

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

This booklet is the closing report of the Laguna Beach Unified School District's School Facilities Modernization Committee. It summarizes the work of more than 40 District staff and community members over more than 21 months.

Table of Contents

Section		Page
I.	Cover Letter from Committee Chair	1.
II.	Letter from Superintendent	2.
III.	Committee Summary and Recommendation	4.
IV.	Committee History and Process	7.
V.	Overview of Existing Facilities	13.
VI.	Recommendations for New Construction Projects	14.
VII.	Site Modernization Plans	16.
VIII.	Facilities Maintenance and Repair Expenditures	24.
IX.	Bond Election Results for Orange County School Districts	25.
X.	Projected Tax Rate for District General Obligation Bond	26.

Dear Members of the Board of Education:

It has been my pleasure to serve as the Chair of the District's Committee for School Facilities Modernization. A large and energetic group of Committee members has worked hard to present the attached report and recommendations to you.

The Committee's work underscores that there is a critical need to modernize and upgrade the facilities at our four schools. The age of the schools (all older than 35 years) and changing educational program needs (technology, in particular) drive the need for a comprehensive facilities plan.

The Committee is recommending a program that modernizes existing facilities and adds new improvements. In the Committee's judgment, making the recommended improvements is essential to provide Laguna's students with safe and well-functioning schools and our teachers with the physical spaces they need to provide the instruction that will keep Laguna schools among the top in the State.

The cost estimate for the recommended plan as of June 30, 2000 was \$33 million. The Committee has identified approximately \$14 million in local sources and State matching grants to fund a portion of the plan. The Committee unanimously recommends that the Board place a general obligation bond proposition on the ballot for voter approval to fund the balance of the program. Based on current estimates, a general obligation bond to fund the balance of the recommended plan will result in tax rates at or below those recently approved in surrounding districts.

In the past two years seven Orange County school districts and many more throughout the State have put the interests of students first and passed bond issues to upgrade aging facilities.

The Committee believes that it is now time for our District to rally community support for a bond issue to benefit our students and teachers and keep Laguna schools among the best.

The Committee appreciates the Board's leadership on this issue and the Board's commitment to excellence in our schools and looks forward to the Board's implementation of the recommended plan.

Sincerely,

Robert J. Whalen
Chair, LBUSD, Committee for School Facilities
Modernization

Dear Members of the Board of Education:

The District facilities are in serious need of major improvement and renovation if Laguna Beach schools are to remain at the top levels of achievement. Implementing the entire facilities plan will cost approximately \$33 million. Given the magnitude of this undertaking, it is essential that the District be guided by two important principles.

First, the District must make every effort to access all existing resources for its facility improvements and utilize District facilities in the most efficient manner. Second, the District must develop and fund an ongoing plan to maintain its facilities and preserve the investment being made in the facilities. Under direction from the Board and with the assistance of the Committee on School Facilities Modernization and District staff, these two principles have been successfully incorporated into the District master plan of facilities now being recommended by the Committee.

In pursuit of the first principle, the District and the Committee have aggressively explored the following sources of outside funding:

- \$1,165,000 in State Modernization Program funding for El Morro Elementary School
- \$1,520,000 in State Modernization Program funding for Top of the World Elementary School
- \$ 975,000 in State Modernization Program funding for Thurston Middle School
- \$2,880,000 in State Modernization Program funding for Laguna Beach High School
- \$1,200,000 in State bond funds for new construction at El Morro Elementary School
- \$6,900,000 in proceeds from the Newport Coast Community Facilities District
- \$ 75,000 in State Deferred Maintenance funds
- \$ 200,000 in Federal Emergency (FEMA) funds
- \$1,000,000 of Developer fees from residential development
- \$ 900,000 from the City of Laguna Beach for play field expansion at El Morro School

As of June, 2000 it appears that the District will realize approximately \$14 million from these sources to fund the facilities plan.

In evaluating the most efficient use of facilities, the Committee analyzed the possibility of year round schools as a means of reducing facilities costs. Based upon information provided by District staff, the Committee has determined that, for Laguna, the year round approach would not save money. Accordingly, I am confident that the facilities plan being recommended is based on the most efficient and cost effective use of our facilities.

District staff and the Committee recognize the importance of a quality maintenance program. Over the past two years the District has reorganized existing resources to maintain its buildings and grounds more efficiently, including the hiring of a Director of Facilities. Annually the District budgets approximately \$2 million for repairs and renovations, for participation in the State Deferred Maintenance Program, and for custodial and maintenance staff salaries and benefits. See "Facilities Maintenance and Repair" in Section VIII. of this Report for details.

Finally, the Committee has recommended that an Ongoing Predictive Maintenance Plan be developed and funded. Such a plan will be implemented following the completion of the modernization process being undertaken by the District. This plan will include an in-depth analysis of site facility component ages and conditions and a schedule for replacement of components prior to the end of their useful lives.

Respectfully Submitted:

Theresa A. Daem, Ed.D.
Superintendent of Schools

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

**Section III
Committee Summary and Recommendations**

The Laguna Beach Unified School District Committee for School Facilities Modernization (the "Committee") submits this closing report to the Board of Education. The report summarizes the Committee's activities and recommendations for the period from October, 1998 to June, 2000.

Since its inception, the Committee has met twenty-one times and has completed a comprehensive analysis of District facilities. The Committee was broad based and included community members, parents, elected officials, educators from other districts, District administrators, teachers and representatives of the District's architectural firm. The Committee was assisted by numerous subcommittees, including subcommittees at each site, and by several professional consultants retained by the District. (See "Committee History and Process" in Section IV. of this Report.)

The Committee was established by the Board of Education with the Board's approval of the Committee Charter on June 9, 1998. The Charter outlined the Committee's scope of work and directed the Committee to analyze nine specific areas. These nine areas and the Committee's responses are listed below.

1. Analyze the current condition of the District's facilities

The Committee concluded that, due to the age of District schools (all more than 35 years old), significant modernization of existing facilities and the addition of new improvements are necessary to bring the District's schools up to current state standards and to make Laguna's schools comparable to those in surrounding districts.

2. Identify improvements, renovations, and repairs necessary to protect the health and safety of the students and the estimated costs of these items

The Immediate Needs subcommittee identified several improvements and repairs in this category. The improvements in this category were deemed to be of an immediate need to eliminate unsafe conditions and most were implemented over the past two years. These improvements include plumbing repairs in restrooms, drinking fountain repairs, slope stabilization, replacement of damaged flooring and repair of security fencing.

3. Identify the improvements, renovations, and repairs necessary to bring all District facilities up to current state building standards and the estimated costs of these items

4. Identify the improvements, renovations, and repairs that are necessary to create state of the art facilities and an optimal learning environment for all District students, staff and volunteers and the estimated costs of these items

The overall facilities plan being recommended by the Committee includes a modernization component and a new construction component. The improvements necessary to bring all District facilities up to state standards are included in the modernization component. The improvements necessary to create an optimal learning environment for students are included in the new construction component. The following table lists the estimated modernization and new construction components by site (in millions) as of June, 2000:

Site	Modernization	New Construction	Total
El Morro	\$6.3*	\$1.8	\$8.1
TOW	\$3.1	\$2.3	\$5.4
Thurston	\$2.5	\$6.5	\$9.0
High School	\$4.6	\$5.9	\$10.5
	\$16.5	\$16.5	\$33.0

* Includes planned expansion.

See Sections VI. and VII. of this Report for greater detail of the recommended improvements.

5. Identify alternate sites for school facilities, if any, and the cost of acquiring and improving such sites

Given the scarcity of land in Laguna, no alternative school facilities sites were identified as available for school use.

6. Identify the school facilities, if any, that should be leased, sold, or put to an alternative use

The District bus yard on Laguna Canyon Road was the only facility identified as appropriate for lease, sale or alternate use. The back of the site has been leased and developed as batting cages and an archery center. This use provides the District with \$18,000 of revenue annually and provides the community with a valuable recreational resource. It was determined that given the cost of relocating the District buses and the current and potential use of a portion of the site by the high school performing arts department, additional development of the site for outside uses is not appropriate at this time.

7. Survey the current inventory of District land and facilities

The Top of the World and El Morro Elementary sites have been surveyed. It was determined that given the configuration of the high school and middle school sites, a survey was not necessary.

8. Identify all potential funding sources for the facilities modernization program

The Committee has assisted the District in aggressively and successfully pursuing funding for the facilities plan. The Committee has identified \$14 million in available funds to finance the needed improvements. Of this total, \$6.9 million has been secured from the Newport Coast Mitigation Agreement and is on deposit in District funds, \$3.7 million has been approved by the State for modernization grants and is expected to be funded this summer, \$1.2 million is a new construction grant expected to be approved by the State in the fall, \$900,000 has been pledged by the City of Laguna Beach and the balance is expected to be available from other District funds. The Committee is recommending that the balance of the plan be funded through the issuance of general obligation bonds.

9. If a general obligation bond is identified as a potential funding source, recommend a date for a bond election, the amount to be voted on, the facilities to be funded and describe any other matters that the Board should consider in evaluating whether to proceed with an election

The Committee recommends that the portion of the plan that cannot be financed from currently available sources be financed through a local general obligation bond. Under current law, a local general obligation bond requires a two-thirds vote to pass. Governor Davis is supporting a proposed State Constitutional amendment to reduce the approval requirement for local school bonds to 55%. This is expected to be on the ballot in November, 2000. Preliminary polling data reviewed by the Committee suggests that there is majority support in the community for the school bond issue. The Committee recommends that the Board select an election date that is later than November 8, 2000.

The Committee recommends that the Board continue to update the cost of the recommended improvements and the funds available to finance the improvements before establishing the final size of the bond issue to be placed before the voters. Using the figures available to the Committee as of June, 2000, the total cost of the plan is \$33 million with \$14 million of available funds. Taking the cost of the remaining improvements and adding a 10% contingency to account for inflation and construction contingencies results in a potential bond issue of \$21 million. A \$21 million dollar local general obligation bond would result in a tax of approximately \$26 per \$100,000 of assessed valuation or \$80 per year for a median assessed home in the City. This tax rate is comparable to the tax rates that have recently been approved in other school bond elections in Orange County. (See "Bond Election Results for Orange County School Districts".

The Committee makes the following recommendations to the Board of Education:

1. Adopt the two components of the facilities plan prepared by the Committee which includes the modernization components, and the new construction component detailed in sections VI and VII.
2. Submit to the voters, after the November 2000 general election, a general obligation bond proposition to fund that portion of the plan that currently remains unfunded.
3. Develop and fund an ongoing predictive maintenance plan to ensure that the District's facilities are well-maintained and are replaced prior to the end of their useful lives.

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

Section IV

Committee History and Process

On June 9, 1998, the Laguna Beach Unified School District Board of Education approved the charter for the Committee for School Facilities Modernization charter and appointed Mr. Bob Whalen as chairperson. Invitations were sent out to the community at-large to apply for membership. As of October 13, 1998, the membership roster included 27 parent and community members, 12 District staff members, and 2 members of the Board of Education. Community representation included the Laguna Beach Taxpayers' Association, City Council, and business leaders.

The Committee also drew on the resources of a number of professional consultants retained by the District. On the following pages is a copy of the Committee Charter, a list of Committee members and a list of the professional consultants that provided assistance to the Committee.

The Committee met monthly for nearly two years and obtained input from a variety of sources including:

- Title company property profiles
- Insurance company analyses of site safety issues
- Architectural facilities impact study
- Athletic Task Force Facilities report
- District capital facilities budgets
- Newport Coast public hearings summary
- Staff analysis of potential for year round school

Copies of these reports and studies are available at the District office.

The Committee appointed and received input from a number of Subcommittees including:

- Immediate Needs: This group toured school sites and recommended projects to be undertaken immediately using State Deferred Maintenance and Developer Fee funds.
- Standards: This group identified the minimum acceptable standards for all facilities in the District.
- Visioning: This group defined the ultimate targets for all facilities in the District.
- Individual Site Committees: These groups analyzed the individual needs of each school site for both modernization and new construction.
- Ongoing and Predictive Maintenance: This group studied the District's custodial and maintenance budgets and formulated a recommendation for a proactive maintenance plan.
- Construction Management: This group investigated various construction management alternatives and upon determining the benefits of using a construction manager at risk, interviewed candidates and recommended hiring McCarthy Brothers, which has been selected by the District.

COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION CHARTER

Purpose of Committee

The Board of Education of the Laguna Beach Unified School District hereby establishes the Committee for School Facilities Modernization for the purpose of analyzing the current condition of the District's school facilities and recommending a plan for modernizing these facilities to create the optimal learning environment for all District students, staff, and volunteers. The Board's intention is to use the Committee's report and recommendations as the basis of a master plan of facilities for the District.

Formation of Committee

The Committee serves as appointees of the Board and will report to the Board periodically as directed by the Board President or the Superintendent. The Committee shall be comprised of up to two Board members, the Superintendent, the Director of Facilities, the District Architect, the Principal of each school (or his/her representative), one teacher from each school site, one member of the School Community Advisory Council from each site, a member of the City Council, a representative of the City Recreation Department, and up to 15 members of the community at large, including at least one current student and two students who have graduated from Laguna Beach High School within the past five (5) years. If a Committee member resigns, the Board may appoint a person to fill the vacancy.

The members of the Committee representing the community at large will be selected by the Board following a formal application process which will be open to all members of the public. The Board will select the members at large with the goal of obtaining a broad-based representation of the Laguna Beach community. The term of the community members will run from the date of appointment to June 30, 1999, at which point the Board may vote to extend the terms of some or all of such community members or select new members. The Committee will conclude its final report and will terminate on June 30, 2000, unless the Board votes to extend the term.

One of the Board members on the Committee will serve as the Chair of the Committee. The Committee will select a Vice Chair and a Secretary, and will keep written minutes of its meetings, which shall be submitted to the Board when available.

The Committee shall form a subcommittee for each school site which shall have at least two Committee members and may be comprised of individuals who are not members of the Committee. The Committee may form subcommittees as determined necessary by the Committee to fulfill its purpose.

COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION CHARTER (continued)

Scope of Work

The Committee's scope of work shall be to gather and analyze the information necessary to create a master plan of facilities for the District and to prepare and submit a master plan of facilities to the Board for its review and approval. At a minimum, the Committee shall undertake the following:

1. Analyze the current condition of the District's facilities.
2. Identify improvements, renovations, and repairs necessary to protect the health and safety of the students and the estimated cost of these items.
3. Identify the improvements, renovations, and repairs necessary to bring all District facilities up to current state building standards and the estimated cost of these items.
4. Identify the improvements, renovations, and repairs that are necessary to create state of the art facilities and an optimal learning environment for all District students, staff and volunteers and the estimated cost of these items.
5. Identify alternate sites for school facilities, if any, and the cost of acquiring and improving such sites.
6. Identify the school facilities, if any, that should be leased, sold, or put to an alternate use.
7. Survey the current inventory of District land and facilities.
8. Identify all potential funding sources for the facilities modernization program.
9. If a general obligation bond is identified as a potential funding source, recommend a date for a bond election, the amount to be voted on, the facilities to be funded and describe any other matters that the Board should consider in evaluating whether to proceed with an election.

The Committee shall submit a written report to the Board not later than December 31, 1998 addressing its progress with respect to the matters set forth above and containing any other information that the Committee determines necessary for the Board to consider in adopting a master plan of facilities for the District. The Committee shall file additional reports as it deems necessary, but shall report in writing to the Board at least once every six (6) months following its December 31, 1998 report.

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

SCHOOL FACILITIES MODERNIZATION COMMITTEE

Public Members	Representing
Charles Adermatt	Self
Gary Alstot	LB Taxpayers Assn.
George Ampagoomian	Self (HS athletics parent)
Marsha Aronoff	Thurston Parent
Erin Arrington	High School Student
Charles Bell	Self (architect)
Frank Bower	Self (architect)
Jane Cheroske	Assistance League and Exchange Club
Bob Earl	High School Parent
Lynn Fair	Thurston Parent
Ellen Fine	Self (elementary school principal)
Paul Freeman	City Council
Ellen Harris	El Morro Parent
Richard Henrickson	TOW Parent
Leah Holley	Self (attorney and financial advisor)
Jenny Johnson	High School Student
Patty Kiraly	TOW Parent and SCAC
William Levin	Self (attorney)
James McBride	Self (CPA)
Meg Monahan	Self (LB Deputy City Clerk)
Gary Monroe	Self (general contractor)
Barbara Norton	High School Parent
Wendy Offield	Self
Wayne Peterson	City Council
Jim Reddon	Self
Susan Sandys	Thurston SCAC
Selevan, Kathy	El Morro Parent
Richard Spangler	Self
Beverly Strongman	Self (retired teacher)
Charlie Williams Jr.	Graduated Student

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

SCHOOL FACILITIES MODERNIZATION COMMITTEE

District Members

Representing

Eileen Walsh	Board of Education
Steve Rabago	Board of Education
Bob Whalen	Board of Education
Theresa Daem	Superintendent
Stu Sims	High School Principal
Barbara Callard	High School Principal
Ron LaMotte	Thurston Principal
Joanne Culverhouse	El Morro Principal
Linda Purrington	El Morro Principal
Nancy Blade	TOW Principal
Steve Romines	CBO
Connie Belda	Facilities Manager
Tom Klingemeier	Classified Employees
Linda Barker	TOW Teacher
Pete Peterson	EM Teacher
Dennis Haryung	TMS Teacher
Ann Becker	HS Teacher

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

District's Professional Consultants for Facilities Modernization Program

(Background information available at the District Office)

Professional Advisors	Representing
Leo Johnson Fred Good, Ed.D. David J. Hansen Charlene Yarnell	PJHM Architects, - The District's Architectural Firm.
Peter V. Voohries	Facilities Maintenance Services, - The District's construction advocate/consultant.
Bruce W. Kerns John Gibson	Stone & Youngberg, LLC, - The District's investment banker.
Randy Highland Richard Henry Randy Burns Bruce Neifert Daniel Nickerbocker	McCarthy Brothers Construction, - The District's construction management firm.
Rob Balen Steven Ross	LSA Associates, Inc., - The District's environmental consultant.
JoAnne C. Hadfield	Development Resource Consultants, Inc., The District's environmental consultant.
Terry T. Tao, A.I.A.	Atkinson, Andelson, Loya, Rudd & Romo, The District's legal counsel.
J. Moore Methods	The District's Public Opinion Surveyors.

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

Section V

Overview of Existing Facilities

El Morro Elementary School is 47 years old. It is located on approximately 11 acres and currently houses approximately 536 students in 20 permanent classrooms and 3 portable classrooms. Its age qualifies it for State Modernization Program dollars for the entire site. Plans for modernization have been completed by the District's architectural firm, have been stamped by the Division of the State Architect, and on May 24, 2000, the State Allocation Board approved a \$1,165,445 modernization grant. The District expects to receive the \$1,200,000 in grant dollars by August 2000. The Board has also allocated more than \$4,000,000 of Newport Coast Community Facilities Development funds for expansion and modernization of this site.

Top of the World Elementary School is 35 years old. It is located on approximately 15 acres and currently houses approximately 690 students in 24 permanent classrooms and 7 portable classrooms. Its age qualifies it for State Modernization Program dollars for the entire site. Plans for modernization have been completed by the District's architectural firm, have been stamped by the Division of the State Architect, and on May 24, 2000, the State Allocation Board approved a \$1,523,756 modernization grant. The District expects to receive the \$1,523,756 in grant dollars by August, 2000.

Thurston Middle School has one section that is 37 years old and another section, which was rebuilt following the 1993 fire, that is 6 years old. It is located on approximately 15 acres, and currently houses approximately 600 students in 27 permanent classrooms and 1 portable classroom. The age of the older section qualifies it for State Modernization Program dollars. Plans for modernization have been completed by the District's architectural firm, have been stamped by the Division of the State Architect, and it is anticipated that the State Allocation Board will approve funding a \$975,000 modernization grant at its June or July 2000 meeting. The District Architect and representatives of the State Allocation Board are unsure whether \$975,000 in State bond dollars will still be available at that time to fund the grant. If the State modernization grant is not approved or is unfunded, the Committee recommends including the \$975,000 of modernization improvements in a local bond initiative.

Laguna Beach High School has one section that is 70 years old and other sections that are somewhat newer but more than 30 years old. Certain of the buildings were renovated as a part of a remodel in 1992. The High School is located on approximately 12.2 acres and currently houses approximately 800 students in 38 permanent classrooms. Most of the buildings qualify for State Modernization Program dollars. Plans for modernization have been completed by the District's architectural firm, have been stamped by the Division of the State Architect, and it is anticipated that the State Allocation Board will approve funding a \$2,880,000 modernization grant at its June or July 2000 meeting. The District architect and representatives of the State Allocation Board have advised the District that, even if the modernization project is approved for funding, State bond dollars will not be available to fund the \$2,880,000 grant. If the State modernization grant is not approved or is unfunded, the Committee recommends including the \$2,880,000 of modernization improvements in a local bond initiative.

Copies of maps, site diagrams, and assessments by school are available for review at the District's Business Office.

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

Section VI

Committee and Site Recommendations for Proposed New Bond-Financed Projects

<u>Laguna Beach High School</u>	<u>Estimated Cost</u>
Construct science and technology classrooms	\$1,400,000
Relocate administration offices	\$ 750,000
Relocate activities offices	\$ 50,000
Relocate dance studio	\$ 300,000
Relocate cafeteria	\$ 500,000
Artists' Theater enhancements	\$1,000,000
Alternative school enhancements	\$ 250,000
Dugger Gym bleachers	\$ 160,000
Athletic field enhancements	\$ 500,000
ADA compliance (transition plan)	\$ 300,000
PCB transformer replacement	\$ 250,000
Site and classroom modernization	<u>\$ 400,000</u>
TOTAL:	\$5,860,000

<u>Thurston Middle School</u>	<u>Estimated Cost</u>
Technology lab/shops enhancements	\$ 340,000
Construction of a performing arts wing	\$ 975,000
Construction of a gym and associated facilities	\$3,500,000
Replacement of portable classrooms	\$ 360,000
Reconfigure/expansion of parking/ingress/egress	\$ 500,000
Improve slope and soil stability	\$ 300,000
Upgrade turf/paved play areas	\$ 250,000
Expand staff facilities/kitchen	\$ 100,000
ADA compliance (transition plan)	<u>\$ 200,000</u>
TOTAL:	\$6,525,000

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

Committee and Site Recommendations for Proposed New Bond-Financed Projects (continued)

<u>Top of The World Elementary</u>	<u>Estimated Cost</u>
Parking lot/playground asphalt	\$ 96,000
Landscaping, signs, and block walls	\$ 31,000
Modernize kitchen, work room, and equipment room	\$ 150,000
Classroom shelves and storage	\$ 70,000
Shade cover for lunch area	\$ 50,000
Replace existing portables (5)	\$ 850,000
Add 4 classrooms for class size reduction	\$ 680,000
Classroom computer work area built-in's	\$ 70,000
Increase security fencing	\$ 34,000
Install sinks in classrooms	\$ 120,000
Site access/play area access improvements	<u>\$ 150,000</u>
TOTAL:	\$2,301,000

<u>El Morro Elementary</u>	<u>Estimated Cost</u>
Replace kindergarten play structures/hardscape	\$ 150,000
Classroom computer work area built-in's/cabinets	\$ 75,000
Upgrade security fencing around perimeter of campus	\$ 15,000
Reconfigure entrance and enlarge play fields	\$ 900,000
Add 4 classrooms for class size reduction	<u>\$ 680,000</u>
TOTAL:	\$1,820,000

Grand Total	\$16,506,000
-------------	--------------

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

Section VII

SITE MODERNIZATION PLANS

El Morro Elementary School:

Item #1:	Re-roof all buildings to remain	TOTAL:	\$ 52,108
Item #2:	Modernize mechanical system	TOTAL:	\$205,000
Item #3	Modernize interior lighting	TOTAL:	\$ 80,000
Item #4	Connect site to sewer – located at Newport Coast Project	TOTAL:	\$280,500
Item #5	Americans With Disabilities Act (ADA) compliance	TOTAL:	\$ 50,000
Item #6	Provide data and additional power to all classrooms/multi-purpose room	TOTAL:	\$ 50,000
Item #7	Replace existing chalkboards with markerboards	TOTAL:	\$ 16,000
Item #8	Completely re-construct kitchen	TOTAL:	\$ 89,000
Item #9	Multi-purpose room modernization	TOTAL:	\$178,000
Item #10	Misc. finish material – interior painting, wall vinyl	TOTAL:	\$ 22,200
Item #11	Paint exterior	TOTAL:	\$ 15,000
Item #12	Asbestos abatement	No dollar figure at this time	
Item #13	Termite abatement	TOTAL:	\$ 1,600
Item #14	New carpet in classrooms & vinyl flooring for “wet area”	TOTAL:	\$ 56,250
Item #15	Sinks for each classroom	TOTAL:	\$ 48,000
Item #16	Modernize fire alarm system	TOTAL:	\$ 30,000
Item #17	Provide new cable television service to classrooms	TOTAL:	\$ 15,000
Item #18	Modernize telecommunications and bell system	TOTAL:	\$ 30,000
Item #19	Computer network and cabling system	TOTAL:	\$ 60,000
		SUB-TOTAL:	\$1,278,658

District-Funded Modernization:	TOTAL:	\$5,000,000
Modernization and expansion: Eight Classrooms, administration, entrance, and Multi-Purpose Room		

GRAND TOTAL: \$6,278,658

***Available State Modernization Grant Funds: \$1,165,445**

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

SITE MODERNIZATION PLANS

Top of the World Elementary School:

Item #1:	Re-roof all permanent buildings based on roof survey	TOTAL:\$ 71,282
Item #2:	Update mechanical equipment. Provide air conditioning	TOTAL:\$ 538,300
Item #3:	Improve campus parking lot---provide bus drop-off	TOTAL:\$ 35,000
Item #4:	Exterior paint at all permanent buildings	TOTAL:\$ 15,000
Item #5:	Modernize interior and exterior lighting	TOTAL:\$ 130,000
Item #6:	Re-stripe Kindergarten and playground	TOTAL:\$ 1,000
Item #7:	Replace existing slot windows with awning type window frames	TOTAL:\$ 30,000
Item #8:	Re-roof portable classrooms	TOTAL:\$ 18,816
Item #9:	Asbestos abatement	No dollar amount at this time.
Item #10:	Relocate emergency bins to behind portables	TOTAL:\$ 2,000
Item #11:	Block wall at exit driveway	TOTAL:\$ 10,000
Item #12:	Replace missing stones at exterior building face	TOTAL:\$ 3,500
Item #13:	Plants/landscape at utility enclosure	TOTAL:\$ 6,000
Item #14:	School sign	TOTAL:\$ 1,500
Item #15:	Install donated Class of 1998 sign	TOTAL:\$ 500
Item #16:	Modernize staff restroom	TOTAL:\$ 10,000
Item #17:	Slurry seal playground areas	TOTAL:\$ 15,000
Item #18:	Provide additional power and conduit for data and drops at all classrooms	TOTAL:\$ 175,000
Item #19:	Replace water fountain near restroom	TOTAL:\$ 2,000
Item #20:	Replace drop ceilings in all classrooms	TOTAL:\$ 72,000
Item #21:	Replace decayed portable wood siding	TOTAL:\$ 3,500
Item #22:	Solve drainage problem at map area and ramps, etc.	TOTAL:\$ 30,000
Item #23:	ADA 10% of total modernization cost (most are covered in listed items)	TOTAL:\$ 40,000
Item #24:	Replace mesh skirting at portables	TOTAL:\$ 1,500
Item #25:	Provide power and self-storage at ball room	TOTAL:\$ 2,000
Item #26:	Classroom wall finishes – tackable surfaces and paint	TOTAL:\$ 22,000
Item #27:	Paint wall surfaces all other spaces than classrooms	TOTAL:\$ 10,000
Item #28:	Provide carpet/vinyl at classrooms and multi-purpose	TOTAL:\$ 139,500
Item #29:	Replace flooring in all non-classroom buildings, carpet/vinyl	TOTAL:\$ 84,900
Item #30:	Provide sink and water fountain within each classroom	TOTAL:\$ 18,000
Item #31:	Provide garbage disposal in primary wing kitchen	TOTAL:\$ 2,000
Item #32:	New plumbing fixtures	TOTAL:\$ 90,000
Item #33:	Misc. site walls/benches/fencing/flatwork	TOTAL:\$ 30,000
Item #34:	Main entrance renovation	TOTAL:\$ 50,000
Item #35:	Mechanical equipment screening	TOTAL:\$ 70,000

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

SITE MODERNIZATION PLANS

Top of the World Elementary School (continued):

Item #36:	Replace fire alarm	TOTAL:\$	40,000
Item #37:	Existing telephone system PBX switch to remain, salvage existing telephone devices and speakers and install new conduits and wiring	TOTAL:\$	20,000
Item #38:	New cable television distribution system including conduits for modernization buildings	TOTAL:\$	30,000
Item #39:	New clock system including clocks, bells, buzzers, conduits and cabling	TOTAL:\$	15,000
Item #40:	New site-wide conduit distribution system for technology systems	TOTAL:\$	15,000
Item #41:	Computer network cabling system	TOTAL:\$	55,000
Item #42:	Internal classroom reconfiguration	TOTAL:\$	<u>400,000</u>

SUB-TOTAL: \$2,305,298

Anticipated Project Expenses:

• Other agency fees	\$	10,000
• Surveys, preliminary tests	\$	20,000
• Misc. costs (printing, etc.)	\$	25,000
• Construction tests	\$	30,000
• Project Manager/District Advocate	\$	25,000
• Construction inspections	\$	50,000
• Interim housing (15 months)	\$	145,000
• A & E fees	\$	246,531
• DSA fees	\$	10,650
• Contingencies	<u>\$</u>	<u>190,000</u>
	\$	752,181

Total Anticipated Modernization Costs: \$3,057,479

***Available State Modernization Grant Funds: \$1,523,756**

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

SITE MODERNIZATION PLANS

Thurston Middle School:

Item #1:	Re-roof all buildings based on roof survey • Built-up • Metal mechanical screens	TOTAL:	\$ 133,844
Item #2:	Modernize mechanical equipment to improve heating and ventilation	TOTAL:	\$ 425,000
Item #3:	Clear existing plumbing lines on site	TOTAL:	\$ 20,000
Item #4:	ADA items – 10% of modernization cost (most will be covered in listed items)	TOTAL:	\$ 40,000
Item #5:	Replace plumbing fixtures throughout original buildings	TOTAL:	\$ 80,000
Item #6:	Repair exposed glu-lam beams	TOTAL:	\$ 5,000
Item #7:	Modernize interior lighting throughout original buildings	TOTAL:	\$ 100,000
Item #8:	Replace drop ceilings	TOTAL:	\$ 85,000
Item #9:	Classroom finish material: • tackable surface/paint/vinyl	TOTAL:	\$ 5,010
Item #10:	Non-classroom spaces – interior finishes • vinyl/paint	TOTAL:	\$ 7,200
Item #11:	Paint exterior – original buildings	TOTAL:	\$ 5,000
Item #12:	Additional power and data to all classrooms and media center	TOTAL:	\$ 155,000
Item #13:	Replace flooring in classroom buildings	TOTAL:	\$ 76,300
Item #14:	Replace flooring in media center/administration/ multi-purpose room	TOTAL:	\$ 67,645
Item #15:	Replace existing boilers with hot water heater system	TOTAL:	\$ 12,000
Item #16:	Provide hot water to staff restrooms and lounge area (instant hot units)	TOTAL:	\$ 1,500
Item #17:	Replace/repair retaining wall between lunch and locker area	TOTAL:	\$ 5,000
Item #18:	Modify communication system	TOTAL:	\$ 15,000
Item #19:	Resolve site drainage problems (rooms #501 & 505)	TOTAL:	\$ 20,000
Item #20:	Provide hot water to science room---under counter instant units	TOTAL:	\$ 2,500
Item #21:	Provide teacher center cabinets at original classrooms	TOTAL:	\$ 42,000
Item #22:	Provide skylights– classroom/media/multi-purpose room	TOTAL:	\$ 50,000
Item #23:	Replace Physical Education lockers	TOTAL:	\$ 38,720
Item #24:	Irrigation survey required/repair and replace as required	TOTAL:	\$ 15,000
Item #25:	Replace rear stage door	TOTAL:	\$ 5,000
Item #26:	Modernize sound system at multi-purpose room	TOTAL:	\$ 10,000
Item #27:	Modernize school security---provide intrusion detection	TOTAL:	\$ 15,000

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

SITE MODERNIZATION PLANS

Thurston Middle School (continued):

Item #28:	Reconfigure sidewalk in front of school and center courtyard	TOTAL:	\$ 20,000
Item #29:	Reconfigure ingress/egress to site and parking	TOTAL:	\$ 200,000
Item #30:	Fire Alarm System	TOTAL:	\$ 30,000
Item #31:	Cable Television	TOTAL:	\$ 30,000
Item #32:	New clocks	TOTAL:	\$ 5,000
Item #33:	New site-wide conduit distribution system for technology systems	TOTAL:	\$ 15,000
Item #34:	Computer networking cabling system	TOTAL:	<u>\$ 35,000</u>
SUB-TOTAL:			\$1,771,719

Anticipated Project Expenses:

• Other agency fees	\$ 10,000
• Surveys, preliminary tests	\$ 20,000
• Misc. costs (printing, etc.)	\$ 25,000
• Construction tests	\$ 30,000
• Project Manager/District Advocate	\$ 25,000
• Construction inspections	\$ 50,000
• Interim housing (15 months)	\$ 145,000
• A & E fees	\$ 137,681
• DSA fees	\$ 8,810
• Contingencies	<u>\$ 250,000</u>
	\$ 701,491

Total Anticipated Modernization Costs: \$2,473,210

***Available State Modernization Grant Funds: \$ 975,583**

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

SITE MODERNIZATION PLANS

Laguna Beach High School:

Item #1:	Lighting systems in classrooms and campus where lighting levels are not adequate- enhance energy efficiency	TOTAL:	\$ 200,000
Item #2:	Modernize power/data at classrooms and throughout campus	TOTAL:	\$ 270,000
Item #3:	Additional exterior lighting	TOTAL:	\$ 15,000
Item #4:	Re-roof per roofing survey	TOTAL:	\$ 125,000
Item #5:	Site drainage improvements -- flatwork/drainlines	TOTAL:	\$ 50,000
Item #6:	Existing flatwork improvements -- air conditioning and concrete	TOTAL:	\$ 50,000
Item #7:	Termite abatement	TOTAL:	\$ 56,000
Item #8:	Replace plumbing fixtures	TOTAL:	\$ 170,000
Item #9:	Modernize domestic water and gas systems	TOTAL:	\$ 97,000
Item #10:	New drinking fountains (4) throughout campus	TOTAL:	\$ 16,000
Item #11:	New boiler	TOTAL:	\$ 22,000
Item #12:	New mechanical systems to provide heat and ventilation throughout campus	TOTAL:	\$ 462,500
Item #13:	ADA - 10% of modernization budget (some will be absorbed in other items)	TOTAL:	\$ 100,000
Item #14:	Comprehensive door and hardware survey/ replacement (ADA)	TOTAL:	\$ 70,000
Item #15:	Modernize girls locker room	TOTAL:	\$ 108,480
Item #16:	Modernize boys locker room	TOTAL:	\$ 153,750
Item #17:	Replace/repair lockers	TOTAL:	\$ 50,000
Item #18:	Window treatments/blinds required at some locations	TOTAL:	\$ 10,000
Item #19:	Modernize drop ceiling system	TOTAL:	\$ 40,000
Item #20:	Modernize coaches locker room	TOTAL:	\$ 20,000
Item #21:	Replace chalkboards with markerboards throughout the campus	TOTAL:	\$ 10,000
Item #22:	Modernize interior wall finishes with paint/vinyl	TOTAL:	\$ 58,000
Item #23:	Replace flooring materials with carpet/vinyl	TOTAL:	\$ 375,050
Item #24:	Completely reconstruct science labs and classrooms	TOTAL:	\$ 645,525
Item #25:	Combine rooms 53 and 54 into one art lab	TOTAL:	\$ 10,000
Item #26:	Repair/replace windows at Girls Gym	TOTAL:	\$ 5,000
Item #27:	Fire Alarm System	TOTAL:	\$ 80,000
Item #28:	Existing telephone system PBX and paging equipment to remain; salvage existing telephone devices and speakers and install new conduits and wire	TOTAL:	\$ 60,000
Item #29:	New cable television distribution system	TOTAL:	\$ 30,000
Item #30:	Computer network cabling system	TOTAL:	\$ 80,000
		SUB-TOTAL:	\$3,439,305

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

SITE MODERNIZATION PLANS

Laguna Beach High School (continued):

Anticipated Project Expenses:

• Other agency fees	\$ 10,000
• Surveys, preliminary tests	\$ 20,000
• Misc. costs (printing, etc.)	\$ 25,000
• Construction tests	\$ 30,000
• Project Manager/District Advocate	\$ 25,000
• Construction inspections	\$ 50,000
• Interim housing (15 months)	\$ 145,000
• A & E fees	\$ 351,615
• DSA fees	\$ 17,542
• Contingencies	<u>\$ 550,000</u>
	\$ 1,224,157

Total Anticipated Modernization Costs: \$4,663,462

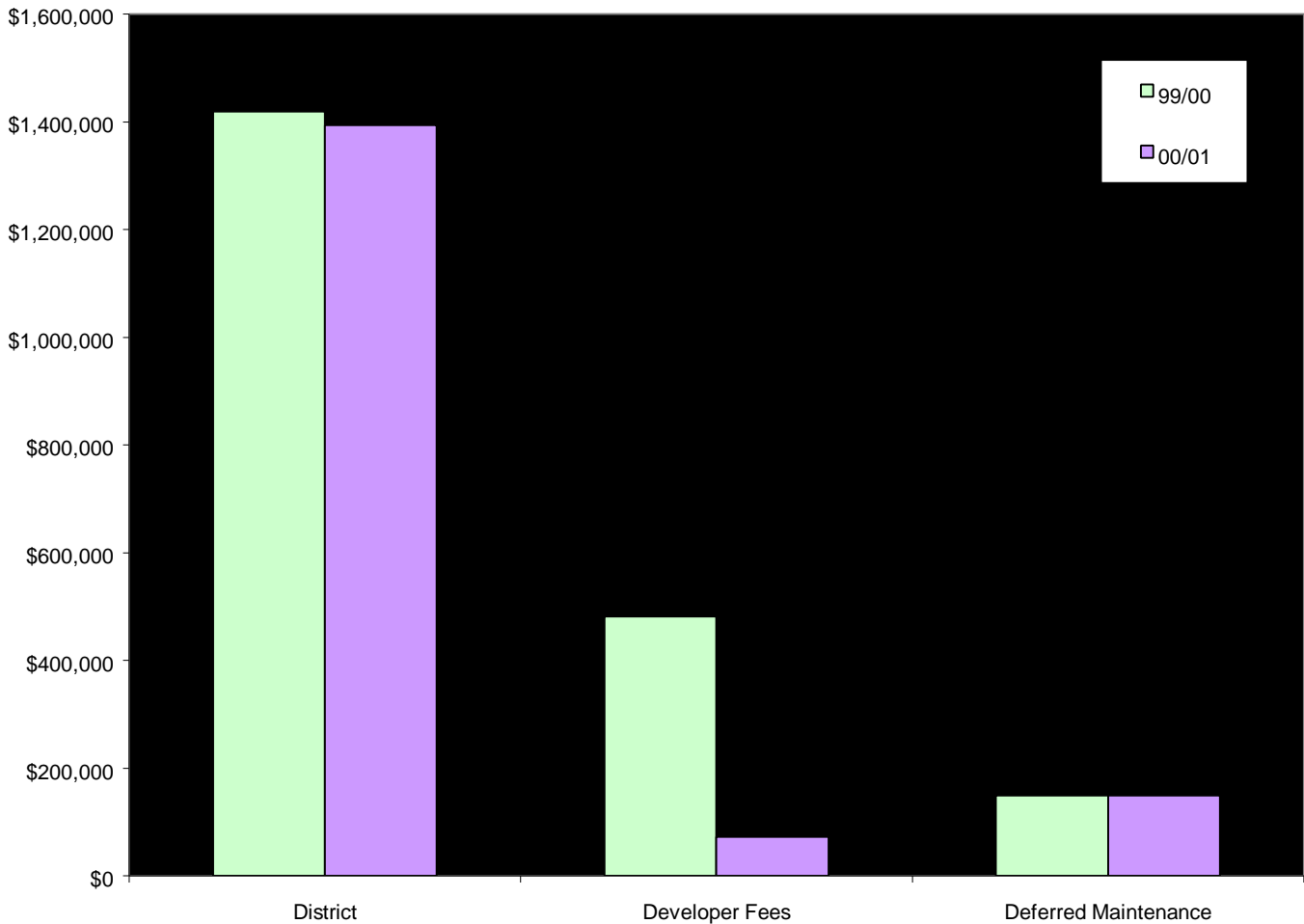
GRAND TOTAL \$16,472,809

***State Modernization Grant Applied for: \$2,880,000**

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

Section VIII

Facilities Maintenance and Repair Expenditures



The above chart shows actual expenses for 1999-2000 and budgeted expenses for 2000-2001 for the three funds that provide maintenance and repair dollars, including personnel costs related to those functions. In 1999-2000 a total of \$2,057,180 was spent from the District General Fund, Developer Fee Fund and Deferred Maintenance Fund to repair and maintain District schools and facilities.

In 2000-2001 it is expected that approximately \$1.4 million will again be expended from the General Fund and \$150,000 from the Deferred Maintenance Fund for facilities repair and maintenance. The Developer Fee Fund maintenance budget for 2000-2001 has been reduced to \$72,000 with most of the Developer Fee Fund being reallocated from ongoing maintenance to the District's modernization and new construction activities that are planned for the school sites.

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

Section IX

Bond Election Results for
Orange County School Districts

	ADA at Time	Amount		Tax Per	Vote	% of Yes
District	Of Election	In Millions	Type of Election	\$100,000	Date	Vote
La Habra City ESD	5,970	\$16.0	General Obligation	\$22.00	Jun-00	72.8%
Newport-Mesa USD	20,327	\$110.0	General Obligation	\$22.35	Jun-00	71.9%
Magnolia ESD	6,134	\$9.7	General Obligation	\$25.66	Mar-00	73.4%
Santa Ana USD	53,946	\$145.0	General Obligation	\$45.74	Nov-99	69.8%
Huntington Beach UHS	15,549	\$123.0	General Obligation	\$27.24	Nov-99	61.6%
Capistrano USD SFID	41,471	\$65.0	General Obligation	\$14.85	Nov-99	72.9%
Brea Olinda SD	6,350	\$27.0	General Obligation	\$27.80	Jun-99	79.3%
Buena Park SD	5,339	\$13.8	General Obligation	\$16.00	Nov-98	74.4%
Anaheim City SD	17,991	\$48.0	General Obligation	\$22.00	Apr-98	55.5%

Table prepared by Stone & Youngberg, LLP.

**COMMITTEE FOR SCHOOL FACILITIES MODERNIZATION
CLOSING REPORT
OCTOBER, 1998, TO JUNE, 2000**

Section X

Projected Tax Rate for District General Obligation Bond

Financing Assumptions

Construction Proceeds (1)	\$21,000,000
Amount of Bonds	\$20,650,000
Number of Bond Issues	1
Construction Proceeds By Bond Issue – August 2001	\$21,000,000
Pattern of Annual Tax	Level
Debt Repayment Structure	Escalating (2)

Estimated Ad Valorem Tax Rates

	\$100,000 <u>Assessed Valuation</u>		Median Value <u>Single Family Home (3)</u>	
	Average Annual <u>Tax</u>	Highest Annual <u>Tax</u>	Average Annual <u>Tax</u>	Highest Annual <u>Tax</u>
Estimated Average Annual Future Assessed Valuation Growth 4.0% to 2000-01, and 4.0% thereafter (4)	\$25.66	\$26.50	\$79.19	\$82.52

- (1) Gross construction proceeds including investment earnings, assuming 4.25% annual yield on invested funds and the spending of construction proceeds over a 24-month period for the bond issue.
- (2) Rate of debt service escalation is 1.8% per year.
- (3) The 1999-00 median assessed valuation of single family homes in the school district is \$297,464 based on the 1999-00 secured assessment roll of the Orange County Assessor.
- (4) The average annual compound growth rate for assessed valuation in the school district was 8.40% between 1979-90 and 1999-00.