**52,990**	**273,990**	Footnote 3
DEJEAN MS	**64,929**	**381,209**	381,209	-	**381,209**	**-**	**-**	Footnote 1
HELMS MS	**61,287,986**	**83,432,888**	83,432,888	-	**83,432,888**	**-**	**-**	Footnote 1
HERCULES MS	**602,982**	**699,000**	699,000	-	**699,000**	**-**	**-**	Footnote 1
KOREMATSU MS	**37,937,901**	**73,382,179**	72,657,291	-	**72,657,291**	**265,130**	**459,758**	Footnote 2
PINOLE MS	**38,828,979**	**56,689,430**	56,689,430	-	**56,689,430**	**-**	**-**	Footnote 1
Middle Sch Total	**139,928,488**	**221,130,602**	**220,078,584**	**150**	**220,078,734**	**318,120**	**733,748**	

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WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
Bond Program Spending to Date by Site
Data as of 09/30/2020

Updated 10/06/2020

Site Name	Original Budget *	Board Approved Budget 07/29/20	Expended FY 99-01 thru FY 19-20	Expended FY 20-21 Jul-Sep	Expended Total thru 09/30/20	Committed Balance as of 09/30/20	Budget Balance as of 09/30/20	Notes
DE ANZA HS	**105,389,888**	**132,236,248**	132,236,248	-	**132,236,248**	**-**	**-**	Footnote 1
EL CERRITO HS	**93,605,815**	**146,850,105**	146,850,105	-	**146,850,105**	**-**	**-**	Footnote 1
GREENWOOD	**35,315,772**	**79,583,607**	79,583,607	-	**79,583,607**	**-**	**-**	Footnote 1
HERCULES HS	**12,603,343**	**17,995,019**	3,295,019	-	**3,295,019**	**-**	**14,700,000**	Footnote 3
KENNEDY HS	**89,903,130**	**46,054,981**	33,854,981	-	**33,854,981**	**-**	**12,200,000**	Footnote 3
PINOLE VALLEY HS	**124,040,286**	**216,549,580**	196,481,690	(85,563)	**196,396,128**	**721,564**	**19,431,888**	Footnote 2
RICHMOND HS	**94,720,910**	**42,622,087**	30,559,099	3,362,104	**33,921,203**	**8,408,066**	**292,819**	Footnote 3
VISTA HS	**3,566,208**	**7,236,543**	7,236,543	-	**7,236,543**	**-**	**0**	Footnote 1
High Sch Total	**559,145,352**	**689,128,170**	**630,097,292**	**3,276,541**	**633,373,834**	**9,129,630**	**46,624,707**	
ADAMS MS	**703,660**	**691,211**	691,211	-	**691,211**	**-**	**-**	Footnote 1
CAMERON	**284,012**	**1,422,195**	122,195	-	**122,195**	**-**	**1,300,000**	Footnote 3
CASTRO	**11,901,504**	**620,944**	620,944	-	**620,944**	**-**	**-**	Footnote 1
DELTA NSS	**152,564**	**152,226**	152,226	-	**152,226**	**-**	**-**	Footnote 1
EL SOBRANTE	**187,343**	**536,231**	536,231	-	**536,231**	**-**	**-**	Footnote 1
HARBOUR WAY	**121,639**	**121,944**	121,944	-	**121,944**	**-**	**-**	Footnote 1
KAPPA NSS	**109,809**	**109,831**	109,831	-	**109,831**	**-**	**-**	Footnote 1
NORTH CAMPUS	**169,849**	**205,450**	205,450	-	**205,450**	**-**	**-**	Footnote 1
OMEGA NSS	**117,742**	**118,313**	118,313	-	**118,313**	**-**	**-**	Footnote 1
SEAVIEW	**178,534**	**499,116**	499,116	-	**499,116**	**-**	**-**	Footnote 1
SIGMA NSS	**110,728**	**110,949**	110,949	-	**110,949**	**-**	**-**	Footnote 1
TLC	**118,020**	**116,673**	116,673	-	**116,673**	**-**	**-**	Footnote 1
WEST HERCULES	**-**	**56,847**	56,847	-	**56,847**	**-**	**-**	Footnote 1
Closed/Program Total	**14,155,404**	**4,761,930**	**3,461,930**	**-**	**3,461,930**	**-**	**1,300,000**	
CENTRAL	**67,713,312**	**102,831,634**	98,466,020	524,146	**98,990,166**	**1,875,340**	**1,966,128**	Budget thru 20-21
RCP CHARTER	**8,148,550**	**4,415,204**	4,415,204	-	**4,415,204**	**-**	**-**	Footnote 1
TECHNOLOGY	**35,000,000**	**35,000,000**	34,294,330	-	**34,294,330**	**-**	**705,670**	Footnote 2
Admin/Other Total	**110,861,862**	**142,246,838**	**137,175,554**	**524,146**	**137,699,700**	**1,875,340**	**2,671,798**	
GRAND TOTAL	**1,262,354,248**	**1,756,329,646**	**1,594,510,658**	**7,298,168**	**1,601,808,826**	**15,585,152**	**138,935,668**	

** Original Budget provided is based on Report#2 dated April 30, 2018, and has not been reconciled.*

*** Board approved renaming of Wilson Elementary school to Michelle Obama School on 02/12/20.*

Footnote 1: Site projects are completed.

Footnote 2: Site Legacy projects are under planning, construction or in closeout.

Footnote 3: Site Legacy projects are completed and 2016 Facilities Master Plan Projects are under planning, construction or in closeout.

Note:. Measure 1998E is not covered under Proposition 39 regulations for school bonds, and is not ordinarily reported in the Bond Program expenditure reports.

The following report shows Measure 1998E projects by site with state funded DeJean middle school project.

Measure 1998E Project	Budget	Expended	
DeJean Middle School	36,836,215	36,836,215	-
1998E Project	*23,994,285*	*23,994,285*	-
State Fund Project	*12,841,930*	*12,841,930*	-
Pinole Valley High School	190,571	190,571	-
Central Program Coordination	16,276,518	16,276,518	-
Total	**53,303,304**	**53,303,304**	**-**

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WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
Bond Program Financial Status
As of September 30, 2020

Cash Projection to June-2021

			Notes
Adjusted Cash Balance		**174,779,099**	**1**
Projected Revenues			
Interest Earning & Other Revenue	$ 3,370,000	$ 3,370,000	**2**
Projected Available Funds		**$ 178,149,099**	
Budget Balance			
Board Approved Budget		$ 1,756,329,646	**3**
Less Expenses to Date		$ (1,601,808,826)	**3**
Current budget balance		**$ 154,520,820**	
Projected Cash Balance June 2021		**$ 23,628,280**	

State Facility Grants Pending State Approval

Estimated after current planning period:	$ 12,340,748	**4**

Items Pending Board Approval

Future Bond Sale 2020 Measure R	$ 575,000,000	
2022-2023 Estimated Central Cost	$ 5,963,011	**6**
2022-2023 Estimated Other Revenue	$ 2,530,000	**2**

WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
Bond Program Financial Status
As of September 30, 2020

Note 1 Adjusted Cash Balance

Description		Amount	Comments
Cash & Equivalents Building Fund 21	$	175,136,926	**A**
Cash & Equivalents County School Facilities Fund 35	$	-	**B**
Cash with Fiscal Agent (contract retentions)	$	1,832,770	**C** 3rd-Party held Retention
Accounts Receivable	$	-	
Accounts Payable	$	-	**D**
Contract Retention	$	(2,190,597)	**C** District held Retention
Adjusted Cash Balance	**$**	**174,779,099**	

Comments

A. The cash balance is reflective of financial data from MUNIS.

B. California School Facilities Grants are deposited into the County School Facilities Fund 35 and subsequently transferred to the Building Fund 21.

C. This liability is deducted from the contractor's process payment and retained; it is deposited in a Third party escrow account or accumulated and held by the district. The amounts are reflective of financial data from MUNIS.

D. Accounts payable is reflective of financial data from MUNIS.

WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
Bond Program Financial Status
As of September 30, 2020

Note 2 Projected Revenues

Fiscal Year	Bond Sales 2010 Measure D	Bond Sales 2012 Measure E	Less: Cost of Bond Issuance	Interest Earnings & Other Revenue	Total
FY2021				$ 3,370,000	$ 3,370,000
Sub-Totals	$ -	$ -	$ -	$ 3,370,000	$ 3,370,000
FY2022				$ 1,530,000	$ 1,530,000
FY2023				$ 1,000,000	$ 1,000,000
Sub-Total	$ -	$ -	$ -	$ 2,530,000	$ 2,530,000
Grand Total	**$ -**	**$ -**	**$ -**	**$ 5,900,000**	**$ 5,900,000**

Note 3 Budget Balance

Description	Note
Board Approved Budget	This represents the current board approved budget amount and should agree with Report#2, Bond Program Spending by Site.
Expenses to Date	This is total expended amount from FY 1999-01 thru Current Fiscal Year Perid and should agree with Report#2, Bond Program Spending by Site.

WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
Bond Program Financial Status
As of September 30, 2020

Note 4 State Facility Grants

Upon release of funds by the California State Allocation Board the State Controller prepares the checks which are then mailed to the County Treasurer for deposit into the District's bank account Fund 35 (County School Facilities Fund) and subsequently are transferred to Fund 21, Building Fund.

School	Funding	OPSC * Status	SAB** Approval[1]	SAB** Funded	Amount
Helms MS	Modernization	On Workload List	Est: 01/23-06/23	Est: Jul-23	$ 4,133,414
Crespi MS	Modernization	On Workload List	Est: 07/23-12/23	Est: Feb-24	$ 3,482,164
De Anza IT Academy	CTE	Approved	9/30/2020		$ 462,307
De Anza Health Academy	CTE	Approved	9/30/2020		$ 1,223,970
De Anza Law Academy	CTE	Approved	9/30/2020		$ 1,348,434
El Cerrito IT Academy	CTE	Approved	9/30/2020		$ 1,037,417
El Cerrito Media Academy	CTE	Approved	9/30/2020		$ 653,042
				Total	**$ 12,340,748**

***Office of Public School Construction - OPSC**

****State Allocation Board - SAB**

[1] Last updated 09/30/2020

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WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
Bond Program Financial Status
As of September 30, 2020

Note 5: 2016 Facilities Master Plan Projects

The Board of Education received the Implementation Plan with the draft Master Plan on June 15, 2016 and approved them unanimously. The Board approved Implementation Plan - Model one, which includes the following projects with the project cost, including inflation:

School	Project Type	FMP 2016	Current Budget
Ed Specs & School Size		$ 200,000	$ 200,000
Cameron School	Critical Needs	$ 1,300,000	$ 1,300,000
Chavez Elementary School	Critical Needs	$ 600,000	$ 72,847
Collin Elementary School	Critical Needs	$ 3,500,000	$ 3,500,000
Crespi Middle School	Critical Needs	$ 3,100,000	$ 5,300,000
Fairmont Elementary School	Critical Needs	$ 3,000,000	$ 3,000,000
Grant Elementary School	Critical Needs	$ 900,000	$ 211,467
Harmon Knolls	Critical Needs	$ 200,000	$ 406,946
Harmon Knolls	Soils Testing	$ 100,000	$ 41,489
Hercules Middle School***	Critical Needs	$ 7,500,000	$ 7,500,000
Hercules High School***	Critical Needs	$ 7,200,000	$ 7,200,000
Highland Elementary School	Critical Needs	$ 800,000	$ 800,000
Kennedy High School	Critical Needs	$ 12,200,000	$ 12,200,000
Lake Elementary School	Critical Needs	$ -	$ 147,501
Lake Elementary School	RS Replacement	$ 66,100,000	$ 65,600,000
M Obama Elementary School*	RS Replacement	$ 40,300,000	$ 40,300,000
Ohlone Elementary School	Critical Needs	$ 800,000	$ 623,885
Olinda Elementary School	Critical Needs	$ 1,000,000	$ 793,247
Richmond High School**	Critical Needs	$ 15,100,000	$ 21,000,000
Riverside Elementary School	Critical Needs	$ 6,900,000	$ 6,900,000
Shannon Elementary School	Critical Needs	$ 7,100,000	$ 7,100,000
Stege Elementary School	Critical Needs	$ 2,900,000	$ 2,900,000
Valley View Elementary School	Critical Needs	$ 1,000,000	$ 1,091,447
TOTAL IMPLEMENTATION PLAN MODEL 1		**$ 181,800,000**	**$ 188,188,828**

** BOE approved supplemental fund for Obama ES: Fund 25 of $1.75M and Fund 01 MRAD of $0.85M on 06/26/19*

** BOE approved supplemental fund for Obama ES: Fund 25 of $2M on 06/24/20*

*** BOE approved supplemental fund for Richmond HS: Fund 40 of $1M on 11/06/19*

*** BOE approved supplemental fund for Richmond HS: Fund 40 of $0.6M on 09/09/20*

**** 2016 FMP scope and budget for Hercules MS & Hercules HS is for a singular project so the combind budget will be reported under Hercules HS on various financial reports*

Definition of ROM[1]

Five percent inflation has been applied from mid-2016 to the scheduled midpoint of construction, compounded yearly, to account for inflation. These "Rough Order of Magnitude" (R.O.M.) cost estimates, which are based on general cost per square foot, do not include market-based contract escalation (if any) above 5% annual inflation.

Additionally, the cost of temporary housing has been included where it was known to be required at the time of the Master Plan (e.g., at Lake Elementary). It has not been included where it was not anticipated prior to the release of the Master Plan (e.g., at M Obama Elementary).

Note that further Architectural and Engineering studies are required, including scoping and budgeting, for all Critical Needs.

*In June 2016 the Board approved $181,800,000 FMP since then the following budget revisions have been approved by the Board:

- Harmon Knolls $250,000 and Valley View $150,000 on 08/09/17; Grant <$688,533>, Harmon Knolls <$101,565>, Lake <$352,499>, Ohlone <$176,115>, & Valley View <$58,553> on 07/25/18; Richmond $3,900,000 on 11/14/18; Crespi $2,200,000 on 03/20/19; Chavez <$572,153> on 06/26/19; Richmond $2,000,000 on 11/06/19; Olinda <$206,753.35> on 02//26/20

WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
Bond Program Financial Status
As of September 30, 2020

Note 6 Unbudgeted Central Services Projected Expenses FY2021-22 & 2022-23

Description	FY 2021-22	FY 2022-23	Total
Salaries & Benefits	$ 1,530,600	$ 1,591,344	$ 3,121,944
Services & Other Cost	$ 1,550,177	$ 1,290,890	$ 2,841,067
Total Projection	**$ 3,080,777**	**$ 2,882,234**	**$ 5,963,011**

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WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
Financial Impact of Report 13 Analysis
From August 2020 to September 2020

Updated 09/06/2020

Items	Beginning Balance	Ending Balance	Variance	Notes
Adjusted Cash Balance	**177,468,820**	**174,779,099**	**(2,689,720)**	**<$2,689,720.40> expended in September 2020**
Projected Revenue				
Bond Sales 2010 Measure D	-	-	-	
Bond Sales 2010 Measure E	-	-	-	
Less: Cost of Issuance	-	-	-	
Other Revenues estimated to 2021	3,370,000	3,370,000	-	
Projected Revenue Total	**3,370,000**	**3,370,000**	**-**	
Projected Available Funds	**180,838,820**	**178,149,099**	**(2,689,720)**	**<$2,689,720.40> expended in September 2020**
Budget Balance				
Board Approved Budget	1,756,329,646	1,756,329,646	-	
Less Expenses to Date	(1,599,119,106)	(1,601,808,826)	(2,689,720)	<$2,689,720.40> expended in September 2020
Budget Balance Total	**157,210,540**	**154,520,820**	**(2,689,720)**	
Projected Cash Balance June 2021	**23,628,280**	**23,628,280**	**0**	
State Facility Grants				
Estimated during current planning period	-	-	-	
Estimated after current planning period	7,615,578	12,340,748	4,725,170	$4,725,170 CTE State Funding approved on 09/30/2020
Future Facilities Master Plan Projects	-	-	-	
Future Bond Sale 2020 Measure R	575,000,000	575,000,000	-	
2022-2023 Estimated Central Cost	5,963,011	5,963,011	-	
2022-2023 Estimated Other Revenue	2,530,000	2,530,000	-	

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A/P Check List

September, 2020

Fund 21

Updated 10/06/2020

Vendor Name	Check No.	Check Date	Short Account	Invoice Number	Invoice Date	Amount	Invoice Description
Site 000 - UNDISTRIBUTED						**180,828.86**	
C OVERAA & CO	197206	09/01/20	21-9745-9135-000	1000002635-24TRUST	09/01/20	86,950.12	CONTRACT 1000002635 RETAINAGE JULY 2020
LATHROP CONSTRUCTION ASSOCIATE	197230	09/01/20	21-9745-9135-000	1000003023-00020TRUS	09/01/20	93,878.74	CONTRACT 1000003023 RETAINAGE JULY 2020
Site 123 - FAIRMONT						**7,540.44**	
BIZON GROUP INC	197309	09/15/20	21-9748-5610-123	INV-055886	08/29/20	119.63	FAIRMONT CNP CONTAINERS 07/20 UNIT1235
BIZON GROUP INC	197309	09/15/20	21-9748-5610-123	INV-055888	08/29/20	119.63	FAIRMONT CNP CONTAINERS 07/20 UNIT3059
BIZON GROUP INC	197309	09/15/20	21-9748-5610-123	INV-055890	08/29/20	119.63	FAIRMONT CNP CONTAINERS 07/20 UNIT 2079
BIZON GROUP INC	197309	09/15/20	21-9748-5610-123	INV-055891	08/29/20	119.63	FAIRMONT CNP CONTAINERS 07/20 UNIT4284
BRADLEY J WILLIAMSON	197439	09/15/20	21-9745-6214-123	1790	08/31/20	5,130.00	FAIRMONT PROJECT INSPECTOR AUG 2020
HIBSER YAMAUCHI ARCHITECTS INC	197341	09/15/20	21-9745-6201-123	491026	08/31/20	1,931.92	FAIRMONT - DESIGN SERVICES AUG 2020
Site 134 - LAKE						**44,469.00**	
ALAN KROPP AND ASSOCIATES INC	197195	09/01/20	21-9745-6190-134	27140	08/21/20	3,500.00	LAKE ES GEOTECHNICAL ENGINEERING SVCS
EAST BAY MUNICIPAL UTILITY DIS	197743	09/29/20	21-9745-6205-134	LAKE ES	09/22/20	369.00	LAKE ES FIRE SERVICES
PERKINS EASTMAN ARCHITECTS, D.	197806	09/29/20	21-9745-6201-134	85400.00.0-3	08/07/20	27,150.00	LAKE CAMPUS REPLACEMENT BRI JULY 2020
PERKINS EASTMAN ARCHITECTS, D.	197806	09/29/20	21-9745-6201-134	85400.00.0-4	09/09/20	13,450.00	LAKE ES CAMPUS REPLACEMENT BRI AUG 2020
Site 165 - MICHELLE OBAMA ELEM						**982,634.53**	
3QC	197713	09/29/20	21-9745-5890-165	61878	09/17/20	5,200.00	M OBAMA - CAMPUS REPLACEMENT JULY 2020
3QC	197713	09/29/20	21-9745-5890-165	61994	09/17/20	2,000.00	M OBAMA - CAMPUS REPLACEMENT AUG 2020
C OVERAA & CO	197732	09/29/20	21-9745-6201-165	1000002635-25B	09/21/20	11,510.00	M OBAMA DESIGN AUG 2020
C OVERAA & CO	197732	09/29/20	21-9745-6211-165	1000002635-25	09/21/20	933,709.87	M OBAMA CONSTRUCT AUG 2020
INSPECTION SERVICES INC	197500	09/22/20	21-9745-5890-165	256640	09/03/20	13,414.66	WILSON ES DSA SPECIAL TESTING AUG 2020
STRUCTURE GROUPS	197541	09/22/20	21-9745-6214-165	190933-13	08/31/20	16,800.00	WILSON ES PROJECT INSPECTOR SE AUG 2020
Site 362 - PINOLE VALLEY HIGH						**13,084.65**	
SIERRA WEST CONSULTING GROUP I	197815	09/29/20	21-9748-5860-362	20-3882	09/17/20	8,980.00	PVHS COST ESTIMATING SVCS AMEND#1
WLC ARCHITECTS INC	197440	09/15/20	21-9745-6201-362	0101970108	08/10/20	4,104.65	PINOLE DESIGN CONTRACT AUG 2020
Site 364 - RICHMOND HIGH						**1,307,334.10**	
3QC	197447	09/22/20	21-9745-5890-364	61784	09/17/20	1,800.00	RHS GYM & VOL SEISMIC RE THR 06/2020
3QC	197447	09/22/20	21-9745-5890-364	61906	09/17/20	3,800.00	RHS GYM & VOL SEISMIC RE THR 07/2020
3QC	197713	09/29/20	21-9745-5890-364	62006	09/17/20	2,750.00	RHS GYM & VOLUNTARY SEISMIC RE AUG 2020
CHIPMAN CORPORATION	197461	09/22/20	21-9745-5890-364	125565	09/07/20	11,318.00	RICHMOND HS CLASSROOM RELOCATI
INSPECTION SERVICES INC	197345	09/15/20	21-9745-5890-364	256661	09/04/20	3,375.04	RHS SPECIAL INSPECTION AND MAT AUG 2020
INSPECTION SERVICES INC	197500	09/22/20	21-9745-5890-364	256699	09/10/20	5,190.75	RHS SPECIAL INSPECTION AND MAT SEPT 2020
LATHROP CONSTRUCTION ASSOCIATE	197767	09/29/20	21-9745-6201-364	1000003023-00021A	09/10/20	36,236.90	RICHMOND HS - DESIGN THR AUG 2020
LATHROP CONSTRUCTION ASSOCIATE	197767	09/29/20	21-9745-6211-364	1000003023-00021	09/10/20	1,226,063.41	RICHMOND HS - CONSTR THR AUG 2020
STRUCTURE GROUPS	197417	09/15/20	21-9745-6214-364	190934-11	08/31/20	16,800.00	RICHMOND HS DSA PROJECT INSPEC AUG 2020
Site 615 - OPERATIONAL SUPPT SRVS CE						**187,114.91**	
AA OFFICE EQUIPMENT CO INC	197193	09/01/20	21-9745-5640-615	AR74921	07/31/20	51.11	FOC COPIERS- SERVICE MAINT. AG JULY 2020
AA OFFICE EQUIPMENT CO INC	197280	09/15/20	21-9745-5640-615	AR75019	08/31/20	59.36	FOC COPIERS- SERVICE MAINT AUG 2020
BLUEBEAM INC.	197296	09/15/20	21-9745-5850-615	1316578	08/27/20	745.00	FOC - BOND PRG. BLUEBEAM SOFWA
BPXPRESS REPROGRAPHICS	197300	09/15/20	21-9748-6207-615	BE00149290	09/03/20	346.15	DOCUMENT REPRODUCTION AUG 2020
EDUARDO DONOSO	197320	09/15/20	21-9745-5210-615	08/05/20-08/27/20	08/27/20	22.54	EC2 REIMBURSEMENT AUG 2020
EMPLOYERS ADVOCATE INC	197477	09/22/20	21-9748-5890-615	11255	09/11/20	160.00	PROGRAM-WIDE PROJECT LABOR AGR AUG 2020
GRAMMARLY INC	197339	09/15/20	21-9745-5850-615	6423	08/31/20	300.00	GRAMMARLY LICENSE ANNUAL SUBSCRIPTION
INTEGRATED EDUCATIONAL PROGRAM	197346	09/15/20	21-9748-5860-615	12	09/07/20	43,200.00	STAFF AUGMENTATION - VARIOUS P JULY & AUG 2020
KBA DOCUMENT SOLUTIONS, LLC	197353	09/15/20	21-9745-4300-615	55Y1115062	08/28/20	46.91	BLANKET PO JULY 2020-JUNE 2021
LISA NAGAI	197373	09/15/20	21-9745-6217-615	46	09/01/20	7,200.00	CONSTRUCTION MANAGEMENT-AUG 2020
MELISSA TRUITT	197549	09/22/20	21-9745-6203-615	0048	08/31/20	13,650.00	PROGRAM MANAGEMENT- PLANNING/C AUG 2020
ORBACH HUFF AND SUAREZ LLP	197520	09/22/20	21-9745-5895-615	91436	09/10/20	6,260.00	CONTINUING CONTRACT AUG 2020
ORBACH HUFF AND SUAREZ LLP	197520	09/22/20	21-9745-5895-615	91437	09/10/20	12,721.50	CONTINUING CONTRACT AUG 2020
SOUTHWEST SCHOOL & OFFICE SUPP	197537	09/22/20	21-9745-4300-615	PINV0727970	08/20/20	28.53	BLANKET PURCHASE ORDER AUG 2020
SWINERTON MANAGEMENT & CONSULT	197826	09/29/20	21-9745-6202-615	18100022-015	08/20/20	47,142.00	FOC - STAFF AUGMENTATION JULY 2020
SWINERTON MANAGEMENT & CONSULT	197826	09/29/20	21-9745-6217-615	18100022-015	08/20/20	48,184.00	FOC - STAFF AUGMENTATION JULY 2020
TECHSMITH CORPORATION	197425	09/15/20	21-9745-5850-615	I708376	08/11/20	42.81	FOC - SNAGIT 2020-2023 LICENSE
WEI JUN WANG	197434	09/15/20	21-9745-6202-615	0001	08/31/20	6,955.00	DISTRICT WIDE FACILITIES MGMT AUG 2020
Grand Total						**2,723,006.49**	

AP CHECKS TOTAL	**2,723,006.49**
Non expense account - RETENTION TO VENDOR'S ESCROW ACCOUNT	(180,828.86)
unpaid RETENTION WITHHELD AMOUNT	113,672.28
Sep.2020 PAYROLL	97,601.13

A/P Check List

September, 2020

Fund 21

Updated 10/06/2020

Vendor Name	Check No.	Check Date	Short Account	Invoice Number	Invoice Date	Amount	Invoice Description
	Refund Check from Vendor					(41,120.70)	
	MANUAL JOURNAL ENTRY					(22,609.94)	
	TOTAL Sep.2020 EXPENSE AMOUNT					**2,689,720.40**	

-

Object 9570 - Retention withheld amount:

Vendor Name	Check No.	Check Date	Short Account	Invoice Number	Invoice Date	Amount	Invoice Description
C OVERAA & CO	197732	09/29/20	21-9745-6211-165	1000002635-25	09/21/20	49,142.63	M OBAMA CONSTRUCT AUG 2020
LATHROP CONSTRUCTION ASSOCIATE	197767	09/29/20	21-9745-6211-364	1000003023-00021	09/10/20	64,529.65	RICHMOND HS - CONSTR THR AUG 2020
Grand Total						**113,672.28**	

Payroll

Project#	Check No.	Check Date	Short Account	Invoice Number	Invoice Date	Amount	Notes
66901396-01		09/30/20				79,731.55	Facility Program Staff Sep Pay
67001396-01		09/30/20				17,869.58	Assoc Supt Operation Staff Sep Pay
Grand Total						**97,601.13**	

Refund Checks

Vendor Name	Check No.	Check Date	Short Account	Invoice Number	Invoice Date	Amount	Notes
DIVISION OF STATE ARCHITECT	196856	08/18/20	21-9748-6205-214	KOREMATSU	08/12/20	(2,167.50)	CANCELED DSA CHECK
KLEINFELDER		09/18/20	21-9745-6190-362			(38,953.20)	REFUND FOR OVERPAYMENT
Grand Total						**(41,120.70)**	

Manual Journal

Vendor Name	Check No.	Check Date	Short Account	Invoice Number	Invoice Date	Amount	Notes
August 2020 Facility Staff Salary Adjustment thru Time Study						(15,258.16)	
Regulary Payroll $66,164.31 - Adjustment $15,258.16 = Revised $50,906.15							
August 2020 Assoc Supt Operat Staff Salary Adjustment thru Time Study						(7,351.78)	
Regulary Payroll $17,870.10 - Adjustment $7,351.78 = Revised $10,518.32							
Grand Total						**(22,609.94)**	

* Board approved renaming of Wilson Elementary School to Michelle Obama school on 02/12/20.

WEST CONTRA COSTA UNIFED SCHOOL DISTRICT
HISTORICAL AND PROJECTED TAX DATA AS OF OCTOBER 10, 2020
Actual Tax Rates Through 2020/21; *Rates in Italics Are Estimates*; Stabilization Rates are in Dark Red
(Dollars of Tax Per $100,000 of Secured Assessed Value)
Rates Based On Assumed Annual Assessed Value Growth of 4.00%

	1998 Measure E	2000 Measure M	2002 Measure D	2005 Measure J	2010 Measure D	2012 Measure E	District Totals
Target Maximum Tax	**$26.40**	**$55.60**	**$60.00**	**$60.00**	**$48.00**	**$48.00**	
Rate per $100,000:	**Not Stabilized**	**Not Stabilized**	**Not Stabilized**	**Not Stabilized**	**Not Stabilized**	**Not Stabilized**	
Tax Year							
1998/99	$6.10						$6.10
1999/00	12.50						12.50
2000/01	20.40	$6.90					27.30
2001/02	18.00	6.90					24.90
2002/03	16.10	25.00					41.10
2003/04	12.30	45.00					57.30
2004/05	16.10	46.90	$9.99				72.99
2005/06	11.50	43.70	11.90				67.10
2006/07	10.50	38.00	16.76	$16.50			81.76
2007/08	9.00	34.20	16.56	16.10			75.86
2008/09	9.30	36.50	18.31	28.80			92.91
2009/10	10.50	55.20	23.32	59.00			148.02
2010/11	11.30	55.60	27.84	60.00			154.74
2011/12	8.60	55.60	49.08	60.00	$48.00		221.28
2012/13	8.70	55.60	60.00	60.00	31.40		215.70
2013/14	10.20	55.60	60.00	60.00	48.00	$48.00	281.80
2014/15	8.70	55.60	60.00	60.00	48.00	48.00	280.30
2015/16	6.50	55.60	60.00	60.00	48.00	48.00	278.10
2016/17	5.80	38.60	60.00	60.00	48.00	48.00	260.40
2017/18	5.30	18.40	60.00	60.00	48.00	48.00	239.70
2018/19	9.38	18.30	60.00	60.00	48.00	48.00	243.68
2019/20	4.50	17.40	60.00	60.00	48.00	48.00	237.90
2020/21	3.20	15.90	60.00	77.40	45.30	41.40	243.20
2021/22	*8.03*	*16.00*	*63.40*	*77.04*	*43.83*	*41.33*	*249.63*
2022/23	*7.72*	*14.44*	*61.77*	*76.28*	*42.45*	*39.00*	*241.67*
2023/24	*3.68*	*14.05*	*61.93*	*74.27*	*41.07*	*37.77*	*232.78*
2024/25	*1.71*	*13.71*	*62.68*	*74.98*	*40.82*	*36.52*	*230.42*
2025/26	*(0.08)*	*12.90*	*63.42*	*75.44*	*39.52*	*35.33*	*226.53*
2026/27		*11.49*	*62.51*	*75.93*	*38.42*	*34.18*	*222.54*
2027/28		*11.06*	*63.07*	*76.38*	*39.79*	*33.07*	*223.38*
2028/29		*10.62*	*63.57*	*76.88*	*43.52*	*34.68*	*229.27*
2029/30		*10.20*	*64.10*	*77.33*	*41.63*	*38.12*	*231.37*
2030/31		*9.79*	*64.64*	*77.81*	*41.25*	*36.57*	*230.07*
2031/32		*9.40*	*64.38*	*78.39*	*40.00*	*38.94*	*231.11*
2032/33		*(0.45)*	*62.89*	*77.87*	*38.83*	*37.50*	*216.64*
2033/34			*63.70*	*78.13*	*37.64*	*36.30*	*215.76*
2034/35			*(3.06)*	*43.99*	*36.51*	*35.08*	*112.52*
2035/36				*47.16*	*35.42*	*33.92*	*116.50*
2036/37				*(2.26)*	*34.39*	*32.82*	*64.95*
2037/38					*33.36*	*31.76*	*65.12*
2038/39					*32.13*	*30.71*	*62.84*
2039/40					*31.16*	*29.69*	*60.85*
2040/41					*22.24*	*28.71*	*50.95*
2041/42					*21.87*	*27.78*	*49.65*
2042/43					*21.78*	*26.85*	*48.63*
2043/44					*21.02*	*25.98*	*47.00*
2044/45					*14.15*	*25.13*	*39.28*
2045/46					*13.93*	*16.58*	*30.50*
2046/47					*8.27*	*16.33*	*24.60*
2047/48					*8.19*	*10.97*	*19.17*
2048/49					*5.18*	*10.77*	*15.95*
2049/50					*5.11*	*7.49*	*12.59*
2050/51					*4.90*	*7.34*	*12.24*
2051/52					*4.72*	*7.05*	*11.77*
2052/53					*4.53*	*6.78*	*11.31*
2053/54					*3.03*	*6.52*	*9.55*
2054/55					*(0.15)*	*(0.31)*	*(0.46)*
2055/56							*0.00*

DRAFT

WCCUSD
Updating the 2016 Facilities Master Plan

October 2020

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2020 Facilities Master Plan Next Steps



Develop Options for Implementation Plan

Assessing Prioritization and Incorporating Measure R Timeline

Summer / Fall 2020

- Reform the Prioritization Committee
- Issue Community Survey
- HVAC Study

Winter 2020

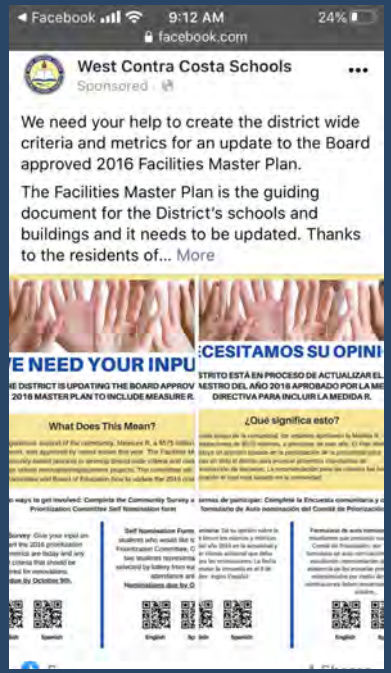
- Present the Criteria to the Board
- Present the Updated List of Priority School Sites based on the Board approved Criteria
- Refine Project scopes for Priority Schools, HVAC & Tech
- Present Options to the Board

Spring 2021

- Present Implementation Plan to Board (Scope, Schedule & Budget)

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Participation in the Survey and Nomination Forms



Prioritization Committee

Self-Nomination Lottery

(Parents & Students only)

- **Parents: 58 nominees from 28 Schools**
- **Students: 13 nominees from 7 Schools**
- **Nomination Form closed on 10/10/2020**
- **Lottery completed on 10/13/2020**

Community Survey

- **442 responses**
- **Almost every school in the district is represented**
- **Survey submission deadline extended to 10/20/2020**

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ID	School Representation	Role
	Richmond Family	
2	Cesar Chavez ES	Parent
69	Richmond High	Student
70	Richmond High	Student
	Kennedy Family	
21	Grant ES	Parent
65	Kennedy HS	Student
67	Kennedy HS	Student
	Hercules Family	
27	Hercules HS	Parent
63	Hercules HS	Student
64	Hercules HS	Student
	Pinole Family	
50	Stewart K-8	Parent
60	Collins ES	Student
68	Pinole Valley HS	Student
	De Anza Family	
51	Valley Vies ES	Parent
61	De Anza High	Student
	El Cerrito Family	
37	Mira Vista K-8	Parent
62	El Cerrito High	Student

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Prioritization Committee Lottery - Results

Lottery was completed at the Facilities Committee Meeting on October 13th

- One Parent and Two students from each feeder pattern
- Some of the feeder patterns did not have sufficient number of students apply so there is one student member listed

CBOC representative to the Prioritization Committee is Don Gosney

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Next Steps

- Prioritization Committee first meeting is tentatively scheduled for the evening of October 27th
- Results of the Community Survey to be posted to the website
- RFQ/P process for the HVAC study to be conclude by the end of November

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DRAFT MINUTES

Meeting of September 14, 2020

A) OPENING PROCEDURES

Note: this meeting was held on line using the Zoom platform and was open to the public to attend.

B) CALL TO ORDER/PLEDGE OF ALLEGIANCE

Mr. Gosney called the meeting to order at 2:06 pm.

C) ROLL CALL

Present: John Anderson, Maisha Cole, Sallie DeWitt, Don Gosney, Lorraine Humes, Anton Jungherr, Cameron Moore

Absent: Ken Burns, Guadalupe Enllana

9 members ~ 5 required for a quorum; a quorum was present.

Staff Present: SeJeung Cha, Luis Freese, Ellen Mejia-Hooper, Melissa Payne, Tony Wold

Board Liaison: Absent

D) APPROVAL OF AGENDA

Mr. Gosney requested that Item R – Bond Performance Audit and Item Q – Bond Waiver Limit to be addressed first in the agenda so that Dr. Wold could present and participate in the discussion. The agenda was approved by consent with these changes.

E) PUBLIC COMMENTS FOR ITEMS NOT ON THE AGENDA

None.

D I S T R I C T R E P O R T S

F) BOND PROGRAM PROJECTS STATUS and FINANCIAL REPORTS (Luis Freese/Melissa Payne)

Mr. Freese presented the project reports. Items of note:

Michelle Obama School remains on track for (potential) occupancy by October 1, and full completion by the end of October. A grand opening event is tentatively scheduled for October 29.

Ellen Mejia-Hooper introduced herself as the new Director of Planning and Construction. She provided an update on the status and schedule of the Lake Elementary rebuild project, and reviewed the bridging design (presentation included in the agenda packet).

In response to questions from Mr. Moore, Mr. Freese provided an update on the status of change order negotiations with the Obama School contractor related to soils conditions and Covid impacts, and a summary of the recent $600k budget increase funded from non-bond funds for the Richmond HS project.

Ms. Payne highlighted several items from the financial reports: (1) that they reflect the Board approval of budgets for the final 6 projects in the FMP implementation plan, (2) the Hercules HS

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and MS budgets have been combined since the project is the construction of a new science building that will be shared by the two schools, and (3) the $23.4 million state grant for PVHS has been received and is reflected in the reports.

Mr. Moore noted how the financial projections have improved over the past four years. When the 21 project FMP implementation plan was approved on June 15, 2016 it was acknowledged that there was a $17 million deficit between projected available funds and projected costs through June 2023, which would need to be closed. At present, Report 13 indicates a projection of a $20 million surplus through June 2023.

Ms. DeWitt asked questions about how Report 13 reflects project budget increases that are funded from sources outside the bond fund. She requested that Report 13 reflect the total project budgets and all funding sources rather than just indicating this information in a footnote. Ms. Payne responded with the District's philosophy of the reporting of bond and non-bond funding. It was agreed they would discuss potential changes to Report 13 off-line.

Ms. Mejia-Hooper provided a review of the process to update the Facilities Master Plan and the re-establishing the Prioritization Committee. In response to questions from Mr. Moore she indicated that the PTA would be able to nominate a member to the committee, and that Mandarin School parents/students could participate within the Kennedy High School feeder group. In response to a question from Ms. Humes, Mr. Freese and Ms. Mejia-Hooper indicated that representatives could come from any District school, not just the schools on the FMP list.

G) BOARD OF EDUCATION LIAISON REPORT (Consuelo Lara)

No report.

C B O C R E P O R T S

CONSENT ITEMS

The consent items were approved with no objections.

H) ADOPTION OF MINUTES (Cameron Moore)
08.10.20 CBOC Draft Minutes

I) CBOC MEMBER INFORMATION REQUEST LOG (Don Gosney)
09.14.20 CBOC Member Information Requests Status Log

J) APPROVED RECOMMENDATIONS BY THE CBOC (Don Gosney)
09.14.20 CBOC Approved Recommendations

C O M M I T T E E R E P O R T S

K) MEMBERSHIP (Cameron Moore)

Mr. Gosney noted that Mr. Burns had missed his first three meeting and he would follow up with him and the Building Trades Council.

L) MEMBERSHIP ROSTER (Don Gosney)

Mr. Gosney noted the current roster.

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M) CHAIRPERSON REPORTS (Don Gosney)

Mr. Gosney summarized his reports to the Board, which were included in the agenda packet.

N) **FORENSIC ACCOUNTING INVESTIGATION TASK FORCE UPDATE (Cameron Moore)**

Mr. Moore noted that the task force met in September and planned to meet in October prior to the presentation of the PMP to the Board for approval.

O) ANNUAL REPORT UPDATE (Sallie DeWitt and Lorraine Humes)

The goal is to present the annual report draft for discussion at the October 2020 CBOC meeting.

P) AUDIT SCHEDULES (Anton Jungherr)

Mr. Jungherr referred to the schedule in the agenda packet.

Q) BOND WAIVER LIMIT (Don Gosney)

Dr. Wold presented information related to the public hearing on the proposed debt limit waiver application for Measure R bonds that will occur at the September 9, 2020 Board meeting in conjunction with the proposed Board resolution to seek the waiver to raised the debt limit from 2.5% to 4.1% of assessed value. A memo providing details, the public hearing notice, and the proposed resolution are included in the agenda packet.

R) BOND PROGRAM PERFORMANCE AUDIT (Don Gosney)

Mr. Gosney provided background information on this item covering the performance audit RFP scope. The discussion centered on three issues: (1) whether an "effectiveness and results" audit could be charged to the bond fund or would need to be charged to the general fund, (2) whether the audit firm that was tasked with the state mandated performance audit should also conduct the "effectiveness and results" audit (for the past several years, Moss Adams has conducted both audits), and (3) whether the District should engage an "effectiveness and results" in FY2020. The CBOC had proposed that (1) the District should continue to engage a single auditor to conduct both the performance audit and the "effectiveness and results" every year and (2) the full cost of the "effectiveness and results" audit should be charged to the bond fund, citing its own analysis, an attorney general ruling, and the analysis of its independent counsel Adam Ferber. Dr. Wold's perspective was (1) the allocation of cost between the bond and general fund depended on the scope of the tasks in the "effectiveness and results" audit, citing a letter from the District's bond counsel Nixon Peabody related to the allocation of costs for the forensic accounting investigation (FAI), (2) he perceived a potential conflict of interest if the same auditor conducted performance and "effectiveness and results" audits, and (3) the District should focus on closing out and obtaining 3rd party verification (the Moss Adams FAI phase 2 review) of the remaining open FAI recommendations in FY2020. Dr. Wold recommended that the District resume "effectiveness and results" audits in FY2021 with a third auditor that isn't

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engaged on either the bond fund financial or performance audits. Mr. Jungherr requested the task order list the District provided to Nixon Peabody on which the firm based their analysis. Ms. Payne noted that many of the open FY2017-2019 "effectiveness and results" audit recommendations (approximately 24 of 26) would be addressed by the completion and approval of the Program Management Plan.

S) REVISITING RESOLUTION 20-2 (Don Gosney)

Mr Gosney noted that at the August 2020 meeting one of the Resolution 20-2 motions did not have a second and therefore required a revote.

Resolved: that in the CBOC's opinion:

The current Board Policy BP 7100 Facilities Planning, Facilities Master Plan should be amended by adding the following Section:

A Five-Year Capital Improvement Budget shall be prepared by the Superintendent or designee and presented to the Board of Education in July of each year for action. Said budget will reference the Facilities Master Plan. The Capital Improvement Budget shall include by fiscal year for each of the next five fiscal years all capital improvement projects funded by:

- *Fund 21 Building Fund.*
- *Fund 25 Capital Facilities Fund.*
- *Fund 35 County School Facilities Fund.*
- *Fund 40 Special Reserve Fund for Capital Outlay Projects.*

Ms. DeWitt motioned to approve the resolution, seconded by Mr. Jungherr, and Ms. DeWitt motioned to amend the resolution by adding "the Five-Year Capital Improvement Budget shall be included as a part of each annual Facilities Master Plan update." at the end of the third sentence; also seconded by Mr. Jungherr. Roll call vote on amendment: Yes (7), No (0), Abstain (0), Absent (2, Burns, Enllana). The amendment passed. Roll call vote on amended motion: Yes (6), No (1, Moore), Abstain (0), Absent (2, Burns, Enllana). The amended motion passed.

T) CALENDAR (Don Gosney)

Mr. Gosney noted the calendar in the agenda packet.

U) JOINT MEETING AGENDA ITEMS (Don Gosney)

The following suggestions were made: performance audit scope, Board Policy 7214.2, the CBOC website, and the Program Management Plan.

V) FUTURE AGENDA TOPICS (Don Gosney)

No new topics.

W) ADJOURNMENT

The meeting was adjourned at 5:04 pm.

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Submitted by: Cameron M. Moore, Secretary

October 14, 2020

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CBOC MEMBER RECORDS REQUEST AND STATUS LOG

10/19/20

REQUESTER	DATE REC'D	SUBJECT	FORWARDED FOR RESPONSE	RESPONSE DATE	RESPONSE
111) Anton Jungherr	3/16/19	Copy of 03/20/19 Closed Session referenced case and District's related cross-action	03/18/19 to L. LeBlanc	04/02/19 emailed A. Jungherr documents requested	04/02/19
112) Anton Jungherr	4/15/19	Copy of Riverside RFQ Design Build	4/15/19 to L. LeBlanc	4/17/19 emailed A. Jungherr requested documents	4/17/19
113) Anton Jungherr	4/15/19	Disclosure Procedures	5/15/19 to J. al-Amin	4/17/19 emailed A. Jungherr requested documents	4/17/19
114) Anton Jungherr	5/2/19	Parley Pro agreement	5/2/19 to M. Payne	5/6/19 emailed A. Jungherr requested documents	5/6/19
115) Anton Jungherr	5/6/19	Copy of Moss Adams proposal for systems and procedures services	5/6/19 to L. LeBlanc	5/6/19 emailed A. Jungherr requested documents	5/6/19
116) Anton Jungherr	5/5/19	Copy of DDLN agreement and amendments 1-6	5/6/19 to M. Payne	5/9/19 emailed A. Jungherr requested documents	5/9/19
117) Anton Jungherr	5/16/19	Details for 4 items discussed at FSC meeting -5-15-19	5/16/19	6-17-19 emailed A. Jungherr documents	6/17/19
118) Anton Jungherr	5/16/19	Details of Bond Program Cash Position Projection Summary	5/16/19 to M. Payne	6/17/19 emailed A. Jungherr documents(duplicate of #117)	6/17/19
119) Anton Jungherr	5/16/19	Melissa Truitt Project Administration Agreement	5/17/19 to M. Payne	6/17/19 emailed agreement to A. Jungherr	6/17/19
120) Anton Jungherr	5/17/19	Lisa Nagai Consulting Project Agreement	5/17/19-to M. Payne	6/17/19 emailed agreement to A. Jungherr	6/17/19
121) Anton Jungherr	5/17/19	Colbi Implementation Survey	5/17/19-to M. Payne	6/24/19 emailed A. Jungherr survey	6/24/19

CBOC MEMBER RECORDS REQUEST AND STATUS LOG

10/19/20

REQUESTER	DATE REC'D	SUBJECT	FORWARDED FOR RESPONSE	RESPONSE DATE	RESPONSE
122) Anton Jungherr	5/17/19	Bond Program Management Plan table of contents	5/17/19 to M. Payne	7/15/19 Emailed Jungherr and Gosney	7/25/19
123) Anton Jungherr	5/17/19	Current version of Bond Program Budget Practices and Procedures (duplicate from 4.16.19)	5/17/19 to M. Payne	Withdrawn by A. Jungherr	7/27/19
124) Anton Jungherr	5/17/19	Copies of Adam Ferber's invoices for assorted listed months	5/20/19 to S. Garfield	5/28/19 emailed copies of invoices to A. Jungherr	5/28/19
125) Anton Jungherr	5/24/19	Bond Program staffing positions for 2015-16 and 2016-17.	5/24 to Payne 10/16 to Bueno/Wold	2/10/20 emailed A. Jungherr & D. Gosney updated report	2/10/20
126) Anton Jungherr	5/26/19	Current version of Munis Training Manual	5/28/19 to S. Garfield	5/28/19 emailed response to A. Jungherr to access manual through the District's website under Purchasing Dept.	5/28/19
127) Anton Jungherr	5/1/19	Copies of sample reports provided by Colbi	5/1/19 to M. Payne	5/1/19 emailed reports to G. Visineau, A. Jungherr, D. Gosney	5/1/19
127A) Anton Jungherr	6/22/19	Explanation in Variance between Report 13 and staff report	6/24/19 to M. Payne	Emailed information to Jungherr and Gosney to share with CBOC	6/28/19
128) Anton Jungherr	6/30/19	Master List Numbers for various Phase 1 & Phase 2 recommendations	7/1/19 to M. Payne	04/13/20 ~ A. Jungherr requested for it to be marked Completed	04/13/20
129) Anton Jungherr	6/30/19	Completed version of the Colbi District information document.	7/1/19 to M. Payne	2-7-20 emailed Jungherr/Gosney requested information	2/7/20
130) Gregg Visineau	7/4/19	Questions on KNN schedules & clarification on previously answered inquiries.	7/8/19 to M. Payne	7/19/19 emailed to G. Visineau with comments and documents	7/19/19

CBOC MEMBER RECORDS REQUEST AND STATUS LOG

10/19/20

REQUESTER	DATE REC'D	SUBJECT	FORWARDED FOR RESPONSE	RESPONSE DATE	RESPONSE
131) Sallie DeWitt	7/16/19	Asked for staff to review and comment on the variance report she prepared for Annual Report	7/16/19 to M. Payne	7/17/19 emailed S. DeWitt with comments and document	7/17/19
132) Anton Jungherr	8/16/19	Copy of Riverside ES Soils Stabilization Project RFP	8/19 to L. Freese	9/3/19 emailed Jungherr & Gosney requested documents	9/3/19
133) Don Gosney	9/19/19	RFP for Wilson Project	9/19 to L. Freese	10/09/19 emailed record to Gosney	10/09/19
134) Anton Jungherr	10/11/19	District's CBOC budget for FY 2019	10/14 to L. Freese & T. Wold	10/16 Emailed response to A. Jungherr	10/16/19
135) Anton Jungherr	1/15/20	Request for copies of Orbach's invoices for check #190261	1/15/20 S. Cha	1/21/20 emailed Jungherr/Gosney	1/21/20
136) Anton Jungherr	2/2/20	Detailing variances from Report 13A	2/2/20 M. Payne	2/7/20 emailed Jungherr/Gosney Requested information	2/7/20
137) Gregg Visineau	2/12/20	Settlement agreement District & RCI for Nystrom	2/13/20 to M. Mayne	2/25/20 emailed G. Visineau and D. Gosney with copy of settlement	2/25/20
138) Lorraine Humes	7/14/20	Copy of current Chart of Accounts for Fund 21	7/14/20 to M. Payne	7/22/20 M. Payne emailed L. Humes requested chart	7/22/20
139) Anton Jungherr	8/10/20	Back-up documents for charges shown on the A/P Check List Fund 21 July 2020 for Facility Program Staff and Assoc. Supt Operations Staff for July pay.	8/10/20 to M. Payne	8/12/20 Emailed A. Jungherr back-up document	8/12/20
140) Anton Jungherr	8/13/20	Copies of supporting documents for the back-up documents for Facility Program Staff and Assoc. Sup Operations Staff July pay that was sent on 8/12/20	8/17/20 to M. Payne	8/27/20 Request being reviewed Also see #144	
141) Lorraine Humes	8/19/20	Copy of December 2018 Report #13 and Variance Report for it.	8/19/20 to M. Payne	8/26/20 M. Payne emailed reports to L. Humes	8/26/20

CBOC MEMBER RECORDS REQUEST AND STATUS LOG

10/19/20

REQUESTER	DATE REC'D	SUBJECT	FORWARDED FOR RESPONSE	RESPONSE DATE	RESPONSE
142) John Anderson	8/24/20	Copy of documents for 2019 Property tax rates and bond program key performances indicators summary.	8/24/20 to M. Payne	8/26/20 M. Payne emailed KPI report and Report 13 Variance Report. Due to Covid 19, the 20-21 tax rates have been delayed. **They may be available in September.**	8/26/20
143) Anton Jungherr	9/4/20	Final Copy of RFQ.RFP 2021-01	9/8/20 to D. Johnston	9/8/20 to A. Jungherr & D. Gosney. This has not been issued yet.	9/8/20
144) Anton Jungherr	9/11/20	Back up worksheets and documents for the two 08.20 payrolls and the two 07.20 adjustments	09.14.20 to M. Payne		
145) Anton Jungherr	9/18/20	Nixon Peabody 8/19/16 ltr Copies of 303 Task Orders All relating to recent and ongoing projects	9/18/20 to T. Wold	9/24/20 T. Wold sent letter of response to A. Jungherr	9/24/20
146) Anton Jungherr	9/18/20	Nixon Peabody 8/19/16 ltr Copies of 184 Task Orders relating to past and completed projects	9/18/20 to T. Wold	9/24/20 T. Wold sent letter of response to A. Jungherr	9/24/20
147) Anton Jungherr	10/1/20	From the Implementation of Recommendations report number of In Process recommendations-number of Implemented and Ready for Review recommendations-copies of all Internal Auditor reviews of the 60 implemented and ready to review as of 9.30.20	10.13.20 To M. Romo		

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Invoice
August 1 through September 30, 2020
West Contra Costa USD
Citizens' Bond Oversight Committee

8/19	Review materials received from Don Gosney re: funding of annual performance audit; prepare e-mails (2) to Gosney Re: same	1.7 hrs
8/20	Legal research and prepare e-mail memorandum to Don Gosney re: funding of annual performance audit	1.2 hrs
9/12	Review September meeting agenda materials received From Don Gosney	0.4 hrs
Total Hours at $275 per hour		3.3 hrs
TOTAL NOW DUE AND PAYABLE		**$907.50**

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West Contra Costa Unified School District

Citizens' Bond Oversight Committee

CBOC Approved Recommendations

10.19.20

Per Board of Education Policy #7214.2: "All recommendations approved by the Committee (CBOC) shall be presented to the Board of Education. The Board shall respond to the Committee's recommendation(s) within sixty (60) days after receipt of the recommendation(s)."

The purpose of this log is to document recommendations made by the CBOC to the Board of Education

Item No.	Recommendation	Date CBOC Approved	District's Response
1	Proposed Board Policy 7161.1 Lesson Learned Process	12.21.16	"...not needed at this time … ."
2	Eight standard Financial Impact Statement formats for Board of Education agenda precis on bond Program budget approval and expenditure authorizations.	07.30.18 09.12.18 discussed joint CBOC/Board meeting	Currently being reviewed as part of the drafting of Bond Program Management Plan
3	Amendments to Board Policy BP 7214.2 Citizens' Bond Oversight Committee	03.14-27.19 discussed joint CBOC/Board meeting 05.15.19 Governance Committee	Discussion but no action when discussed by Board on 05.27.20
4	Facilities Road Map 2023 be approved by the Board of Education. Discuss at the Joint Board/CBOC September 11, 2019.	06.20.19	Currently under review **Done**

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West Contra Costa Unified School District

Citizens' Bond Oversight Committee

CBOC Approved Recommendations

10.19.20

Item No.	Recommendation	Date CBOC Approved	District's Response
5	That the Board of Education ensure that an independent 3rd party determine the amount of FY2019 salaries & benefits that can be legally charged to Fund 21 Building Fund based on California Attorney General Opinion No. 04-110.	06.20.19	**IMPLEMENTED on 03.01.20**
6	That the Board of Education ensure that only legally appropriate amount of FY2020 salaries & benefits are charged to Fund 21 Building Fund.	06.20.19	**IMPLEMENTED on 03.01.20**
7	District staff include Board Program Financial Status Reports (Report 12 and 13A) in the Board of Education agenda packet for one meeting each month under agenda item E.2, Standing Reports.	07.30.18	REPORTED MONTHLY TO FACILITIES COMMITTEE
8	Amend Director Internal Audit job description to report functionally to the Board of Education and administratively to the Superintendent.	12.19.18	**REJECTED**
9	That the District prepare a plan to update 2016 Master Plan cost estimates.	03.14.19	**DONE**

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West Contra Costa Unified School District

Citizens' Bond Oversight Committee

CBOC Approved Recommendations

10.19.20

Item No.	Recommendation	Date CBOC Approved	District's Response
10	That the Board provide a response to the CBOC by June 28, 2019 to the 24 recommendations in the FY2018 Board Program Performance Audit marked "TBD" including a responsible official and a planned resolution date.	04.18.19	NOT DONE
11	Appoint an appropriate Business Services member to the 2016 FAI Recommendation Implementation Task Force.	12.19.18	**DONE**
12	Have Moss Adams, LLP forensic accounting review cycle align with their bond program performance audit cycle.	12.18.18	**REJECTED**
13	Have Moss Adams, LLP review forensic accounting investigation implementation status as of June 30, 2019 and June 30, 2020.	03.14.19	**REJECTED**
14	Have Director Internal Audit dedicate full time on the implementation of the forensic investigation recommendations.	03.14.19	**REJECTED**

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West Contra Costa Unified School District

Citizens' Bond Oversight Committee

CBOC Approved Recommendations

10.19.20

Item No.	Recommendation	Date CBOC Approved	District's Response
15	Amend Director Internal Audit job description to include responsibility for auditing the implementation of the forensic review and performance audit recommendations.	04.18.19	**REJECTED**
16	Fill the position of Director Internal Audit as soon as possible.	04.18.19	**Filled on 07.01.20 [lower level classification of Lead Internal Auditor without Certified Public Accountant license requirement]**
17	That the Board of Education take formal action to accept the March 20, 2019 Phase 1 Forensic Accounting Investigation Implementation Review report. Furthermore, that the Board of Education advise when the 29 unvalidated recommendations from Phase 1 will be reviewed and validated as effectively implemented; and by whom.	05.16.19	**REJECTED**

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West Contra Costa Unified School District

Citizens' Bond Oversight Committee

CBOC Approved Recommendations

10.19.20

Item No.	Recommendation	Date CBOC Approved	District's Response
18	Review three job descriptions: • Associate Superintendent of Business and Operations • Associate Superintendent of Facilities, Maintenance, Operations and Bond Program Director of Internal Audit (including reporting relationship to Board of Education)	08.15.19	**DONE**
19	Include these three planning elements in the scope of the Lake Elementary School planning report: • Alternatives, if any, to the replacement of this school. • Elementary schools current design capacities, enrollments, projected enrollments and excess capacities. • Options for redrawing elementary school attendance boundaries and closing elementary schools.	08.15.19	Need Response
20	Make format changes to the Bond Program Financial Status (Report #13) as displayed in August 15, 2019 CBOC Minutes.	08.15.19	**Done**

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West Contra Costa Unified School District

Citizens' Bond Oversight Committee

CBOC Approved Recommendations

10.19.20

Item No.	Recommendation	Date CBOC Approved	District's Response
21	Immediate fulfillment of the role of Director of Internal Audit for purpose of independent review of the implementation of internal controls improvement recommendations in preparation for the Moss Adams final review.	12.10.19	**Filled on 07.01.20 [lower level classification of Lead Internal Auditor without Certified Public Accountant license requirement]**
22	That the Superintendent direct that additional revenue sources to finance bond Fund 21 Building Fund projects be transferred to Fund 21 Building Fund.	12.10.19	**Done via footnotes on Fund 21 Financial reports**
23	That the District modify the format for the Colbi Technologies Consolidated Budget Status Report to include a column for the "original budget" and that Measure E budget and actual expenditures be added.	12.10.19	**District and CBOC agreed that the Bond Program Spending to Date by Site (Report #2) would continue to display "Original Budget" and include a footnote on Measure E budget and actual expenditures. Therefore, the current Colbi financial reports do not need to be modified.**

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West Contra Costa Unified School District
Citizens' Bond Oversight Committee
CBOC Approved Recommendations
10.19.20

Item No.	Recommendation	Date CBOC Approved	District's Response
24	That the District negotiate with Moss Adams LLP a three-year extension to their current agreement to prepare Proposition 39 school construction performance audits for FY2020, FY2021 and FY2022. Further, that the audit objectives include compliance, effectiveness and results.	01.13.20	**REJECTED**
25	That the District submit the following financial reports to the CBOC on the frequency displayed in the table below:	03.09.20	**DONE**

	REPORT TITLE	FREQUENCY
25 Table	• Consolidated Budget Status Report (Colbi)	Monthly
	• Consolidated Budget Status Report ~ 2016 Master Plan Projects (Colbi)	Monthly
	• Bond Program Spending to Date by Site (Report #2)	Monthly
	• Bond Program Financial Status (Report #13)	Monthly
	• Financial Impact of Report #13 Analysis (Report #13A)	Monthly
	• A/P (Accounts Payable) Check List	Monthly
	• Bond Program KPI Summary (Report #1)	Annually
	• Report #13A Annual Variance	Annually

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West Contra Costa Unified School District

Citizens' Bond Oversight Committee

CBOC Approved Recommendations

10.19.20

Item No.	Recommendation	Date CBOC Approved	District's Response
26	The CBOC supports the staff recommendation that an RFP be issued for Proposition 39 school bond performance audit services for FY2020 through 2022. The audit scope should include compliance (California Guide for Annual Audits, Appendix A) and program effectiveness and results (Government Auditing Standards 2018 Revision, section 1.22 a).	05.11.20	Needs Response
27	That an RFP be solicited for performance audit services to verify the 29 forensic investigation recommendations that were not verified in the Moss Adams. LLP Phase 1 report and are not covered in their Phase 2 Report contract.	05.11.20	Needs Response
28	That FY2021 salaries and benefits charged to Fund 21 Building Fund shall have a beneficial relationship to the Bond Program and be supported by a timekeeping system reviewed by the District's independent performance auditor.	05.11.20	**Done**

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West Contra Costa Unified School District

Citizens' Bond Oversight Committee

CBOC Approved Recommendations

10.19.20

Item No.	Recommendation	Date CBOC Approved	District's Response
29	That Board of Education support these Little Hoover Commission legislative changes to enhance the independence of the CBOC and provide authority for CBOC "best practices": • effectiveness and results performance audits. • advise on selection of auditors. • change appointment authority for CBOC members. • CBOC budgets. • CBOC website	06.08.20	Yet to be addressed
30	Request District to provide to the CBOC responses to FY2019 performance audit recommendations as required by Ed Code Section 15280(a)(2).	07.13.20	**Not completed by 06.30.20 legal deadline**
31	A Five-Year Capital Budget should be prepared annually as part of each Master Plan Update.	08.10.20	Needs Response
32	2020 Measure R bond measure language cannot be used as the basis for effective bond oversight; therefore, the Board has not implemented 2016 Forensic Accounting Investigation recommendation on this matter.	08.10.20	Needs Response

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WCCUSD
CITIZENS' BOND OVERSIGHT COMMITTEE

ATTENDANCE REPORT for PREVIOUS 12 MONTHS
10.19.20

	2019			2020									
	10/15	11/7	12/10	1/13	2/10	3/9	4/13	5/11	6/8	7/13	8/10	9/14	9/30
John Anderson							CANCELLED						
Ken Burns										UA	UA	UA	UA
Maisha Cole											EA		
Sallie DeWitt													
Guadalupe Enllana		EA										UA	
Kathy Fleming		EA											
Don Gosney													
Vanessa Hill													
Lorraine Humes		EA			EA	EA							
Anton Jungherr													
Cameron Moore													
Gregg Visineau	EA	EA			EA								
BOE Liason*			UA	UA	EA	UA		UA	UA	UA	UA	UA	

Key Codes:
EA = Excused Absence (contacted CBOC Chair or Secretary in advance of absence)
UA = Unexcused Absence (absent but did not contact CBOC Chair or Secretary in advance of absence)
TOO MANY ABSENCES – Too many absences (>=5 absences)
WARNING OF ABSENCES – Warning on absences (4 absences)

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CITIZENS' BOND OVERSIGHT COMMITTEE MEMBERSHIP ROSTER
10/19/20

Categories per BP 7214.2 Effective December 9, 2015					
#	Category	Name	Term Start Date	Term Ends	Term #
1	Business Organization*	Sallie DeWitt	01/18/19	01/17/21	2
2	Senior Citizen Organization*	Don Gosney	05/24/19	05/23/21	3
3	Taxpayers Organization*	Lorraine Humes	03/06/19	03/05/21	1
4	Parent or Guardian*	Maisha Cole	06/10/20	06/09/22	1
5	Parent or Guardian & PTA*	Cameron Moore	04/27/20	04/26/22	3
6	El Cerrito Resident	Vacant	—	—	—
7	Hercules Resident	Anton Jungherr	02/11/19	02/10/21	3
8	Pinole Resident	Vacant	—	—	—
9	Richmond Resident	Guadalupe Enllana	08/07/19	08/06/21	1
10	Richmond Resident	John Anderson	06/10/20	06/09/22	1
11	Richmond Resident	Vacant	—	—	—
12	San Pablo Resident	Vacant	—	—	—
13	Unincorporated Area Resident	Vacant	—	—	—
14	Unincorporated Area Resident	Vacant	—	—	—
15	Building Trades Council	Ken Burns	06/24/20	06/23/22	1
16	WCCUSD Employee Unions**	—	—	—	—
17	WCCUSD Student	Vacant	—	—	—

The Proposition 39 WCCUSD CBOC was established by the Board of Education on April 9, 2003. All appointments are made by the Board of Education per BP 7214.2. Terms are for two (2) years with a maximum of three consecutive two (2) year terms.

The date appointments were approved by the Board of Education is the same as the "Term Start" date.

* Legally required category under Proposition 39, California Education Code Section 15282 (a).
**One member, who is not a current WCCUSD employee, representing the five WCCUSD employee unions: United Teachers of Richmond, Teamsters Local 856, School Supervisors Association, West Contra Costa Administrators Association and Adult School Teachers United.

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CHAIRPERSON'S REPORT

09/23/20

The CBOC will be hosting their regular monthly meeting at 2 PM on Monday afternoon, October 19th. All are welcome. Please go to the District's web site, scroll down to Committees, click on the CBOC and you'll find the Zoom link. Or bookmark the CBOC web site and you'll see links for the current agenda—which will also have the Zoom link.

Before that meeting, however, the CBOC will have a joint meeting with the Board of Education. That meeting will commence at 6 PM on Wednesday September 30th.

Because of the recently enacted shelter-in-place orders back in March, our previously schedule bi-yearly joint meeting was cancelled. It's been a year sine we've had the opportunity to sit down and actually discuss issues of importance to us all so we welcome the opportunity to meet next week.

It's regretful, though, that we're limited to only three items to discuss. It still leaves many items up in the air. Our next joint meeting will be with a different Board so we can expect different viewpoints. But that meeting is another half a year away.

On the agenda at the joint meeting we expect a presentation from staff on the status of the Program Management Plan—often referred to as the PMP. The creation of the PMP has been a major task put together by Melissa Payne and her people. She's given the CBOC periodic updates and solicited input from the Board, staff, the CBOC and the public so when it's completed, it will help everyone to move forward in a smarter and more efficient manner maximizing the available resources and with the kind of transparency that this community demands.

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Second on that agenda will be a discussion about the scope of the Bond Program Performance Audit. I've come before you several times in recent months and gone out to the community to seek input and ask that they tell the Board whether they want a simple compliance performance audit—the minimum that is required by statute—or whether the District should embrace a more comprehensive performance audit that will examine the effectiveness of the Program and look into the results of what the Board and staff has done with the many tens of millions of their tax dollars since the previous performance audit.

This expanded audit would also help to verify the large number of Forensic Accounting Investigation (FAI) and Performance Audit recommendations since 2015 that have not yet been independently verified even though the District has previously reported them to be complete. It should be an interesting discussion and we welcome input from the public on this issue.

The last item on that meeting's agenda will be a status report on the 112 recommendations made in the FAI approved by the Board 4 years ago this month. The CBOC has been sitting at the edge of their seats waiting to see if and when the District and the Board will take action to complete these items after knowing about them for 5 years or more.

In case you were wondering, the three other agenda items that the CBOC suggested but were rejected due to the lack of time are:

1. An open discussion of recommendations previously made by the CBOC and forwarded to the Board to embrace the Little Hoover Commission's recommendation for the operation of a Bond Program.
2. Updating the CBOC web site.
3. And Broadening the lines of communication between the Board, staff and the CBOC with regards to the role of the CBOC and updating Board Policy 7214.2.

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While I still have a minute or so left let me mention the value of the CBOC web site:

This is like a a library where the public can walk in, pull an item from the shelf and learn about the issues. Like the library, this should be a valued part of the community.

- But what happens in that library when you rip off the spine covers so no one knows what the document is until they open it and look at the front cover?
- What happens when the items are placed on the shelves absent the Dewey Decimal System?
- What happens when some of the chapters are missing?
- What do you do when you want to look at today's newspaper in that library but all you can find was the version from last month?

Is that library really something to be proud of?

We have such a problem with our 'library' and when we have real performance audits, we often get dinged for the shabbiness of that library—or web site.

Staff has recently been very helpful in trying to update the web site but it needs the assistance of actual CBOC members—people who know what they're looking at and what the public is asking for.

We asked for permission for one member to have access to the site so we could ensure the accuracy of the submissions and make sure that everything was there, but we were rebuffed whenever it was brought up. We thought that having volunteer CBOC members who knew what they were doing perform these updates instead of taking valuable staffers away from their business would be welcomed—but we were mistaken.

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Over the past year I've reached out to each Board member and senior staffers multiple times offering to sit to discuss some of the issues you all have with us and the issues we have with you. My goal was to find a way to bridge this divide so we're all working together.

My offers were met with varying degrees of acceptance with some senior staffers and some Board members taking the time to meet with me and discuss the issues while others just didn't respond.

Come December when we have a new Board, I'll extend the offer again.

I've mentioned a couple of times tonight about the new Board so I want to touch on that a bit:

I've offered to work with all 13 of the original candidates to educate them about the Bond Program. Many have taken me up on this offer. It was just two weeks back during a forum where a couple of the candidates made statements that were not as accurate as they should have been. I've had phone conversations with both of them and expect to have more. The idea is that whoever is victorious after the election, they need to start off their time on the Board actually knowing about the Bond Program. Maybe then we won't have mistakes made through ignorance.

On that note, just a few hours ago I extended an offer on most of the local social media Facebook sites and NextDoor pages offering to speak with anyone that might have questions about the Bond Program. The CBOC believes that the better informed everyone is, the easier it will be to take the next steps to provide our youth with the finest facilities.



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CHAIRPERSON'S REPORT

10/07/20

While all of the CBOC reports are being made to the Board, they're also being made to the public—whether they're live and in person, watching on Zoom or even watching the reruns from an online link. The CBOC feels very strongly about transparency and wants everyone kept in the loop.

The big news since my last report was that we were finally able to meet with the Board for a joint meeting. Because of the shelter-in-place directives, the previously scheduled meeting in late March was cancelled. That means that it had been more than a year since we had a joint meeting.

As reported many times before, the real value of these joint meetings is that everyone has an opportunity to actually discuss the issues. We're not constrained by a clock staring us in the face. We can have an honest to goodness back and forth exchange of thoughts and ideas. So much can be accomplished when we meet like this.

That's why the CBOC and the several members of the community that called or emailed me were so disappointed when two of the five Board members were unable to participate in what we believed to be an important meeting.

As for the meeting itself, we thought it was productive.

We heard a report from Melissa Payne about the great Project Management Plan—the PMP—that she and her people have been working on for the past couple of years. We look forward to this being finalized and fully utilized.

We also had an update on the status of the unresolved items of concern from the Forensic Accounting Investigation from nearly five years back. From this report, there were only ten items left to resolve and two of these involved

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the Ivy League Connection and were, for all intents and purposes, resolved just two days prior.

The last of the three items we were allowed to discuss was the need (or the lack of a need) of a Bond Program Performance Audit that went beyond the statutorily required compliance and embraced effectiveness and results as well.

Waiting another nine months to BEGIN an audit of the many dozens of unverified recommendations seemed counterproductive to the CBOC and we still advocate spending the relatively small amount needed to wipe the slate clean instead of kicking the can down the road another year. This may be an acceptable policy for the District's budget but the CBOC can't accept that it's the right path for the Bond Program.

The CBOC looks forward to when this actually comes before the Board for action to see what path they take—clean slate or kick the can.

I've been working with any and all candidates willing to speak with me so whoever wins in November will be fully versed about the Bond Program and the Facilities Master Plan when they take office in December.

The candidate forums have not been as well publicized as people wish they had been many of the forums have asked questions about the future of the Facilities Master Plan. While the CBOC has no say or control over the final details of the FMP, we are, of course, very interested in the process that will be used to rank the schools. That's why we're so pleased to have a seat at the table on the FMP Prioritization Committee.

When we hear from members of the community and the candidates, we frequently hear the term equity being used and, in the case of the FMP, equity seems to mean that the Board and the District has to take care of the schools in the ward that the candidate and their supporters live—even if that means

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that schools, students, parents and voters in other wards have to suffer. And we can thank Attorney Scott Rafferty for this new version of equity. It doesn't seem to matter what might be best for the District as a whole as long as the people in individual wards get what they want.

One problem that we're hearing from the candidates is the lack of equity when it comes to how much of the Bond Program funds have been spent on Richmond and San Pablo students. I remind everyone that once each month we have Report #2 that is published online. This valuable resource shows how much has been spent on every school in the District. This report shows with greater accuracy just how much the flatlands students have benefitted from the Bond Program. And just a reminder that 60% of the students attending El Cerrito High School and Korematsu Middle school live in Richmond.

The CBOC is still actively working to recruit new members to serve on the CBOC and we can use the help of Board members before they leave the Board.

Because we have a statutory requirement to fill five mandated positions, when one of those positions becomes vacant, we work to fill that positions. Compliance is important to the CBOC and to the staff members we work with—in particular Luis Freese. A few months back I voluntarily transferred my representation from Richmond to Senior Citizens. Tonight you approved the transfer of Maisha Cole from a Richmond representative to a Parent representative. The benefit of both of those is that it frees up spots based on residency—in this case, Richmond spots.

And, as always, we're working to update the CBOC web site because the people deserve to know everything about the Bond Program.

As another reminder, our next meeting will be hosted at 2 PM on Monday afternoon, October 19th. All are welcome. Please go to the District's web

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site, scroll down to Committees, click on the CBOC and you'll find the Zoom link. Or bookmark the CBOC web site and you'll see links for the current agenda—which will also have the Zoom link.



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IMPLEMENTATION OF FORENSIC ACCOUNTING INVESTIGATION RECOMMENDATIONS

Four years ago, the Board of Education accepted the Forensic Accounting Investigation report, which offered 112 recommendations to improve management and oversight of the WCCUSD bond program.

Thirty-five (35) of these recommendations were implemented by June 30, 2017 and verified by independent auditor Moss Adams LLP.

Sixty (60) of these recommendations have now been implemented and are ready for review by the District's Internal Auditor. Ten (10) recommendations are in the process of being implemented and seven (7) recommendations could not be implemented because the Board would not release information because of attorney-client privilege, a total of seventy-seven (77) recommendations.

At the September 30, 2020 Joint Board/CBOC meeting staff announced, "Complete independent internal auditor review of all recommendations no later than June 20, 2021."

It would be useful for the CBOC to monthly monitor the Internal Auditor's review of the remaining seventy-seven (77) recommendations.

Recommended Action: That the CBOC recommends that the District provide to the CBOC a monthly report on the status of Internal Auditor's reviews in the following format:

Description October 2020	Total
Balance to review beginning of month	77
Internal Auditor reviews this month	
Balance to review end of month	

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West Contra Costa Unified School District



Citizens' Bond Oversight Committee

2019 ANNUAL REPORT

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West Contra Costa Unified School District

Citizens' Bond Oversight Committee

2019 Annual Report

WCCUSD Citizens' Bond Oversight Committee*

Executive Committee

Don Gosney
Chairperson

Guadalupe Enllana
Vice Chairperson

Cameron "Mac" Moore
Secretary

Other Members

John Anderson
Ken Burns
Maisha Cole
Sallie DeWitt
Lorraine Humes
Anton Jungherr

Annual Report 2019 Subcommittee

Sallie DeWitt, Co-Chair
Lorraine Humes, Co-Chair
John Anderson

**Membership as of September 14, 2020*

Annual Report 2019
January through December 2019

To Promote Bond Fund Economy and Efficiency

The State of California requires Citizens' Bond Oversight Committees to inform the public and taxpayers concerning the Proposition 39 (55% local school bond measures) expenditures and use of bond funds at least once a year.

This is the West Contra Costa Unified School District's Citizens' Bond Oversight Committee (CBOC) Annual Report 2019.

The CBOC expresses its sincere thanks to Luis Freese, Melissa Payne, SeungJa Cha, Ellen Mejia Hooper, Peter Hempel and Christine Tai.

Contacting the CBOC
West Contra Costa Unified School District
Facilities Operation Center
1400 Marina Way South, Richmond, CA 94804

510-730-0460
Email: wccusd.cboc@gmail.com

Cover photo: Michelle Obama (formerly Wilson) Elementary School construction in progress, 2020.

Style guide used: Punctuation Plain and Simple by Edgar C. Alward and Jean A. Alward, 1997

This report is available from the CBOC's website at

https/www.wccusd.net/cboc

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EXECUTIVE SUMMARY

The Purpose of this Report

The State of California requires Citizens' Bond Oversight Committees (CBOCs) to inform the public and taxpayers about expenditures and use of bond funds at least once a year[1]. This is West Contra Costa Unified School District's (WCCUSD's) CBOC Annual Report 2019. It is meant to inform and be read by the school community, local student families, teachers and other District staff, the Board of Education, local property owners, as well as any other interested parties.

The Focus of this Report

This report covers actions taken and events related to WCCUSD's bond fund which took place primarily in calendar year 2019. Events leading up to 2019, or ones that took place in 2020, before the release date of this report, are included as needed to explain and give context to actions and events pertinent to 2019.

The Organization of this Report

Following background information about CBOCs and an introduction to this annual report, the main body of this report is organized into the following sections:

- The use of bond funds in 2019 and program financial status
- WCCUSD finance and performance audits for Fiscal Years ending June 30, 2019, and the CBOC's Annual 2019 Compliance Statement
- Implementation of the 2016 Forensic Accounting Investigation Recommendations
- Implementation status of the 2016 Long Range Facility Master Plan
- Other CBOC, Board and District Actions in 2019

This report should be available online at http://www.wccusd.net/cboc.

Use of Bond Funds in 2019

Through December 31, 2019, actual cash expenditures from the bond fund totaled $51.4 million [2], primarily for the construction of the new Pinole Valley High School (PVHS) and eight other projects included in the 2016 Long Range Facilities Master Plan (the FMP).

- The grand opening for the new Pinole Valley High School (PVHS) was held on August 12, 2019, in time for the 2019/2020 school year. Work continued into 2020, with the

[1] **California Education Code Section 15278 (b):** "The citizens' oversight committee shall advise the public as to whether a school district or community college district is in compliance with the requirements of paragraph (3) of subdivision (b) of Section 1 of Article XIIIA of the California Constitution" and **Section 15280 (b):** "The citizens' oversight committee shall issue regular reports on the results of its activities. A report shall be issued at least once a year."

[2] Ref: Report 13A (Variance analysis) Dec 31, 2019. Appendix I.

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sports fields and field house construction and closeout of the primary construction contract. The PVHS project budget totaled $216.5 million at the end of 2019.

- Construction commenced on Wilson Elementary School campus replacement project on August 2, 2019. (In February, 2020, the Board approved changing the name to Michelle Obama Elementary School. In this report, Michelle Obama Elementary is referred to as Wilson Elementary School to align with 2019 district data reports.) At the end of 2019, the budget for this project was $44.1 million.
- Work was done on a seismic upgrade project for the gymnasium at Juan Crespi Middle School, budgeted at $6.5 million at the end of 2019. Completion is expected in March 2020[3].
- On November 11, 2019 construction commenced on a project at Richmond High School which includes the demolition of the small gymnasium, locker room, weight room and dance studio, student health center, and auto shop buildings, construction of a replacement gymnasium, seismic upgrades to the Science Building, and replacement of the health center portables. Budget for this project at the end of 2019, was $42.6 million.
- Upgrade and improvement projects were completed or underway at Fairmount and Olinda Elementary Schools, and design and procurement activities are underway for projects at Riverside, Highland, and Lake Elementary Schools.

Program Current Financial Status and Forecast

As of December 31, 2019, the net bond fund cash balance was projected to be $9.8 million through June 30, 2023. See additional details in Section 3 of this report.

2019 Budget and Forecast Highlights

- In June 2019, the District was informed that its State grant application for the PVHS project was increased from $16.5 to $23.4 million and the estimated funding date was pulled in from February 2023 to July 2020. The grant was received in August 2020.
- As noted in the CBOC's 2018 Annual Report, increasing project costs are a key challenge that needs to be managed carefully by the District. These increases are a result of construction cost escalation above the 5% annual rate assumed in the FMP; unforeseen conditions at the sites; and outside agency requirements.
- As of December 31, 2019, budget increases (net of savings) have added 15% ($11.7 million) to the originally estimated $76.9 million of the 14 FMP projects started.
- The District is managing the impact of higher project costs by re-assessing the scope and timing for the Lake Elementary replacement project; by continuing to apply for additional State grants; and by conducting program risk analysis on total program costs.
- "Supplemental funds" (i.e., "non-bond" funds, such as developer fees) totaling $3.6 million in 2019, were used to fund project budget increases approved by the Board at Wilson ES and Richmond HS. The Board approved additional budget increases funded by the same funding sources at selected schools in 2020. The District commented on

[3] As of the CBOC meeting on September 14, 2020, Juan Crespi MS was still in closeout.

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these increases in one of the two public reports used as the basis of this annual report, however, the District did not update these comments in 2020[4]. Thus, to date, the CBOC is unaware of a public report showing project budget and expenditure totals for schools funded by sources other than bond revenue and state grants.

- In 2019, the Board authorized the placement of Measure R, a $575 million bond measure on the March 2020 ballot, and the measure passed, providing a significant new source of revenue for school construction.

FY 2019 Bond Fund Financial and Performance Audits

The District is subject to two annual audits of the bond program which require oversight from the CBOC, a financial and a performance audit. Both must be conducted by independent professional auditing firms per published standards and guidelines, and be completed no later than March 31 following the close of the District's fiscal year, which ends on June 30.

A basic performance audit is required by state law to determine whether bond funds meet Proposition 39 requirements, i.e., are used for projects listed in bond ballot measures, and only for construction, furnishings and equipment. In addition, following recommendations made by the CBOC, the Board contracted with Moss Adams LLC to do an expanded scope performance audit, including "effectiveness and results" -- an assessment of bond program management and recommendations for improvements -- for three years, starting with FY 2017.

The required FY 2019 Financial Audit conducted by independent financial auditor Christy White Associates confirmed that the financial statements "... present fairly, in all material respects … " the financial position as of June 30, 2019. [5]

FY 2019 Bond Fund Compliance Performance Audit by Moss Adams LLP was not able to confirm the salary and benefits charged to the bond bond due to the lack of form time cards or other timekeeping systems.

FY 2019 Bond Fund Agreed Upon Procedures Audit by Moss Adams, LLP on 22 audit objects confirmed that 23 of the prior year's 25 recommendations were not fully addressed. Five additional improvement opportunities were identified for a total 28 open recommendations.

2019 WCCUSD CBOC Compliance Opinion for General Obligation Bonds Measure D (2010) and Measure E (2012)

[4] School site budget increases are not included in site totals on Report 2 (Appendix H) nor are they included as a funding source in Report 13 (Appendix I) in 2019. They are shown in Report 13 in Note 2, Comments A and B, at the end of 2019, however, these comments were discontinued, despite budget increases approved by the Board, in 2020.

[5] 2010 Measure D and 2012 Measure E Bond Building Fund, West Contra Costa Unified School District Financial Audit Report, For the Year Ended June 30, 2019, March 3, 2020, Christy White Associates, page 4.

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California Education Code Section 15278 (b) requires the CBOC to advise the public whether the District is in compliance with four state accountability requirements[6].

The CBOC's 2019 compliance opinion concerning four state accountability requirements in the California Constitution is that the District did not meet the requirement to spend on authorized purposes (Requirement A); it "cannot be determined" if specific school facilities projects were funded (Requirement B); and the District did meet the California Constitution requirements to perform annual independent performance and financial audits (Requirements C and D). In addition a statement has been added for the first time that the CBOC has determined that generally all bond expenditures were made in accordance with the Board approved 2016 Facilities Master Plan Report.

Status of Implementation of 2016 Forensic Accounting Recommendations

As noted in the CBOC's 2018 Annual Report, the auditor that performed the 2017 and 2018 Performance Audits and the first FAI Recommendations Implementation Review recommended that the District engage external parties to supplement staff resources to complete the implementation of the FAI recommendations as well as open improvement recommendations from the Performance Audits.

Of the 161 total such recommendations across the FAI (112), the 2017 audit (21) and the 2018 audit (28), 75 of the still-open recommendations cover the policies, procedures and resolutions necessary to ensure effective internal controls over the bond fund and effective communication of those policies and procedures throughout the organization. These are separated into four key areas of bond program management: (1) Program and Operations; (2) Administrative; (3) Project Management; and (4) Fiscal.

In May 2019, the Board approved a contract with Swinerton Management and Consulting to assist staff in developing a comprehensive set of policies and procedures, known as the bond Program Management Plan (the PMP). Colbi Technologies was also contracted in May 2019 to provide (1) program and project management and reporting software; (2) construction document management software; and (3) electronic access to historical bond program information.

As of December 31, 2019, the District had targeted completion of the PMP and presentation to the Board for approval by June 2020; however, due to Covid-19 impacts, completion was delayed and the new target is October 2020. Drafts of all four sections of the PMP have been completed and posted to the District website for public comment at https://www.wccusd.net/Page/13520, and over 100 comments were received.

Implementing the 2016 Long Range Facility Master Plan

The 2016 Long Range Facilities Master Plan (FMP) provided an analysis and cost estimate of all critical needs and replacement projects for schools in the District. In June 2016 the Board

[6] See Appendix Q, "*Prop 39 Bonds in the California State Constitution*", State Constitution Article XII A, Section 1(b)(3), for the full text of these Accountability Requirements.

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approved an implementation plan for a subset of 21 FMP projects -- the “FMP Implementation Plan Projects” -- to be implemented over the 2016-2023 period. These were primarily “critical needs” projects (for seismic and other health and safety needs) as well as two school replacement projects: Wilson Elementary School and Lake Elementary School. The FMP Implementation Plan assumed that only existing or approved bond funds and forecast state school facilities program funding as of 2016 would be utilized and was based on preliminary project concepts and “Rough Order of Magnitude”[7] cost estimates totaling $181.8 million.

As of December 31, 2019, the first wave of 14 projects identified in the 21 project FMP Implementation Plan were underway or completed. Planning began on the Lake Elementary replacement project, the largest of the remaining 7, with the Board’s approval of a $1 million design and planning budget.

Measure R

On November 20, 2019, the Board approved a resolution to place a $575 million local school bond measure on the March 3, 2020 ballot to provide funding for at least some of the 21 unfunded future projects identified in the 2016 FMP (these 21 projects had rough order of magnitude cost estimate of $1.1 billion). Measure R passed, with 59% of the vote. The District has begun the process of updating the FMP which will guide the prioritization and implementation of these projects using Measure R funds.

Other Items of Significance in 2019

In September 2019, Mr. Luis Freese was promoted from District Engineering Officer to Associate Superintendent for Facilities, replacing Ms Lisa LeBlanc who retired in June. The job of District Engineering Officer remains unfilled at present.

Beginning in August 2019, Dr. Tony Wold began as the new Associate Superintendent for Business Services. He follows Dr John al-Amin, who left the District in June after one year on the job.

A new Director of Internal Audit, a position created in response to a recommendation from the FAI, began in July 2019. This position had remained unfilled for a year, since the departure of the previous incumbent in June 2018. This new hire subsequently resigned for health reasons in October 2019.

A key responsibility of the Director of Internal Audit is to provide internal verification of FAI recommendation implementation and performance audit improvement recommendations, before they go to an outside auditor for independent third-party verification of effective implementation. Since the District currently has no plans to fill the Director of Internal Audit position, these responsibilities have been assigned to the Internal Auditor, reporting to the Associate

[7] Based on general cost per square foot, including 5% annual forecast cost escalation.

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Superintendent for Business Services. The CBOC has recommended that the Director of Internal Audit position be filled and that it report to the Board of Education to assure full internal independence from those District functions being audited.

Beginning in January of 2017, the CBOC, District Staff, and the Board Governance Committee began the process of drafting updates to the Board Policy related to the CBOC (Policy 7214.2) for consideration by the Board of Education. This activity continued through 2019. The proposed new policy was presented to the Board for consideration at its May 2020 meeting, but the Board could not establish a consensus on the policy and no vote was taken. No further action has been taken.

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1. West Contra Costa Unified School District and the Citizens' Bond Oversight Committee

West Contra Costa Unified School District (WCCUSD)

The WCCUSD was established in 1965. The District includes the cities of Hercules, Pinole, San Pablo, Richmond, and El Cerrito. It also includes the unincorporated areas of Bayview-Montalvin Manor, East Richmond Heights, North Richmond, El Sobrante, Kensington, and Tara Hills. The District has 29,000 students, 56 district schools, and eight charter schools.

Citizens' Bond Oversight Committee (CBOC)

In the State of California, the mission of the CBOC is to oversee the proper expenditure of money for the construction, repair, and modernization of schools in accordance with California State Proposition 39 (Prop 39), passed in the 2000[8].

The West Contra Costa County Unified School District's (WCCUSD) CBOC is authorized by the WCCUSD Board of Education to have a volunteer committee of 17 local citizens. Its purpose is to oversee school construction using funding from the current WCCUSD local school bond measures passed under Proposition 39: D-2002, J-2005, D-2010, E-2012 and R-2020. On September 14, 2020, there were nine active members and eight vacancies[9].

The Committee meets publicly 11-12 times a year with facilities and bond finance staff. These include two joint meetings with the Board, usually held in the spring and fall. Other activities include providing an annual report to the public on its oversight of the Prop 39 bond construction program, receiving and reviewing financial and performance audits of the bond program, and touring construction sites.

2019 CBOC Subcommittees

- **Audit Subcommittee** - standing subcommittee open to the public, subject to the Brown Act. Meets normally once monthly to review audits, financial reports and related bond program oversight issues (note: this subcommittee went on hiatus effective Dec, 2019).
- **Site Tours Subcommittee** - ad hoc subcommittee[10] to visit bond program work-in-progress.
- **Annual Report Subcommittee** - ad hoc subcommittee to produce the CBOC's annual report.

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[8] See Appendix Q, "*References for Prop 39 Bonds*", for details on the legal requirements for a CBOC.
[9] Vacant positions: Pinole Resident, San Pablo Resident, El Cerrito Resident, Unincorporated Area (2), Parent or Guardian, WCCUSD Student, and WCCUSD Employee Unions.
[10] Adhoc committees are set up for specific purposes, often temporarily. Unlike standing committees, adhoc committee meetings are not open to the public nor are they subject to the Brown Act.

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- **Website Subcommittee** - ad hoc subcommittee to make improvements to the WCCUSD CBOC website.
- **Bylaws Subcommittee** - ad hoc subcommittee to review and update CBOC bylaws, as needed.
- **Forensic Task Force -** A member of the CBOC participates on the District's 2016 Forensic Accounting Investigation Recommendations Implementation Task Force (ITF).

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Members of WCCUSD CBOC during the period January 2019 through September 14, 2020.[11]

Name	Role/Subcommittee
John Anderson*	Richmond Resident, Annual Report
Ken Burns*	Building Trades Council
Maisha Cole*	Richmond Resident
Sallie DeWitt*	Business Organization, Annual Report Co-Chairperson
Guadalupe Enllana*	Richmond Resident, Vice Chairperson
Kathy Fleming	El Cerrito Resident
Don Gosney*	Senior Citizen Organization, Chairperson
Vanessa Hill	Parent or Guardian
Lorraine Humes*	Taxpayers' Organization, Annual Report Co-Chairperson
Anton Jungherr*	Hercules Resident, Bylaws
Cameron (Mac) Moore*	Parent or Guardian & PTA,Secretary, Forensic Task Force
Robson Swift	Student Representative
Gregg Visineau	Senior Citizen Organization,, Annual Report

*Member as of September 14, 2020

To contact the CBOC send email to:
:www.westcontracostacboc@gmail.com

[11] See Appendix M for CBOC member background information.

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2. CBOC ANNUAL REPORT INTRODUCTION

Report Purpose

The State of California requires Citizens' Bond Oversight Committees to inform the public and taxpayers concerning bond fund expenditures and use of bond funds at least once a year[12]. This is WCCUSD's CBOC Annual Report 2019, meant to inform the school community, local students families, teachers and other District staff, the Board, local property owners, as well as any other interested parties.

This report covers actions taken and events related to WCCUSD's bond fund which took place primarily in the calendar year 2019. Events leading up to 2019, or ones that took place in 2020, before the release date of this report, are included as needed to explain and give context to actions and events pertinent to 2019.

Report Organization

1. About WCCUSD's CBOC
2. CBOC Annual Report Introduction
3. Use of Bond Funds and Bond Program Financial Status
4. District Audits and 2019 CBOC Compliance Statement
5. 2016 Forensic Accounting Investigation (FAI) Recommendations Implementation Status
6. 2016 Long Range Facilities Master Plan Implementation Status
7. Other CBOC, Board and District Actions in 2019

Glossary of Terms

1. WCCUSD = the West Contra Costa Unified School District.
2. Board = WCCUSD Board of Education.
3. CBOC = WCCUSD Citizens' Bond Oversight Committee.
4. District = WCCUSD (West Contra Costa Unified School District).
5. FY = Fiscal Year. For the District, these run from July 1 to the following June 30.
6. FAI = "2016 *Forensic Accounting Investigation*", effective as of September 21, 2016.
7. FMP = "2016 *Long Range Facilities Master Plan*", effective as of June 15, 2016.
8. ITF = 2016 Forensic Accounting Investigation Recommendations *Implementation Task Force*.

[12] California Education Code Section 15278 (b): "The citizens' oversight committee shall advise the public as to whether a school district or community college district is in compliance with the requirements of paragraph (3) of subdivision (b) of Section 1 of Article XIIIA of the California Constitution". Also, Section 15280 (b): "The citizens' oversight committee shall issue regular reports on the results of its activities. A report shall be issued at least once a year."

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3. USE OF BOND FUNDS AND BOND PROGRAM FINANCIAL STATUS

Bond Fund Background

The table below shows the District's summary of historical WCCUSD Facilities Bonds through December 31, 2019. Please also refer to Appendices A, B, C, H and I for additional information.

Table 1 – Bonds Authorized

Bond Measures	Voter Approved		Bonds Issued					Bond Payments		
	Month Year	Amount ($)	Latest Issue	Total Issued	Tax Rate per $100k [4]	Not Yet Issued	Scheduled Issues [5]	Principal Paid	Finish Date	Interest Paid
[1] Msr 1998-E	Jun 1998	40,000,000	Jan 2001	40,000,000	$4.50	0	0	27,750,000	Aug 2025	30,484,937
[2] Msr 2000-M	Nov 2000	150,000,000	Apr 2003	150,000,000	$17.40	0	0	89,805,000	Aug 2032	88,898,593
[3] Msr 2002-D	Mar 2002	300,000,000	Oct 2005	299,997,483	$60.00	2,517	0	96,322,052	Aug 2034	131,312,648
[3] Msr 2005-J	Nov 2005	400,000,000	Jun 2010	322,409,709	$60.00	77,590,292	0	25,182,920	Aug 2036	147,511,184
[3] Msr 2010-D	Jun 2010	380,000,000	May 2018	315,000,000	$48.00	65,000,000	65,000,000	39,580,000	Aug 2054	52,165,623
[3] Msr 2012-E	Nov 2012	360,000,000	May 2018	295,000,000	$48.00	65,000,000	65,000,000	36,500,000	Aug 2054	39,787,443
Grand Totals		1,630,000,000		1,422,407,191	$237.90	207,592,809	130,000,000	315,139,972		490,160,426

"Principal Paid" is total principal paid and includes principal paid on related refunding bonds subsequent to defeasance of any original bonds defeased.
"Interest Paid" is total gross interest paid less, if applicable, bid premium and accrued interest deposited to Debt Service Fund, refunding escrow funding and federal subsidy payments; in other words, actual payments by County from tax revenue.

Table 1 Source *:* See Appendix C, "*Bond Program Key Performance Indicators (KPI) Summary*" (Report #1), dated 01/03/2020. The footnotes numbered 1-5 in Table 1 are in the original source document.

Bond Projects History

Source of Bond Funds: The WCCUSD bond program began in 1998 with the passage of local school bond Measure E. Since then, a total of six local school bond measures have been passed by West County voters, through 2012's Measure E, totalling $1.630 billion in bonding authority for the District. As of December 31, 2019, the District had issued $1.423 billion of local school bonds under those voter authorizations.

Additionally, as of December 31, 2019, the District had applied for and had received grants from the state of California totalling $188.5 million. These grants are funded from statewide bond measures approved by California's voters.

See Appendix A - "*WCCUSD Facilities Funding Sources*" and Appendix C - "*Bond Program Key Performance Indicators Summary*" for more detail on revenue.

Use of Bond Funds: As of December 31, 2019, approximately $1.557 billion had been spent on WCCUSD school facilities projects since the bond program began in 1998. Out of 53 schools in the WCCUSD, 16 have been built or rebuilt and 28 have been renovated with these bond funds.

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See Report 2 (Appendix H) - "*Bond Fund Program Spending by Site*" for more details on expenditures at each school site.

Construction During 2019: In 2019, project expenditures totalled $51.4 million[13].

Bond Funded Projects Underway as of December 31, 2019 (See Appendix G - "*Project Status Report*", for greater detail.)

School	Phase	Project	Status*
Wilson ES	Construction	Campus Replacement (DBE)	Under Construction
Pinole Valley HS	Construction	Campus Replacement	Punchlist Work/Closeout
Crespi MS	Construction	Gym Seismic Retrofit	Under Construction
Fairmont ES	Construction	Critical Needs Phase 1	Punchlist/Closeout
Richmond HS	Construction	Critical Needs	Under Construction
Riverside ES	Procurement	Critical Needs	Pending Reissuance
Pinole Valley HS	Design	Fields Restoration and Site Work	Construction Documents/DSA Submission Pending
Lake ES	Design	Campus Replacement	RFQ/RFP Bridging AOR
Stege ES	Design	Critical Needs	Design Development
Highland ES	Design	Critical Needs	Assessing Water and Power and Upgrades
Korematsu MS	Design	Fall Protection	Hold

*Acronyms: DSA - Division of State Architect ; DBE = Design-Build Entity.

Bond Fund Revenue and Expenditures Forecast[14]

As of December 31, 2019, the net bond fund cash balance was projected to be $9.8 million through June 30, 2023. Projected revenue and expenditures shown below are taken from two District public reports dated December 31, 2019. Report 13 shows high level project budget and expenditure totals, including a year-over-year variance report, and Report 2 which shows school site totals.

12/31/19 Adjusted Cash Balance $65.7 million

[13] See *Report 13A, Variance Analysis* at the end of Appendix I.
[14] See Report 13 (Appendix I) and Report 2 (Appendix J)

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Projected Bond Sales for Measure D and Measure E through 2023[15]	$129.5 million
Estimated State Facility Grants to 2023	$23.4 million
Estimated Other Revenue[16]	$2.8 million
Projected Available Funds through FY 2023	**$221.4 million**
Budgeted Project Expenses	$100.1 million
Future FMP Projects (Not Yet Budgeted)	$103.4 million
Central Costs (Not Yet Budgeted)	$8.1 million
Projected Use of Funds through FY 2023	**$211.6 million**
Net Projected Cash Balance at FY 2023	**$9.8 million**

Special note: "Supplemental funds" (i.e., "non-bond" funds, such as developer fees) totaling $3.6 million in 2019, were used to fund project budget increases approved by the Board at Wilson ES and Richmond HS. The Board approved additional budget increases funded by the same funding sources at selected schools in 2020. The District commented on these increases in one of the two public reports used as the basis of this annual report, however, the District did not update these comments in 2020[17]. Thus, to date, the CBOC is unaware of a public report showing project budget and expenditure totals for schools funded by sources other than bond revenue and state grants.

[15] Measure D and Measure E only; not including Measure R, passed in March, 2020, less cost of issuance.
[16] Projected interest earnings through 2023 per Note 2 in Report 13.
[17] School site budget increases related to "supplement funds" are not included in site totals on Report 2 (Appendix H) nor are they included as a funding source in Report 13 (Appendix I) in 2019. They are shown in Report 13 in Note 2, Comments A and B, at the end of 2019, however, these comments were later discontinued, despite budget increases funded by "supplemental funds" approved by the Board in 2020.

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4. DISTRICT AUDITS AND 2020 CBOC COMPLIANCE STATEMENT

Overview of Bond Fund District Audits

The required FY2019 Financial Audit conducted by independent financial auditor Christy White, Inc. confirmed that the financial statements "... present fairly, in all material respects … " the financial position as of June 30, 2019. [18]

The required FY2019 Performance Audit conducted by independent performance auditor Moss Adams, LLP stated, "We conclude that bond proceeds were only expended on the Listed Projects under Measure D (2010) and Measure E (2012) bond language for the fiscal year (FY) ended June 30, 2019. For District labor charges to the Bond Program, we noted that the District was unable to demonstrate that these charges were accurately and completely identified as Bond Program costs with timekeeping records." [19]

The performance audit also noted that the FY 2017 recommendation to reimburse $50,205 to the General Fund for the School Facility Consultants charge was not yet done.[20]

In addition, Moss Adams, LLP performed an agreed upon procedures audit on twenty-two (22) audit objects determined by the District. "Additionally, we evaluated the effectiveness and efficiency of internal controls to provide an analysis of the School Construction Program so that those charged with District governance and oversight can use the information to improve Bond Program performance and operations. Through inquiry and review of documents, we confirmed that 23 of the prior year's 25 recommendations were not fully addressed. There were 14 recommendations where steps had been taken by the District, nine recommendations where no steps had been taken by the District, and two recommendations that were fully addressed by the District. Five additional improvement opportunities were identified during the current period under review, for a total of 28 open recommendations." [21]

The District is subject to both a financial and performance audit of the bond program, required by Prop 39, and thus subject to oversight from the CBOC. The agreed upon procedures audit is not legally required. The audits are performed by independent professional auditing firms contracted by the District according to published standards and guidelines. The audits are completed no later than March 31 following the close of the District's fiscal year, which ends on the previous June 30. The FY2019 financial audit was performed by Christy White, Inc. and the

[18] 2010 Measure D and 2012 Measure E Bond Building Fund, West Contra Costa Unified School District Financial Audit Report, For the Year Ended June 30, 2019, March 12, 2020, Christy White, Inc., page 4 [available on the CBOC website at www.wccusd-bond-oversight.com].
[19] Final Report West Contra Costa Unified School Proposition 39 Bond Performance Audit Report for the Fiscal Year Ended June 30, 2019, March 12, 2020, Moss Adams, LLP, page ii [available on the CBOC website at www.wccusd-bond-oversight.com].
[20] Ibid., page 34.
[21] Ibid. page ii.

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FY2019 required performance audit was performed by Moss Adams LLP. Moss Adams, LLP also performed the FY 2019 agreed upon procedures audit of 22 objectives determined by the District.

The required California Proposition 39 performance audit has only two audit objectives: [22]

1. Use of bond funds is restricted to construction, furnishings and equipment and not for teacher and administrator salaries and other school operating expenses, and
2. Bond funds are spent only on listed projects from their ballot measures.

In addition to the legally required performance audit, and, following recommendations made by the CBOC, the Board contracted with Moss Adams, LLP to do an agreed upon procedures performance audit, on 22 audit objectives for three years, FY2017.to FY2019.

[22] 2018-19 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting, Education Audit Appeals Panel, July 1 2018, Appendix A.

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2019 Bond Fund CBOC Compliance Opinion

General Obligation Bonds Measure D (2010) and Measure E (2012)

California Education Code Section 15278 (b) requires that: "The citizens oversight committee shall advise the public as to whether the [District] is in compliance with the requirements of paragraph (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution".[23]

This is the Citizens' Bond Oversight Committee (CBOC) 2019 Compliance Opinion:

State Constitution [Art XIII A, Sec 1(b)(3)]	Local Bond Fund Accountability Requirements	In Compliance? (CBOC)
A	Bond funds are Used Only For: "The construction, reconstruction, rehabilitation, or replacement of school facilities, including the furnishing and equipping of school facilities". And Not For: "Any other purpose, including teacher and administrator salaries and other school operating expenses".	No (See Below)
B	"A list of the specific school facilities projects to be funded"	Cannot be determined (See Below)
	The CBOC did determine that bond funds were only expended on 2016 Facilities Master Plan Projects as approved by the Board of Education, with the exceptions noted in Section A above.	
C	"Conduct an annual, independent performance audit".	Yes
D	"Conduct an annual, independent financial audit".	Yes

Accountability Requirement A

District performance auditor, Moss Adams, LLP and the CBOC both agree that the District could not demonstrate compliance with the requirement that bond funds are used only for school facilities construction and not for other purposes. The reason is that operations staff work both on bond fund projects and other non bond fund related activities. District management allocates staff time between activities, but there is no formal time card or other system that would allow a third party auditor to confirm the allocations. Staff salaries and benefits totaling $11.3 million

[23] See Appendix P for detailed Project Lists for these two ballot measures.

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were charged to the bond fund over the past six fiscal years that are at risk for overcharges to the building fund. [24]

Accountability Requirement B

With respect to compliance with the requirement that bond funds be used only for projects listed in the bond measures, Moss Adams and the CBOC--each guided by a different set of standards and guidelines--differ in their conclusions. The language in Measures D and E was general in nature--for example, "School Renovation, Repair and Upgrade Projects"[25]. Moss Adams determined that bond funds were spent largely for stated purposes *in general* in FY 2017 and concluded that the District was in compliance with this requirement in FY 2018 [26] and FY 2019. [27]

The CBOC's opinion is that, because Measures D and E both passed without a list of "specific school facilities projects to be funded", compliance with Requirement B cannot be determined.

The CBOC's opinion is supported by guidelines and best practices for strong bond oversight promoted by, among others, the Little Hoover Commission, a bipartisan state board which works to foster economy, efficiency and improved services in the use of public funds. This board calls for *specific project lists in bond measure language*, even recommending a change in the education code to require this:

> "The Governor and Legislature should update and overhaul the education code related to the Strict Accountability in Local School Construction Bonds Act of 2000. Specifically, to '[r]equire bond measures proposed to voters under the reduced threshold to include specific project lists.'"[28]

The Little Hoover Commission's best practice guidance is also reflected in one of VLS' recommendations in the 2016 Forensic Accounting Investigation (FAI) Phase II Final Report which calls for greater specificity in bond measure language:

> "When the District seeks the passage of a future bond measure(s), include language in the bond measure that specifically refers to the Board approved Long-Range Facilities Master Plan. Adding this language to the bond measure will afford the District increased transparency, allow the voters to better understand the projects and timeline of the

[24] WCCUSD Unaudited Actuals Reports, FY2015 to FY2019 and FY2020 Estimated Actuals Report.
[25] See details in Appendix P *"Measure D and E Ballot Wording."*
[26] West Contra Costa Unified School District Proposition 39 Bond Performance Audit Report for the Fiscal Year Ended June 30, 2018, March 28, 2019, Moss Adams, LLP, page ii
[27] Ibid. pate ii.
[28] *Borrowed Money: Opportunities for Stronger Bond Oversight*, Report #236, February 2017, by The Little Hoover Commission, formally known as the Milton Marks "Little Hoover" Commission on California State Government Organization and Economy, an independent state oversight agency. See 2017 Recommendations for Local Bond Oversight # 7.

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> projects that will be undertaken with the bond proceeds, and will hold the District and Board members accountable to the public…."[29]

And finally, in June 2019, the CBOC approved **Facilities Roadmap 2023 Excellence Every Day** included the following provisions under *Features of a Transparent Bond Measure*:

- Specified prioritized Project List with estimated cost of each project and a commitment to build the projects in the priority order promised.
- A statement in the ballot language that includes the total amount of bonds to be issued, the duration of the bonds debt service, an estimate of average annual tax rate provided by an official source.

In summary, Moss Adams' opinion is based on performance audit standards and guidelines, and states that expenditures in FY 2017, FY 2018 and FY 2019 were spent, in general, on school facility construction projects. The CBOC, on the other hand, per Proposition 39 amendments to the California Constitution, has a duty to inform the public on expenditures by "a list of specific school facilities projects to be funded". Under the circumstances--i.e., without specific school projects listed in the original bond measures--the CBOC cannot determine the amount of bond funds spent for specific projects. The CBOC's opinion is supported by other third parties, including the Little Hoover Commission and recommendations in the 2016 Forensic Accounting Investigation, both of which promote greater specificity in bond measure language as a basis for bond oversight best practices.

CBOC has determined that generally bond funds were only expended on 2016 Facilities Master Plan Projects as approved by the Board of Education. For the first time this determination by the CBOC has been included in this year's 2019 Bond Fund CBOC Compliance Opinion.

Accountability Requirements C and D

The WCCUSD is in compliance with the accountability measures of obtaining an independently conducted annual performance audit and financial audit.

Summary of Bond Fund Financial Audit FY 2019

The bond fund received a clean opinion from the independent financial auditor, Christy White, Inc. (CW), as it has in previous years. Here is their opinion:

> "In our [CW's] opinion, the financial statements referred to [in this Financial Audit] present fairly, in all material respects, the respective financial position of the 2010 Measure D and 2012 Measure E Bond Building Fund of West Contra Costa Unified School District as of June 30, 2019, and the respective changes in financial position for the year then ended in accordance with accounting principles generally accepted in the United States of America." [30,]

[29]VLS Recommendation TC 2-2 (ITF Master List Recommendation #3)
[30] Christy White, Inc., Financial Audit Report, For the Year Ended June 30, 2019, page 4.

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WCCUSD Audit Report FY 2019

In addition to the bond fund financial audit, WCCUSD is subject to an annual financial audit covering all aspects of District activities. In the FY 2018 Audit, the District's auditors (Christy White Associates) found material weaknesses in how the District accounts for capital assets, including completed capital assets that had been funded by bonds. The bond fund includes the accounting for funds available to fund projects and projects under construction. Once completed, the assets are recorded in the District financial statements. While the WCCUSD audit results are not strictly within the purview of the CBOC, we believe that (a) good governance and management requires the WCCUSD to accurately account for assets that were funded by bond measures; and (b) the CBOC appropriately highlights the material weakness in the interest of transparency. The auditor's statement from the FY 2018 Audit:

> "The balances within the capital asset summary, specifically buildings, improvements, and accumulated depreciation, are not properly supported by an accurate listing and may be materially misstated with respect to the balances presented as capital and accumulated depreciation in the government-wide financial statements. The auditor's opinion was qualified because it cannot determine whether the capital assets and the related accumulated depreciation balances are fairly stated."

Christy White, Inc. in their FY 2019 annual financial audit reported that the recommended FY 2018 corrective action plan to reconcile the work in progress balances and update facilities capital asset tracking had been implemented. [31]

Summary of FY 2019 Bond Fund Performance Audit Results

A compliance performance audit is required by state law, beginning in FY 2016, to determine whether bond funds meet Proposition 39 compliance requirements, i.e., are used for projects listed in bond ballot measures, and only for construction, furnishings and equipment. In addition to the compliance requirement the Board contracted with Moss Adams, LLP to do an agreed upon procedure performance audit, including "effectiveness and results" -- an assessment of bond program management and recommendations for improvements -- for three years, starting with FY2017.

WCCUSD bond program performance audits can be summarized depending on who determined the audit objectives - the District, the State of /California or the auditor. To ensure transparency and adequate oversight, both the Little Hoover Commission and the CBOC recommend performance audits objectives be set by the auditors or the State of California, not the District.

[31] West Contra Costa Unified School District Audit Report June 30, 2019, Christy White, Inc,. page 112.

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Special Note - The Scope and Objectives of WCCUSD Bond Fund Performance Audits

With the exception of compliance audits required by the State since FY2016, the scope and objectives for all of the prior WCCUSD performance audits (FY 2003 to FY 2019) have been determined by WCCUSD, not by the auditors.

See Appendix E - "*2003 - 2019 WCCUSD Bond Program Audit History"* for more detail on performance auditing standards.

See Appendix D for a summary of recommendations made in Moss Adams, LLP FY 2019 performance audit as well as the table in Section IV of the performance audit entitled *Reporting Views of Responsible Officials* beginning on page 34 that provides a complete summary of the Auditors' Recommendations, the District Management Response, and Status of Resolution. The 2019 WCCUSD Performance Audit[32] can be viewed in its entirety on the CBOC website.

SUMMARY DISTRICT AUDITS AND CBOC 2019 COMPLIANCE STATEMENT

- FY 2019 Bond Fund Financial Audit by Christy White, Inc. was free of negative findings.

- FY 2019 Bond Fund Compliance Performance Audit by Moss Adams LLP was not able to confirm the salary and benefits charged to the bond bond due to the lack of form time cards or other timekeeping systems.

- FY 2019 Bond Fund Agreed Upon Procedures Audit by Moss Adams, LLP on 22 audit objects confirmed that 23 of the prior year's 25 recommendations were not fully addressed. Five additional improvement opportunities were identified for a total 28 open recommendations.

- The CBOC's 2019 compliance opinion concerning four state accountability requirements in the California Constitution is that the District did not meet the requirement to spend on authorized purposes (Requirement A); it "cannot be determined" if specific school facilities projects were funded (Requirement B); and the District did meet the California Constitution requirements to perform annual independent performance and financial audits (Requirements C and D). In addition a statement has been added for the first time that the CBOC has determined that generally all bond expenditures were made in accordance with the Board approved 2016 Facilities Master Plan Report.

  Note: The FY 2019 Moss Adams, Inc. performance audit report included both the compliance report and agreed upon procedures report in one document.

[32] https://www.wccusd.net/cms/lib/CA01001466/Centricity/Domain/1871/B_1_2018PerformanceAuditFinal_0.pdf

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5. 2016 FORENSIC ACCOUNTING INVESTIGATION (FAI) RECOMMENDATIONS IMPLEMENTATION STATUS

Background

In 2015, the Board directed the forensic accounting firm Vincenti, Lloyd & Stutzman, LLP (VLS) to assess the risk of fraud, corruption and waste in the bond program as a result of allegations made by a District employee. In its 2016 report[33], VLS made 112 recommendations to reduce risk and improve organizational efficiency. In September 2016 the Board established that the District would implement these recommendations and the District originally targeted completing implementation over a two-year period, by October 2018.

The Board established a FAI Recommendations Implementation Task Force (ITF) to track the District's progress and periodically report status to the Board and public.The task force consists of the Superintendent, the Associate Superintendent in charge of Operations and the Bond Program, the Internal Auditor, the Director of Contracts Administration, a member of the CBOC, and a member of the Solutions Team (employee union representative, this position has been vacant).

In October 2017, the Board accepted the CBOC's recommendation to engage an auditing firm (Moss Adams LLP) to review and verify the District's implementation of the FAI recommendations. This independent review is being performed in two phases. In Phase 1, completed on March 7, 2019, Moss Adams reviewed recommendations implemented up to June 30, 2017: Moss Adams determined that of the 62 recommendations the District reported as implemented as of June 30, 2017, 33 were verified as fully implemented, 19 as partially implemented, 3 as not implemented, and 7 as undetermined[34]. The second phase review will occur after the District deems the implementation is fully complete. The CBOC recommended that the recommendations that were determined partially or not implemented in Phase 1 would be re-verified in Phase 2, however, the District has yet to add this to Moss Adams' scope of work.

2019 District FAI Implementation Activities

[33] The report can be viewed on the District website, https://www.wccusd.net/domain/1723. A matrix detailing the status of each recommendation as well as reports from the ITF to the Board and Facilities Committee can be viewed on the District website, https://www.wccusd.net/Page/8139.
[34] The documents associated with implementation of these recommendations are subject to attorney client privilege, which was not waived by the Board, and therefore the auditor could not verify.

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In its FAI recommendations review and performance audits, Moss Adams indicated that many of the remaining FAI recommendations as well as performance audit recommendations relate to documenting bond program policies and procedures and obtaining Board approval. The firm recommended that the District engage external parties to supplement staff resources to complete this effort. In May 2019, the Board approved a contract with Swinerton Management and Consulting to assist staff in developing the comprehensive set of policies and procedures, known as the bond Program Management Plan (the PMP). Work on the PMP continued through 2019 and 2020 and is targeted to be completed and presented to the Board for approval in October 2020.

The status of FAI Recommendation implementation as of December 31, 2019, as self-reported by the District, is listed in the table below. Note that while the District has a process for internal verification by its Internal Auditor, independent verification by Moss Adams (the external auditor) will not occur until Phase 2 of its review.

Status →	Implemented and Verified as of March 31, 2019 *	Undetermined (Attorney/Client Privilege) *	Implemented and Ready for Review **	Implementation by October 2020 **
Recommendations (112 total)	35	6	51	20
High Risk Items (out of 112 total)			13	8
Percent of Total	31.3%	5.4%	45.5%	17.9%

* As reviewed and reported by independent third-party auditor Moss Adams, LLP.

** To be reviewed and reported by Moss Adams after completion of implementation.

See Appendix J for further details concerning the implementation status and risk association of FAI recommendations not yet verified as fully implemented by an independent third-party.

In 2019, the Implementation Task Force met quarterly and provided several updates to the Board and the Board Facilities Committee.

SUMMARY

Implementation of the FAI recommendations is well behind the original schedule of October 2018. In 2019, the Board took action to supplement staff resources with external support to help complete the implementation. Progress on the Program Management Plan - the comprehensive set of written policies and procedures for the bond program - continued in 2019 and 2020. Drafts of all sections of the PMP have been completed and posted to the District website for public comment at https://www.wccusd.net/Page/13520, and the District now targets completion and presentation to the Board for approval by October 2020.

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6. 2016 LONG RANGE FACILITIES MASTER PLAN IMPLEMENTATION STATUS

Background

The Facilities Master Plan (FMP) represents the District's main statement of strategy for school facility upgrades and replacements over the next five years and beyond. It is comprised of the following:

- The "*Long Range Facilities Master Plan" (July 2016)* - this document describes the master planning process: assessing existing facilities, estimating future needs, setting priorities, developing options, and establishing an implementation plan.
- The "*Educational Specifications*" and "*Materials and Product Standards*" (*2016-2017*) - these documents establish District wide standards for school designs and the materials used in school construction.

The Facilities Master Plan was prepared by external architects and consultants (Darden Architects and Integrated Educational Planning & Programming) after an extensive eleven month process of input from school site and the general communities[35]. In June 2016 the Board approved an implementation plan for 21 projects - the "FMP Implementation Plan Projects" - to be implemented from 2016-2023 and that focused primarily on "critical needs" projects (for seismic and other health and safety needs) as well as two school replacement projects: Wilson and Lake EleBelow is a chart entitled, Status, Estimates and Budgets for the 2016 FMP Board approved "Implementation Plan Projects" as of December 31, 2019, that gives you an overview of the status of the 2016 facilities Master Plan. It is a compilation of four Board of education charts –Report #13, Note #5 (Appendix I), the Consolidated Budget Status -Report – FMP (Appendix), and Report #2 (Appendix H).mentary Schools. These projects and their status and schedules are summarized in the tables below. The approved implementation plan assumed that only existing or approved bond funds and forecast state school facilities program funding would be utilized and was based on preliminary project concepts and "Rough Order of Magnitude"[36] cost estimates totaling $181.8 million.

Below is a chart entitled, *Status, estimates and budgets for the 2016 FMP Board Approved "Implementation Plan Projects" as of December 31, 2019*, that gives you an overview of the status of the 2016 Facilities Master Plan. It is a compilation of three Board of Education charts – Report #13, Note #5 (Appendix I), the Consolidated Budget Status Report – FMP and Report #2 (both in Appendix H).

[35] These documents and others related to the Facilities Master Plan can be viewed on the District website, https://www.wccusd.net/Page/6945.
[36] Based on general cost per square foot, including 5% annual forecast cost escalation.

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2016 FMP Board approved "Implementation Plan Projects"

School	Project Type	R.O.M. Estimate FMP 2016 (per Report 13 Note 5)*	Board Approved Budget Dec 31, 2019*	Project Status (per Report #2 and Consolidated Budget Report)*
Ed Specs. & School Size	-	200,000	200,000	
Harmon Knolls	Soil Testing	100,000	41,489	Completed
Valley View ES	Critical Needs	1,000,000	1,091,447	Completed
Crespi MS	Critical Needs	3,100,000	5,300,000	Underway**
Riverside ES	Critical Needs	6,900,000	6,900,000	Underway**
Richmond HS	Critical Needs	15,100,000	21,000,000	Underway**
Highland ES	Critical Needs	800,000	52,875	Completed
Highland ES	Water & Power Upgrade		747,125	Not yet started
Grant ES	Critical Needs	900,000	211,467	Completed
Olinda ES	Critical Needs	1,000,000	1,000,000	Underway**
Chavez ES	Critical Needs	600,000	72,847	Underway**
Ohlone ES	Critical Needs	800,000	623,885	Completed
Harmon Knolls	Critical Needs	200,000	406,946	Completed
Fairmont ES	Critical Needs	3,000,000	3,000,000	Underway**
Stege ES	Critical Needs	2,900,000	2,900,000	Underway**
Wilson ES	RS Replacement	40,300,000	40,300,000	Underway**
Lake ES***	Critical Needc(portable demolition)		147, 501	Future Project
Lake ES***	RS Replacement	-	1,000,000	Future Project
SUB-TOTALS		***76,900,000***	***84,995,582***	

ES = Elementary School MS = Middle School HS = High School

* See Report 13 in Appendix I; Report 2 in Appendix H; "Budget" shown in Consolidated Budget Report - FMP in Appendix XXX
**FMP Projects "underway" are in planning, construction, or closeout phase.
***In 2019, the Board approved reallocating $1.5 million from the budget for Lake's Future Facility Master Plan Projects "Implementation Plan Projects" to cover more immediate critical needs totaling $1.15 million.

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Future Facilities Master Plan Projects, Implementation Plan Model 1

School	Project Type	R.O.M. Cost Estimate* FMP 2016	"Current Budget" - Report 13 Note 5	Project Status**
Cameron	Critical Needs	1,300,000	1,300,000	In 2016, the Board approved implementation, funded by Measure D (2010) and Measure E (2012). Project Status at the end of 2019, is Future Projects with budget to-be-determined.
Collin ES	Critical Needs	3,500,000	3,500,000	
Hercules MS	Critical Needs	7,500,000	7,500,000	
Hercules HS	Critical Needs	7,200,000	7,200,000	
Kennedy HS	Critical Needs	12,200,000	12,200,000	
Lake ES***	RS Replacement	66,100,000	64,600,000	
Shannon ES	Critical Needs	7,100,000	7,100,000	
SUB_TOTALS		***104,900,000***	***103,400,000***	
Total Implementation Plan Model 1		**$181,800,000**	**$188,395,582**	

"Unfunded" Master Plan Projects

The most expensive phase of the 2016 FMP projects has yet to be funded. The Facilities Master Plan identifies an additional 21 projects with an aggregate Rough Order of Magnitude cost estimate of $1.1 billion that will require additional bond measures to implement. These projects are referred to as "Unfunded Master Plan Projects", and are summarized in a table below.

Unfunded Master Plan Projects		
School Site	**Project Type**	**R.O.M Cost Estimate**
Alvarado Adult	Critical Needs	$ 4.2 million
Sierra Adult	Critical Needs	3.4
Stege Elementary	Replacement	86.4
Highland Elementary	Replacement	121.9
Valley View Elementary	Replacement	108.5
Grant Elementary	Modernization/Partial Replacement	46.6
Richmond High	Modernization/Partial Replacement	119.2
Shannon Elementary	Modernization/Partial Replacement	28.1
Olinda Elementary	Replacement	89.6
Fairmont Elementary	Replacement	102.4
Crespi Middle	Modernization/Partial Replacement	65.5
Collins Elementary	Modernization/Partial Replacement	37.2
Kennedy High	Modernization/Partial Replacement	110.4
Riverside Elementary	Modernization/Partial Replacement	58.1
Chavez Elementary	Modernization/Partial Replacement	24.6
Hercules Middle	Modernization/Partial Replacement	7.2
Hercules High	Modernization/Partial Replacement	15.9
Ohlone Elementary	Modernization/Partial Replacement	10.2
Cameron School	Modernization/Partial Replacement	37.4
Alvarado Adult	Modernization/Partial Replacement	25.7
Sierra Adult	Modernization/Partial Replacement	17.4
	Unfunded Master Plan Projects	**$ 1,119.9 million**

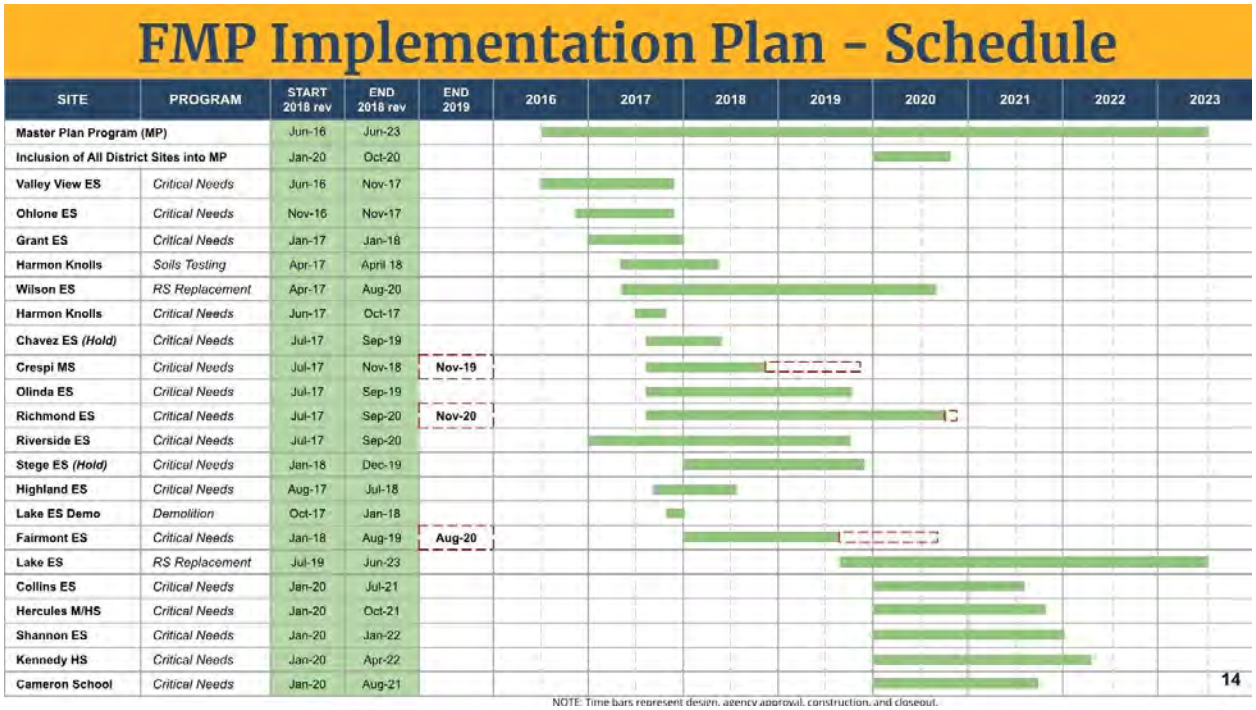
"Unfunded Projects" are listed above in their order of prioritization and timeline scheduling, within the *Long Range Facility Master Plan*.

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Measure R

In November, 2019, the Board approved placing Measure R, a $575 million school construction bond for WCCUSD, on the March ballot. Since this guarantees only about half of the $1.1 billion needed to complete the unfunded projects listed in the 2016 FMP, it is likely the District will need one or more new bond measures in order to fund all unfunded 21 construction projects.

The WCCUSD has posted Annual 2016 FMP Implementation Plan updates in 2018 and 2019 on their website. The 2019 updates include items like the 2019 FMP Implementation Plan Schedule Chart below.



FMP Implementation Plan - Schedule

SITE	PROGRAM	START 2018 rev	END 2018 rev	END 2019
Master Plan Program (MP)		Jun-16	Jun-23	
Inclusion of All District Sites into MP		Jan-20	Oct-20	
Valley View ES	*Critical Needs*	Jun-16	Nov-17	
Ohlone ES	*Critical Needs*	Nov-16	Nov-17	
Grant ES	*Critical Needs*	Jan-17	Jan-18	
Harmon Knolls	*Soils Testing*	Apr-17	April 18	
Wilson ES	*RS Replacement*	Apr-17	Aug-20	
Harmon Knolls	*Critical Needs*	Jun-17	Oct-17	
Chavez ES *(Hold)*	*Critical Needs*	Jul-17	Sep-19	
Crespi MS	*Critical Needs*	Jul-17	Nov-18	Nov-19
Olinda ES	*Critical Needs*	Jul-17	Sep-19	
Richmond ES	*Critical Needs*	Jul-17	Sep-20	Nov-20
Riverside ES	*Critical Needs*	Jul-17	Sep-20	
Stege ES *(Hold)*	*Critical Needs*	Jan-18	Dec-19	
Highland ES	*Critical Needs*	Aug-17	Jul-18	
Lake ES Demo	*Demolition*	Oct-17	Jan-18	
Fairmont ES	*Critical Needs*	Jan-18	Aug-19	Aug-20
Lake ES	*RS Replacement*	Jul-19	Jun-23	
Collins ES	*Critical Needs*	Jan-20	Jul-21	
Hercules M/HS	*Critical Needs*	Jan-20	Oct-21	
Shannon ES	*Critical Needs*	Jan-20	Jan-22	
Kennedy HS	*Critical Needs*	Jan-20	Apr-22	
Cameron School	*Critical Needs*	Jan-20	Aug-21	

2016 2017 2018 2019 2020 2021 2022 2023

14

NOTE: Time bars represent design, agency approval, construction, and closeout.

The chart above is from a presentation entitled "Facilities, Planning & Construction Department Implementation Update 5.30.19" available on the District website https://www.wccusd.net/Page/6945.

Monitoring Bond Program Project Status

School construction projects fall under the WCCUSD Facilities Planning and Construction Department. The Associate Superintendent for Facilities, attends the Citizens' Bond Oversight Committee's monthly meetings and presents to our committee his Facilities Master Plan Project Update Report on the progress of the School District's construction bond program. In his report are photos taken at school construction sites, a Bond Project Status Update Chart (Appendix G), individual school project status reports , and copies of Newsletters sent to the community about active sites in their community. The CBOC uses the Associate Superintendent's report, along with a monthly financial report presented by a member of the Financial Business Services Department, to help in monitoring the district's construction bond program for the taxpayers.

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2019 Facility Master Plan Activities

Legacy Projects

During 2019, construction of the two remaining legacy projects (projects approved prior to the establishment of the FMP), Pinole Valley High School and Nystrom Elementary School - both replacement projects - continued through 2019 with Nystrom Elementary School being completed by the end of January 2020[37].

Construction Projects' Status Changes

There are three phases in completion of a project - Design, Procurement, and Construction. During the Design phase sites are assessed, architect plans drawn up, reviewed and approved. During the Procurement phase bids are accepted and contracts awarded. Finally during the Construction phase the construction of the project occurs, after which a punch list work walk through (a walk through to make sure everything agreed upon is completed and satisfactory), and a closeout of all the paperwork, in order to pay the contractors, occurs.

Construction Projects During 2019[38]

During 2019, in addition to Pinole Valley HS and Nystrom ES campus replacement legacy projects, five FMP projects were under construction (Wilson ES, campus replacement and Olinda ES, Fairmont ES, Crespi MS and Richmond HS, all of which are critical needs projects). Critical needs projects are projects involving seismic and other health and safety needs. For example, Crespi MS had to have its gymnasium retrofitted to assure seismic stability; Olinda ES had a courtyard common area that had tree roots lifting the concrete and causing a tripping hazard; Richmond HS needed new fire and water lines; and Fairmont ES had persistent sewer problems.

In addition to ongoing FMP and Legacy construction projects listed in the chart below and in the December 2019, *Bond Program Status Report* (in Appendix G), by the end of 2019, five projects were in the Design phase, and one was in the Procurement phase. Occasionally a project is placed on hold. For example, Korematsu Elementary School fall protection project concerns a railing around the roof of the school building. This project started 2019 on hold, in the Procurement phase, then moved to the Design phase in May, and remained there for the remainder of the year.

[37] The construction of the Nystrom Elementary School Modernization Project was completed, and the school opened in August 2016. There was a settlement for the Project in January 2020. Subsequently, the financial closeout and reconciliation of the Project were completed in February 2020

[38] Data source: Bond Project Status Update charts, the Bond Program Spending by Site reports (Report #2), and the Consolidated Budget reports, all of which can be found in the CBOC monthly Meeting Agenda Packets (January 2019-February 2020) listed on the CBOC's website, www.wccusd.net/cboc under Hitorical CBOC Meeting Agendas, minutes, & recordings.

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FMP and Legacy Construction Projects During 2019			
Legacy / FMP Project	**School**	**Project**	**Status as of 12/31/2019**
FMP	Wilson ES	Campus Replacement	Under Construction
	Fairmont ES (Phase I)	Critical Needs	Punch list work / Close-out
	Crespi MS	Gym Seismic Retrofit	Under Construction (As of 9/2020 - still in closeout)
	Richmond HS	Critical Needs	Under Construction
	Orlinda ES	Critical Needs	Close-out (Completed Feb. 2020)
Legacy	Nystrom ES	Campus Replacement	Under closeout and reconciliation (was completed by February 2020)
	Pinole Valley HS	Campus Replacement	Punch list work / Close-out

Pinole Valley High School (PVHS)
The Grand opening of PVHS was held on August 12, 2019, in time for the 2019/2020 school year. Left on the primary contract is to build the sports field and field house.

Wilson Elementary School Campus Replacement Project
The school was moved to a temporary campus for the 2018-20 school years.
In August of 2019, the Wilson Elementary School campus replacement project commenced with the demolition of the existing campus. By October the Wilson ES construction phase was in full stride. In the October Facilities' Committee individual project status report for Wilson ES, the revised final completion date for the replacement project is July 27, 2020. The project has a targeted occupancy date of August 2020, in time for the 2020/2021 school year.

The Wilson Elementary School campus replacement project is the first time that the District has used the Design-Build or Design-Build Entity (DBE) construction contracting approach. Prior to the Wilson campus replacement project, the WCCUSD used the Design-Bid-Build (DBB) method of construction contracting. Under the DBB method WCCUSD first gets bids from architects , signs a contract and the design plans are delivered to the District. Next the District would take the architect design and get bids from construction contractors separately. Any contract changes (change orders) during the construction phase could lead to three way

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negotiations between the architect, builder and the District. An example of this is the campus replacement project for Nystrom ES mentioned above. Under the new DBE method, the WCCUSD bids and signs a contract for the design and construction of the entire project with only one contractor.

During the summer of 2017, the District started the process of qualifying and interviewing prospective DBE's for the Wilson campus replacement project. C. Overaa Construction, Inc. is the first DBE partner for a design-build project in the WCCUSD.[39]

Summary

In 2019, of the 42 schools identified in the WCCUSD FMP Implementation Plan, thirteen schools' projects have been completed or are in the Planning, Construction or Closeout phases. Nineteen schools projects will have to wait for future funds to begin their critical needs and/or modernization, partial replacement, replacements projects.

During the year 2019, 2 of 3 campus replacement Legacy projects (Pinole Valley HS and Nystrom ES) were nearing completion and another campus replacement project (Wilson ES) was started. Four school critical needs projects were nearing completion or completed and 1 was still under construction. At the end of 2019, 5 new school projects are in the design or procurement phases and will move into the construction phase come 2020.

WILSON DEMOLITION PICTURE HERE

[39] WCCUSD CBOC 2017 Annual report, pages 29 & 30; the report can be found on the CBOC website, www.wccusd.net/cboc .

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Wilson Temp Campus Conversion - Upper Grade playground

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7. OTHER CBOC, BOARD AND DISTRICT ACTIONS IN 2019

1. **District Staff Changes affecting bond fund management, budgeting, accounting, reporting and internal auditing:**

    - Tony Wold started as *Associate Superintendent for Business Services* in August 2019.

    - The District's *Director, Internal Audit* position was vacant much of 2019. Grace Elzerman, started in May, 2019, and resigned in October, 2019. (Elzerman replaced Jackie Kim who started in early 2017, and resigned in July, 2018.) The position has remained vacant since June, 2019.

      Background: The District's 2016 *Financial Accounting Investigation (FAI)* included a strong recommendation that the Internal Audit Department have ",,,adequate resources and authority" to operate effectively ..." Accordingly, in 2017, a new position, *Director, Internal Audit*, was created to fulfill this recommendation.

      The reporting structure for this position from its inception in 2017, was inconsistent with both the FAI recommendation and the job description approved in 2017, by the Board of Education. The latter called for the *Director, Internal Audit* to have "direct access" to the President of the Board of Education. Instead, the position reported both functionally and administratively to the District's Superintendent as the Board's "designee". This did not align with best practices put forth by The Institute of Internal Auditors International Professional Practice Framework who said, simply, that the *Director, Internal Audit* should report functionally to the Board of Education and administratively to the Superintendent.

      In December, 2018, the CBOC formally approved a recommendation to the Board of Education that the job description of the *Director, Internal Audit* be amended to establish greater independence from District management, and conform more explicitly with the FAI's recommendation and industry best practices. In May, 2019, the CBOC's recommendation was rejected by District management.

    - On May 8, 2019, the Board of Education approved a contract with Swinerton Management & Consulting (SMC) to assist the District to develop, draft and publish a *Bond Program Management Plan (PMP)*.

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The purpose of the PMP is to provide information to Bond Program participants on relevant policies and procedures. It outlines all the processes for Bond Program activities, including, but not limited to, staffing, procurement, financial controls, document control, budgeting practices, master planning, scheduling, invoice/payment application review and processing, change order review and processing, and claims avoidance and management.

The PMP will also provide documentation of the internal controls that properly implement the District's policies, safeguard its assets, provide compliance with state and federal laws and regulations, and produce timely and accurate financial information.

One of the significant types of consistent implementation is the suite of monthly reports with the CBOC. See additional details in Appendix K.

Regular updates and draft sections of the PMP are available on the District's website[40].

2. 2019 CBOC Recommendations to the Board

To improve bond oversight and transparency, in 2019 the CBOC approved and sent seventeen recommendations to the West Contra Costa Unified School District (WCCUSD) School Board. By the end of December, two of these recommendations had been formally accepted and one was rejected. The CBOC awaited a response on the remaining fourteen recommendations.[41] Of the two recommendations which were accepted, one was done and another was in process at the end of 2019.

The CBOC's 2019 recommendations covered a variety of topics. All seventeen are listed in Appendix F along with the District's responses. Examples include personnel matters such as the need for a Director of Internal Audits (see #1, above) and an independent third party to determine what employee hours can be charged to the construction bond fund, and requesting a review of selected job descriptions. The CBOC also recommended that the 2016 Master Plan be updated and that the Board Policy dealing with the role of the CBOC be reviewed and updated (see #3, below). Three recommendations dealt with elements of the Forensic Audit.

3. 2019 Proposed Amendments to Board Policy 7214.2 and Discussion Concerning the Role of the CBOC

[40] *https://www.wccusd.net/Page/13520*

[41] Of the 17 CBOC recommendations made in 2019, by August 10, 2020, one still needed a response (dealing with the scope of Lake Elementary School planning report.); two were still under review (dealing with Board Policy); five recommendations were rejected; nine were done. Ref: WCCUSD Citizens' Bond Oversight Committee Meeting Packet for August 10, 2020.

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The WCCUSD established Board Policy 7214.2 to oversee the independent Citizens' Bond Oversight Committee (CBOC). Just as with any other set of rules, periodic updates have been necessary. Beginning in January of 2017, the CBOC began the process of drafting updates to Board Policy 7214.2 for consideration by the Board of Education

Areas of concern noted in CBOC Board Policy 7214.2 proposed amendments included:

- Reducing the size of the CBOC to reduce District staff time, and eliminating seats that had gone unfilled for lengthy periods, for example, seats for specific groups (the Contra Costa Building Trades Council and the Solutions Team (made up of the five unions representing District employees), plus a student representative. There were difficulties in filling these three seats. The practicality of a student being able to fulfill the two year commitment required of all CBOC members—as well as being properly versed in the issues of the District as a whole—were areas of concern the CBOC hoped to address. Furthermore, there was the perception that the Building Trades and Solutions Team seats were being awarded to special interest groups looking after specific concerns instead of representing the full range of West County residents..
- Reconfirming the independence of the CBOC, in particular that the CBOC have access to independent legal counsel.
- Streamlining and clarifying Board policy references to the California Ed Code.
- Requiring the Board Liaison to the CBOC to actually attend CBOC meetings.
- Requiring the CBOC website, administered by District Staff, be accurate and maintained up to date. The CBOC site has been seriously out of date with inaccurate documents, incorrect documents, missing documents, and documents with dead or missing hyperlinks. The proposed amendments would have given access to the CBOC web site to one member of the CBOC to allow prompt updating of the information at minimal cost to the District.
- Making the CBOC partners with the District and the Board when draft copies of the Financial and Performance Audits are issued.
- Reinforcing the need for the District to provide resources to ensure that the work of the CBOC was disseminated to the public.
- Requiring a mutually agreed upon yearly "not to exceed" budget for the operation and support of the CBOC.

Members of the CBOC met numerous times with District staff and the Board's Governance Committee to try to find compromises that all parties could agree to.

FOLLOW UP: There was an unexpected resistance by several Board and senior staff members to the proposed amendments that continued the amendment process well into 2020. When the matter was finally brought before the Board at their meeting of 27 May 2020, the pushback from several Board members was severe enough that no vote was taken. At the date of release of this report, proposed amendments will have yet to be considered.

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4. Board of Education Approval of *Bond Measure R*

On November 20, 2019, the West Contra Costa Unified School District Board of Education passed Resolution No. 43-1920, placing a $575 million bond measure on the March 3, 2020 ballot. It was approved by 58.7% of voters on March 3, 2020; 55% was required for passage of this measure.

Measure R's ballot summary was non-specific, similar to WCCUSD Measures D (2010) and E (2012).[42] Measures D and E were both approved by voters years before the Board approved the District's comprehensive Long Range Facility Master Plan (FMP) in 2016. The Board chose not to reference the FMP in Measure R's ballot summary statement at all, and only loosely in the full text of the ballot measure.[43]

This is notable, since the 2016 Forensic Accounting Investigation (FAI) Phase II Final Report by Vicenti, Lloyd, Stutzman (VLS), included a recommendation (TC 2-2) concerning ballot language in future bond measures.[44] This recommendation called for an unambiguous tie to the District's FMP in any future bond measure language. The only exceptions to the master plan were for "flexibility in the event of an unforeseen or catastrophic event". In 2019, Measure R was the first WCCUSD bond measure approved since VLS made this recommendation and the Board of Education accepted it in 2016. Therefore, this was the Board's first opportunity to implement this particular FAI recommendation.

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[42] Voters see the summary statement ("The Question") on the ballot itself. The ballot summaries for Measure D and E are shown at the end of Appendix P in this report. The ballot summary for Measure R was: "WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT CLASSROOM MODERNIZATION AND SAFETY UPDATE MEASURE. To repair, upgrade neighborhood schools, shall West Contra Costa Unified School District modernize core classrooms; provide safe, secure school environments, including updated technology and air conditioning, that improve academic achievement and provide relevant career pathways for all students, by issuing $575 million of bonds, at legal rates, averaging $34.48 million annually while bonds are outstanding, at 6¢ per $100 assessed value, with strict citizens' oversight, annual audits and all money for local schools?"

[43] The full text of a ballot measure is printed in the voter guide sent one-to-a-household along with ballots for each voter in the household. The full text of Measure R is shown in Appendix XX.

[44] VLS recommendation (TC2-2/ITF Master List Recommendation #3): "*When the District seeks the passage of a future bond measure(s), include language in the bond measure that specifically refers to the Board approved Long- Range Facilities Master Plan. Adding this language to the bond measure will afford the District increased transparency, allow the voters to better understand the projects and timeline of the projects that will be undertaken with the bond proceeds, and will hold the District and Board members accountable to the public. The language added to the bond measure should include a statement that provides the District with some flexibility in the event of an unforeseen or catastrophic event, requires that the Board approve revisions made to the Facilities Master Plan, and indicates the means by which the public could obtain a copy of the approved Facilities Master Plan*." This was related to allegations of Conflict of Interest (COI), deemed "medium" risk to the District—i.e., "… the dollar impact may be large, and there may be an impact on public perception/trust."

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VLS' recommendation was meant to improve bond oversight and accountability. In their words, "Adding this language to the bond measure will afford the District increased transparency, allow the voters to better understand the projects and timeline of the projects that will be undertaken with the bond proceeds, and will hold the District and Board members accountable to the public."

Measure R's generalized wording, both in the ballot summary and full text, is also worth noting in light of the CBOC's Proposition 39 compliance opinion included in annual reports since 2016. Concerning Measures D and E, the CBOC opined that compliance "Cannot be determined" because these were approved "...without a list of 'specific school facilities projects to be funded...."[45] It's reasonable to assume that the CBOC's compliance opinion concerning Measure R will be the same as for Measures D and E.

[45] See Section 4 of this report, concerning Accountability Requirement B of CA Ed Code, for a detailed explanation of the CBOC's Measure D and E compliance opinion.

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APPENDICES

1. Use of Bond Funds/Program Financial Status

APPENDIX A: WCCUSD Facilities Funding Sources

Source: WCCUSD/CBOC "*Bond Program KPI (Key Performance Indicator) Summary*", Report 1, Table 1 – Bonds Authorized, shown in Appendix C. "Tax Rates" are for County tax year 2017/2018, from Appendix B.

Bond Measure	Month, Year	Authorized Amt	Issued-to-Date	Remaining Amt	Tax Rate [Note 1]
1998 – E	June, 1998	$ 40 million	$ 40 million	--	$5.30 / year
2000 – M	November, 2000	$ 150 million	$ 150 million	--	$ 18.40 / year
2002 – D *	March, 2002	$ 300 million	$ 300 million	$.002 million	$ 60 / year
2005 – J *	November, 2005	$ 400 million	$ 323 million	$ 77 million [Note 4]	$ 60 / year
2010 – D *	June, 2010	$ 380 million	$ 315 million	$ 65 million	$ 48 / year
2012 - E *	November, 2012	$ 360 million	$ 295 million	$ 65 million	$ 48 / year
Current Local Bond Fund Totals		**$ 1,630 million**	**$ 1,423 million**	**$ 130 million****	**$ 239.70 / year**
Pending: California State School Facility Fund		$ 21 million (See Note 2 below)	--	$ 21 million	Grants from State Bonds
Received: California State School Facility Fund		$ 188 million received-to-date	$ 188 million (See Note 3 below)	--	Grants from State Bonds
Total Local + State Bond Funding		**$ 1,839 million**	**$ 1,611 million**	**$ 151 million****	**n.a.**

* WCCUSD local school bond measures passed under California Proposition 39 requirements.

**Excludes $77 million in outstanding 2005-J authorization; see Note 4.

Projected Issue Dates for "Remaining Amount" (shown above)

Source: WCCUSD "*Bond Program Financial Status, Cash Projections to June-2021*", Report 13, Note 2, shown in Appendix I.

Bond Measure	2020 Issue	Future Issue (See Note 4 below)	Total
2010 – D	$ 65 million	--	$ 65 million
2012 - E	$ 65 million	--	$ 65 million
Sub-Totals	**$ 130 million**	**--**	**$ 130 million****
2005 – J	--	$ 77 million	$ 77 million
Totals	**$ 130 million**	**$ 77 million**	**$ 207 million**

**Excludes $77 million in outstanding 2005-J authorization; see Note 4.

Note 1 Tax Rate: The "Tax Rate" is the annual property tax amount paid by County taxpayers, per each $100,000 of their property's assessed value, to pay off each WCCUSD bond. For any given property, the assessed value (which is set by the County Assessor) is not necessarily the same as the original purchase price or the current market value.

Note 2 State Grants Pending: Source: WCCUSD/CBOC "*Bond Program Financial Status, Cash Projections to June-2021*", Report #13, Note 4, shown in Appendix I. These pending grants are forecast to be received by the District within the FMP planning period.

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Note 3 State Grants Received: The District has successfully leveraged its bond funds with a significant amount of matching state grants.

Source: WCCUSD/CBOC "*Bond Program KPI (Key Performance Indicator) Summary*", Report #1, shown in Appendix C. See especially note 13. "*Total Other Revenue by bond or funding source*", particularly the line item titled "School Facility" = $188,452,875.

For further details behind that data, please also see from the same resource: Table 2 – Funds from Other Sources, with particular reference to Note 6. "*School Facilities*", Note 8. "*Interest Earnings*" and note 9. "*Net Transfers*".

Note 4 2005 Measure J: "On issuing bonds, the District must certify that the tax rate for the bonds will not exceed $60 per $100 thousand of property value. In addition, the District has a publicly stated goal for the 2010 – D and 2012 – E bonds of maintaining the tax rate at $48 per $100 thousand". [Source: WCCUSD/CBOC "*Bond Program KPI (Key Performance Indicator) Summary*", Report #1, Table 1, Note 4].

As a result, the remaining $77 million from the 2005 Measure J bond authorization cannot currently be issued: It is already maxed out at the tax rate cap of $60 per $100 thousand of assessed value to pay off the $323 million in 2005 Measure J bonds which has been issued-to-date.

According to the most recent forecast of property tax rates required to service the $323 million of Measure J bonds currently outstanding, the earliest that the tax rate will drop below $60 per $100 thousand of assessed value is Tax Year 2034/2035. Please refer to Appendix B - "*West Contra Costa County Property Tax Rates*".

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APPENDIX B: West Contra Costa County Property Tax Rates

(This section is pending input from Staff/County Assessor's office expected 09/30/2020)

Property Tax Rates: The "Tax Rate" is the annual property tax amount paid by County taxpayers, per each $100,000 of their property's assessed value, to pay off each local bond measure. For any given property, the assessed value (which is set by the County Assessor) is not necessarily the same as the original purchase price or the current market value.

The historical property taxes paid-to-date by West County taxpayers to service WCCUSD bonds are as follows:

Election Measure	1998 E	2000 M	2002 D	2005 J	2010 D	2012 E	Total Annual Property Tax Rate, by Tax Year[46]
Authorized	$40	$150	$300	$400	$380	$360	
Issued-to-Date	$40 million	$150 million	$300 million	$323 million	$250 million	$235 million	
Target Rates	$24.60	$55.60	$60.00	$60.00	$48.00	$48.00	
1998/99	$6.10						**$6.10**
1999/00	$12.50						**$12.50**
2000/01	$20.40	$6.90					**$27.30**
2001/02	$18.00	$6.90					**$24.90**
2002/03	$16.10	$25.00					**$41.10**
2003/04	$12.30	$45.40					**$57.30**
2004/05	$16.10	$46.90	$7.83				**$70.83**
2005/06	$11.50	$43.70	$9.75				**$64.95**
2006/07	$10.50	$38.60	$14.85	$16.50			**$79.85**
2007/08	$9.00	$34.20	$14.82	$16.10			**$74.12**
2008/09	$9.30	$36.50	$16.57	$28.80			**$91.17**
2009/10	$10.50	$55.20	$21.33	$59.00			**$146.03**
2010/11	$11.30	$55.60	$25.69	$60.00			**$152.59**
2011/12	$8.60	$55.60	$46.96	$60.00	$48.00		**$219.16**
2012/13	$8.70	$55.60	$60.00	$60.00	$31.40		**$215.70**
2013/14	$10.20	$55.60	$60.00	$60.00	$48.00	$48.00	**$281.80**
2014/15	$8.70	$55.60	$60.00	$60.00	$48.00	$48.00	**$280.30**
2015/16	$6.50	$55.60	$60.00	$60.00	$48.00	$48.00	**$278.10**
2016/17	$5.80	$38.60	$60.00	$60.00	$48.00	$48.00	**$260.40**
2017/18	$5.30	$18.40	$60.00	$60.00	$48.00	$48.00	**$239.70**
Cumulative-to-Date	**$217.40**	**$728.90**	**$517.80**	**$600.40**	**$319.40**	**$240.00**	**$2,623.90**

[46] Data from the County Tax Assessor, as provided by the District on July 24, 2019. See also County of Contra Costa, Detail of Tax rates 2017-2018, Robert Campbell, County Auditor-Controller, Martinez, California, September 2017.

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Projected Tax Rates[47]: To date, the authorized amounts for 1998 Measure E, 2000 Measure M and 2002 Measure D have been 100% issued and are reflected in these projected tax rates. Although not yet fully issued, the projected tax rates shown below for 2010 Measure D and 2012 Measure E are based on 100% issuance, as planned by the District ($130 million in FY 2020). Projected tax rates for 2005 Measure J do not include the final $77 million still available to issue, as no schedule has been set to issue it.

Note that these projections may well change from Annual Report to Annual Report due to refundings during the year (if any) and/or due to changes in projected assessed values (if any).

Election Measure	1998 E	2000 M	2002 D	2005 J	2010 D	2012 E	Total Annual Property Tax Rate, by Tax Year
Authorized	$40	$150	$300	$400	$380	$360	
Issued-to-Date	$40 million	$150 million	$300 million	$323 million	$250 million	$235 million	
Target Rates	$24.60	$55.60	$60.00	$60.00	$48.00	$48.00	
2018/19	$9.24	$18.48	$60.00	$60.00	$48.00	$48.00	**$243.72**
2019/20	$8.85	$18.25	$60.00	$60.00	$48.00	$35.20	**$230.30**
2020/21	$8.50	$17.41	$60.00	$60.00	$31.58	$42.23	**$219.72**
2021/22	$8.19	$16.68	*$61.29*	*$73.73*	$46.85	$40.42	**$247.16**
2022/23	$7.86	$15.97	*$64.05*	*$74.64*	$44.51	$42.94	**$249.97**
2023/24	$3.74	$14.61	*$64.30*	*$73.59*	$43.11	$41.32	**$240.67**
2024/25	$1.74	$14.28	*$64.28*	*$75.79*	$41.72	$39.96	**$237.77**
2025/26	**Paid off**	$13.45	*$65.04*	*$76.90*	$41.46	$38.65	**$235.50**
2026/27	**in 2025**	$12.93	*$65.42*	*$77.36*	$40.15	$37.37	**$233.23**
2027/28		$12.41	*$65.86*	*$77.82*	$38.96	$36.15	**$231.20**
2028/29		$11.90	*$66.31*	*$78.33*	$40.37	$37.72	**$234.63**
2029/30		$11.43	*$66.79*	*$78.79*	$44.17	$41.12	**$242.30**
2030/31		$11.98	*$67.28*	*$79.28*	$42.24	$39.43	**$240.21**
2031/32		$10.53	*$66.60*	*$79.87*	$47.09	$41.77	**$245.86**
2032/33		**Paid off**	*$64.02*	*$79.33*	$45.36	$40.22	**$228.93**
2033/34		**in 2032**	*$64.91*	*$79.60*	$44.00	$38.92	**$227.43**
2034/35			**Paid off**	$44.73	$42.60	$37.61	**$124.94**
2035/36			**in 2034**	$48.06	$41.29	$36.36	**$125.71**
2036/37					$40.03	$35.18	**$75.21**

$Italics: Tax Rates > $60 will be collected to service projected debt payments.

Shaded: Tax rate falls below $60, freeing up capacity for remaining $77 million of 2005-J funds.

[47] Data from the County Tax Assessor, as provided by the District on July 24, 2019.

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Election Measure	1998 E	2000 M	2002 D	2005 J	2010 D	2012 E	Total Annual Property Tax Rate, by Tax Year
Authorized	$40	$150	$300	$400	$380	$360	
Issued-to-Date	$40 million	$150 million	$300 million	$323 million	$250 million	$235 million	
Target Rates	$24.60	$55.60	$60.00	$60.00	$48.00	$48.00	
2037/38					$38.83	$34.04	**$72.87**
2038/39					$37.64	$32.91	**$70.55**
2039/40					$36.24	$31.80	**$68.04**
2040/41					$35.14	$30.75	**$65.89**
2041/42					$25.90	$29.75	**$55.65**
2042/43					$25.43	$28.75	**$54.18**
2043/44					$25.21	$27.81	**$53.02**
2044/45					$24.34	$26.90	**$51.24**
2045/46					$17.21	$18.12	**$35.33**
2046/47					$16.89	$17.85	**$34.74**
2047/48					$11.01	$12.23	**$23.34**
2048/49					$5.35	$7.88	**$13.23**
2049/50					$5.42	$7.78	**$13.20**
2050/51					$5.19	$7.47	**$12.66**
2051/52					$5.00	$7.18	**$12.18**
2052/53					$4.81	$6.91	**$11.72**
2053/54					$4.62	$6.64	**$11.26**
2054/55					$3.08	**Paid off**	**$3.08**
2055/56					**Paid off**	**in 2054**	
2056/57					**in 2055**		
Projected to Maturity	**$48.12**	**$200.31**	**$1,026.15**	**$1,277.82**	**$1,138.80**	**$1,085.44**	**$4,776.64**

- These projections assume 4% annual compounded growth in the total of assessed property valuations, across all properties included in the District's tax base.
- Measure 2005-J is forecast to have the tax rate for its future debt service fall below the $60 per $100,000 threshold beginning about Tax Year 2034/35 (see shaded entry in table above). According to the projection, this is the earliest that the District could legally contemplate issuing any of its remaining $77 million authorization from the electorate's original passage of its $400 authorization in 2005.
- The tax rates shown in *italics* above, forecast to exceed the statutory maximum allowable value of $60 per $100,000 of assessed property value, will be collected by the County Tax authorities at those higher tax rates. This is the property tax revenue necessary to service the annual debt payments for each of Measures 2002-D and 2005-J in those future tax years.

Bond Sales and Local Property Taxes

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Previously authorized but unissued 2010 Measure D and 2012 Measure E WCCUSD local school bond capacity totals $130 million. The District plans to issue these final "new money" bonds (cash received from selling new bonds under existing authorizations) in FY2020.[48]

This will exhaust the District's current near-term borrowing authority from the voters:

Issued-to-Date	$1,423 million
Deferred Issues	$77 million[49]
To-be-Issued in FY 2020	$130 million
Total Authorized since 1998	**$ 1,630 million**

See Appendix A - "*WCCUSD Facilities Funding Sources*" for more details.

Property Tax Rates

The "Tax Rate" is the annual property tax amount paid by County taxpayers, per each $100,000 of their property's assessed value, to pay off each WCCUSD bond measure. For any given property, the assessed value (which is set by the County Assessor) is not necessarily the same as the original purchase price or the current market value.

For a complete table of historical actual and current year property tax rates for WCCUSD bonds, as well as projected rates, see to Appendix B - "*West Contra Costa County Property Tax Rates*".

Frequently Asked Questions on Tax Rates

-- Current and Historical Property Tax Rates

1. What is the total tax rate for a property owner during the most recent West County Tax Year?

Tax Year	1998 E	2000 M	2002 D	2005 J	2010 D	2012 E	Total
2017/18	$5.30	$18.40	$60.00	$60.00	$48.00	$48.00	$239.70

Last year's tax rate was $260.40, immediately below.

2. How has this changed since the CBOC's Annual Report 2017?

Tax Year	1998 E	2000 M	2002 D	2005 J	2010 D	2012 E	Total
2016/17	$5.80	$38.60	$60.00	$60.00	$48.00	$48.00	$260.40

[48] WCCUSD "*Bond Program Financial Status, Cash Projections to June-2021*", Report 13 (effective Dec 31, 2018), Note 2, page 72, Appendix I.

[49] 2005 Measure J is "maxed out" for any more near-term bond issues because current debt service is costing taxpayers the full $60 per $100,000 rate until Tax Year 2034/35. This is the earliest date currently projected for freeing up taxing capacity to issue part or all of the remaining $77 million Measure J authorization. See Appendix B, "*West Contra Costa County Tax Rates*". Measure J Authorization = $400 million, Issued-to-Date = $323 million, Remaining-to-Issue = $77 million.

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Rates have dropped from the previous 2016/17 tax year to the current 2017/18 tax year due mainly to retirement of principal for the early bond Measures 1998 E and 2000 M. These two bond measures are nearing their projected "pay off" dates of 2025 and 2032, respectively.

-- Projected Property Tax Rates

To date, the authorized amounts for 1998 Measure E, 2000 Measure M and 2002 Measure D have been 100% issued and are reflected in these projected tax rates. Although not yet fully issued, the projected tax rates for 2010 Measure D and 2012 Measure E are based on 100% issuance, as planned by the District (the remaining $130 million in FY 2020). Projected tax rates for 2005 Measure J do not include the final $77 million still available to issue, as no schedule has been set to issue it.

3. How are total tax rates projected to change over the next five years?

Tax Year	1998 E	2000 M	2002 D	2005 J	2010 D	2012 E	Total
2018/19	$9.24	$18.48	$60.00	$60.00	$48.00	$48.00	**$243.72**
2019/20	$8.85	$18.25	$60.00	$60.00	$48.00	$48.00	**$230.30**
2020/21	$8.50	$17.41	$60.00	$60.00	$31.58	$42.43	**$219.72**
2021/22	$8.19	$16.68	$61.29	$73.73	$46.85	$40.42	**$247.16**
2022/23	$7.86	$15.97	$64.05	$74.64	$44.51	$42.94	**$249.97**

The tax rates shaded above, forecast to exceed the statutory maximum allowable value of $60 per $100,000 of assessed property value, will be collected by the County Tax authorities at those higher tax rates. Without further tax management by the District, this is the property tax revenue necessary to service the annual debt payments for each of Measures 2002-D and 2005-J in those future tax years.

4. When are each of these WCCUSD bonds projected to be fully paid off?

$ millions	1998 E	2000 M	2002 E	2005 J	2010 D	2012 E
Authorized	$40	$150	$300	$400	$380	$360
Years to Maturity	6-years (2025)	13-years (2032)	15-years (2034)	17-years (2036}	36-years (2055)*	35-years (2054)*

*The projected Year to Maturity for Measure 2010-D and Measure 2012-E was reduced from 2060 in last year's Annual Report following recent WCCUSD school bond refundings and adjustments to West County-wide assessed values by the County Assessor.

-- Further Information on School Bonds

5. Where can I find additional information on school bonds?

Additional guidance about the issuance of school bonds can be found in the Little Hoover Commission February 2017 report[50]. The Little Hoover Commission is a bipartisan California

[50] Little Hoover Commission Report #236, February 2018, "*Borrowed Money: Opportunities for Stronger Bond Oversight*", pages 14 – 15.

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state oversight agency created in 1962 to promote economy and efficiency in the transaction of public business.

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APPENDIX C: Bond Program Key Performance Indicators Summary (Report #1)

Report # 1

BOND PROGRAM KPI SUMMARY

Bond Information (Key Performance Indicators) for WCCUSD Bond Program
for December 31, 2019

Table 1 – Bonds Authorized

Bond Measures	Voter Approved		Bonds Issued					Bond Payments		
	Month Year	Amount ($)	Latest Issue	Total Issued	Tax Rate per $100k [4]	Not Yet Issued	Scheduled Issues [5]	Principal Paid	Finish Date	Interest Paid
[1] Msr 1998-E	Jun 1998	40,000,000	Jan 2001	40,000,000	$4.50	0	0	27,750,000	Aug 2025	30,484,937
[2] Msr 2000-M	Nov 2000	150,000,000	Apr 2003	150,000,000	$17.40	0	0	89,805,000	Aug 2032	88,898,593
[3] Msr 2002-D	Mar 2002	300,000,000	Oct 2005	299,997,483	$60.00	2,517	0	96,322,052	Aug 2034	131,312,648
[3] Msr 2005-J	Nov 2005	400,000,000	Jun 2010	322,409,709	$60.00	77,590,292	0	25,182,920	Aug 2036	147,511,184
[3] Msr 2010-D	Jun 2010	380,000,000	May 2018	315,000,000	$48.00	65,000,000	65,000,000	39,580,000	Aug 2054	52,165,623
[3] Msr 2012-E	Nov 2012	360,000,000	May 2018	295,000,000	$48.00	65,000,000	65,000,000	36,500,000	Aug 2054	39,787,443
Grand Totals		1,630,000,000		1,422,407,191	$237.90	207,592,809	130,000,000	315,139,972		490,160,426

"Principal Paid" is total principal paid and includes principal paid on related refunding bonds subsequent to defeasance of any original bonds defeased.
"Interest Paid" is total gross interest paid less, if applicable, bid premium and accrued interest deposited to Debt Service Fund, refunding escrow funding and federal subsidy payments; in other words, actual payments by County from tax revenue.

Table 2 – Funds From Other Sources

Source	Prior	FY 2020	Total
[6] School Facilities	159,968,205		159,968,205
[7] Developer Fees	24,900,038		24,900,038
[8] Interest Earnings	44,679,573	515,739	45,195,311
[9] Net Transfers	(3,920,753)		(3,920,753)
[10] Other Revenue	12,934,496		12,934,496
[11] Fund Adjustments	948,397		948,397
Total Other Revenue	239,509,955	515,739	240,025,694

Table 3 – Program Summary

Revenues	Actuals to Date
[12] Bonds Issued	1,422,407,191
[1] less: Msr 1998E	(40,000,000)
[13] Other Revenue	240,025,694
Program Revenue	1,622,432,885
[14] School KPI Actuals	(1,556,723,675)
Accounts Receivable	-
Accounts Payable	-
[15] Net Retentions	299,504
Cash on Hand [16]	66,008,714
	-

Table 4 – Average Monthly Spending

3 Months	6 Months	12 Months
5,103,308	3,138,075	4,287,228

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BOND PROGRAM KPI SUMMARY

Report # 1

Bond Information (Key Performance Indicators) for WCCUSD Bond Program for December 31, 2019

Notes:

1. Measure 1998-E is not covered under Proposition 39 regulations for school bonds, and is not ordinarily reported in the Bond Program expenditure reports. The following schedule shows Measure 1998-E expenditures by site with state funded DeJean expenditures shown in a separate column.

School	1998E	State	Total
DeJean MS	23,994,285	12,841,930	36,836,215
Pinole Valley HS	190,571		190,571
Central	16,276,518		16,276,518
Grand Total	**40,461,374**	**12,841,930**	**53,303,304**

2. Measure 2000-M is not a Proposition 39 bond, but is included in Bond Program reporting because the original bond language required a "Citizens' Oversight Committee".

3. Measures 2002-D, 2005-J, 2010-D, and 2012-E are all authorized under Proposition 39, requiring public oversight through the Citizen's Bond Oversight Committee.

4. On issuing bonds the District must certify that the tax rate for the bonds will not exceed $60 per $100 thousand of property value. In addition, the District has a publicly stated goal for the 2010-D and 2012-E bonds of maintaining the tax rate at $48 per $100 thousand.

   As a result, the remaining $77 million from the 2005 Measure J bond authorization cannot currently be issued. The property tax rate for it is already maxed out at $60 per $100 thousand of assessed value to pay off the $322 million in 2005 Measure J bonds which has been issued-to-date. Current estimate is that these bonds cannot be sold until on or about 2034 because of tax rate limitations.

5. The expected issuance schedule below is from the KNN Public Finance presentation to the Facilities Subcommittee on March 15, 2016

Year	2010-D	2012-E	Total
2020-21	65,000,000	65,000,000	130,000,000
Grand Total	**65,000,000**	**65,000,000**	**130,000,000**

6. School Facility revenues by school are:

School	Amount	School	Amount
Bayview	2,535,074	Ohlone	2,403,971
Coronado	1,348,331	Peres	2,569,652
Dover	7,286,188	Riverside	1,191,472
Downer	4,834,933	Sheldon	331,311
Ellerhorst	1,352,870	Stewart	1,147,062
El Sobrante	369,339	Tara Hills	1,501,831
Fairmont	571,594	Valley View	290,214
Ford	7,245,372	Verde	1,180,094
Grant	369,288	Washington	2,162,982
Lupine Hills	1,147,097	Wilson	323,957
Harding	1,948,349	Helms Middle	9,122,092
Kensington	1,274,843	Pinole Jr High	5,190,574
King	4,637,680	Korematsu MS	20,383,150
Lake	309,937	De Anza High	14,588,681
Lincoln	984,983	El Cerrito High	14,247,249
Madera	1,216,917	Kennedy High	7,779,203
Mira Vista	1,528,265	Richmond High	11,599,844
Montalvin	313,287	Greenwood/LPS	18,706,460
Murphy	1,595,572	Pinole Valley HS	2,740,128
Nystrom	1,638,359		
		Grand Total	**159,968,205**

7. In June 2007 $24,900,036 of expenditures were transferred to the Capital Facilities Fund (Developer Fees). The District has reported this in project reporting as an increase to Program revenues. These transfers were limited to schools with assessed needs based on population growth.

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BOND PROGRAM KPI SUMMARY

Report # 1

Bond Information (Key Performance Indicators) for WCCUSD Bond Program for December 31, 2019

Notes:

8. Interest earnings by Bond Measure or other funding source:

Source	Prior	FY 2020	Total
2000 Measure M	4,987,784		4,987,784
2002 Measure D	14,785,928		14,785,928
2005 Measure J	1,373,462		1,373,462
2010 Measure D	3,104,721	343,317	3,448,038
2012 Measure E	1,285,471	141,598	1,427,069
Building Fund - Other	17,278,843	30,823	17,309,665
School Facility Fund	1,883,353	1	1,883,355
Grand Total	**44,679,573**	**515,739**	**45,195,311**

Unallocated interest derived from bond proceeds was posted to the undistributed resource (9790), and is shown in Building Fund - Other priot to 06/30/15

9. Net Transfers by Bond Measure or Funding source are shown below. Approximately 90% of all transferred amounts were from the Building Fund to the School Facility Fund to match State revenues.

Source	Amount
2000 Measure M	(11,939,439)
2002 Measure D	(11,099,851)
2005 Measure J	(12,625,650)
Building Fund - Other	1,934,111
School Facility Fund	29,810,076
Grand Total	**(3,920,753)**

Net transfers were to, or from, the following offsetting non-program resources or funds:

Transferred From (To)	Amount
1998 Measure E	6,077,014
General Fund (Resc 8150 - RRM)	(2,700,000)
Deferred Maintenance Fund	(5,158,224)
Building Fund (other revenues)	990,573
Capital Outlay Fund	750,138
Bond Interest & Redemption Fund	(3,042,495)
Debt Service Fund	(837,758)
Grand Total	**(3,920,753)**

10. Other Revenue by source:

Revenue Source	Amount
Vendors	
Alterra	108,000
Misc Vendors	678,172
Pacific Gas & Electric	136,099
SBC (E-Rate)	2,597,426
WLC Architects	100,000
Other	
2000M Bond Refinance	550,000
2005J Bond Premium	5,357,323
Bond Sales journaled at net	(964,575)
Cost of Issuance rebates	120,417
El Portal Land Sale	838,291
FEMA - Riverside ES	906,437
Other	909
Pinole MS joint use	2,000,000
Retention corrections	138,295
Rosie the Riveter	169,440
San Pablo Economic Develop Corp	200,262
Grand Total	**12,934,496**

SBC (now AT&T) payments were primarily for "E-Rate" school subsidies. The remaining vendor payments are for cost reimbursements, contract or dispute settlements, or fee rebates.

In order to show Bond Sales correctly at the stated face value, a negative $964,576 line item is included. The amount is from the District booking bond sales at net of costs of issuance for fiscal years 2013-14 and 2014-15.

The El Portal Land Sale was originally posted to the Building Fund, but was later transferred. It is listed in the prior note as the transfer to the Debt Service Fund.

The Pinole MS joint use revenue was from an expired agreement with the City of Pinole for the school gym and sports fields.

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BOND PROGRAM KPI SUMMARY

Report # 1

Bond Information (Key Performance Indicators) for WCCUSD Bond Program for December 31, 2019

Notes:

11. Fund Adjustments by Bond Measure and other funding source:

Adjustment	Amount
2000 Measure M	907,243.03
2002 Measure D	(99,877.00)
2005 Measure J	(58,278.17)
Building Fund - Other	199,308.76
Grand Total	**948,396.62**

Fund Adjustments by category:

Adjustment	Amount
Beginning Balances	218,257.13
Close Non-Bond Resources	(58,277.86)
FEMA Adjustment	805,260.00
FY 2006 Beginning Balance	-
Prior Year Correction	(16,842.65)
Grand Total	**948,396.62**

12. Bonds issued by fiscal year:

in thousands

Fiscal Year	1998E	2000M	2002D	2005J	2010D	2012E	Grand Total
1999	20,000						20,000
2000	10,000						10,000
2001	10,000	15,000					25,000
2002		40,000	30,000				70,000
2003		95,000					95,000
2004			100,000				100,000
2005			69,999				69,999
2006			99,998	70,000			169,998
2009				120,000			120,000
2010				132,410			132,410
2012					100,000		100,000
2014					40,000	85,000	125,000
2015					50,000	85,000	135,000
2016					60,000	65,000	125,000
2018					65,000	60,000	125,000
Total	40,000	150,000	299,997	322,410	315,000	295,000	1,422,407

13. Total Other Revenue by bond or funding source:

Source	Prior	FY 2020	Total
2000 Measure M	(3,938,956)		(3,938,956)
2002 Measure D	5,957,893		5,957,893
2005 Measure J	(5,732,025)		(5,732,025)
2010 Measure D	7,672,760	343,317	8,016,077
2012 Measure E	899,521	141,598	1,041,118
Building Fund - Other	18,543,941	30,823	18,574,764
Capital Facilities	27,640,166	1	27,640,167
School Facility	188,466,655		188,466,655
Grand Total	**239,509,955**	**515,739**	**240,025,694**

14. Expenditures by bond or funding source are as follows:

Source	Prior	FY 2020	Total
2000 Measure M	146,061,044	-	146,061,044
2002 Measure D	304,455,376	-	304,455,376
2005 Measure J	318,177,684	-	318,177,684
2010 Measure D	268,079,512	18,669,097	286,748,609
2012 Measure E	270,534,589	153,650	270,688,240
Building Fund - Other	32,809,991	-	32,809,991
Capital Facilities	24,900,038	-	24,900,038
School Facility	172,882,693	-	172,882,693
Grand Total	**1,537,900,927**	**18,822,748**	**1,556,723,675**

15. The District retains up to 5 percent of payments on construction contracts, and frequently makes payments to vendor trust accounts for the retained amounts. The trust accounts are reported as cash on the District's financial records. Net retainage liability, less cash in trust accounts, is as follows:

Account	Prior	FY 2020	Total
Retentions	7,997,122	566,423	8,563,545
Trust Accounts	(7,737,802)	(526,240)	(8,264,041)
Net Retentions	**259,321**	**40,183**	**299,504**

BOND PROGRAM KPI SUMMARY

Report # 1

Bond Information (Key Performance Indicators) for WCCUSD Bond Program for December 31, 2019

Notes:

16. Ending Cash on Hand by funding source is as follows:

Source	Beg Bal	FY 2020	Total
2010 Measure D	61,142,638	(20,711,152)	40,431,485
2012 Measure E	22,956,317	(1,421,875)	21,534,443
Building Fund - Other	4,001,802	40,983	4,042,785
School Facilities	-	1	1
Grand Total	**88,100,758**	**(22,092,043)**	**66,008,714**

Ending Cash on Hand by cash type:

Source	Beg Bal	FY 2020	Total
Cash	67,401,399	(22,352,631)	45,048,768
LAIF (Cash Equivalent)	20,699,358	260,587	20,959,946
Grand Total	**88,100,758**	**(22,092,043)**	**66,008,714**

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2. Audits & Compliance

APPENDIX D: Fiscal Year 2019 Performance Audit

Audit Scope and Summary of Improvement Recommendations

The FY2019 performance audit of the District's bond program conducted by Moss Adams LLP was the third of three consecutive ones whose objectives include both compliance and effectiveness and results in accordance with government auditing standards[51] [52]. The Table below shows the recommendations associated with the audit objectives in FY 2019[53]. Two of the effectiveness and results audit objectives (No. 17 & 18) had "No Exception Taken", meaning that there were no improvement recommendations made by the auditor.

Performance Audit Objective	**Audit Scope** Note 1 **Improvement Recommendations** Note 2
Prop. 39 Compliance Audit CAPA 1	Conduct a basic Prop 39 Compliance Performance Audit (1) "The District should continue efforts to implement the processes and controls needed to provide supporting documentation that validates the applicability and accuracy of labor charged to the Bond Program." *[54]
Effectiveness and Results Audit No. 1	District and Professional Services Staffing Plan for the Bond Program (2) "As a best practice, appropriate WCCUSD management should approve an annual staff plan, including key metrics such as positions staffed, number of personnel, number of planned projects, and dollar value of planned projects to help determine organizational structure alignment with the Bond Program needs."

[51] Government Auditing Standards, Comptroller General of the United States, United States Government Accountability Office, 2011 Revision. Note 2018 Revision is effective for performance audits beginning on or after July 1, 2019.
[52] See Appendix E, 2003-2018 WCCUSD Bond Program Audit History for a listing of previous WCCUSD performance audits.
[53] WCCUSD Prop 39 Bond Performance Audit Report for FY 2019, Section III. Audit Results pgs. 9-31.
[54] *Indicates that this recommendation was made by Moss Adams LLP in their FY2017 Audit Report, not implemented in FY 2018 Audit Report and began to be addressed by FY 2019 Audit Report.

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No. 2	Design and Construction Schedules Cash Flow Analysis (3) The District should continue producing cash flow reports with key information to support projected cash flow amounts. “However the District should implement controls to consistently and accurately report total expected revenues and expenses. Additionally formal written policies and procedures... should be created and added to a Bond Program manual. (see Recommendation No. 22a)
No.3a	Design and Construction Budget Management (4) “The District should continue efforts to develop and implement policies and procedures for budget establishment and management activities for the Bond Program.”
No. 3b	Design and Construction Budget Management (5) The District should continue producing project level expenditure reporting... However, the District should implement controls to consistently and accurately report total Bond expenditures. Additionally, formal written policies and procedures should be created and added to a comprehensive Bond Program manual.(see Recommendation No. 22a)”
No.4a	Bidding and Procurement Procedures (6) “The District should continue efforts to develop and implement formal written policies and procedures including defined approval authority for bid and procurement to ensure appropriate review and approval controls are in place for procurement procedures. (see Recommendation No. 22a)”

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No. 4b	Bidding and Procurement Procedures (7) "The District should continue to work with legal to ensure evaluation and scoring of total price on design-build projects is consistent with the Education Code. Additionally, the District should retain complete procurement and evaluation documentation to ensure vendor selection is consistent with RFP and Education Code requirements, ...maintain a consolidated bid and procurement checklist and activity report ...to identify, prevent, or detect non-compliance with District policies and procedures, State laws and regulations."
No. 4c	Bidding and Procurement Procedures (8) "The District should comply with District procedures to ensure competitive pricing for the Bond program. Supporting documentation for a proper procurement should be readily available...A checklist or equivalent mechanism should be maintained with appropriate sign-offs on procurement requirements…"
No. 5	Procurement Fraud Prevention and Detection Controls (9) "Consistent with the GFOA, WCCUSD should implement policies and procedures to assist in identifying, preventing, and detecting procurement fraud. The policies should include reporting protocols, training requirements, and escalation procedures specific to procurement fraud."
No. 6a	Bond program master Planning and Reporting (10) "As a best practice, WCCUSD should continue its efforts to ensure defined and documented processes are in place for master planning." Policies should be in place to continually review, evaluate and update the Long-Range Facilities Plan..
No. 6b	Bond Program Master Planning and Reporting (11) "Budget-to-actual comparisons of revenues, expenditures, cash flow, and fund balances should be periodically reported. Master Plan budgets and current forecasts at program and project level should be available...Change order reporting should include change responsibilities… (see Observation 13 b)"
No. 7	Cost Schedule Budgetary Management, and Reporting Controls Implementation "See Objectives 2, 3, 6, and 10"
No. 8	Claim Avoidance and Control Proceures (12) "The District should continue efforts to formalize policies and procedures identifying roles and responsibilities to be taken to prevent or limit claim exposure. These should be added to a comprehensive Bond program policy and Procedure Manual. (see Recommendation 22a.) "

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No. 9	Materials Specifications (13) “The District should continue its efforts to formalize policies and procedures regarding how to update the Material specifications log. WCCUSD should define how to make updates to the standards specifications document and update Bond Program policies and procedures (see Recommendation 22a.)”
No. 10	Cost Benefit and Value Engineering Analyses (14)” As a best practice, the District should ensure formal, defined, and documented policies and procedures as well as roles of responsibilities are in place for cost benefit analysis and value engineering for its projects.”
No. 11	Maintenance of District Assets Funded by Local Bond and Warrenty Conditions Compliance (15) “As a best practice, the District should ensure compliance with all warranty conditions to sustain a level of protection against breach of warranty and proper maintenance of District facilities in accordance with warranty conditions and District requirements.”
No. 12	Implementation of schedule Quality, Scope, and Performance Management Controls “See individual recommendations for objectives number 2, 6, 10, 15, and 22.”
No. 13a	Change Order Management and Controls Application (16) “The District should continue efforts to formalize change order policies and procedures,..., including defined approval authority for change orders. These should be added to a comprehensive Bond program Policy and Procedure manual to ensure appropriate review and approval controls are in place before vendor payment release. (see Recommendation No. 22a)”
No. 13b	Change Order Management and Controls Application (17) “As a best practice, District change order reporting should include accurate information…”
No. 13c	Change Order Management and Controls Application (18) “As a best practice, competitive bidding and procurement practices should include a full evaluation of bidders and the total scope of work on a comparative basis to ensure competitive pricing for Bond Program Objectives.”

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No. 14	Contractor Billing Compliance Controls (19)" Formal written policies and procedures, including defined approval authority for vendor payment processing should be created and added to a comprehensive Bond Program Policy and Procedure Manual to ensure appropriate review and approval controls are in place before vendor payment release. (see Recommendation 22 a)"
No. 15	Project Close-out Controls (20) "The district should compile a consolidated project close-out list to ensure and report on turnover of documentation by contractors and compile all critical tasks prior to release of final payment. (see Recommendation 22 a)"
No. 16	Post-Financing Review (21) "As a best practice, the District should have established pricing goals and requirements included within their policies and procedures." (see Recommendation 22a)"
No. 17	Refunding of Outstanding Bonds (NO EXCEPTION) "No exception taken."
No. 18	Arbitrage and Investments NO EXCEPTION) "No exception taken."
No. 19	Timeliness of Payment (22)"The District's Facility Planning and Construction department should continue to ensure that each invoice is processed by payment in a timely manner.Where payment has been delayed due to contractor inaccuracies within invoice payment applications etc. the District should provide rejection letters to contractors detailing why payment is being delayed."
No. 20	Local Partiscipation Requirements (23)"The District should define its position and role in achieving local participation goals and Board policies should be updated accordingly. (see Recommendation No. 22a)"
No. 21	CBOC Compliance (24) "The District should formalize the amendments to Board Policy 7214.2 to establish roles and operations of the CBOC."

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No. 22a	Transparency of Bond Program (25) "As a best practice, the District should continue to consolidate all Bond Program policies, procedures and resolutions into one document to ensure effective controls and communication of the policies and procedures and obtain Board approval." "The GFOA recommends that the documentation of accounting policies and procedures should be evaluated annually and updated no less than once every three years."
No. 22b	Transparency of Bond Program (26) Concerning the CBOC website, "the District should continue efforts to follow best practices, as specified by SDTEF, to support demonstration of accountability and transparency to all stakeholders."
No. 22c	Transparency of Bond Program (27) Concerning information on the status of construction projects, "as a best practice, the District should develop a communications strategy for projects for key and public stakeholders. WCCUSD should review current methods of communication and verify that communications are organized, consistent, timely, and reach the appropriate audience."

Note 1: Audit Scope

The Audit Scope descriptions shown above for each Performance Audit Objective are verbatim from the "*Bond Program Performance Audit*" for FY 2019.

Note 2: Improvement Recommendations

The Improvement Recommendations shown above for each Performance Audit Objective are verbatim from the "*Bond Program Performance Audit*" for FY 2019. For brevity, only the opening sentence is shown in the Table; see the full audit report for the entirety of each Improvement Recommendation.

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APPENDIX E: WCCUSD Bond Program Performance Audits History

On November 7, 2000, California voters approved Proposition 39 (School Bonds 55%) that amended the California Constitution to lower the approval threshold for school district general obligation bonds from two-thirds (2/3) voter approval to 55% voter approval. Proposition 39 required school districts that had bonds approved by this new 55% provision to, ",,, conduct an annual, independent performance audit to ensure that the funds have been expended only on the specific projects listed." [55]

Proposition 39 Performance Audits California Legislative History

June 27, 2000: Governor approved an amendment to Education Code Section 15278 that provides, among other things, for the establishment of CBOCs and that CBOC may engage in "receiving and reviewing" the annual independent performance audit. This legislation was approved prior to the passage of Proposition 39 "in an effort to increase voter acceptance for Proposition 39".[56]

September 23, 2010: For the first time Government Auditing Standards were required for the conduct of performance audits.[57]

September 6, 2011: Performance audits for the preceding fiscal year shall be submitted to the CBOC by March 31 of each year.[58]

August 12, 2013: Performance audits must be submitted to CBOC at the same time they are submitted to the school district. District must respond to the CBOC, within three months of receiving the audit concerning the auditor's recommendations.[59] Effective January 1, 2014.

August 27, 2013: Requires State Controller to provide performance audit "Standards and Procedures" for annual audit guide starting for the Fiscal Year 2016.[60] *This is the first time that the State of California defined the scope of a Proposition 39 school bond performance audits.* See California Appendix A below for a description of these requirements.

[55] California Constitution, Article XIII (b) (3) (C).
[56] *Citizens Oversight Committees Requirements and Guidelines*, Bowie, Arneson, Wiles & Giannone, September 24, 2001.
[57] Senate Bill No. 1473, Chapter 294, September 23, 2010.
[58] Senate Bill 423, Chapter 237, September 6, 2011.
[59] Senate Bill 581, Chapter 91, August 12, 2013.
[60] Senate Bill 584, Chapter 167, August 27, 2013.

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WCCUSD Performance Audit History FY2003 to FY2019

WCCUSD bond program performance audits can be summarized depending on who determined the audit objectives--the District, the State of California or the auditor[61]. **To ensure transparency and adequate oversight, both the Little Hoover Commission and the CBOC recommend performance audit objectives be set by the auditors or the State of California, not by the District.** *To date, with the exception of compliance audits required by the State since FY2016, the scope and objectives of all WCCUSD performance audits have been set by the District.*

Summary of WCCUSD Performance Audits From FY2003 - FY2019

Type	Description	Attestation Type	Audit Objectives Determined by	Note
CA	Compliance	Agreed upon procedures	District	From FY 2003 to FY 2015 *the District determined the audit objective for all compliance performance audits.*
CE	Compliance	Examination	California Appendix A	Beginning in FY 2016 the California audit guide Appendix A prescribed objectives for bond program compliance performance audits.
PA	Program effectiveness and results	Agreed upon procedures	District	*The District determined audit objectives for all seventeen (17) bond program effectiveness and results performance audits.*
PE	Program effectiveness and results	Examination	Auditor	To ensure transparency and effective oversight, both the Little Hoover Commission and the CBOC recommend effectiveness and results performance audits *where the auditor determines the audit objectives, not the District.*

[61] The CBOC reported the history of WCCUSD's performance audits for the first time in the CBOC 2017 Annual Report as Appendix R, and in the CBOC 2018 Annual Report as Appendix E. In both cases, WCCUSD performance audits through FY2018 were reported without reference to who determined the audit objectives, the District, State of California, or the auditor. Performance audits were classified as follows:

- Performance Audit
- Agreed-Upon Procedures Report
- Performance Audit, Compliance Only

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WCCUSD Performance Audit Information FY 2003 to FY2019

Fiscal Year	Auditor	Type	Cost	Pgs	FI	Rec
FY2003	Total School Solutions	CA & PA	$187,800	117	43	61
FY2004	Total School Solutions	CA & PA	$277,800 *	105	33	63
FY2005	Total School Solutions	CA & PA	$277,800 *	149	22	28
FY2006	Total School Solutions	CA & PA	$283,434 *	212	12	22
FY2007	Total School Solutions	CA & PA	$321,937 *	160	9	28
FY2008	Total School Solutions	CA & PA	$306,852 *	152	2	12
FY2009	Total School Solutions	CA & PA	$325,539 *	195	3	26
FY2010	Total School Solutions	CA & PA	$342,364 *	169	3	6
FY2011	Total School Solutions	CA & PA	$ 87,000	204	4	21
FY2012	Total School Solutions	CA & PA	$101,850	200	5	20
FY2013	Total School Solutions	CA & PA	$106,943	186	4	22
FY2014	Vavrinek, Trine, Day & Company	CA	$142,000	7	0	0
FY2014	Vavrinek, Trine, Day & Company	PA	Included above	122	0	15
FY2015	Vavrinek, Trine, Day & Company	CA	$146,000	7	0	0
FY2015	Vavrinek, Trine, Day & Company	PA	Included above	39	0	18
FY2016	Vavrinek, Trine, Day & Company	CE	$ 36,000	8	0	0
FY2017	Moss Adams, LLP	CE & PA	$ 77,000	39	2	19
FY2018	Moss Adams, LLP	CE & PA	$ 75,000	54	2	26
FY2019	Moss Adams, LLP	CE & PA	$ 75,000	55	2	28

*Total School Solutions for the FY2004 to FY2010 also performed semi-annual reviews. Therefore, during these seven (7) fiscal years the District received performance audit reports every six (6) months. The FY2009 and FY2010 semi-annual reports are not displayed on the CBOC website.

The scope for the FY2020 has not yet been determined as of this writing on August 19, 2020. CBOC on January 13, 2020 recommended California Proposition 39 compliance audit objectives (required by California Appendix A) and Government Auditing Standards program effectiveness and results performance audit objectives determined by the auditor. District staff have recommended only the required compliance audit scope.

Performance Audit Classifications

For classifying the performance audits by type note the following:

- Type Attestation Audits.
- Types Performance Audits.

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- California Appendix A.

These reclassifications are consistent with definitions in the Government Auditing Standards, Revision 2018.

Type Attestation Audits

Government Auditing Standards, often referred to as generally accepted government auditing standards (GAGAS) (2018 revision) [62] (frequently referred to as the Yellow Book because of its yellow cover) provides for three types of attestation engagements [63] between an independent auditor and their client:

- Examination, an auditor obtains reasonable assurance on which to base the auditor's opinion.

- Review, an auditor obtains limited assurance and does not include reporting on internal controls or compliance with provisions of laws. regulations, contracts, and grant agreements.

- Agreed-upon procedures, "An auditor performs specific procedures on subject matter or an assertion and reports the findings without providing an opinion or a conclusion on it. The specified parties to the engagement agree upon and are responsible for the sufficiency of the procedures for their purposes. The specified parties are the intended users to whom use of the report is limited." [64]

Types Performance Audits

Government Auditing Standards provides for four (4) types of performance audits, two of which pertain to WCCUSD:

- Program effectiveness and results audit objectives. "These are frequently interrelated with economy and efficiency objectives. Audit objectives that focus on program effectiveness and results typically measure the extent to which a program is achieving its goals and objectives. Audit objectives that focus on economy and efficiency address the costs and resources used to achieve program results." [65]

[62] During the fiscal years of the WCCUSD Proposition 39 bond program there have been six (6) revisions of GASAS: 1994, 2002, January 2007, July 2007, 2011 and 2018. For preparing the table we have used the 2018 revision.
[63] "An examination, review, or agreed-upon procedures engagement conducted under the GAGAS attestation standards related to subject matter or an assertion that is the responsibility of another party." (Government Auditing Standards, 2018 revision, page 211). "Attestation" is defined as "an act or instance of attesting something: such as (a) a proving of the existence of something through evidence (b) an official verification or something as true or authentic (The Merriam-Webster.com Dictionary)
[64] Government Auditing Standards, 2018 Revision, Section 1.18 c, pages 9-10.
[65] Ibid. Section 1.22 a, page 11.

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California Little Hoover Commission, in their February 2017 report, recommended, "Amend statutory code on performance audits to include the effectiveness and results of the bond program." [66]

WCCUSD CBOC has also recommended that performance audits be effectiveness and results audits. [67]

- Compliance audit objectives. "These relate to an assessment of compliance with criteria established by provisions of laws, regulations, contracts, and grant agreements, or other requirement … ." [68]

California Appendix A

Starting with FY2016 the California Education Audit Appeals Panel *Guide for Annual Audits of K-12 Education Agencies and State Compliance Reporting* included Appendix A, *Local School Construction Bond Audits, Performance Audit Procedures*. Prior to FY2016 the Government Auditing Standards, discussed above, were the standards for California Proposition 39 school bond performance audits.

Appendix A has had the same language for each FY2016 to FY2020 and includes:

- "…ensure that funds were properly expended on specific projects listed in the text of the applicable ballot measure."

- "Verify that funds were generally expended for the construction, renovation, furnishing, and equipping of school facilities constituting authorized bond projects."

- "Verify that the funds used to pay the salaries of district employees were allowable per Opinion 04-110 issued on November 9, 2004 by the State of California Attorney General."

Definition of Performance Audit Findings and Recommendations

Findings

"An issue that may involve a deficiency in internal control; noncompliance with provisions of laws, regulations, contracts, or grant agreements; or instances of fraud." [69] The number of findings made in each audit report. Includes new findings plus prior year findings that were not implemented during the current audit year.

Recommendations

[66] Borrowed Money: Opportunities for Stronger Bond Oversight, Report # 236, February 2017, page 20.
[67] CBO meeting of May 11, 2020.
[68] Ibid. Section 1.22 c, page 11.
[69] Government Auditing Standards, 2018 Revision, page 214.

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"An effective audit recommendation provides suggestions for correcting problems. It also addresses the cause of issues." [70] The number of program improvement recommendations made in each performance audit report. Includes new recommendations plus prior year recommendations that were not implemented during the current audit year.

Summary

For the first ten years after the approval of Proposition 39 no standards for the required performance audits were set by the State of California. During this period auditors used generally accepted government auditing standards.

In September 2010, the California legislature required government auditing standards be used for bond program performance audits. In August 2013, the legislature required specific standards for compliance performance audits, effective starting in FY 2016.

The California compliance performance audit standards, published annually, are included as Appendix A in the Guide for Annual Audits of K-12 Districts. Audit objectives are limited to compliance regarding expending monies on projects in the ballot measure and not using the monies for salaries except when spent on bond projects.

Effectiveness and results performance audits focus on program effectiveness and results to measure the extent to which a program is achieving its goals and objectives. *To ensure transparency and adequate oversight, both the Little Hoover Commission and the CBOC recommend performance audit objectives be set by the auditors or the State of California, not by the District.*

WCCUSD has never had an effectiveness and results performance audit, where the auditor determined the audit objectives. For all such performance audits, the District has determined the audit objectives.

[70] How to Write An Audit Recommendation, Tara Duggan, September 26, 2017, bizfluent online.

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APPENDIX F: CBOC Recommendations

NOTE: Per Board of Education Policy #7214.2: "All recommendations approved by the Committee (CBOC) shall be presented to the Board of Education. *The Board shall respond to the Committee's recommendation(s) within sixty (60) days after receipt of the recommendation(s)*."

The purpose of this Appendix is to document recommendations made by the CBOC to the Board of Education for the period January 1, 2016 through June 30, 2019 and to display their current status.

The following 15 recommendations made by the CBOC were accepted by the Board of Education as of January 13, 2020:

1. Support the Clay Subcommittee recommendation for Phase II of Bond Construction Program Forensic Investigation. (CBOC minutes January 27, 2016)
2. Provide the amount of unobligated funds available through December 31, 2021 to finance the New Master Facilities Plan. (CBOC Minutes January 27, 2016)
3. Agreeing with District on monthly reports to be provided to the CBOC (CBOC Minutes February 24, 2016)
4. Approve legal services agreetween for Law Offices of Adam S. Ferber. (CBOC Minutes February 24, 2016)
5. Request that performance audit scope include compliance and program effectiveness and results. (CBOC Minutes February 24, 2016)
6. District prepare a long range facilities master plan. (CBOC Minutes March 23, 2016)
7. That the scope of the performance audit include 18 program effectiveness and results objectives. (CBOC Minutes March 23, 2016)
8. Provide copy of legal opinion on the use of bond funds to pay for forensic review. (CBOC Minutes April 20, 2016)
9. That the original budget and current budget numbers be included on financial reports. (CBOC Minutes May 18, 2016)
10. That the FY2015 compliance audit report and agreed upon procedures audit report be presented as two separate audit reports. (CBOC Minutes May 18, 2016)
11. That Bond Funds Remaining Through 2021 (CBOC Report # 13) be approved as to format and as a monthly report. (CBOC Minutes, December 21, 2016)
12. That a member of the CBOC be part of the District's Forensic Implementation Task Force. (CBOC Minutes December 21, 2016)
13. That Moss Adams, LLP review the implementation of the 112 forensic accounting investigation review recommendations. (CBOC Minutes, June 21, 2017)
14. That the District adopt eight Financial Impact Statement formats for bond budgets and expenditures. (CBOC Minutes July 30, 2018)

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15. Make Format changes to the Bond Program Financial Status Report (Report #13). (CBOC Minutes August 15, 2019.)
16. [FMP update (#9)]

The following table shows CBOC recommendations that remained outstanding, either rejected or waiting for a response, at the end date of this report period:

CBOC Recommendations Rejected or Waiting for a Response

Item No.	Recommendation	Date CBOC Approved	District's Response
1	Proposed Board Policy 7161.1 Lesson Learned Process	12.21.16	"...not needed at this time …."
2	Eight standard Financial Impact Statement formats for Board of Education agenda precis on bond Program budget approval and expenditure authorizations.	07.30.18 09.12.18 discussed joint CBOC/Board meeting	Not currently preparing the Report 13A Variance Report in the requested CBOC format. Reject doing financial impact statement for completed projects.
3	Amendments to Board Policy BP 7214.2 Citizens' Bond Oversight Committee	03.14/27.19 discussed joint CBOC/Board meeting 05.15.19 Governance Committee	Approved by Governance Subcommittee 11/21/19
4	Facilities Road Map 2023 be approved by the Board of Education.	06.20.19	Currently under review (Discussed at the Joint Board/ CBOC September 11, 2019.)
5	That the Board of Education ensure that an independent 3rd party determine the amount of FY2019 salaries & benefits that can be legally charged to Fund 21 Building Fund based on California Attorney General Opinion No. 04-110.	06.20.19	Need response
6	That the Board of Education ensure that only legally appropriate amount of FY2020 salaries & benefits are charged to Fund 21 Building Fund.	06.20.19	Need response
7	District staff include Board Program Financial Status Reports (Report 12 and 13A) in the Board of Education agenda packet for one meeting each month under agenda item E.2, Standing Reports.	07.30.18	Reject

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Item No.	Recommendation	Date CBOC Approved	District's Response
8	Amend Director Internal Audit job description to report functionally to the Board of Education and administratively to the Superintendent.	12.19.18	Reject
9	That the Board provide a response to the CBOC by June 28, 2019 to the 24 recommendations in the FY2018 Board Program Performance Audit marked "TBD" including a responsible official and a planned resolution date.	04.18.19	Need response
10	Have Moss Adams, LLP forensic accounting review cycle align with their bond program performance audit cycle.	12.18.18	Reject
11	Have Moss Adams, LLP review forensic accounting investigation implementation status as of June 30, 2019 and June 30, 2020.	03.14.19	Reject
12	Have Director Internal Audit dedicate full time on the implementation of the forensic investigation recommendations.	03.14.19	"... will assess... .
13	Amend Director Internal Audit job description to include responsibility for auditing the implementation of the forensic review and performance audit recommendations.	04.18.19	Need response
14	Fill the position of Director Internal Audit as soon as possible.	04.18.19	Position open 12.10.19
15	That the Board of Education take formal action to accept the March 20, 2019 Phase 1 Forensic Accounting Investigation Implementation Review report. Furthermore, the Board of Education advises when the 29 not validated recommendations from Phase 1 will be reviewed and validated as effectively implemented; and by whom.	05.16.19	Need response

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Item No.	Recommendation	Date CBOC Approved	District's Response
16	Review three job descriptions: • Associate Superintendent of Business and Operations • Associate Superintendent of Facilities, Maintenance, Operations and Bond Program • Director of Internal Audit (including reporting relationship to Board of Education)	08.15.19	Need Response
17	Include these three planning elements in the scope of the Lake Elementary School planning report: • Alternatives, if any, to the replacement of this school. • Elementary schools current design capacities, enrollments, projected enrollments and excess capacities. • Options for redrawing elementary school attendance boundaries and closing elementary schools.	08.15.19	Need Response
18	Make format changes to the Bond Program Financial Status (Report #13) as displayed in August 15, 2019 CBOC Minutes.	08.15.19	Done
19	Immediate fulfillment of the role of Director of Internal Audit for the purpose of independent review of the implementation of internal controls improvement recommendations in preparation for the Moss Adams final review.	12.10.19	Awaiting Response
20	That the Superintendent direct that additional revenue sources to finance bond Fund 21 Building Fund projects be transferred to Fund 21 Building Fund.	12.10.19	Awaiting Response
21	That the District modify the format for the Colbi Technologies Consolidated Budget Status Report to include a column for the "original budget" and that Measure E budget and actual expenditures be added.	12.10.19	Awaiting Response

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APPENDIX G: Bond Program Status Report eff. Dec 31, 2019

Bond Project Status Update
December 2019

	SITE	PROJECT	REVISED CONTRACT AMOUNT	STATUS
CONSTRUCTION	Wilson ES	Campus Replacement	$35,963,093	Under Construction
	Crespi MS	Gym Seismic Retrofit	$4,061,455	Under Construction
	Richmond HS	Critical Needs	$19,932,841	Under Construction
	Fairmont ES	Critical Needs Phase 1	$407,000	Punchlist Work/Closeout
	Pinole Valley HS	Replacement Campus	$135,324,210	Punchlist Work/Closeout
	SITE	**PROJECT**	**BUDGET**	**STATUS**
PROCUREMENT	Riverside ES	Critical Needs (Soils Stabilization)	$6,900,000	Pending Reissuance
	SITE	**PROJECT**	**BUDGET**	**STATUS**
DESIGN	Pinole Valley HS	Fields Restoration & Site Work	$17,173,016	Construction Documents/DSA Submission Pending
	Lake ES	Campus Replacement	$1,000,000	RFQ/RFP Bridging AOR
	Stege ES	Critical Needs	$2,900,000.00	Design Development
	Highland ES	Critical Needs	$747,125	Assessing Water & Power Upgrades
	Korematsu MS	Fall Protection	$726,978	Hold

LEGEND & ACRONYMS
(DSA) Division of the State Architect
(RFP) Request for Proposals
(AOR) Architect of Record

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APPENDIX H: WCCUSD Bond Program Spending by Site

Report #2

Report#2

WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
Bond Program Spending to Date by Site
Data as of December 31, 2019

Updated 01/03/2020, effective date as of 12/31/2019

Site Name	Original Budget *	Board Approved Budget 11/6/19	Expended FY 99-01 thru FY 18-19	Expended FY 19-20	Expended Total thru 12/31/19	Committed as of 12/31/19	Balance as of 12/31/19	Notes
BAYVIEW	17,732,392	19,850,802	19,850,802	-	19,850,802	-	0	Footnote 1
CHAVEZ	1,339,784	1,058,234	1,058,234	-	1,058,234	-	0	Footnote 3
COLLINS	993,294	1,638,871	1,638,871	-	1,638,871	-	(0)	Footnote 4
CORONADO	11,278,047	43,022,627	43,022,627	-	43,022,627	-	0	Footnote 1
DOVER	13,070,243	35,095,267	35,095,267	-	35,095,267	-	0	Footnote 1
DOWNER	28,819,079	33,415,902	33,415,902	-	33,415,902	-	0	Footnote 1
ELLERHORST	11,238,341	13,931,806	13,931,806	-	13,931,806	-	0	Footnote 1
FAIRMONT	10,971,356	6,864,259	4,213,128	421,158	4,634,286	75,390	2,154,583	Footnote 3
FORD	11,839,322	30,817,526	30,817,526	-	30,817,526	-	0	Footnote 1
GRANT	1,409,600	2,155,565	2,155,565	-	2,155,565	-	0	Footnote 1
HANNA RANCH	680,923	783,349	783,349	-	783,349	-	(0)	Footnote 1
HARDING	15,574,211	22,632,446	22,632,446	-	22,632,446	-	(0)	Footnote 1
HARMON KNOLLS	-	448,435	448,435	-	448,435	-	-	Footnote 1
HIGHLAND	13,504,714	2,679,839	1,932,714	-	1,932,714	-	747,125	Footnote 1
KENSINGTON	16,397,920	19,343,892	19,343,892	-	19,343,892	-	0	Footnote 1
KING	16,688,732	25,342,166	25,342,166	-	25,342,166	-	(0)	Footnote 1
LAKE	822,657	2,647,823	1,647,823	-	1,647,823	-	1,000,000	Footnote 4
LINCOLN	15,225,821	17,676,561	17,676,561	-	17,676,561	-	(0)	Footnote 1
LUPINE HILLS	16,111,242	15,395,678	15,395,678	-	15,395,678	-	(0)	Footnote 1
MADERA	11,088,764	12,233,801	12,233,801	-	12,233,801	-	(0)	Footnote 1
MIRA VISTA	13,928,364	16,651,130	16,651,130	-	16,651,130	-	0	Footnote 1
MONTALVIN	15,904,716	16,791,028	16,791,028	-	16,791,028	-	(0)	Footnote 1
MURPHY	13,554,495	15,619,655	15,619,655	-	15,619,655	-	(0)	Footnote 1
NYSTROM	20,999,690	51,486,844	45,461,314	-	45,461,314	339,265	5,686,265	Footnote 2
OHLONE	14,174,928	34,492,752	34,492,752	-	34,492,752	-	(0)	Footnote 1
OLINDA	1,170,596	2,286,942	1,582,077	497,597	2,079,675	15,846	191,421	Footnote 3
PERES	19,752,789	21,424,293	21,424,293	-	21,424,293	-	(0)	Footnote 1
RIVERSIDE	13,439,831	21,511,005	14,723,012	14,940	14,737,952	172,594	6,600,460	Footnote 3
SHANNON	1,157,736	1,555,163	1,555,163	-	1,555,163	-	0	Footnote 4
SHELDON	14,968,745	15,102,837	15,102,837	-	15,102,837	-	(0)	Footnote 1
STEGE	13,000,749	6,345,886	3,481,786	-	3,481,786	-	2,864,100	Footnote 3
STEWART	12,710,427	16,737,037	16,737,037	-	16,737,037	-	(0)	Footnote 1
TARA HILLS	14,160,935	14,975,067	14,975,067	-	14,975,067	-	0	Footnote 1
VALLEY VIEW	11,117,405	10,222,362	10,222,362	-	10,222,362	-	0	Footnote 1
VERDE	15,709,690	16,065,870	16,065,870	-	16,065,870	-	(0)	Footnote 1
WASHINGTON	14,051,720	15,322,847	15,322,847	-	15,322,847	-	0	Footnote 1
WILSON	13,673,885	44,129,324	9,664,279	9,919,754	19,584,033	23,640,042	905,249	Footnote 3
Elementary Total	**438,263,142**	**627,754,891**	**572,509,102**	**10,853,448**	**583,362,551**	**24,243,137**	**20,149,203**	

** Original Budget provided is based on Report#2 dated April 30, 2018, and has not been reconciled.*

Footnote 1: Site projects are completed.
Footnote 2: Site Legacy projects are under planning, construction or in closeout.
Footnote 3: Site Legacy projects are completed and Facilities Master Plan Projects are under planning, construction or in closeout.
Footnote 4: Site projects are part of the Facilities Master Plan Projects to commence in future fiscal year.
Note 1: Does not include 1998 Measure E projects (DeJean Middle School)

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Report#2

WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
Bond Program Spending to Date by Site
Data as of December 31, 2019

Updated 01/03/2020, effective date as of 12/31/2019

Site Name	Original Budget *	Board Approved Budget 11/6/19	Expended FY 99-01 thru FY 18-19	Expended FY 19-20	Expended Total thru 12/31/19	Committed as of 12/31/19	Balance as of 12/31/19	Notes
CRESPI MS	1,205,711	6,545,896	2,553,744	2,640,074	5,193,819	786,138	565,939	Footnote 3
DEJEAN MS	64,929	381,209	381,209	-	381,209	-	(0)	Footnote 1
HELMS MS	61,287,986	83,432,888	83,432,888	-	83,432,888	-	0	Footnote 1
HERCULES MS	602,982	699,000	699,000	-	699,000	-	(0)	Footnote 1
KOREMATSU MS	37,937,901	73,382,179	72,655,201	-	72,655,201	-	726,978	Footnote 2
PINOLE MS	38,828,979	56,689,430	56,689,430	-	56,689,430	-	0	Footnote 1
Middle Sch Total	**139,928,488**	**221,130,602**	**216,411,472**	**2,640,074**	**219,051,547**	**786,138**	**1,292,917**	
DE ANZA HS	105,389,888	132,236,248	132,236,248	-	132,236,248	-	(0)	Footnote 1
EL CERRITO HS	93,605,815	146,850,105	146,850,104	-	146,850,104	-	1	Footnote 1
GREENWOOD	35,315,772	79,583,607	79,583,607	-	79,583,607	-	(0)	Footnote 1
HERCULES HS	12,603,343	3,295,019	3,295,019	-	3,295,019	-	0	Footnote 4
KENNEDY HS	89,903,130	33,854,981	33,854,981	-	33,854,981	-	0	Footnote 4
PINOLE VALLEY HS	124,040,286	216,549,580	185,963,019	4,024,094	189,987,114	4,132,635	22,429,832	Footnote 2
RICHMOND HS	94,720,910	42,622,087	22,854,818	155,684	23,010,501	17,312,470	2,299,116	Footnote 3
VISTA HS	3,566,208	7,236,543	7,236,543	-	7,236,543	-	(0)	Footnote 1
High Sch Total	**559,145,352**	**662,228,170**	**611,874,340**	**4,179,778**	**616,054,117**	**21,445,104**	**24,728,949**	
ADAMS MS	703,660	691,211	691,211	-	691,211	-	-	Footnote 1
CAMERON	284,012	122,195	122,195	-	122,195	-	-	Footnote 4
CASTRO	11,901,504	620,944	620,944	-	620,944	-	-	Footnote 1
DELTA NSS	152,564	152,226	152,226	-	152,226	-	-	Footnote 1
EL SOBRANTE	187,343	536,231	536,231	-	536,231	-	-	Footnote 1
HARBOUR WAY	121,639	121,944	121,944	-	121,944	-	-	Footnote 1
KAPPA NSS	109,809	109,831	109,831	-	109,831	-	-	Footnote 1
NORTH CAMPUS	169,849	205,450	205,450	-	205,450	-	-	Footnote 1
OMEGA NSS	117,742	118,313	118,313	-	118,313	-	-	Footnote 1
SEAVIEW	178,534	499,116	499,116	-	499,116	-	-	Footnote 1
SIGMA NSS	110,728	110,949	110,949	-	110,949	-	-	Footnote 1
TLC	118,020	116,673	116,673	-	116,673	-	-	Footnote 1
WEST HERCULES	-	56,847	56,847	-	56,847	-	-	Footnote 1
Closed/Program Total	**14,155,404**	**3,461,930**	**3,461,930**	**-**	**3,461,930**	**-**	**-**	
CENTRAL	67,713,312	102,831,633	94,934,549	1,124,565	96,059,115	1,949,816	4,822,702	Budget thru 20-21
RCP CHARTER	8,148,550	4,415,204	4,415,204	-	4,415,204	-	-	Footnote 1
TECHNOLOGY	35,000,000	35,000,000	34,294,330	24,882	34,319,211	-	680,789	Footnote 2
Admin/Other Total	**110,861,862**	**142,246,837**	**133,644,083**	**1,149,447**	**134,793,530**	**1,949,816**	**5,503,491**	
GRAND TOTAL	**1,262,354,248**	**1,656,822,431**	**1,537,900,924**	**18,822,748**	**1,556,723,674**	**48,424,196**	**51,674,561**	

** Original Budget provided is based on Report#2 dated April 30, 2018, and has not been reconciled.*

Footnote 1: Site projects are completed.
Footnote 2: Site Legacy projects are under planning, construction or in closeout.
Footnote 3: Site Legacy projects are completed and Facilities Master Plan Projects are under planning, construction or in closeout.
Footnote 4: Site projects are part of the Facilities Master Plan Projects to commence in future fiscal year.
Note 1: Does not include 1998 Measure E projects (DeJean Middle School)

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Consolidated Budget Status Report

Consolidated Budget Status Report - 2016 FMP

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APPENDIX I: Bond Program Financial Status (Report #13)

Bond Program Financial Status at the START of 2019

Report #13

West Contra Costa Unified School District
Bond Program Financial Status
As of December 31, 2018

Cash Projection to June-2021

			Notes
Adjusted Cash Balance		$114,748,098	1
Projected Revenues			
Bond Sales 2010 Measure D	65,000,000		2
Bond Sales 2012 Measure E	65,000,000		2
Less: Cost of Issuance	(510,000)		2
Other Revenues	2,820,000	132,310,000	2
Projected Available Funds		**$247,058,098**	
Budgeted and Projected Expenses			
Committed Costs as of 12/31/18	82,734,307		3
Budget Balance as of 12/31/18	64,133,854		3
		146,868,161	
Projected Cash Balance June 2021		**$100,189,937**	

Items Pending State Approval

State Facility Grants Estimated Funding	$ 20,636,299	4

Items Pending Board Approval

Future Facilities Master Plan Projects	$104,400,000	5
2022-2023 Estimated Central Cost	$ 8,070,000	6
2022-2023 Estimated Other Revenue	$ 840,000	2

Page 1 of 6 *Updated 01/14/19*

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Report #13

West Contra Costa Unified School District
Bond Program Financial Status
As of December 31, 2018

Note 1 Adjusted Cash Balance

Description	Amount	Comment
Cash & Equivalents Building Fund 21	113,436,669	A
Cash & Equivalents County School Facilities Fund 35	1,424,263	B
Cash with Fiscal Agent (contract retentions)	6,698,879	C
Accounts Receivable	0	
Accounts Payable	(160)	D
Contract Retention	(6,811,553)	C
Adjusted Cash Balance	**$114,748,098**	

Comments

A. This cash balance is reflective of financial data from MUNIS and should agree with Report 1, Note 16 less cash in Fund 35.

B. California School Facilities Grants are deposited into the County School Facilities Fund 35 and subsequently transferred to the Building Fund 21.

C. The new liability for vendor contract retentions billed, not paid, is the net of the Contract Retentions and Cash with Fiscal Agent. The amounts are reflective of financial data from MUNIS and are displayed on Report #1, Bond Program Key Performance Indicators (page 1) and on Note 15 of this same Report #1.

D. Accounts payable is reflective of financial data from MUNIS and are adjusted at June 30 fiscal year end.

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Report #13

West Contra Costa Unified School District
Bond Program Financial Status
As of December 31, 2018

Note 2 Projected Revenues

Fiscal Year	Bond Sales 2010 Measure D	Bond Sales 2012 Measure E	Less: Cost of Bond Issuance	Interest Earnings	Total
FY2018					
FY2019				850,000	850,000
FY2020	65,000,000	65,000,000	(510,000)	1,050,000	130,540,000
FY2021				920,000	920,000
Sub-Totals	65,000,000	65,000,000	(510,000)	2,820,000	132,310,000
FY2022				610,000	610,000
FY2023				230,000	230,000
Sub-Total	-	-	-	840,000	840,000
Grand Total	65,000,000	65,000,000	(510,000)	3,660,000	133,150,000

The average issuance cost for the last two issues is $505,549.60.

Note 3 Budgeted and Projected Expenses

Description	Note
Committed Expenses	This number comes from Report # 2, Bond Program Spending by Site. This represents the amount of contracts and purchase orders that have been issued but not yet paid.
Estimated Expenses (Budget Balance)	This number comes from Report # 2, Bond Program Spending by Site. This represents the amount of project budgets that have not been committed or paid. It assumes that the balance of each project budget will be spent.

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Report #13

West Contra Costa Unified School District
Bond Program Financial Status
As of December 31, 2018

Note 4 California State Facilities Grants

Upon release of funds by the California State Allocation Board the State Controller prepares the checks which are then mailed to the County Treasurer for deposit into the District's bank account Fund 35 (County School Facilities Fund) and subsequently are transferred to Fund 21, Building Fund.

School	Funding	OPSC * Status	SAB ** Approval	SAB ** Funded	Amount
Pinole Valley HS	Modernization	On Work List	07/22-12/22	Est: Feb-23	16,502,885
Helms	Modernization	On Work List	07/28-12/28	Est: Feb-29	4,133,414
				Total	**20,636,299**

*Office of Public School Construction – OPSC
**State Allocation Board - SAB

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Report #13

West Contra Costa Unified School District
Bond Program Financial Status
As of December 31, 2018

The Board of Education received the Implementation Plan with the draft Master Plan on June 15, 2016 and approved them unanimously. The Board approved Implementation Plan - Model one includes the following projects with the project cost, including inflation:

School	Project Type	FMP 2016	Current Budget
Ed Specs & School Size		200,000	200,000
Harmon Knolls	Soils Testing	100,000	41,489
Valley View ES	Critical Needs	1,000,000	1,091,447
Crespi MS	Critical Needs	3,100,000	3,100,000
Riverside ES	Critical Needs	6,900,000	6,900,000
Richmond HS	Critical Needs	15,100,000	19,000,000
Highland ES	Critical Needs	800,000	800,000
Grant ES	Critical Needs	900,000	211,467
Olinda ES	Critical Needs	1,000,000	1,000,000
Chavez ES	Critical Needs	600,000	600,000
Ohlone ES	Critical Needs	800,000	623,885
Harmon Knolls	Critical Needs	200,000	406,946
Fairmont ES	Critical Needs	3,000,000	3,000,000
Stege ES	Critical Needs	2,900,000	2,900,000
Wilson ES	RS Replacement	40,300,000	40,300,000
Lake ES	Critical Needs	0	147,501
Sub Total		**76,900,000**	**80,322,735**

Note 5: FUTURE FACILITIES MASTER PLAN PROJECTS

Cameron School	Critical Needs	1,300,000	1,300,000
Collins ES	Critical Needs	3,500,000	3,500,000
Hercules MS	Critical Needs	7,500,000	7,500,000
Hercules HS	Critical Needs	7,200,000	7,200,000
Kennedy HS	Critical Needs	12,200,000	12,200,000
Lake ES	RS Replacement	66,100,000	65,600,000
Shannon ES	Critical Needs	7,100,000	7,100,000
Sub Total		**104,900,000**	**104,400,000**

TOTAL IMPLEMENTATION PLAN MODEL 1 $181,800,000* $184,722,735

Definition of ROM[1]

Five percent inflation has been applied from mid-2016 to the scheduled midpoint of construction, compounded yearly, to account for inflation. These "Rough Order of Magnitude" (R.O.M.) cost estimates, which are based on general cost per square foot, do not include market-based contract escalation (if any) above 5% annual inflation.

Additionally, the cost of temporary housing has been included where it was known to be required at the time of the Master Plan (e.g., at Lake Elementary). It has not been included where it was not anticipated prior to the release of the Master Plan (e.g., at Wilson Elementary).

Note that further Architectural and Engineering studies are required, including scoping and budgeting, for all Critical Needs. *In June 2016 the Board approved $181,800,000 FMP since then following budget revisions have been approved by the board:
- Harmon Knolls $250,000 & Valley View $150,000 on 08/09/17, Grant <$688,533>, Harmon Knolls <$101,565>, Lake <$352,499>, Ohlone <$176,115>, & Valley View <$58,553> on 07/25/18, and Richmond $3,900,000 on 11/14/18.

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Report #13

West Contra Costa Unified School District
Bond Program Financial Status
As of December 31, 2018

Note 6 Unbudgeted Central Services Expenses FY2022-2023

Description	Amount
Salaries & Benefits	$5,200,000
Services & Other Cost	2,870,000
	$8,070,000

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Bond Program Financial Status at the END of 2019

West Contra Costa Unified School District
Bond Program Financial Status As of December 2019

Report #13

Cash Projection to June-2021

				Notes
Adjusted Cash Balance		$	65,709,212	1
Projected Revenues				
Bond Sales 2010 Measure D	$ 65,000,000			2
Bond Sales 2012 Measure E	$ 65,000,000			2
Less: Cost of Issuance	$ (510,000)			2
Interest Earnings	$ 1,970,000	$	131,460,000	2
Projected Available Funds		$	197,169,212	
Budget Balance				
Board Approved Budget		$	1,656,822,431	3
Less: Expenses to Date		$	(1,556,723,674)	3
Current Budget Balance		$	100,098,757	
Projected Cash Balance June 2021		$	97,070,454	

Items Pending State Approval

State Facility Grants Estimated Funding

Current Planning Period	$ 23,400,090.00	4
2023-2024 Planning Period	$ 7,615,578.00	4

Items Pending Board Approval

Future Facilities Master Plan Projects	$ 103,400,000	5
2022-2023 Estimated Central Cost	$ 8,070,000	6
2022-2023 Estimated Other Revenue	$ 840,000	3

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West Contra Costa Unified School District
Bond Program Financial Status As of December 2019

Report #13

Note 1 Adjusted Cash Balance

Description		Amount	Comments
Cash & Equivalents Building Fund 21	$	66,008,713	A
Cash & Equivalents County School Facilities Fund 35	$	2	B
Cash with Fiscal Agent (contract retentions)	$	8,264,041	C
Accounts Receivable	$	-	
Accounts Payable	$	-	D
Contract Retention	$	(8,563,545)	C
Adjusted Cash Balance	**$**	**65,709,212**	

Comments

A. This cash balance is reflective of financial data from MUNIS and should agree with Report 1, Note 16 less cash in Fund 35.

B. California School Facilities Grants are deposited into the County School Facilities Fund 35 and subsequently transferred to the Building Fund 21.

C. The new liability for vendor contract retentions billed, not paid, is the net of the Contract Retentions and Cash with Fiscal Agent. The amounts are reflective of financial data from MUNIS and are displayed on Report #1, Bond Program Key Performance Indicators (page 1) and on Note 15 of this same Report #1.

D. Accounts payable is reflective of financial data from MUNIS and are adjusted at June 30 fiscal year end.

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West Contra Costa Unified School District
Bond Program Financial Status As of December 2019

Report #13

Note 2 Projected Revenues

Fiscal Year	Bond Sales 2010 Measure D	Bond Sales 2012 Measure E	Less: Cost of Bond Issuance	Interest Earnings	Total
FY2020	$ 65,000,000	$ 65,000,000	$ (510,000)	$ 1,050,000	$ 130,540,000
FY2021				$ 920,000	$ 920,000
Sub-Totals	$ 65,000,000	$ 65,000,000	$ (510,000)	$ 1,970,000	$ 131,460,000
FY2022				$ 610,000	$ 610,000
FY2023				$ 230,000	$ 230,000
Sub-Total	$ -	$ -	$ -	$ 840,000	$ 840,000
Grand Total	**$ 65,000,000**	**$ 65,000,000**	**$ (510,000)**	**$ 2,810,000**	**$ 132,300,000**

Comments

A. Wilson has a BOE approved budget increase on 6.26.19 with supplemental funds from Fund 25 of $ 1.7M and Fund 01-9200 MRAD of $850,000.

B. Richmond HS has a BOE approved budget increase on 11.6.19 with supplemental funds from Fund 40 of $ 1M.

C. The average issuance cost for the last two issues is $ 505,549.60

Note 3 Budgeted and Projected Expenses

Description	Note
Board Approved Budget	This number comes from Report # 2, Bond Program Spending by Site. This represents the amount of contracts and purchase orders that have been issued but not yet paid.
Expenses to Date	This number comes from Report # 2, Bond Program Spending by Site. This represents the amount of project budgets that have not been committed or paid. It assumes that the balance of each project budget will be spent.

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Bond Program Financial Status at the END of 2019

West Contra Costa Unified School District
Bond Program Financial Status As of December 2019

Report #13

Note 4 California State Facilities Grants

Upon release of funds by the California State Allocation Board the State Controller prepares the checks which are then mailed to the County Treasurer for deposit into the District's bank account Fund 35 (County School Facilities Fund) and subsequently are transferred to Fund 21, Building Fund.

School	Funding	OPSC * Status	SAB** Approval	SAB** Funded	Amount
Pinole Valley HS	Modernization	Unfunded Approval List	07/19 - 12/19	Est. Jul-20	$ 23,400,090
Helms	Modernization	On Work List	07/22 - 12/22	Est. Jul-23	$ 4,133,414
Crespi MS	Modernization	On Work List	07/23 - 12/23	Est. Feb-24	$ 3,482,164
				Total	$ 31,015,668

***Office of Public School Construction - OPSC**
****State Allocation Board - SAB**

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West Contra Costa Unified School District
Bond Program Financial Status As of December 2019

Report #13

The Board of Education received the Implementation Plan with the draft Master Plan on June 15, 2016 and approved them unanimously. The Board approved Implementation Plan - Model one includes the following projects with the project cost, including inflation:

School	Project Type	FMP 2016	Current Budget
Ed Specs & School Size		$ 200,000	$ 200,000
Harmon Knolls	Soils Testing	$ 100,000	$ 41,489
Valley View Elementary School	Critical Needs	$ 1,000,000	$ 1,091,447
Crespi Middle School	Critical Needs	$ 3,100,000	$ 5,300,000
Riverside Elementary School	Critical Needs	$ 6,900,000	$ 6,900,000
Richmond High School	Critical Needs	$ 15,100,000	$ 21,000,000
Highland Elementary School	Critical Needs	$ 800,000	$ 800,000
Grant Elementary School	Critical Needs	$ 900,000	$ 211,467
Olinda Elementary School	Critical Needs	$ 1,000,000	$ 1,000,000
Chavez Elementary School	Critical Needs	$ 600,000	$ 72,847
Ohlone Elementary School	Critical Needs	$ 800,000	$ 623,885
Harmon Knolls	Critical Needs	$ 200,000	$ 406,946
Fairmont Elementary School	Critical Needs	$ 3,000,000	$ 3,000,000
Stege Elementary School	Critical Needs	$ 2,900,000	$ 2,900,000
Wilson Elementary School	RS Replacement	$ 40,300,000	$ 40,300,000
Lake Elementary School	Critical Needs	$ -	$ 147,501
Lake Elementary School	RS Replacement	$ -	$ 1,000,000
Sub Total		**$ 76,900,000**	**$ 84,995,582**

Note 5: Future Facilities Master Plan Projects

School	Project Type	FMP 2016	Current Budget
Cameron School	Critical Needs	$ 1,300,000	$ 1,300,000
Collin Elementary School	Critical Needs	$ 3,500,000	$ 3,500,000
Hercules Middle School	Critical Needs	$ 7,500,000	$ 7,500,000
Hercules High School	Critical Needs	$ 7,200,000	$ 7,200,000
Kennedy High School	Critical Needs	$ 12,200,000	$ 12,200,000
Lake Elementary School	RS Replacement	$ 66,100,000	$ 64,600,000
Shannon Elementary School	Critical Needs	$ 7,100,000	$ 7,100,000
Sub Total		**$ 104,900,000**	**$ 103,400,000**

TOTAL IMPLEMENTATION PLAN MODEL 1	**$181,800,000***	**$ 188,395,582**

Definition of ROM[1]

Five percent inflation has been applied from mid-2016 to the scheduled midpoint of construction, compounded yearly, to account for inflation. These "Rough Order of Magnitude" (R.O.M.) cost estimates, which are based on general cost per square foot, do not include market-based contract escalation (if any) above 5% annual inflation.

Additionally, the cost of temporary housing has been included where it was known to be required at the time of the Master Plan (e.g., at Lake Elementary). It has not been included where it was not anticipated prior to the release of the Master Plan (e.g., at Wilson Elementary).

Note that further Architectural and Engineering studies are required, including scoping and budgeting, for all Critical Needs. *In June 2016 the Board approved $181,800,000 FMP since then the following budget revisions have been approved by the Board:
- Harmon Knolls $250,000 and Valley View $150,000 on 08/09/17, Grant <$688,533>, Harmon Knolls <$101,565>, Lake <$352,499>, Ohlone <$176,115>, & Valley View <$58,553> on 07/25/18, Richmond $3,900,000 on 11/14/18, Crespi $2,200,000 on 03/20/19, Chavez <$527,153> , Lake $1,000,000 on 06/26/19 and Richmond HS $2,000,000 on 11/6/19.

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West Contra Costa Unified School District
Bond Program Financial Status As of December 2019

Report #13

Note 6 Unbudgeted Central Services Expenses FY2022-2023

Description		Amount
Salaries & Benefits	$	5,200,000
Services & Other Cost	$	2,870,000
	$	8,070,000

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Report#13A

WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
Financial Impact of Report 13 Analysis
From 12/31/2018 to 12/31/2019

Updated 08/26/2020

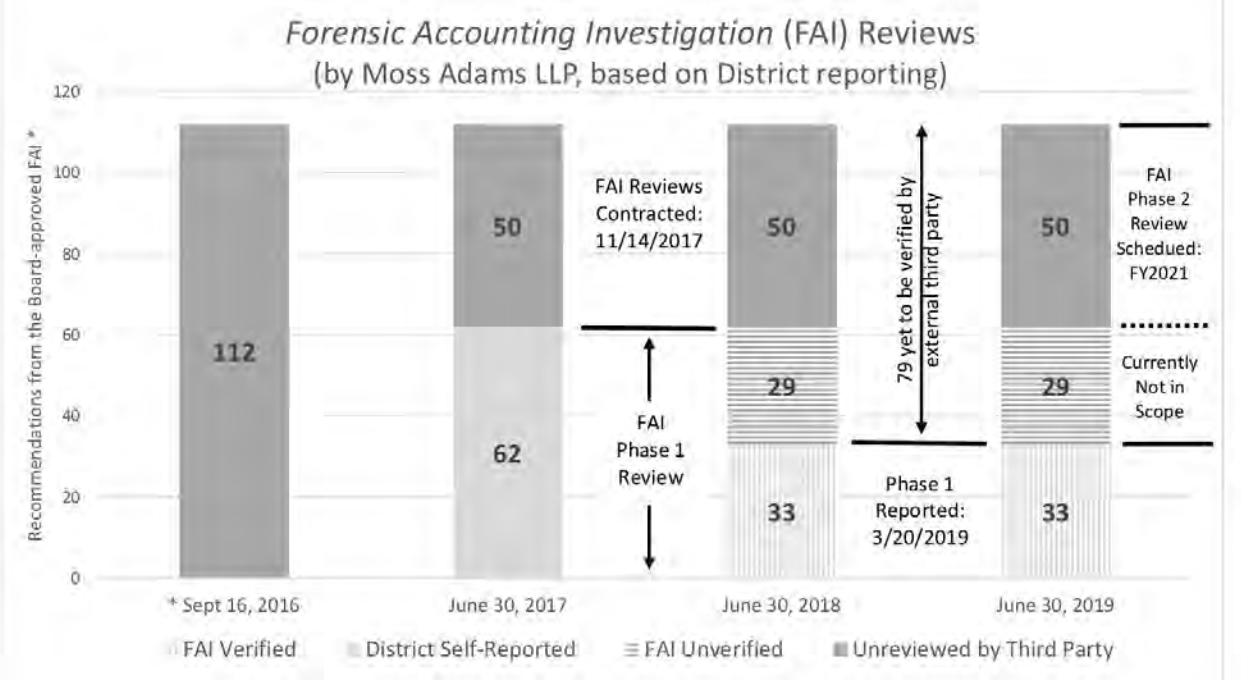
Items	Beg 12/31/18	End 12/31/19	Variance	Notes
Adjusted Cash Balance	**114,746,886**	**65,709,210**	**(49,037,676)**	**<$51,441,038.42> expended in Calendar year 2019 $513,177.05 LAIF Interests $1,890,185.79 Pooled Earning Interests**
Projected Revenue				
Bond Sales 2010 Measure D	65,000,000	65,000,000	-	
Bond Sales 2010 Measure E	65,000,000	65,000,000	-	
Less: Cost of Issuance	(510,000)	(510,000)	-	
Other Revenues estimated to 2021	2,820,000	1,970,000	(850,000)	**FY 2019 <$850,000> removed**
Projected Revenue Total	**132,310,000**	**131,460,000**	**(850,000)**	
Projected Available Funds	**247,056,886**	**197,169,210**	**(49,887,676)**	**<$51,441,038.42> expended in Calendar year 2019 $513,177.05 LAIF Interests $1,890,185.79 Pooled Earning Interests Other Revenue FY 2019 <$850,000> removed**
Budget Balance				
Board Approved Budget	1,652,149,583	1,656,822,430	4,672,847	**03/20/19 BOE budget increase $2,2M 06/26/19 BOE budget increase $472,846.59 11/06/19 BOE budget increase $2M**
Less Expenses to Date	(1,505,281,422)	(1,556,723,675)	(51,442,253)	**<$51,441,038.42> expended in Calendar year 2019 <$1,212.14> not added in Dec 2018 expenditure report**
Budget Balance Total	**146,868,161**	**100,098,755**	**(46,769,406)**	
Projected Cash Balance June 2021	**100,188,725**	**97,070,455**	**(3,118,270)**	**$513,177.05 LAIF Interests $1,890,185.79 Pooled Earning Interests <$850,000> Other Revenue Adjustments <$4,672,846.59> BOE budget increases $1,212.14 December 2018 expenditure adjustment**
State Facility Grants				
Estimated during current planning period	16,502,885	23,400,090	6,897,205	**PVHS Mod revised from $16,502,885 to $23,400,090**
Estimated after current planning period	4,133,414	7,615,578	3,482,164	**Crespi Mod added $3,482,164**
Future Facilities Master Plan Projects	104,400,000	104,400,000	-	
2022-2023 Estimated Central Cost	8,070,000	8,070,000	-	
2022-2023 Estimated Other Revenue	840,000	840,000	-	

Changes in the Financial Status of the Bond Program During the Year 2019

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3. 2016 Forensic Accounting Investigation (FAI)

APPENDIX J: FAI Recommendation Implementation Status and Risk Association



The District's Implementation Task Force (the ITF), charged with managing its implementation of the 112 recommendations from the September 16, 2016 *Forensic Accounting Investigation* (the FAI), began its work in October 2016. On November 14, 2017, the Board approved a contract with Moss Adams LLP to provide external, third party, independent review of the effectiveness of the District's FAI implementation work.

The Moss Adams Phase 1 Review report, delivered on March 20, 2019, covered the District's self-reported implementation of 62 recommendations through the end of FY2017. This chart is meant to provide a quick overview of key milestones during the full Moss Adams review process, covering November 2017 through the completion of its Phase 2 Review.

As of August 2019, the final Phase 2 Review by Moss Adams is expected to be conducted and reported out some time during FY2021 (after the ITF reports that the FAI recommendations have been fully implemented and have been internally reviewed for effectiveness by the end of FY2020[71]).

[71] From "*Implementation of Recommendations*", presented to the Board's Facilities Committee in August 2019, on behalf of the Director of Internal Audit and the ITF.

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Status of Implementation and Risk Association of 2016 FAI Recommendations - Feb 2019

		Total	FAI Allegation Risk Score High	Medium	Low	No Score
Forensic Accounting Investigation (FAI) Recommendations (Oct 2016)		**112**	**21**	**55**	**2**	**34**
Recommendations District reported as "Implemented" by 6/30/17 and Moss Adams (MA) Reviewed by Feb 2019		**62**	5	32	2	23
% of recommendations District reported as "Implemented" by 6/30/17		**100%**	**8%**	**52%**	**3%**	**37%**
Per MA Review in Feb 2019	Implemented	35	0	17	1	17
	Partially Implemented	17	5	11	1	0
	Not Implemented	3	0	3	0	0
	Undetermined	7	0	1	0	6
	Total Partially or Not Implemented, or Undetermined	**27**	**5**	**15**	**1**	**6**
Not Yet Reviewed by MA		**50**	**16**	**23**	**0**	**11**
% of total 112 FAI recommendations MA deemed "Implemented" by Feb 2019		**31%**	**0%**	**31%**	**50%**	**50%**
% of total 112 FAI Recommendations MA deemed Partially or Not Implemented, or not yet reviewed by MA by Feb 2019		**69%**	**100%**	**69%**	**50%**	**50%**

This means that just 31% of the FAI recommendations have been verified as fully implemented by an independent third party as of February, 2019, almost three years after completion of the forensic accounting investigation

None of the 21 *"high-risk"* recommendations have been verified as fully implemented by an independent third party.

Final VLS Report, Phase II (Sept 2016):

- For example, if a New Risk Score is identified as a High risk, this indicates that the internal control(s) in place to minimize fraud, waste, or abuse for that particular allegation or concern are either not implemented or the internal control(s) has been implemented, but testing revealed that the internal control(s) is not functioning adequately. Therefore, a High likelihood exists that 1) the District may be at risk for waste, improper expenditure, or fraud (financial irregularity) related to the Bond Program expenditures, 2) the dollar impact would be significant, and 3) the impact on public perception/trust would be significant. Section III, Test of Controls, specifically addresses the internal control areas that have not been implemented or are not functioning adequately. Methodology for Completing the Final Risk Assessment Matrix Phase II and Assigning the New Risk Score (page 17).
- **The level of risk is defined as follows Methodology for Completing the Final Risk Assessment Matrix Phase II and Assigning the New Risk Score (page 16):**
  - **Low** - There is a low likelihood that the District may be at risk for waste, improper expenditure or fraud (financial irregularity) related to the Bond Program expenditures, the dollar impact would be low, and the impact on public perception/trust would be low.
  - **Medium** - It is possible that the District may be at risk for waste, improper expenditure or fraud (financial irregularity) related to the Bond Program expenditures, the dollar impact may be large, and there may be an impact on public perception/trust.
  - High - There is a high likelihood that the District may be at risk for waste, improper expenditure or fraud (financial irregularity) related to the Bond Program expenditures, the dollar impact would be significant, and the impact on public perception/trust would be significant.

1

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4. Other CBOC Actions and District Support in 2019

APPENDIX K: Bond Program Management Plan (PMP)

On May 8, 2019, the Board of Education approved a contract with Swinerton Management & Consulting (SMC) to assist the District to develop, draft and publish a Bond Program Management Plan (PMP).

The purpose of this Plan is to provide information to Bond Program participants on the procedures relevant to its execution. This Plan outlines all the processes for Bond Program activities, including, but not limited to, staffing, procurement, financial controls, document control, budgeting practices, master planning, scheduling, invoice/payment application review and processing, change order review and processing, and claims avoidance and management.

The Bond Program Management Plan intends to provide the West Contra Costa Unified School District with documentation of the internal controls that properly implement the District's policies, safeguard its assets, provide compliance with state and federal laws and regulations, and produce timely and accurate financial information.

The Plan has four specialized sections: Program & Operations, Administration, Fiscal, and Project Management. Each section includes a corresponding appendix, which includes attachments to describe the procedures for administering and managing the bond program and related projects. These descriptions do not replace the District's contract requirements. Rather, they provide supplemental information regarding management and day-to-day processes. The Plan will ensure that District staff has clear guidelines to follow, assist in training new members of the team by providing them with the initial and fundamental information they will need to meet the expectations of the West Contra Costa Unified School District, and provide consistency in process implementation.

Customizable Reports

In 2019, the District implemented AccountAbility from Colbi Technologies, which specializes in its ability to provide customizable reports. The following reports from AccountAbility will be prepared and presented for each CBOC meeting:

1. *Consolidated Budget Status Report: 2016 Master Plan*
2. *Consolidated Budget Status Report: Program-Wide*

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Agreed-Upon District Monthly Status Reports to the CBOC

One of the significant types of consistent implementation contained in the PMP is the suite of monthly reports agreed-upon with the CBOC. The CBOC receives an update on the status of bond-funded projects at each regularly scheduled meeting of the CBOC. These include the following:

1. *Consolidated Budget Status Report: Program-wide*[72]
   Grouped by the School site, shows Total Budget, Total Commitments, and Total Expenditures for all projects in the Bond Program.

2. *Consolidated Budget Status Report: 2016 Facility Master Plan Projects*
   Grouped by the School site, includes Total Budget, Total Commitments, and Total Expenditures for all projects in the 2016 Facilities Master Plan.

3. *Bond Program Spending to Date by Site*
   Shows Current Board Approved Budget, Prior Year/Current Year and Total Expenditures, Remaining Commitments, and Board Approved Budget Balance for each school site. In addition, footnotes indicate whether the site includes Legacy or 2016 Master Plan projects and the status of those projects.

4. *Bond Program Financial Status, Report 13*
   Provides a cash projection, including Cash Balance, Projected Revenues, Available Funds, Board Approved Budget, Current Budget Balances, and Project Cash Balances. It also includes pending State Facility Grants that are expected in future years, as well as the required funding needs for future Master Plan projects.

5. *Financial Impact of Report 13 Variance*
   Demonstrates and provides an explanation for changes in Adjusted Cash Balance, Projected Available Funds, Projected Cash Balance, and State Facility Grants from month to month.

6. *Accounts Payable (AP) Check List - Fund 21*
   Lists all Warrants issued during the prior month, including Vendor, Check Number, Check Date, Account Code, Invoice Number, Invoice Date, Invoice Amount, and Invoice Description. This report does not include payroll warrants.

[72] Report #2 (Appendix H)

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APPENDIX L: [Left Blank]

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5. Other General References

APPENDIX M: CBOC Member Roster and Bios

Who Served from January 2019 through September 14, 2020

*__Dr. John Anderson__, Richmond Resident 2020-present
Subcommittee: Annual Report

Dr. Anderson has been a resident of Richmond since 1985. He served on the Contra Costa County Civil Grand Jury from 2018 to 2020. He has over 45 years of experience in design and construction of heavy civil works with emphasis on geotechnical and foundation engineering. He has served in various capacities for projects in the US and Internationallyas chief engineer, project manager, technical consultant and design task lead. He attended Northwestern University in Evanston IL where he earned a BS in Civil Engineering, MS in Civil-Geotechnical Engineering and a PhD in Civil-Structural Engineering. He holds a California professional engineers license as a Civil Engineer and a California Geotechnical Engineering authority license. He has served as President and Board Member of the American Society of Civil Engineers (ASCE) Geo-Institute, President of the California Geotechnical Engineers Association, President of ASCE's Civil Engineering Certification Inc. and President of the Academy of GeoProfessionals. He was co-chairperson of the American Society of Civil Engineers Committee that addressed lesions learned from Hurricane Katrina and served for six years on the California Board of Registration for Professional Engineers and Land Surveyors Geotechnical Engineering Technical Advisory Committee.

*__Ken Burns__, Building Trades Council 2020-present

Ken's personal statement: "...I have been a long time Richmond resident, but I am a 25 year member of the Operating Engineer Local #3 Union. Also, I am a local businessman in the City of Richmond. I am deeply rooted here in Richmond and Contra Costa County. I am a landlord of many properties throughout the city and I plan to make Richmond my home after my retirement…."

*__Maisha Cole__, Richmond Resident, 2020-present

Maisha's personal statement: "I am a resident of Richmond and have two children who attend school in the district.

"When my children entered the public school system seven years ago, I wanted to learn as much as I could about the school; the school district and the K-12 education system. I realized very early on that I was not satisfied with the quality of education for students of color and I needed to make sure my children would get the best education possible. I became a volunteer

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at the school and took on several leadership positions. I am currently the PTA president and the School Site Council Chairperson.

“I have always been an advocate, not only for my children, but for children across the state. In order to affect change, one has to be involved in the process. Being an active participant within the WCCUSD, specifically on committees, would be the perfect opportunity for me to develop my knowledge of the district and attempt to make changes. I want to be informed about the school construction funding and work with the district to maintain the commitment to all students, staff and the community. The district has not always been transparent when it comes to expenditures, and this has greatly damaged the reputation in the community.

“It is going to take hard work and dedication from parents like me, who have the time and commitment to invest in rebuilding a relationship with the community. Tax payers need to have confidence that the school district will allocate bond funding in the most cost effective manner and that projects will be completed within budget and on time. I have not given up on the West Contra Costa Unified School District, which is why I would like to serve on this committee.”

*__Sallie DeWitt__, Business Organizations, 2017-present
Subcommittees: Annual Report (2016, 2018 and 2019 Chairperson), Audit

Sallie attended public schools in the Bay Area and then received two degrees from UC Berkeley, a BA in History (Phi Beta Kappa) and an MBA. She and her husband, Jim DeWitt, have lived in Richmond since 1975. Their children and grandchildren attended WCCUSD schools, and now, two great grandchildren are at Washington School. Sallie is an ardent supporter of public education. In the 1990s, she founded the Many Hands Project at Washington School and served on the Board of the West Contra Costa Ed Fund. Starting in 1995, she worked at Chevron as an Education Outreach Coordinator and budget analyst, until she retired in 2015. She is motivated to ensure all public-school students receive a top-notch education and an opportunity to achieve their full potential. Sallie joined the CBOC in January 2017, wanting to put her experience in business planning, budgeting and variance analysis to work overseeing WCCUSD's bond program.

*__Guadalupe (Calvario) Enllana,__, Richmond Resident, 2019-present
Vice Chairperson

Guadalupe’s personal statement: “I’ve been a lifelong Richmond resident. Student and parent of WCCUSD as well as a volunteer in a number of nonprofits within richmond. I want to now support the CBOC and have an opportunity to collaborate in the way Construction funds are properly spent. I’ve advocated as a citizen, I believe I can be an effective advocate as a member of the CBOC by bringing diversity and new ideas to the table. This will also help me see things from the financial perspective in governance. I am a team player and have great collaboration skills as well as very in depth when it comes to data and fine print of systems.”

__Kathy Fleming__, El Cerrito Resident, 2017-2019
Subcommittee: Vice Chair (2018 and 2019) and Annual Report (2017 Chairperson)

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Kathy was appointed to the CBOC in June of 2017. She is a resident of El Cerrito and a parent of two children, the oldest of which is a student in WCCUSD. Kathy brings 30 years of public education experience as a teacher and administrator, currently in San Francisco Unified School District (SFUSD) and previously in the Philadelphia Public Schools. Kathy is currently a Program Administrator for the SFUSD Visual and Performing Arts Department. Prior to this position, Kathy served for nine years as the Director of the SFUSD Public Education Enrichment Fund. In her administrative roles, Kathy is responsible for planning, budgeting and accountability activities to ensure funds are expended per legislation and school board approved annual budgets and plans as well as leading community and stakeholder engagement activities. Kathy welcomes her opportunity to serve on the CBOC and works to ensure transparency and accountability in the expenditure of voter approved bond funds.

*__Don Gosney__, Senior Citizen Organizations, 2008-2012 and 2015-2020
Chair 2018, 2019 and 2020
Former Subcommittees: Bylaws (Chairperson), Audit (Co-Chairperson), Website (Chairperson), Nystrom Subcommittee, Site Visit

Don was first appointed to the CBOC in 2008, and he served two terms before terming out. He was reappointed in 2015 and since 2016 represents Richmond and Senior Citizens Organizations. Don attended high school in West County and graduated from JFK in 1972. He later studied theoretical physics at UC Berkeley and then worked for 49 years building petro-chemical complexes and serving the ranks of Organized Labor. Don is interested in serving on the CBOC because he says that every project needs another set of eyes looking at it to make sure it's done right, done economically, and done serving the best interests of the owner (in this case, the people). Don has worked with the Bond Program since before it first went to the voters in 1998.

__Vanessa Hill__, Parent Representative, 2018 - 2020, Audit Subcommittee 2018

Vanessa attended public schools in Oregon and California before attending Pepperdine University for her undergraduate degree in accounting and University of San Francisco for her MBA with emphasis in finance. She has lived in El Cerrito with her husband since 1999 and her two sons attend WCCUSD schools. Vanessa is a co-founder and partner of Evidentia Consulting, LLP, a forensic accounting and consulting firm with offices in Berkeley and Redwood City. Her work includes serving as an expert witness on accounting and economic damage issues for business disputes as well as providing economic loss analysis for individuals in wrongful termination, personal injury, and wrongful death litigation. A strong supporter of public education, Vanessa joined the CBOC in July 2018 to support the continued upgrading of our school facilities.

*__Lorraine Humes__, West Contra Costa County Taxpayers' Association Representative, 2019-present
I have been a resident of San Pablo for approximately 40 years. I retired after working 29 years

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as a food microbiologist from the U.S. Department of Food and Drug. I have no children but know the value to society in having every child get a good education. I am also a taxpayer and want to provide our children with a safe and interesting learning environment at a reasonable price to me. I got interested in the CBOC when our last school construction bond was trying to be passed and when I heard that there was a committee vacancy, I asked to be our taxpayer's association representative on the committee.

*__Anton Jungherr__, City of Hercules Representative January 2004 – July 2006, Board of Trustee Representative May 2009 – April 2010, Senior Citizen Representative May 2010 – April 2011, Board of Trustee Representative February 2015 – November 2015, Contra Costa Taxpayers Association Representative December 2015 – February 2017, City of Hercules Representative March 2017 – February 2021.
ajungherr@aol.com, 510.697.7212
Subcommittees: Audit, Bylaws, Annual Report, Website
Anton was first appointed to the CBOC in 2004 and served as Secretary and the Executive Director (volunteer) and Audit Subcommittee (co-chair). Anton is a Co-Founder of the California League of Bond Oversight Committees and has served as Board Director, and Executive Director. Anton served as Associate Superintendent Berkeley Unified School District, CA; Deputy Superintendent for San Francisco Unified School District, CA; Deputy Superintendent of Yonkers School District, NY, Director of Finance, Newark, NJ, Controller City of Anchorage, AK, Controller of Anchorage School District, AK, Assistant City Manager Lake Forest, Il, Founding Business Manager Making Waves Academy (public charter school). Anton is the coauthor of Operational PPBS (Planning -Programming-Budgeting-Systems for Education.) He earned his Master of Education degree in Educational Administration from Columbia University, received a Master of Public Administration degree from Syracuse University and a B.S. in Business Administration from the University of Connecticut.

*__Cameron "Mac" Moore__, Parent and PTA, 2016-2020
CBOC Secretary 2017, 2018 and 2019
Mac has lived in West County for 15 years and has two kids in WCCUSD schools. He has a B.A. in Mathematics and Anthropology from Middlebury College in Vermont, and an M.B.A. in Finance from New York University. After a career in finance in New York City, Mac has worked in the solar energy industry for over 20 years, most recently for a company that develops and operates large solar power projects. He joined the CBOC because he believes that all children should be able to attend safe and attractive public schools.

__Gregg Visineau__, Senior Citizen Organization, 2017-2020
gvisineau@gmail.com, 510.236.0761
Subcommittees: Annual Report, Audit
I have been a member of the CBOC since April 2017. I have been involved in District affairs much longer. My family and I are 37-year residents of El Cerrito, with two grown sons who attended Castro Elementary, Portola Middle and El Cerrito High Schools beginning in 1993. We have been active PTA members, Site Council members and school parents throughout that time. We have witnessed firsthand an activist Superintendent (with a quiescent Board) lead the

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District to bankruptcy in the late 1980's. Recently we have witnessed activist Board members (with a laissez faire Superintendent) lead the District into Grand Jury, Securities & Exchange Commission and Forensic Accounting investigations. I have regularly attended Board of Education, CBOC, Audit, Facilities Subcommittee and Governance Subcommittee meetings. I have presented written and oral Public Comments to all of them on topics as diverse as bond funding for technology purchases; conflicts of interest for Board members; and learning from past school design and construction errors to improve on future projects. My education includes degrees in mechanical engineering, naval architecture and business. My professional skills reflect time spent in mergers and acquisitions; economic and project analysis; strategic planning; emergency response; project finance; supply chain management; logistics and trading; and asset management.

*Current members as of September 14, 2020.

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APPENDIX N: CBOC Annual Report Chronology 1998 - 2020

The WCCUSD has received voter approval for 6 local school bond measures since 1998 (see Appendix A for details), the last four of which have been approved under the conditions of California State Proposition 39 (see Appendix A for more information). These are 2002's Measure D (2002 - D), 2005 - J, 2010 - D and 2012 - E. Under the requirements of Proposition 39 (enshrined in the California Education Code), the District commissioned its CBOC in 2002; it began operations in early 2003. With respect to CBOC annual reports, the Education Code Section 15820.(b) says:

> "The Citizens Bond Oversight Committee shall issue regular reports on the results of its activities. A report shall be issued at least once a year".

Here is the chronology of those annual reports from the WCCUSD CBOC since its inception.

Annual Report	Delivered	Chairperson	Type of Report
AR2003	Dec 2003	Mr Richard King	A 3-page letter from the CBOC to the WCCUSD.
AR2004	NO ANNUAL REPORT		
AR2005	NO ANNUAL REPORT		
AR2006	Jan 2008	Mr William Savidge	A 5-page letter from the CBOC Audit Subcommittee to the WCCUSD.
AR2007	Dec 2008	None shown	3-page "Executive Summary"-style.
AR2008	Mar 2010	Ms Sue Pricco	1st real "Annual Report"-type format. 15-pages.
AR2009	NO ANNUAL REPORT		
AR2010	Feb 2012	None shown	The first of 5 consecutive "glossy brochure"-style AR's with content, verbiage, photo's, formatting and production by the WCCUSD. 3-pages.
AR2011	Nov 2012	None shown	The second of 5, same District sourcing and production as AR2010. 2-page glossy brochure.
AR2012	Dec 2013	None shown	The third of 5, same District sourcing and production as AR2010 and AR2011. 2-page glossy brochure.

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Annual Report	Delivered	Chairperson	Type of Report
AR2013	Jan 2015	None shown	The fourth of 5, same District sourcing and production as AR2010, AR2011 and AR2012. 3-page glossy brochure.
AR2014	Apr 2015	None shown	The fifth of 5, same District sourcing and production as AR2010, AR2011, AR2012 and AR2013. 3-page glossy brochure.
AR2015	Jun 2016	Mr Anton Jungherr	Composed and produced by the CBOC's ad hoc Annual Report Subcommittee for AR2015. 188-pages, including appendices.
AR2016	Aug 2017	Ms Sallie DeWitt	Composed and produced by the CBOC's ad hoc Annual Report Subcommittee for AR2016. 48-pages, including appendices.
AR2017	Aug 2018	Ms Kathy Fleming	Composed and produced by the CBOC's ad hoc Annual Report Subcommittee for AR2017. 91-pages, including appendices.
AR2018	Aug 2019	Ms Sallie DeWitt	Composed and produced by the CBOC's ad hoc Annual Report Subcommittee for AR2018. 102 pages, including appendices.
AR2019	Nov 2020	Ms Sallie DeWitt/Ms Lorranine Humes	Composed and produced by the CBOC's ad hoc Annual Report Subcommittee for AR2019. XX-pages, including appendices.

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APPENDIX O: Other References & Links

Purpose: To provide references and online links to documents that support the work of the West Contra Costa Unified School District (WCCUSD) Citizens' Bond Oversight Committee (CBOC).

- The purpose, role and responsibilities of the Citizens' Bond Oversight Committee is governed by California Constitutional Amendment Proposition 39 (2000)[73], California Education Code[74], WCCUSD Board of Education Policy[75] (BP 7214.2 Facilities) and the CBOC's Bylaws[76].

- Various bond resolutions approved by the Board of Education and various ballot measures approved by the voters authorized $1,630,000,000 of general obligations bonds the principal and interest to be paid by the taxpayers of the WCCUSD (ref: WCCUSD Bond Measure Information[77].)

- The Board of Education, on June 15, 2016, approved a Five Year 2016-2021 Master Facilities Plan[78] for twenty-one (21) projects in an amount of $181,800,000 based on the available bond monies that had been previously approved by the voters.

- A forensic accounting investigation[79] of the school construction program was performed by an independent auditor in 2015-16. The District has established a Task Force to implement the 112 recommendations made by the forensic auditor.

- CBOC activities including agenda packets, minutes and voice records are available on the CBOC website[80]. Subcommittee agenda, minutes, voice recordings and reports are also available on the Subcommittee website. Information on how to join the CBOC is also available. District reports given to the CBOC.

- WCCUSD Financial and Performance Audits can be viewed on the CBOC website: www.wccusd-bond-oversight.com

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[73] www.calboc.com/proposition-39.html or www.wccusd.net/cms/lib/CA01001466/Centricity/domain/1873/Regulatory%20Documents/Prop39.pdf

[74] www.calboc.com/education-code.html

[75] www.wccusd.net/cms/lib/CA01001466/Centricity/domain/1873/Regulatory%20Documents/Board%20Policy%207214.2.pdf / Language for Measure R can be found in Annual report 2019, Appendix R

[76] www.wccusd.net/cms/lib03/CA01001466/Centricity/Domain/1873/Regulatory%20Documents/CBOC%20By-Laws%20Rev%2014.pdf

[77] www.wccusd.net/domain/1873

[78] www.wccusd.net/Page/6945 / Facilities Master Plan.

[79] www.wccusd.net/domain/1723 / Forensic Accounting Investigation

[80] www.wccusd.net/cboc / CBOC Website

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- The California League of Bond Oversight Committees (CalBOC)[81] has an excellent website with training resources for CBOC members. They also publish a free newsletter on CBOC activities throughout California.

- The California Little Hoover Commission[82], a State Agency to promote economy and efficiency in State and local governments, issued a report in February 2018[83] with recommendations to improve the effectiveness of CBOCs. The California's Coalition for Adequate School Housing[84] issued in 2014 an important report on school construction costs in California.

- A Moss Adams LLC webcast[85], presented by Mark Steranka, Partner, Advisory Services, on May 21, 2019. Effective risk mitigation, strong internal controls, and efficient operations are the cornerstones of successful organizations. Join us for part one of our internal audit webinar series in which we'll address ***how a comprehensive internal audit program can help your organization enhance efficiency, effectiveness, transparency, and safety, while better meeting regulatory requirements***. Moss Adams LLC is currently under contract with WCCUSD for performance audits through FY2020, and a final review of recommendations that came out of the 2016 Forensic Accounting Recommendation.

- On November 20, 2019, WCCUSD's Board of Education approved wording for ballot Measure R which was approved by voters in March, 2020. The full text of Measure R[86] can be found on the CBOC's website.

[81] www.calboc.net
[82] www.lhc.ca.gov
[83] https://lhc.ca.gov/report-library
[84] www.cashnet.org/
[85] https://www.youtube.com/watch?v=Y9wcd7-yHZc
[86] https://www.wccusd.net/cms/lib/CA01001466/Centricity/Domain/1873/Measure%20R%20Text.pdf

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APPENDIX P: Measure D (2010) & Measure E (2012)

Listed Projects and Ballot Wording

Source: California League of Women Voters of California Education Fund via "smartvoter.org"

June 8, 2010 Election Measure D: $380,000,000	November 6, 2012 Election Measure E, $360,000,000
"PRIORITY SCHOOL PROJECTS LIST"	"PROJECT LIST"
"School Renovation, Repair and Upgrade Projects"	
Repair, upgrade and replace worn-out leaking roofs.	← Same as Measure D (indicated at left)
Replace existing wiring systems to meet current electrical and accessibility codes.	← Same as Measure D (indicated at left)
Additional electrical service capacity to relieve currently overloaded electrical systems.	← Same as Measure D (indicated at left)
Replace existing water, sewer, plumbing and storm drain systems to meet current codes, including the elimination of lead-containing fixtures.	← Same as Measure D (indicated at left)
Upgrade aging and deteriorating school restrooms.	← Same as Measure D (indicated at left)
Replace older ceilings, heating, ventilation, air conditioning and lighting systems with building code compliant, energy efficient systems.	← Same as Measure D (indicated at left)
Install code-compliant ventilating systems in restrooms.	Not Listed in Measure E
Provide improved, upgraded computer labs.	← Same as Measure D (indicated at left)
(1) Upgrade and equip classrooms, science labs, multipurpose rooms, physical education facilities, kitchens, auditoriums, libraries, arts and music rooms, childcare, preschool, adult education and educational support spaces.	Upgrade and equip classrooms, science labs and multipurpose rooms and facilities. See also (1) below
Classroom interiors will receive new paint, carpet/vinyl tile/asbestos abatement, white marker boards, tackable surfaces, storage for instructional materials and equipment.	Not Listed in Measure E
(2) Federal and State-mandated Americans with Disabilities Act (ADA) accessibility upgrades including site access, parking, staff and student restrooms, relocation of some existing electrical devices, drinking fountains, playground equipment, etc.	Not Listed here; see (2) below for Measure E
Replace old, portable classrooms.	← Same as Measure D (indicated at left)
Repair aging schools.	← Same as Measure D (indicated at left)

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June 8, 2010 Election Measure D: $380,000,000	November 6, 2012 Election Measure E, $360,000,000
"PRIORITY SCHOOL PROJECTS LIST"	"PROJECT LIST"
"School Health, Safety and Security, Earthquake Safety and Energy Efficiency School Projects"	
Install new security systems, such as security (surveillance) cameras, outdoor lighting, fencing, gates and classroom door locks.	← Same as Measure D (indicated at left)
Remove or abate asbestos, lead paint, mold and hazardous materials.	← Same as Measure D (indicated at left)
Upgrade emergency communication systems.	← Same as Measure D (indicated at left)
Fire alarm systems upgraded to automatic systems, repair fire safety equipment, add sprinklers and fire safety doors.	← Same as Measure D (indicated at left)
Upgrades to schools to meet handicap accessibility requirements.	← Same as Measure D (indicated at left)
Acquire and install a card access system.	Not Listed in Measure E
Inspect for/repair gas pipe leaks.	Not Listed in Measure E
Replace/upgrade existing signage, bells and clocks.	← Same as Measure D (indicated at left)
Install/replace/upgrade security fencing, cameras and exterior lighting, and establish a standard of complete fencing in good repair at all schools.	Not Listed in Measure E
Replace/upgrade existing security and irrigation systems.	Not Listed in Measure E
Install energy efficient systems, including solar panels, energy efficient heating, ventilation, and cooling systems for cost savings and energy efficiency.	← Same as Measure D (indicated at left)
Replace existing window systems with energy efficient systems.	← Same as Measure D (indicated at left)
Upgrade site playground equipment replacement to meet current safety standards.	← Same as Measure D (indicated at left)
(3) Relocate or improve student drop-off areas for safety, including a separate area for buses.	Not Listed here; see (3) below for Measure E.
Inspect and improve play area fields for safety and drainage.	Not Listed in Measure E
Replace existing doors, door frames and ceilings.	Not Listed in Measure E
Add emergency exits for faster evacuation in an emergency.	Not Listed in Measure E
Upgrade school site parking, utilities and grounds.	Not Listed in Measure E
Repair termite damage to structures and doors/ door frames.	Not Listed in Measure E
Strengthen and repair schools and classrooms vulnerable to serious damage in a major earthquake, as required by State law.	Not Listed in Measure E

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June 8, 2010 Election Measure D: $380,000,000	November 6, 2012 Election Measure E, $360,000,000
"PRIORITY SCHOOL PROJECTS LIST"	**"PROJECT LIST"**
"District-Wide Wiring and Instructional Technology for Effective Learning Environment and Job Training Projects"	
Update computer labs.	Not Listed in Measure E
Provide and maintain upgraded technology, data and communication equipment.	← Same as Measure D (indicated at left)
Upgrade and expand wireless systems, telecommunications, Internet access.	← Same as Measure D (indicated at left)
Upgrade and replace computers, hardware and software systems.	← Same as Measure D (indicated at left)
Upgrade and replace classroom furniture, equipment and instructional aids.	← Same as Measure D (indicated at left)
Upgrade media and audio/visual equipment.	← Same as Measure D (indicated at left)
Expand bandwidth to allow student greater access to the Internet.	← Same as Measure D (indicated at left)
Install up-to-date learning technology and equipment used in job training programs.	← Same as Measure D (indicated at left)
No Further Projects (or Project Categories) Listed in Measure D	**"New Construction Education Enhancement/ Class Size Reduction Projects at School Sites"**
Similar to (1) above for Measure D →	(1) Multi-purpose rooms, including the cafeteria, serving kitchen, staff and student bathrooms, storage, educational support spaces, and classrooms.
Not Listed in Measure D	New classrooms/classroom buildings, which will reduce dependency on portable classrooms.
Not Listed in Measure D	Lunch shelters, playground equipment and playground storage for outdoor activities.
Similar to (2) above for Measure D →	(2) ADA accessibility upgrades as mandated by the Division of the State Architect (DSA).
Not Listed in Measure D	Additional electrical service capacity.
Not Listed in Measure D	Additional staff and student restrooms.
Similar to (3) above for Measure D →	(3) Additional staff, visitor and student parking/drop-off areas.

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Ballot Summary Wording[87]

Measure D: “To make schools safe, complete essential health/safety repairs, qualify for State matching grants, shall West Contra Costa Unified School District upgrade schools for earthquake safety/handicap accessibility, remove asbestos, upgrade restrooms, vocational classrooms/technology/energy systems to reduce costs, install lighting and security systems, acquire, repair, construct, equipment/sites/facilities, by issuing $380,000,000 in bonds within legal rates and bonding capacity limits with independent audits, citizen oversight, and no money for administrators’ salaries?”

Measure E: "To make schools safe, complete essential health/safety repairs, qualify for State matching grants, shall West Contra Costa Unified School District upgrade schools for earthquake safety and handicap accessibility, remove asbestos, upgrade science labs, restrooms, vocational classrooms, technology and energy systems to reduce costs, install lighting and security systems, and acquire, repair, construct, equipment, sites and facilities, by issuing $360,000,000 in bonds within legal rates and bonding capacity limits with independent audits, citizen oversight, and no money for administrators’ salaries?"

[87] Ballot wording and election results are readily available from the *Ballotpedia* website. The full text of the ballot measure – not just what appears on the sample & actual election day ballots (directly above) – is archived by the *California League of Women Voters of California Education Fund* and is the basis for transcribing the WCCUSD Measure D and Measure E “Listed Projects” quoted in the table above (from the “smartvoter.org” website).

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APPENDIX R - Measure R Approved by the Board in 2019

BALLOT SUMMARY STATEMENT

WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT CLASSROOM MODERNIZATION AND SAFETY UPDATE MEASURE. To repair, upgrade neighborhood schools, shall West Contra Costa Unified School District modernize core classrooms; provide safe, secure school environments, including updated technology and air conditioning, that improve academic achievement and provide relevant career pathways for all students, by issuing $575 million of bonds, at legal rates, averaging $34.48 million annually while bonds are outstanding, at 6¢ per $100 assessed value, with strict citizens' oversight, annual audits and all money for local schools?

FULL TEXT

Available on the CBOC's website (Oct 13, 2020):
https://www.wccusd.net/cms/lib/CA01001466/Centricity/Domain/1873/Measure%20R%20Text.pdf

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APPENDIX Q: Overview of "Prop 39 Bonds"

The interplay between Proposition 39, the California Education Code and the California State Constitution (facilitated by California Assembly Bill 1908), is important for understanding the auditing and other requirements which make a local school bond measure – and the management of the subsequent bond program by the school district – "Prop 39 compliant" in the eyes of the law.

Proposition 39, AB1908 and the California Education Code

Proposition 39, the "*Smaller Classes, Safer Schools and Financial Accountability Act* (School Facilities; 55% Local Vote; Bonds, Taxes; Accountability Requirements)" was passed by the voters of California in November 2000. A major element of interest to both school districts and the voters was the ability to reduce the threshold for passing a new local school bond measure from two-thirds to 55% if certain conditions were met.

Assembly Bill (AB) 1908 was passed by the California State Assembly in June 2000, to enhance the favorability of Proposition 39 with the voters and to enable its implementation (should it pass, which it did in November 2000).

Proposition 39 and AB1908 amended the **California State Constitution** (see verbatim text later in this appendix) and the California Education Code (see key elements immediately below).

The California Education Code, Sections 15278, 15280 and 15282, deal with the requirement for; the scope of; school district support for; and the membership of a "*Citizens' [Bond] Oversight Committee*" (a CBOC), as a result of the passage of Proposition 39.

Sections 15264 – 15276 deal with the "*General Provisions*" of "*Strict Accountability in Local School Construction Bonds*", but with particular reference to the above-cited provisions in the California State Constitution, as a result of the passage of Proposition 39.

From Moss Adams LLP "*Bond Program Performance Audit*" for FY 2018
"A Construction Bond Program performance audit is required for WCCUSD Measure D (2010) and Measure E (2012) Construction Bonds by Proposition 39, State Constitution Article XII A, and Education Code Section 15272. These State requirements specify that the proceeds from the sale of school facilities bonds are expended only on Listed Projects. Both the State Constitution and Education Code require an annual independent performance audit to verify Bond proceeds are used on Listed Projects. Listed Projects are defined as follows:

"School district boards are required to evaluate safety, class size reduction, and information technology needs in developing a list of specific projects to present to the voters" and "Before they vote, voters will be given a list of specific projects their bond money will be used for."

See Appendix P for the WCCUSD's Measure D & Measure E Listed Projects.

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The California State Constitution re "Prop 39 Bonds"

Article XIII: Taxation

Article XIII A: Tax Limitation

Section 1: Ad Valorem Tax on Real Property

Subdivision (a): [Maximum 1% Ad Valorem Tax on Real Property]

Subdivision (b): "The limitation provided for in Subdivision (a) shall not apply to ad valorem taxes or special assessments to pay the interest and redemption charges on any of the following:"

Part (3): "Bonded indebtedness incurred by a school district, community college district, or county office of education for the construction, reconstruction, rehabilitation, or replacement of school facilities, including the furnishing and equipping of school facilities, or the acquisition or lease of real property for school facilities, approved by 55 percent of the voters of the district or county, as appropriate, voting on the proposition on or after the effective date of the measure adding this paragraph. This paragraph shall apply only if the proposition approved by the voters and resulting in the bonded indebtedness includes all of the following accountability requirements [(A) – (D), below]:"

"(A): A requirement that the proceeds from the sale of the bonds be used only for the purposes specified in Article XIII A, Section 1 (b) (3) [above], and not for any other purpose, including teacher and administrator salaries and other school operating expenses."
"(B): A list of the specific school facilities projects to be funded and certification that the school district board, community college board, or county office of education has evaluated safety, class size reduction, and information technology needs in developing that list."
"(C): A requirement that the school district board, community college board, or county office of education conduct an annual, independent performance audit to ensure that the funds have been expended only on the specific projects listed."
"(D): A requirement that the school district board, community college board, or county office of education conduct an annual, independent financial audit of the proceeds from the sale of the bonds until all of those proceeds have been expended for the school facilities projects."

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Pinole Valley High School - Construction 2018







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F Y 2 0 2 0 A U D I T S C H E D U L E S P R O P O S E D

Description	Entity See Key Below	Financial Audit FY2019 Christy White Associates	Performance Audit FY2019 No Auditor Yet	Moss Adams LLP Review Final [1]
Entrance Conference	CBOC	11.09.20[2]	11.09.20	?
Exit Conference	CBOC	02.08.21[3]	02.08.21	?
Accept Report	CBOC	03.08.21	03.08.21	?
Accept Report	Board	03.24.21	03.24.21	?
Legal Deadline	Board	03.31.21	03.31.21	N/A
Annual Evaluation of Auditor	CBOC	04.12.21	04.12.21	N/A
Responses to Audit Recommendations [4]	District Staff	06.30.21	06.30.21	N/A

* Indicates that this activity has been completed.

Entity Key:
CBOC ~ Citizens' Bond Oversight Committee
ASC ~ CBOC Audit Subcommittee
Board ~ WCCUSD Board of Education

The schedule for the Moss Adams LLP Phase 2 Final Forensic Accounting Investigation Review (upon completion of the implementation of the 112 recommendations) was June 20, 2020. District staff has set a new target date of June 30, 2021 to have Moss Adams, LLP complete this review[5].
There is no current plan for Moss Adams to review the 29 recommendations not verified in the, March 20, 2019 Phase I report.

[1] Moss Adams LLP review of forensic accounting investigation implementation FY2017 (as of June 30, 2017, Phase 1) and upon implementation of all recommendations (Phase 2) was approved by Board of Education on October 18, 2017
[2] Confirmed by Lead Internal Auditor Margarita Romo on August 11, 2020 email to author.
[3] Ibid
[4] Education Code Section 15280 (a)(2) provides, "The governing board of the district shall provide the citizens' oversight committee with responses … within three months of receiving the audits."
[5] Bond Program Audits Overview, Board of Education Meeting Agenda September 9, 2020, page 10, agenda item E.2.

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CBOC WEB SITE UPDATE

In order to bring the CBOC web site up to where the CBOC wants it, a complete review of the site is necessary.

Every item has to be reviewed first, to determine what items the public might want to see, second, how to arrange the items, and third, how to populate the site with these items.

At the same time, the CBOC needs to collectively review the items that currently populate the site to inventory what is there and then to check each item to ensure that it's the correct version and that any and all links are valid.

The CBOC Chair suggests putting together a spread sheet listing the major categories and then each item under those categories. There will be columns to check off indicating the status of each item. That is, is the item a DRAFT or a FINAL? Are the links hot or dead? Is it a clean version or does it need to be retooled?

Each CBOC member will be asked to volunteer to tackle a particular list of items with many CBOCers taking on multiple items. A target date for completion will be agreed upon by each person and the CBOC Chair.

The site is a fluid site and will be amended frequently but the CBOC needs to have a solid foundation from which to start.

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WCCUSD
CITIZENS' BOND OVERSIGHT COMMITTEE

Guadalupe Enllana, Vice Chairperson
Don Gosney, Chairperson
Cameron Moore, Secretary

2020
CBOC MEETINGS CALENDAR

Meetings will begin at 2:00 PM

Oct 19	Nov 09	Dec 14

SCHOOL BOARD MEETINGS

Oct 21	Nov 04	Dec 09
	Nov 18	Dec 16
Jan 13	Feb 10	Mar 10
Jan 27	Feb 24	Mar 24
Apr 14	May 5	Jun 9
Apr 28	May 19	Jun 23

CBOC Bylaw Requirements

There must be a December meeting for officer elections
2 joint meetings with Board of Education

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FUTURE AGENDA ITEM LOG

10/19/20

Item #	Description	Suggested	Agendized
18-2	CBOC Handbook	10.24.18	ongoing
18-8	Updated By-Laws		TBD
19-1	Bring Draft ByLaws to CBOC for review	02/06/19	TBD
19-6	PVHS Lessons Learned	08/15/19	TBD
19-8	Facilities Master Plan Update	08/15/19	08/10/20
20-01	CBOC Training	01/13/20	TBD
20-03	Brown Act Training	06/08/20	TBD
20-04	CBOC Contact Info	06/08/20	TBD
20-05	Update CBOC Web Site	10/19/20	10/19/20

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