



County School Facilities Consortium

Welcome to the 2016 Annual Summit!

Sheraton Grand Hotel
September 29, 2016

▶ CSFC 2016 Annual Summit

Review of CSFC Activities 2015-2016



▶ CSFC 2016 Annual Summit

State School Bond Efforts Proposition 51

Reflections from the Campaign Team and CASH



**County School Facilities
Consortium Annual Summit**

September 29, 2016



POLITICAL ENVIRONMENT

- 17 Ballot Measures
- Opposition:
 - California Taxpayers Action Network – Lead Opposition
 - Outspoken No on 51 by media / activists / general public
- Entering final phase of our campaign
 - Qualification
 - Legislative Defense / Earned Media
 - Coalition Building
 - Voter Contact



OPPOSITION

Editorial: Stop subsidizing developers; reject Proposition 51 (East Bay Times)

East Bay Times editorial

POSTED: 8/27/2016 12:00 AM PST | UPDATED: 18 DAYS AGO



Proposition 51, a \$9 billion school construction initiative on the November ballot, would lock in a costly, outdated, inefficient and inequitable program that benefits builders at taxpayers' expense.



Ballot Box Budgeting Wreaks Havoc on California Budget, Beware of Props. 51, 55, and 56

By David Kucenas
Former Assistant to the Governor and Public Policy Advisor, August 2016

As a professor of public budgeting and someone who has worked for voters' choice in public budgeting, I can say that ballot box budgeting wreaks havoc on the California budget process and taxpayer interests.

Sue Caro
@SueCaro

Ballot Box Budgeting Wreaks Havoc on Calif Budget. No on Props. 51, 55, and 56 - Union Watch bit.ly/2aB90Dw via @CalPolicyCenter

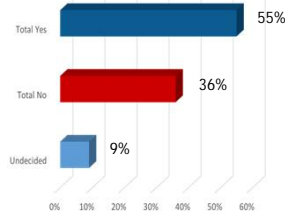
Ballot Box Budgeting Wreaks Havoc on California Budget...
As a professor of public budgeting and someone who has worked for voters' choice in public budgeting, I can say that ballot box budgeting wreaks havoc on the California budget process and taxpayer interests.



School Bond Simulated Ballot Label

SCHOOL BONDS. FUNDING FOR K-12 SCHOOL AND COMMUNITY COLLEGE FACILITIES. INITIATIVE STATUTORY AMENDMENT.

Authorizes \$9 billion in general obligation bonds for new construction and modernizing older Kindergarten through 12th grade public schools, charter schools, vocational education schools, and community colleges. Fiscal Impact: State General Fund costs of \$17.6 billion to pay principal (\$9 billion) and interest (\$8.6 billion) on bonds over 35 years with average annual payments of approximately \$500 million.



Survey Conducted by Fairbank, Maslin, Maulin, Metz & Associates (FM3): May 31 – June 5, 2016

Telephone survey of 800 California voters likely to cast ballots in November 2016 Presidential Election
The margin of sampling error is +/- 3.5% at the 95% confidence level



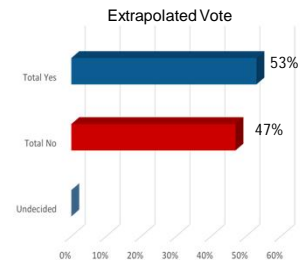
School Bond Simulated Definite Vote – Virtually Tied

Definite Yes 28%

Definite No 25%

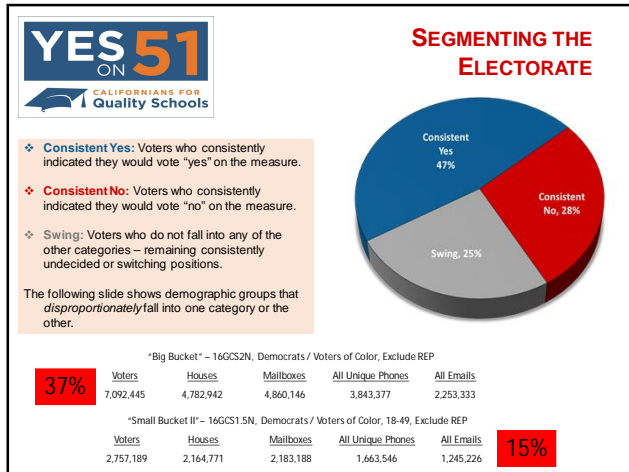
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Virtually Tied



Survey Conducted by Fairbank, Maslin, Maulin, Metz & Associates (FM3): May 31 – June 5, 2016


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3 MESSAGING PILLARS

- 1. Repair & Upgrade Older Schools**
 Prop. 51 will help all students attend up-to-date schools and get a quality education
 - Classroom technology
 - Libraries
 - Science Labs
 - AND a long backlog of other crucial repairs & upgrades
- 2. Bring Schools Up to Basic Health & Safety Standards**
 Prop. 51 brings older school facilities up to basic health and safety standards
 - Remove asbestos
 - Remove lead paint
 - Remove lead pipes
 - Earthquake retrofit
- 3. Expand Schools & Relieve Overcrowding**
 Prop. 51 will increase access and opportunity for all Californians to quality schools
 - Add more classrooms → facilitate smaller classes
 - Expand our community colleges → help students avoid thousands in college debt
 - Help veterans learn new skills → transition to the workplace
 - Expand vocational education → prepare students for good-paying jobs




CAMPAIGN VOTER CONTACT

- Slate Mail
- TV
- Digital
- Social Media
- Direct Mail



VOTER CONTACT SLATE MAIL


Slate	Total Pieces	Universe Description
Election Digest	3,500,000	Democrats and Decline-To-State Households
Budget Watchdogs	4,500,000	Republican, Decline-To-State, and mixed Democrat Households
CalSAL	1,500,000	Seniors Age 60 plus
Cal Voter Guide	2,500,000	Republican
Latino Voter Guide*	1,500,000	Latinos, primarily in SoCal
Educate Your Vote	1,500,000	Democrats and Decline-To-State Women
Voter Newsletter	1,750,000	Democrats
Save Prop 13***	1,250,000	High Propensity Voters who care about Prop 13
SBAC Newsletter***	1,000,000	Sophisticated high-propensity voting list
Woman's Voice***	1,000,000	High Propensity voting Rep, DTS, higher income Dem women
CA Public Safety Voter Guide***	1,250,000	High Propensity voting Rep, moderate/conservative leaning Dem, and DTS
NTLC Early Voter Guide***	1,000,000	High Propensity Rep who support lower taxes messages plus DTS, Dems with high taxation
Republican Leadership Series***	1,000,000	Moderate and Conservative voters
COPS	3,000,000	Rep, Dem, Decline-To-State
Latino Family Voter Guide	1,300,000	Latino Households
California Democratic Party Slate	2,600,000	Democrat Slate, door knob hangers, email communications, etc.
Green	1,150,000	Progressive Households
Continuing the Rep Revolution	650,000	Pure Rep Households
TOTAL PIECES	31,950,000	TOTAL COST TO DATE: \$1,039,000



VOTER CONTACT

TV BUY MAP

		WEEK OF:								
MARKET		FR-SU 9/30-10/2	10/3	10/10	10/17	10/24	10/31	MON 11/7	TOTAL SPOTS	TOTAL WFS-54 GRPS
LOS ANGELES	TOTAL SPOTS:	191	431	431	431	240	210	0	1934	900.0
	TOTAL GRPS:	87.9	200.0	200.0	200.0	112.1	100.0	0.0		
	TOTAL COST:	\$222,375	\$512,245	\$512,245	\$512,245	\$288,870	\$252,825	\$0		\$2,301,805
SACRAMENTO Sacramento	TOTAL SPOTS:	205	497	497	497	289	232	0	2217	900.0
	TOTAL GRPS:	87.9	200.0	200.0	200.0	112.1	100.0	0.0		
	TOTAL COST:	\$22,431	\$70,325	\$70,325	\$70,325	\$63,123	\$47,408	\$0		\$363,937
SAN DIEGO	TOTAL SPOTS:	193	438	438	438	242	205	0	1944	900.0
	TOTAL GRPS:	87.9	200.0	200.0	200.0	112.1	100.0	0.0		
	TOTAL COST:	\$36,523	\$86,726	\$86,074	\$86,074	\$61,307	\$61,698	\$0		\$436,402
SAN FRANCISCO SAN JOSE	TOTAL SPOTS:	198	470	470	470	250	212	0	2070	900.0
	TOTAL GRPS:	87.9	200.0	200.0	200.0	112.1	100.0	0.0		
	TOTAL COST:	\$91,225	\$259,271	\$259,271	\$259,271	\$258,233	\$207,580	\$0		\$1,282,831
CAMPAIGN TOTAL:		\$372,554	\$928,567	\$928,015	\$928,015	\$608,533	\$588,491	\$0	3800.0	\$4,384,975



VOTER CONTACT

CABLE PENETRATION

Market	Cable Penetration	Satellite Penetration	TOTAL Penetration
Los Angeles	52.0%	34.1%	86.1%
San Francisco	63.7%	24.8%	88.5%
Sacramento	48.0%	41.5%	89.5%
San Diego	70.0%	23.2%	93.2%





YES ON 51
CALIFORNIANS FOR Quality Schools

MAIL/TELECOM

October 5	Small Bucket II Universe
October 14	Small Bucket II Universe
October 21	Small Bucket II Universe

"Small Bucket II" – 16GCS1.5N, Democrats / Voters of Color, 18-49, Exclude REP

Voters	Houses	Mailboxes	All Unique Phones
2,757,189	2,164,771	2,183,188	1,663,546

YES ON 51
CALIFORNIANS FOR Quality Schools

BUDGET

SCHOOL BOND BUDGET 2016

	Total	%
Consulting		5%
Legal	95,000	
General Consulting	95,000	
GOP Coalitions	95,000	
DEM Coalitions	110,000	
Earned Media	95,000	
Expenses -- travel/adm/misc	31,000	
Research		1%
Polling	104,000	
Ad Testing	-	
Voter Contact		94%
Electronic Media -- Network/Cable/Radio	4,490,000	
Digital Media - Internet/Social/War Room	553,500	
Social Media/Website	332,800	
States	1,065,000	
Direct Mail	2,875,000	
Telemarketing	0	
Collaterals	10,000	
Total Expenses	9,951,300	100%



PAST SCHOOL BOND BUDGETS

	<u>CTA</u>
o2002: Prop 47 - \$8.89 million	\$4.99 mil
o2004: Prop 55 - \$9.61 million	\$5.05 mil
o2006: Prop 1D - \$11.27 million	\$7.44 mil
o2016: Prop 51 - \$10.0 million proposed	



Discussion and Questions



The 2016 Annual Summit

15 Minute Break

Sheraton Grand Hotel
September 29, 2016



Chester A. Widom, FAIA
State Architect





DSA: Serving California Since 1907

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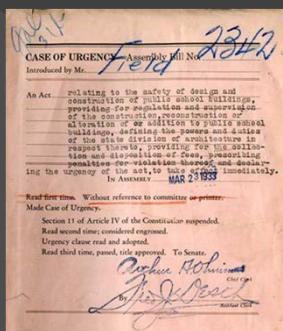


1906: San Francisco



1933: Long Beach

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Field Act

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EVOLUTION OF THE STATE ARCHITECT

- **1907:** Dept. of Engineering: State Architect responsible for all state buildings
- **1933:** Field Act; State Architect to build safe schools
- **1945:** State Architect to Dept. of Public Works
- **1963:** Reassigned to Dept. of General Services
- **1996:** DGS creates OPDM
- **1997:** Office of the State Architect splits into DSA and RESD

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STATUTORY AUTHORITY

- Education Code
(K-12 Schools & Community Colleges)
- Government Code
(Access for State Buildings & Fire for Schools)
- Health & Safety Code
(Essential Service Buildings)
- California Code of Regulations
 - Title 19 (Fire)
 - Title 24 (Building Standards)
 - Title 23 (Water)

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DESIGN AND CONSTRUCTION OVERSIGHT: STRUCTURAL, FIRE/LIFE SAFETY, ACCESS

- 72 Community College Districts
 - 114 Campuses
 - 191 Projects (2015-2016)
- 1,084 K-12 School Districts
 - 9,292 Campuses
 - 2,137 Projects (2015-2016)
- Essential Service Buildings
 - 5 Projects (2015-2016)

Incremental projects not included



30

DESIGN OVERSIGHT: ACCESS COMPLIANCE ONLY

- Courts
- UC Campuses
- CSU Campuses
- 219 Projects (2014-15)



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ADDITIONAL RESPONSIBILITIES

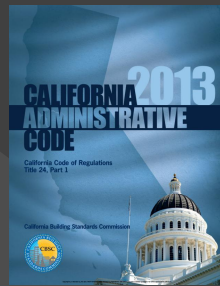
- Prop 39 Review
- Project Inspector Certification
- Testing Laboratory Certification
- DSA Academy
- Construction Change Documents
- CASp Certification
- CASp Outreach (SB 1186)

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CODE DEVELOPMENT RESPONSIBILITIES

- Triennial Publication
- Intervening Update
- Emergency Regulations

- Access*
- Structural
- Mechanical
- Electrical
- Plumbing
- Landscape Irrigation
- **CALGreen.**



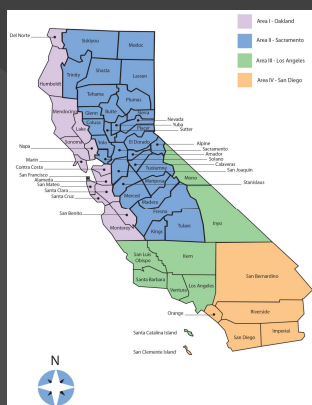
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HEADQUARTERS OFFICE

- Standards and Procedures
- Policy & Communication
 - › Client Relations
 - › Administration Relations
 - › Legislative Relations
- Code Development
- Oversight Responsibilities
- Ad Hoc Task Forces
- Sustainability (MEPE)

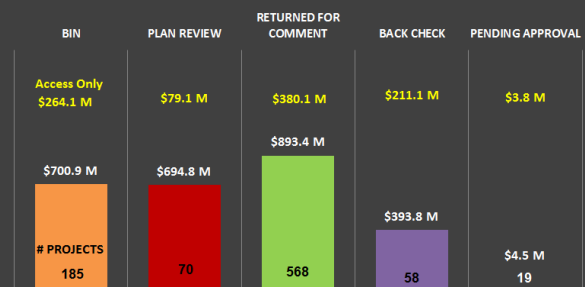
34

REGIONAL OFFICES

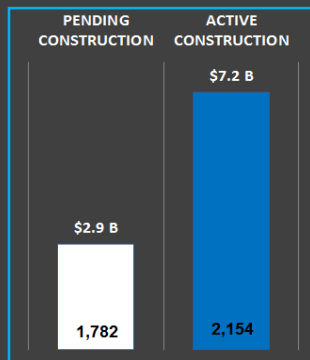


35

PROJECTS IN PROGRESS AS OF AUGUST 31, 2016

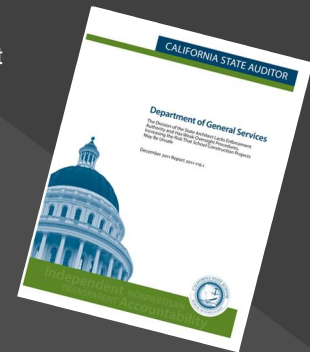


PROJECTS IN PROGRESS AS OF AUGUST 31, 2016



CHALLENGES: JANUARY 1, 2012 BUREAU OF STATE AUDITS

- Documentation
- Metrics Development
- Certification



California Watch

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CHALLENGES: JANUARY 1, 2012 CULTURE

- Client Perception
- ADA vs. California Access Code
- Staff Issues
- Communication

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CHANGING CULTURE CHANGING PROCESSES



40

CHANGING CULTURE



41

CLIENT PERCEPTION

- ◉ Districts
- ◉ Program Managers
- ◉ Construction Managers
- ◉ Architects & Engineers
- ◉ Inspectors
- ◉ Contractors

- ◉ Advisory Task Forces

42

LEADERSHIP & STAFFING

- ◉ Leadership
 - › Headquarters
 - › Regional Offices
 - › Succession Plan
- ◉ Staff Development
 - › Collaboration
 - › Communication
- ◉ Client Awareness
 - › DSA Processes
 - › Communication

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CHANGING PROCESSES



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COMMUNICATION

- Cloud Based Connectivity and Transparency
 - Projects: DSABox
 - Certification Box
 - Inspector Box
 - Landscape Irrigation Box
- Field Engineer Connectivity
- Box Collaborators (Total): 13,189
 - External Users Only 12,886
- eTracker → iTracker

45

DOCUMENTATION & METRICS

- Inspectors
 - Tracking
 - Evaluation
 - Training
- Field Engineers
 - Site Visits
 - Training
 - Communication



46

ACCESS CODE

- Align with ADA
- Constructability



47

CERTIFICATION (1982 – 2010)

- Total Projects 53,000*
- Certified: 69% 36,614
- Occupied without Certification (K-12 and Community College Projects) 16,386

**Available Information*

48

CERTIFICATION CHALLENGES

- DSA's Limited Authority
- Beneficial Occupancy
- Team Relationships
 - › District
 - › Program/Construction Manager
 - › Design Professionals
 - › DSA Field Engineer
- **No Inspection Card System**

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POST AUDIT CERTIFICATION

- Total Transition Projects (January 2011 to May 31, 2013) 9,606
- Stop the Bleeding
- Change the Process

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INSPECTION CARD PROCESS

- Inspection Card
- Concurrent Certification
- DSAbox
 - › All members of team
- Project Status
 - › Under Construction
 - › Occupied without Certification
 - Form DSA 301-N
 - Form DSA 301-P
 - › Certified

The image shows a sample of the DSA Project Inspection Card, Form 152. It is a detailed form with multiple sections for project information, including project name, location, and various inspection points. A large red stamp with the text 'SAMPLE DO NOT USE' is overlaid on the form.

51

INSPECTION CARD PROCESS (CONTINUED)

- Transparency
 - › Certification Box
 - › Public
- Training

The image shows two screenshots. The top screenshot is a web browser displaying the DSA website, which includes a 'Certification Box' for public viewing. The bottom screenshot is a sample of the DSA 301-P form, titled 'NOTIFICATION OF REQUIREMENT FOR CERTIFICATION'. It contains fields for project information and a section for the notification. A large red stamp with the text 'SAMPLE DO NOT USE' is overlaid on the form.

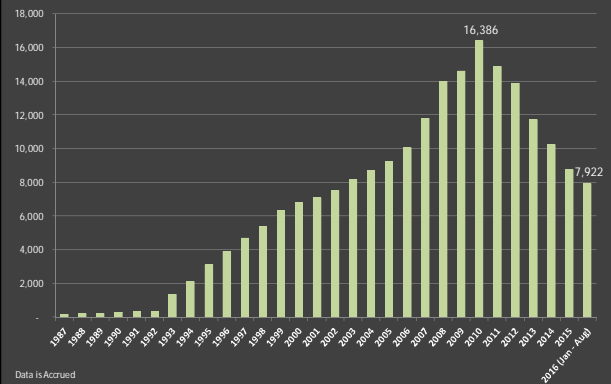
52

CERTIFICATION CATEGORIES

- Three categories of projects occupied without certification:
 - Legacy 1983 - 2010
 - Transition: 2011 – May 31, 2013
 - Inspection Card: June 1, 2013 - Present

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OCCUPIED W/O CERTIFICATION – LEGACY PROJECTS as of August 31, 2016



TRANSITION PROJECTS

- Total Transition Projects: 9,610
- Total Certified: 90.7% 8,700
- Total Occupied w/out Certification 887
- Total In-process (in construction pending 301-N) 23

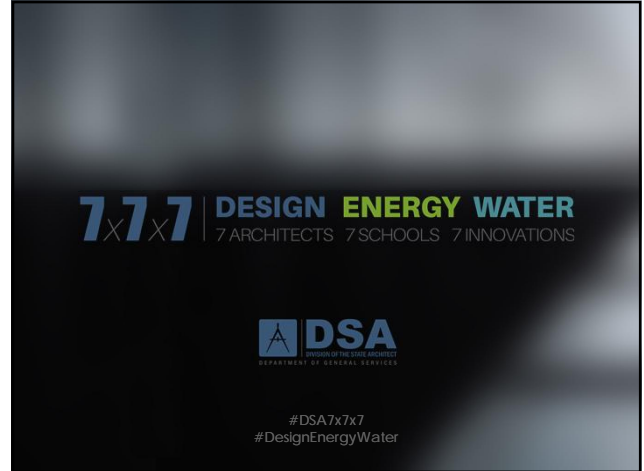
* Base Transition project numbers change due to projects moving to Inspection Card projects

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INSPECTION CARD PROJECTS

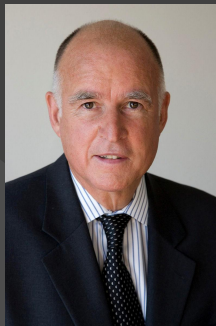
- Total Inspection Card Projects: 7,930
- Total Certified: 92.4% 4,780
- Total Occupied w/out Certification 394
- Total In-process (in construction, pending 301-N) 2,756

56



GOVERNOR BROWN ON CALIFORNIA GOING GREEN

In his 2015 inaugural address, the Governor announced his goal to double the efficiency of existing buildings by 2030.

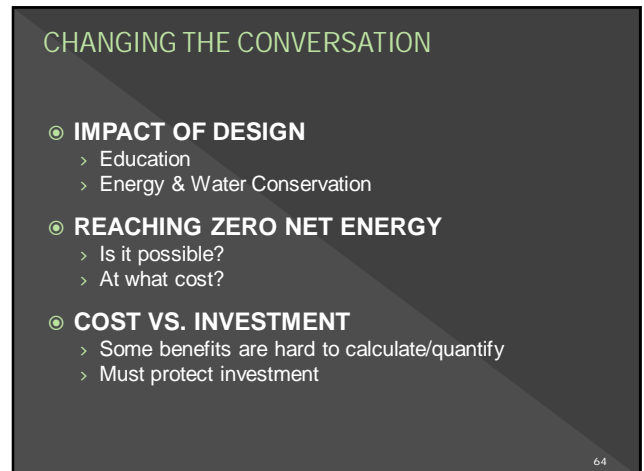


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DESIGN AWARD JURIES



60



UNQUANTIFIABLE RETURNS

- ◉ Reduction of staff illness
- ◉ Reduction of carbon emissions
- ◉ Increase in student attendance
- ◉ Increase in student achievement

65

WHY 7x7x7?

- ◉ Architectural Typologies
- ◉ Construction Methods
- ◉ Geographical Locations
- ◉ Building Age

66

7x7x7 FIRMS

- ◉ WRNS Studio
- ◉ Hamilton+Aitken
- ◉ HGA
- ◉ DLR Group
- ◉ Ehrlich Architects
- ◉ Lionakis
- ◉ Aedis Architects

67

COMMON ELEMENTS

- ◉ Insulation
- ◉ Dual Glazing
- ◉ LED and Automated Lighting
- ◉ Plug Load Reduction
- ◉ Increased HVAC Efficiency
- ◉ Low-Flow Faucets and Toilets
- ◉ Permeable Paving
- ◉ Drought Resistant Landscaping

68

COMMON GOALS

- ◉ Educational Quality
- ◉ Solutions as Teaching Tools
- ◉ Incremental Solutions Leading to ZNE
- ◉ Recognition of Operational Limitations
- ◉ Behavior Modification:
 - ✓ Students, Staff, and Teachers
 - ✓ Operations and Maintenance

69

COMMON REFRAIN

- ◉ Long-Term Strategies
 - > Goal: 2030
- ◉ Synergy: One Move with Many Benefits
- ◉ Passive Solutions

More Questions Than Answers!!!

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ARCHITECTURAL TEAM'S ASSIGNMENT

- ◉ **IDEAS** vs. Beautiful Drawings
- ◉ Preliminary Presentations
- ◉ "Call to Action"
- ◉ Collaborate with Construction Team
- ◉ Publish Full Schematic Design Concepts

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WEB SITE

Video of presentation at the Crest Theatre

www.7x7x7DesignEnergyWater.com

Final Report (still in design)

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Trajan Elementary School
San Juan Unified School District
Built in 1980s

LIONAKIS
Siegfried Engineering
Glumac

FINGER PLAN



50'S AND 60'S ERA

Good orientation
North and South Facing windows
(wall to wall)

80'S ERA:

Good orientation
Less Windows than predecessors

"Be the change you want to see in the world."
- Mahatma Gandhi

BEST DAYLIGHTING

TRANSFORMATION T

Respect circadian impacts with daylight and view windows, schedule

SYSTEMS S

LED Lighting and simple controls

EFFICIENCY E

Add passive approaches to improve daylighting, like expanded glazing area, light shelves and skylights.

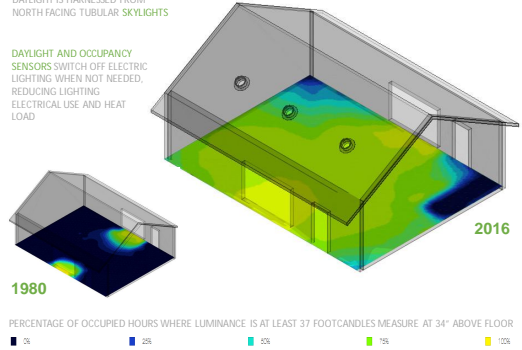
BEHAVIOR B

Open the blinds; turn off the lights; monitoring and education

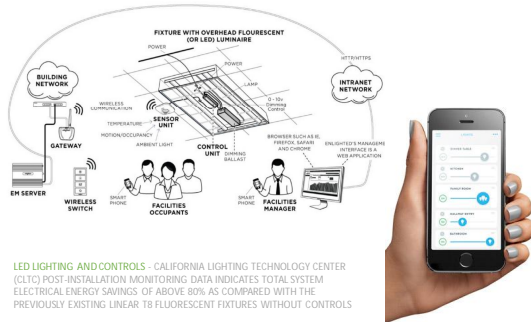
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S
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DAYLIGHT AND OCCUPANCY SENSORS SWITCH OFF ELECTRICAL LIGHTING WHEN NOT NEEDED, REDUCING LIGHTING ELECTRICAL USE AND HEAT LOAD

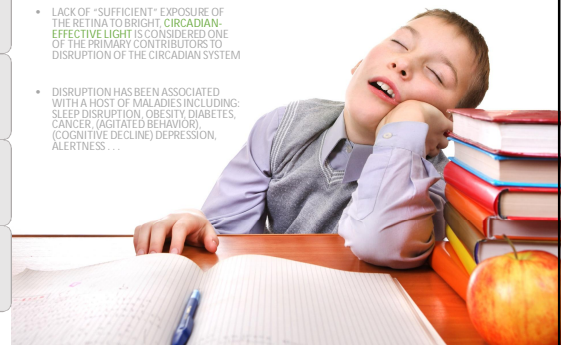


TS&B

T
S
E
B

- LACK OF "SUFFICIENT" EXPOSURE OF THE RETINA TO BRIGHT, **CIRCADIAN-EFFECTIVE LIGHT** IS CONSIDERED ONE OF THE PRIMARY CONTRIBUTORS TO DISRUPTION OF THE CIRCADIAN SYSTEM

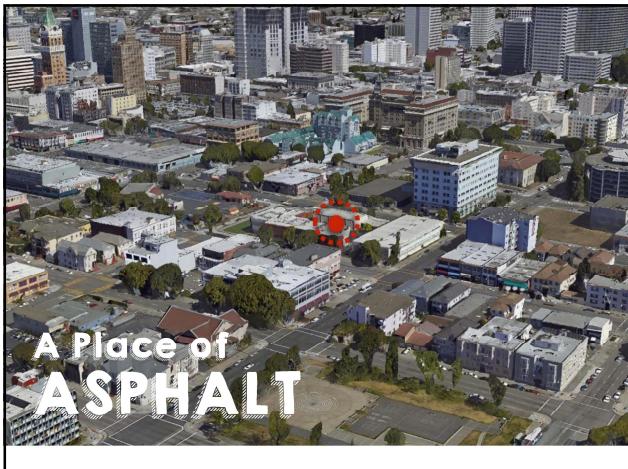
- DISRUPTION HAS BEEN ASSOCIATED WITH A HOST OF MALADIES INCLUDING: SLEEP DISRUPTION, OBESITY, DIABETES, CANCER, (AGITATED BEHAVIOR), (COGNITIVE DECLINE) DEPRESSION, ALERTNESS . . .



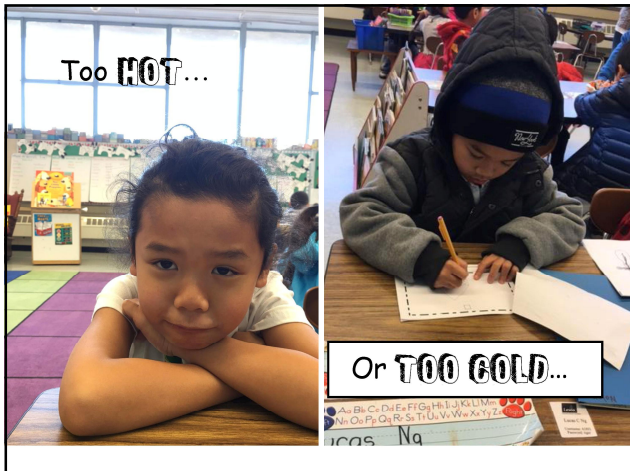
Lincoln Elementary School
Oakland Unified School District
Built in 1950s

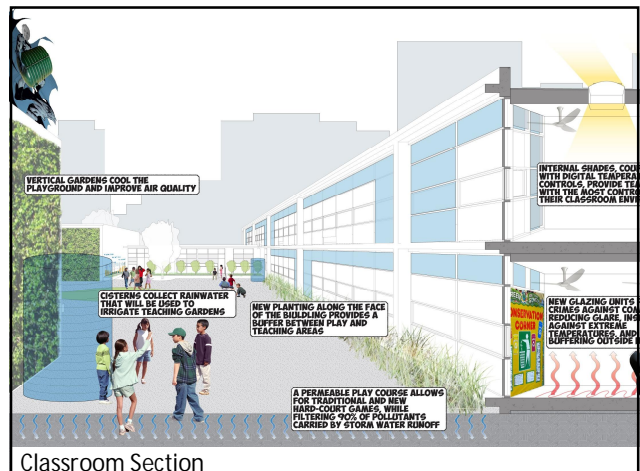
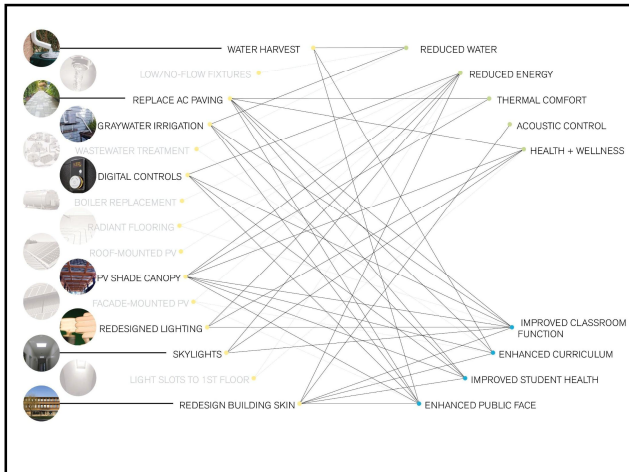
WRNS STUDIO

Sherwood Engineers
Bellinger Foster Steinmetz
Interface Engineering
Integral Group
Loisos+Ubbelohde



95% of the school site is impervious
100% of the play yard is impervious





happy students

The Best Reason

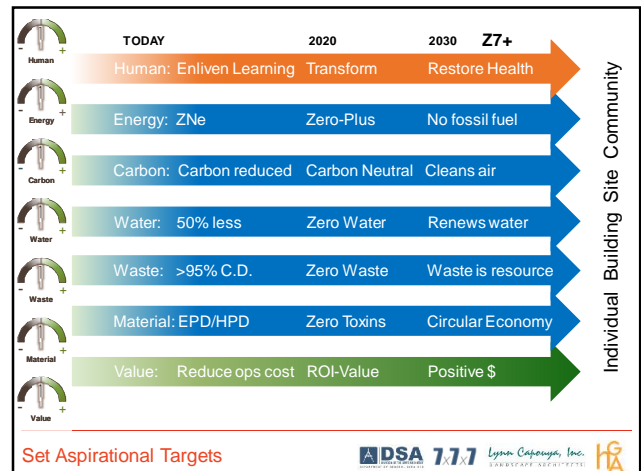


And a
Place
that is
just
RIGHT

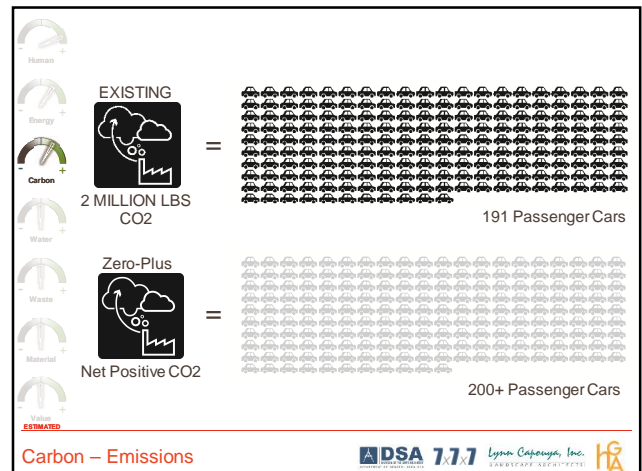
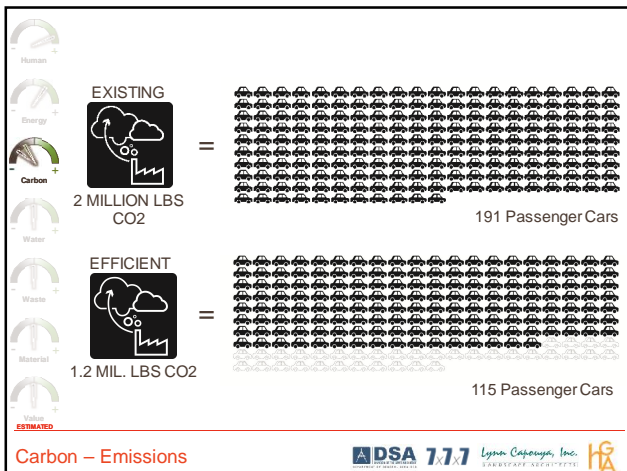


Los Angeles Trade Technical College
Los Angeles Community College District
Built in 1970s

HGA
Lynn Capouya Inc.







2002
When the college freshman of today were in kindergarten





When today's kindergarteners are college freshman
2030

Consider our Future

DSA
7.7.7

Lynn Capoen, Inc.
SARASOTA, FL 34231

HA


Santa Barbara High School
Santa Barbara Unified School District
Built in 1920s

HAMILTON+AITKEN
ARCHITECTS
Capital Engineering Consultants, Inc.

100

Santa Barbara High School

Built in: 1924
Site Acres: 40
Building Footprint: 58,000 sqft
Grades: 9th to 12th
Students: 2,100
Faculty and Staff: 254




7.7.7
DESIGN ENERGY WATER
ARCHITECTS SCHOOLS TERRACOTTA

CAPITAL
ENGINEERING CONSULTANTS, INC.

HAMILTON+AITKEN
Architects

Historic Schools

- Beautifully detailed
- An important part of our past
- Communities want them to be preserved



7.7.7
DESIGN ENERGY WATER
ARCHITECTS SCHOOLS TERRACOTTA

CAPITAL
ENGINEERING CONSULTANTS, INC.

HAMILTON+AITKEN
Architects

Windows

- Single pane windows lets a lot of heat into the classroom
- Uncomfortable Glare
- Blinds block natural daylighting
- Electric Lighting increases electrical loads

7.7.7 DESIGN ENERGY WATER
ARCHITECTS TEACHERS THERMODYNAMICS

CAPITAL
HAMILTON+AITKEN
Architects

High Performance Glazing

Step 1

- Low E Coating blocks heat from entering the classroom
- Double glazing prevents heat from leaving the classroom

7.7.7 DESIGN ENERGY WATER
ARCHITECTS TEACHERS THERMODYNAMICS

CAPITAL
HAMILTON+AITKEN
Architects

Natural Daylighting

Step 2

- Lightlouvers act as mini light shelves, bouncing light deep into the classroom
- Modern shades prevent glare but still maintain views to the outside

7.7.7 DESIGN ENERGY WATER
ARCHITECTS TEACHERS THERMODYNAMICS

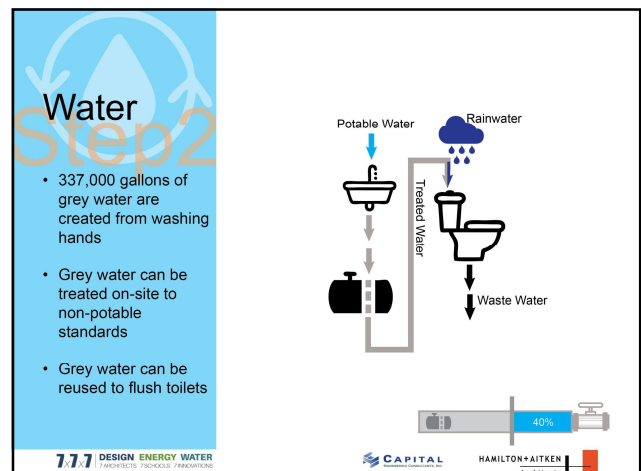
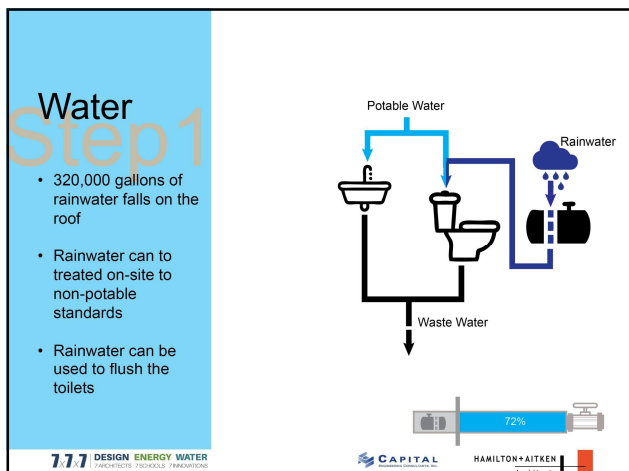
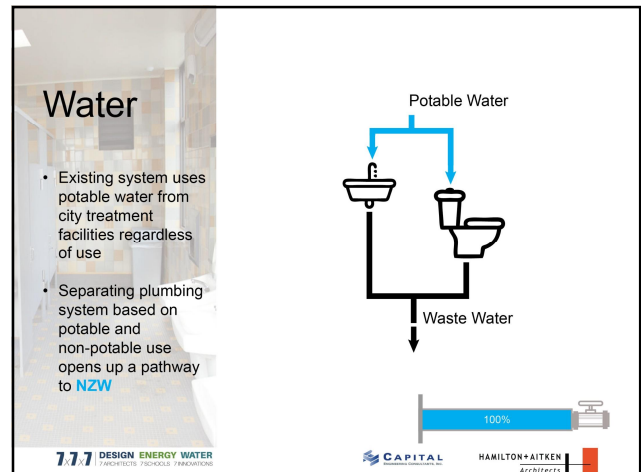
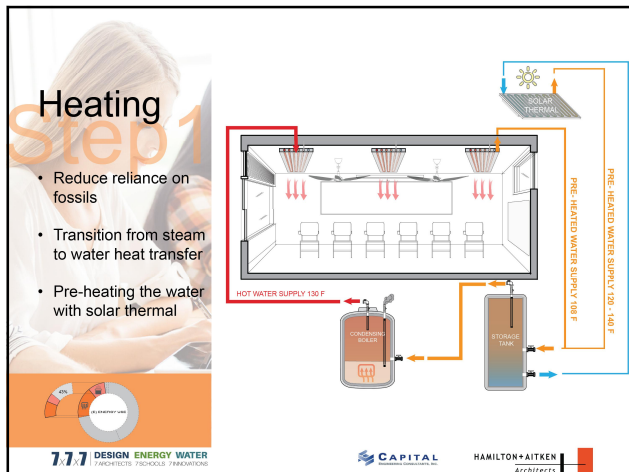
CAPITAL
HAMILTON+AITKEN
Architects

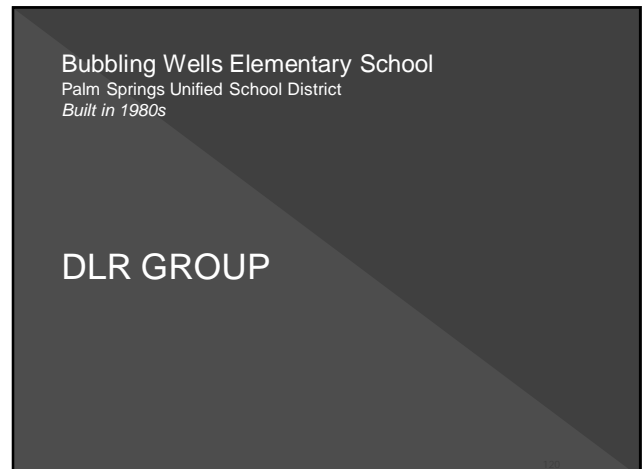
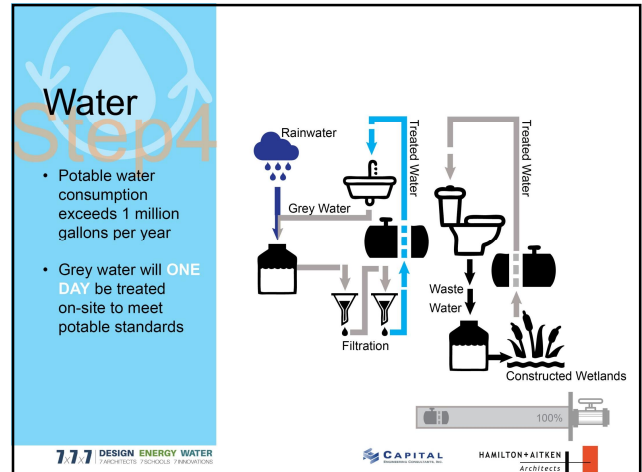
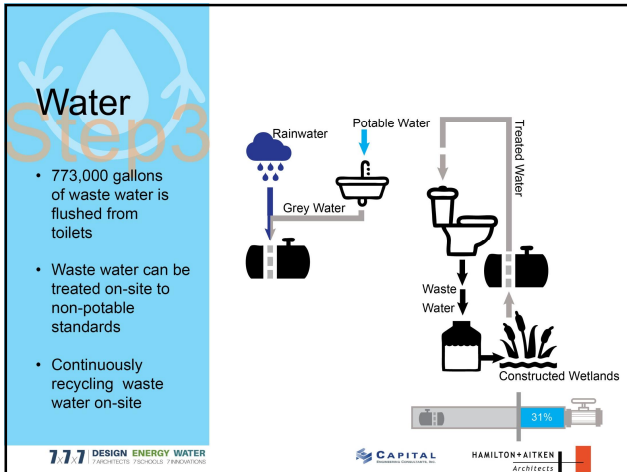
Heating & Cooling

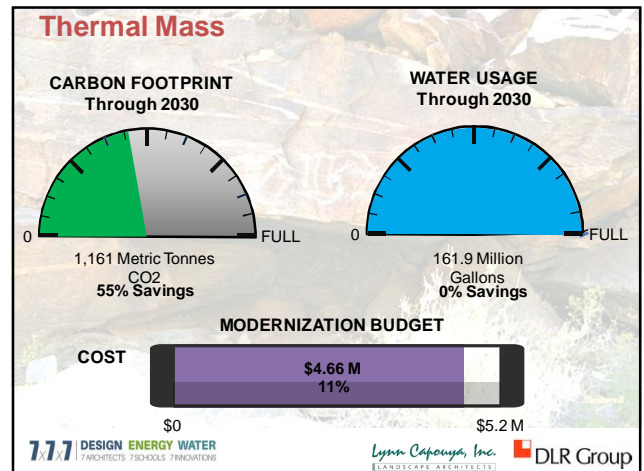
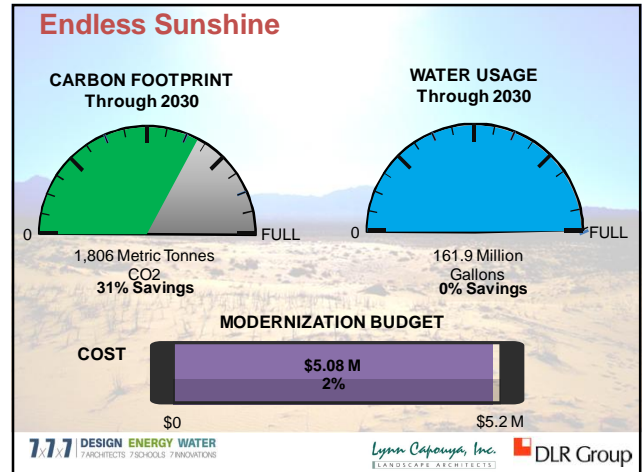
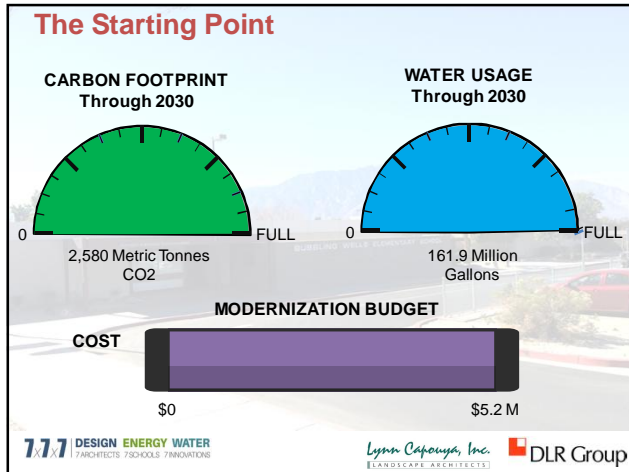
- No mechanical cooling system
- The un-shaded south facade bakes in the warmer months

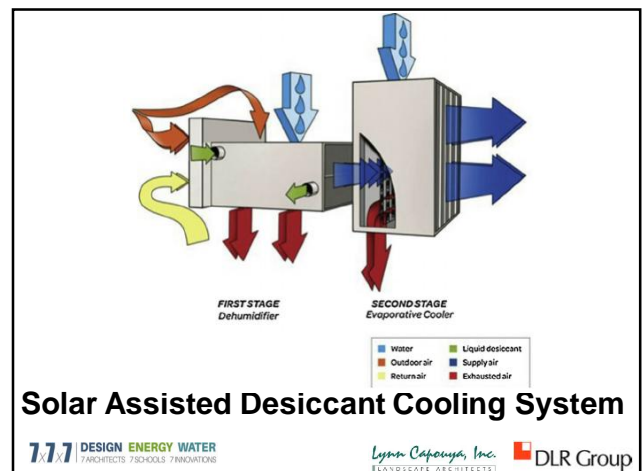
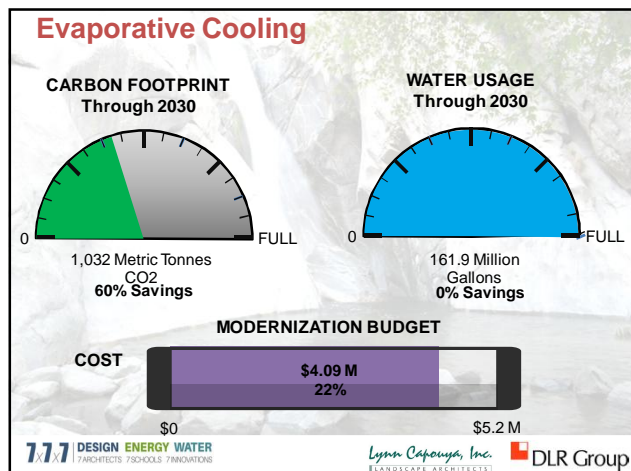
7.7.7 DESIGN ENERGY WATER
ARCHITECTS TEACHERS THERMODYNAMICS

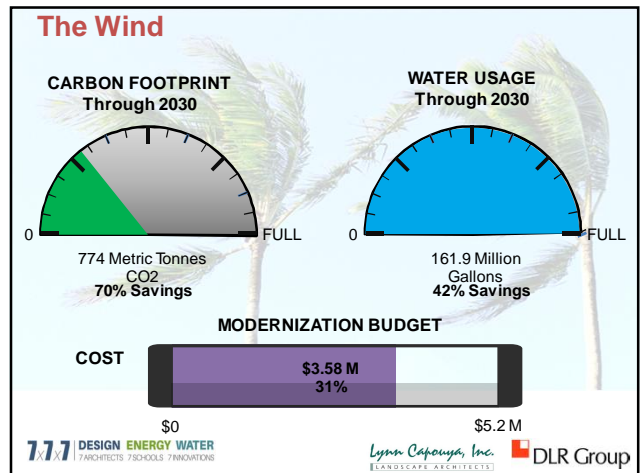
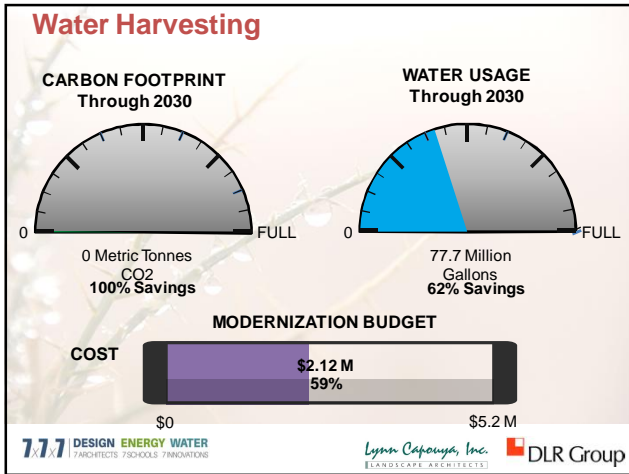
CAPITAL
HAMILTON+AITKEN
Architects











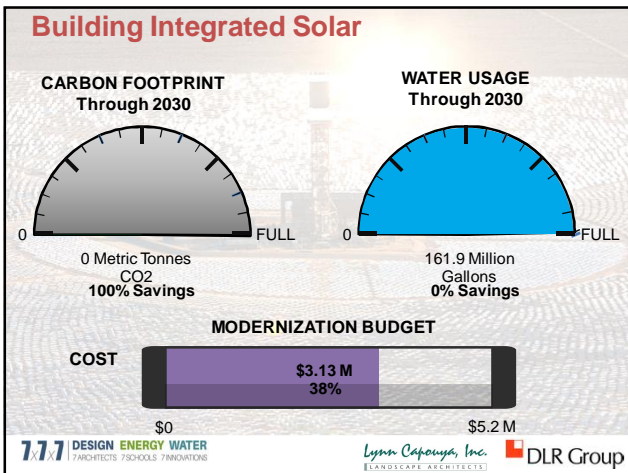
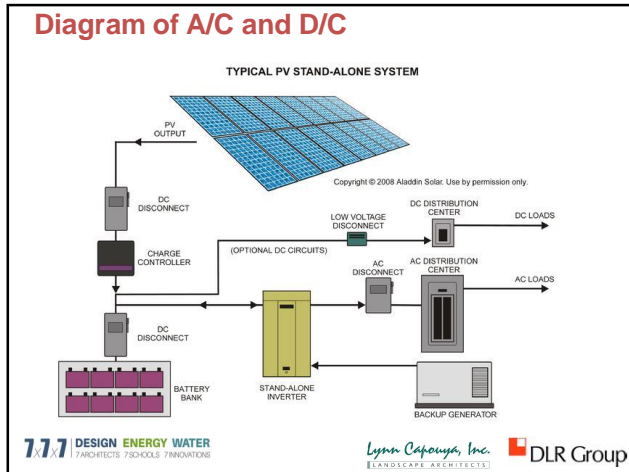


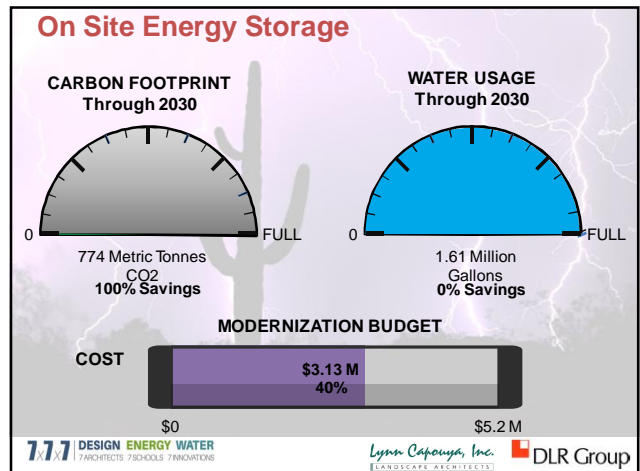
Diagram of A/C and D/C



Power Wall



On Site Energy Storage



122nd Street Elementary School
Los Angeles Unified School District
Built in 1960s

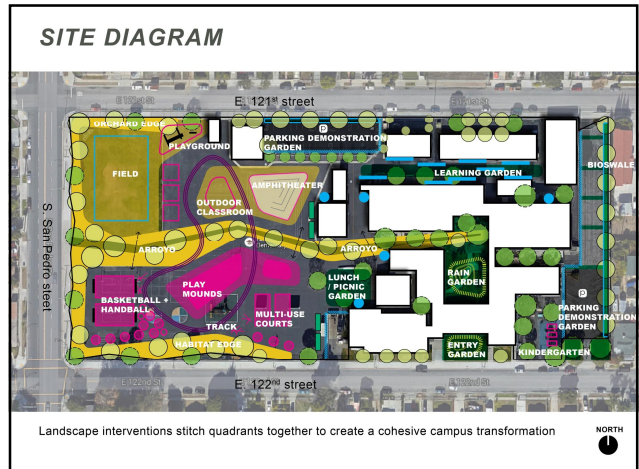
EHRlich ARCHITECTS
Mia Lehrer+Associates
MEE Engineers



AERIAL VIEW OF SCHOOL

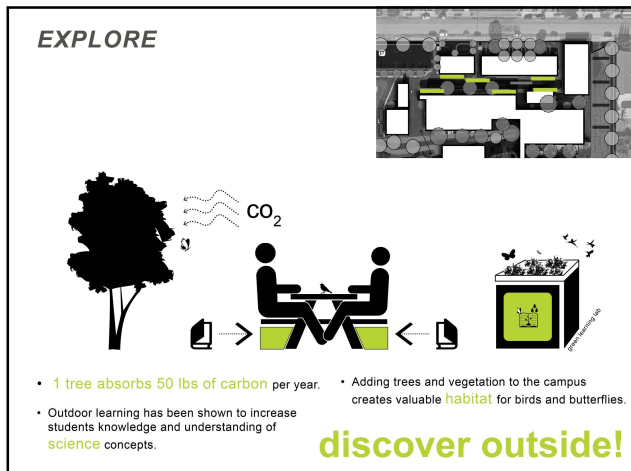
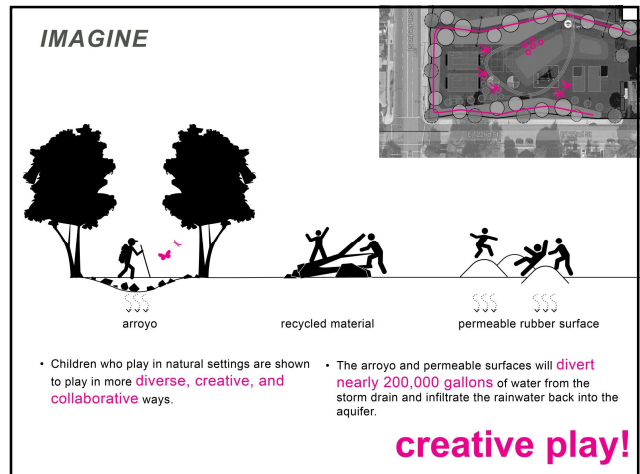
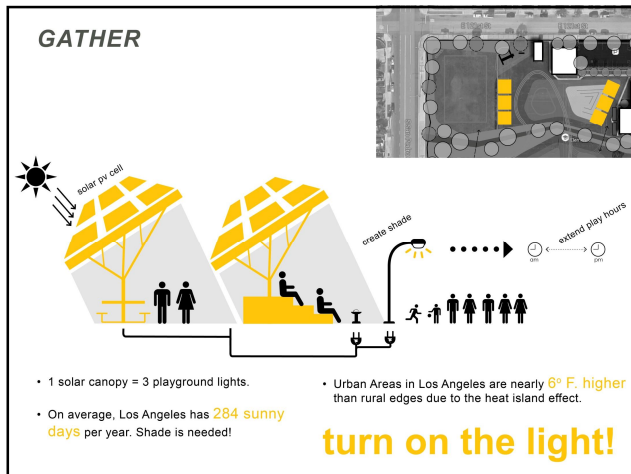


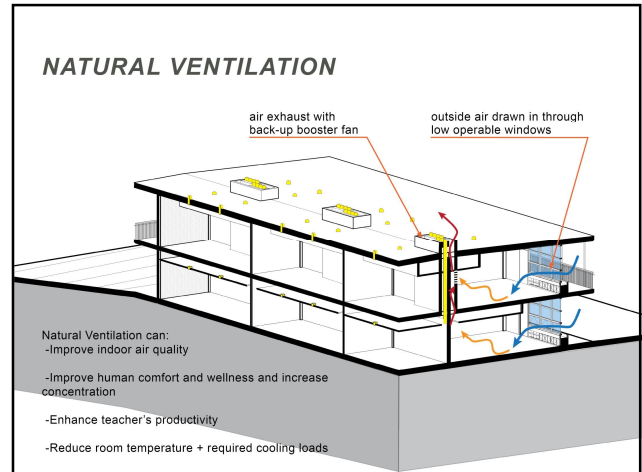
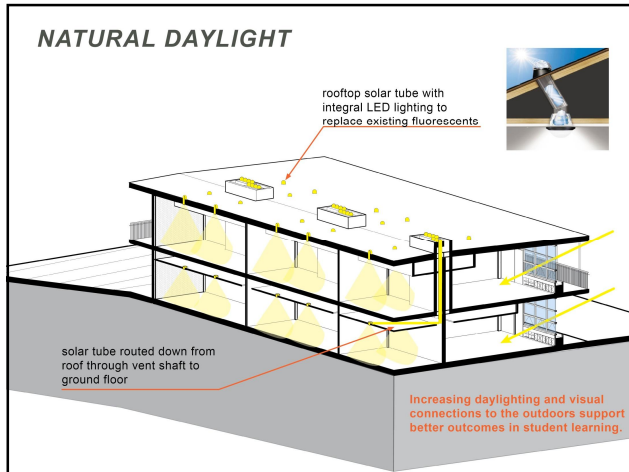
VIEW FROM PLAYGROUNDS LOOKING NORTHEAST



SITE DIAGRAM

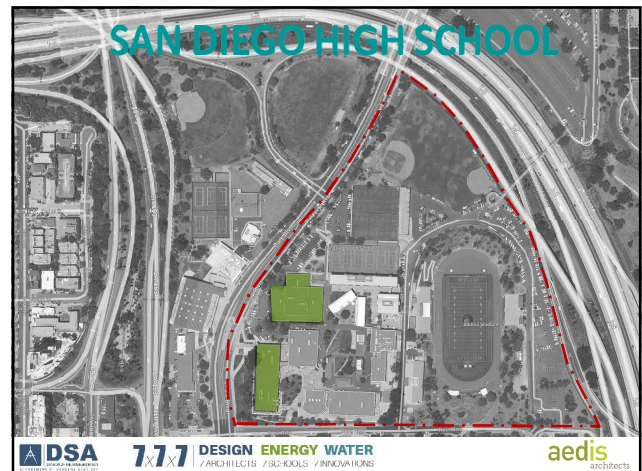
Landscape interventions stitch quadrants together to create a cohesive campus transformation

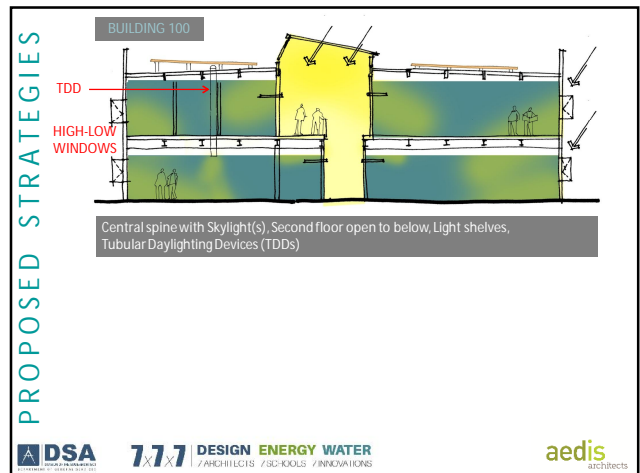
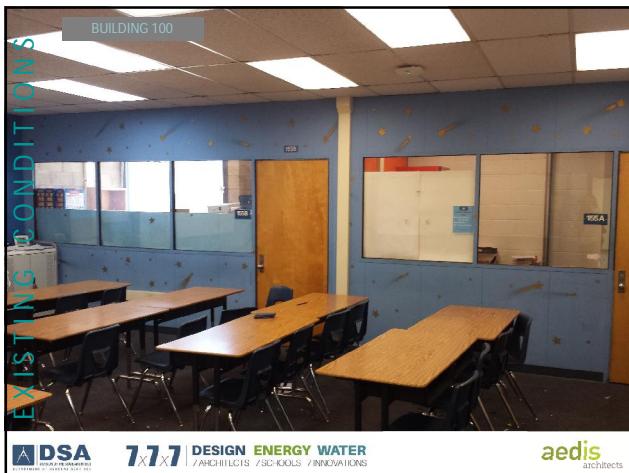
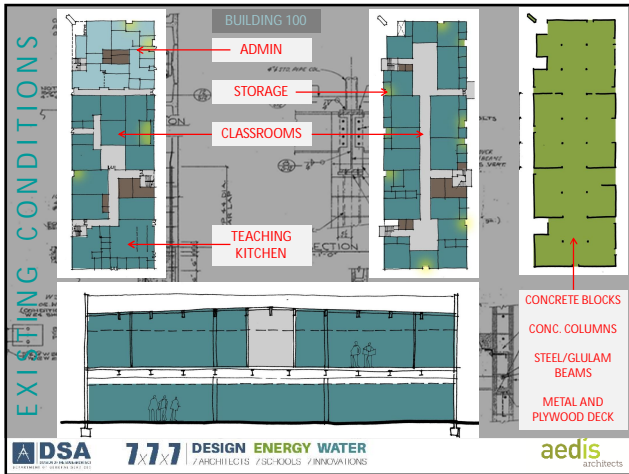




San Diego High School
San Diego Unified School District
Built in 1970s

AEDIS ARCHITECTS
Sherwood Design Engineers
BFS Landscape Architects
Base Design
Integral Group





ZOOMING OUT

PALO ALTO – Potential Eco-District



7x7 DESIGN ENERGY WATER
/ ARCHITECTS / SCHOOLS / INNOVATIONS

aedis
architects

ZOOMING OUT

SACRAMENTO

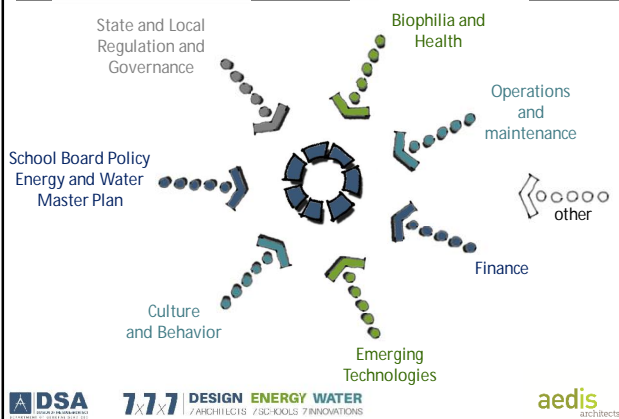
Potential
Eco-District



7x7 DESIGN ENERGY WATER
/ ARCHITECTS / SCHOOLS / INNOVATIONS

aedis
architects

ZOOMING OUT – Action Items



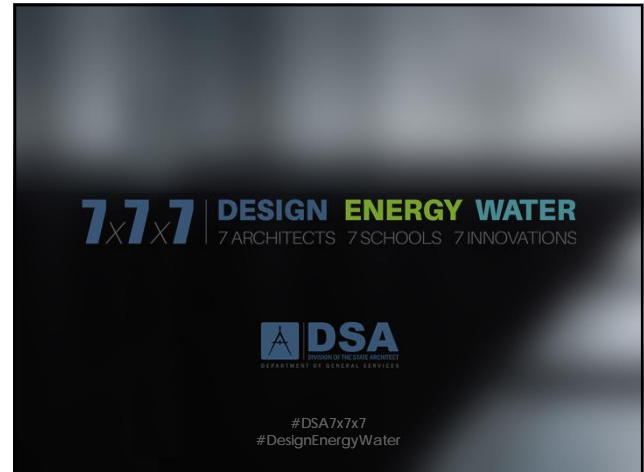
7x7 DESIGN ENERGY WATER
/ ARCHITECTS / SCHOOLS / INNOVATIONS

aedis
architects

ZERO NET ENERGY PLANS AND IMPLEMENTATION STRATEGIES FOR EVERY CAMPUS: 2030

- ◉ Coordinate with Education Plan
- ◉ Coordinate with Funding Plan
- ◉ Integrated with Master Plan
- ◉ Champions at Every Level
 - Boards of Education - Superintendents
 - Facilities Staff - Teachers and Parents
 - Legislators - Students

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Skilled Workforce Legislation

- ▶ In 2015, three bills enacted more stringent workforce provisions:
 - AB 566 (O'Donnell) – LLB
 - AB 1358 (Debabneh) – Design-Build
 - AB 1185 (Ridley-Thomas) – Best Value for LAUSD
- ▶ Requires the use of a skilled and trained workforce
 - All workers must be apprentices and journeypersons for apprenticeable occupations



Skilled Workforce Legislation

- ▶ SB 693 (Hueso)
 - CSFC Position: Watch
 - Sponsored by Building Trades
 - Consolidates skilled workforce statutes for AB 566, AB 1358, and AB 1185
 - Requires 60% of skilled journeypersons to be graduates of an approved apprenticeship program by Jan. 1, 2020
 - Clarifies what to do if contractor/bidder falls out of compliance
 - How to calculate apprentice % requirements
 - Passed by Legislature



AB 2316 (O'Donnell) – LLB

- ▶ CSFC Position: Watch
- ▶ Creates competitive selection process for Lease-Leaseback (LLB)
 - Strikes "without advertising for bids"
- ▶ Provides safe harbor from conflict of interest litigation for contracts signed prior to July 2015 (disgorgement issue)
- ▶ Can sign contracts prior to DSA approval for LLB – for preconstruction services
- ▶ Passed by Legislature



AB 626 (Chiu) – Claims Process

- ▶ CSFC Position: Neutral
- ▶ Reintroduction of AB 1347 from 2015
 - Now exempts CalTrans
- ▶ Establishes new claims process
 - Timely payment for undisputed claim amounts
- ▶ Respond to a claim within 45 days to identify disputed/undisputed amounts
 - Owner has 60 days to pay undisputed amounts
 - Non-response means claim is *rejected* in its entirety
- ▶ Passed by Legislature



AB 1783 (Dodd) – Seismic Safety

- ▶ CSFC Position: Concerns
- ▶ Requires schools in areas of high seismicity to conduct a one-time earthquake safety assessment of non-structural classroom contents by January 1, 2020
- ▶ Report prioritization of non-compliant items that are an immediate threat to safety
- ▶ Won't be implemented unless state funding is provided
- ▶ Passed by Legislature



SB 885 (Wolk) – Duty to Defend

- ▶ CSFC Position: Oppose
- ▶ Carve-out to indemnity and duty to defend law for design professionals
 - Who pays first dollar of defense?
 - Creates reimbursement-only system for DPs
 - Reverses agreement in SB 972 (2010)
- ▶ Shifts risk to other parties (contractor, owner)
- ▶ Proponents say errors and omissions insurance doesn't cover up-front defense costs for additional insured
- ▶ Died in Assembly Judiciary Committee



SB 1170 (Wieckowski) – SWPPPs

- ▶ CSFC Position: Watch
- ▶ Prohibits public agencies from contracting with a general contractor to develop Storm Water Pollution Prevention Plans (SWPPPs)
- ▶ Sponsored by Associated General Contractors
- ▶ Shifts risk and liability to public agency
- ▶ Public agencies: Contractors who perform work are in the best position to understand conditions at the site
- ▶ Died in Assembly Appropriations Committee



Climate Change & Energy

- ▶ CSFC Position: Watch
- ▶ SB 32 (Pavley)
 - Extends GHG reduction goals.
 - Cut emissions at least 40% below 1990 levels by 2030
 - Passed by Legislature, signed by Governor
- ▶ SB 1207 (Hueso)
 - Extends Energy Conservation Assistance Account (ECAA) program to January 1, 2018
 - Does not provide funding for ECAA loans
 - Passed by Legislature



Climate Change & Energy

- ▶ AB 2120 (Weber)
 - Allows COEs and consortiums of K-12 school districts to participate in the intervenor compensation program for PUC utility rate case proceedings
 - Hot topic due to energy rate increases
 - Died in Senate Appropriations Committee



Bond Accountability/Use of Funds

- ▶ CSFC Position: Watch
- ▶ AB 2429 (Thurmond) – Bonding capacity
 - Increases the limits on bonding capacity for Prop 39 bonds:
 - From 1.25% to 2% of taxable property – ESDs and HSDs
 - From 2.5% to 4% of taxable property – USDs and CCDs
 - Potential impacts to Level 2 developer fee calculation
 - Author pulled bill due to these concerns



Bond Accountability/Use of Funds

- ▶ SB 1029 (Hertzberg) – CDIAC Reporting
 - Requires state and local government debt issuers to report additional info to CDIAC re: proposed and outstanding debt
 - Concerns that this creates duplicative efforts
 - DOF opposed
 - Signed by Governor



RRMA Requirements

- ▶ Questions about the relationship between Prop 51 and RRMA requirements
 - Does 3% return immediately if Prop 51 passes?
- ▶ 3% RRMA Phase-In – 2015-16 budget – after Jan. 1, 2015
 - 2% by 2017-18
 - 3% by 2020-21
- ▶ Should there be relief for COEs?
 - Restrict RRMA calculation to certain fund codes, to more closely resemble instructional functions provided by districts?



DOF Prop 1D Audit

- ▶ Department of Finance, Office of State Audits and Evaluations completed OPSC Prop 1D audit August 2016
 - Bond oversight and accountability
 - Audit findings show “lack of fiduciary responsibility”
- ▶ Reviewed progress to address corrective actions from June 2011 audit
- ▶ Concerns:
 - Expenditure audits not performed
 - Financial Hardship regulations not implemented
 - Project savings data inadequately tracked



DOF Prop 1D Audit

- ▶ Concerns, cont'd
 - Ineligible program expenditures
 - Districts keep ineligible expenditures as “project savings”
 - No timetable to use project savings
- ▶ OPSC required to develop Corrective Action Plan – due in 60 days
- ▶ OPSC response:
 - Will address pending outcome of Prop 51



Questions?



▶ CSFC 2016 Annual Summit

CSFC Visioning and Organizational Matters

- *The Future of COE Funding and the State Program*
- *2017 Goals and Priorities*
- *Election of Executive Committee Officers*





Reception at 6:00 p.m.
Downtown & Vine
1200 K Street, #8
Dinner to Follow at 7:00 p.m.



CSFC Annual Summit
September 29-30, 2016



County School Facilities Consortium

Welcome to the 2016 Annual Summit!

Sheraton Grand Hotel
September 30, 2016

CSFC 2016 Annual Summit

FSCO Update

Kathy Daniels, FSCO Chair



CSFC 2016 Annual Summit

School Facilities in an LCAP World

- *FIT 2.0 – From Williams to LCAP*
- *Advocating Effectively for Facilities Funding in the LCAP Process*
- *County LCAP Reviews – Facilities and Best Practices*
- *Feedback from CSFC on FIT Template*



School Maintenance: From *Williams* to the LCAP

Ian Padilla
Coalition for Adequate School
Housing



Senate Bill 50 Establishes

- The Deferred Maintenance Program (DMP)
- Routine Restricted Maintenance Account (RRMA)



The *Williams* Settlement Establishes:

- The "Good Repair" Standard
 - E.C. 17002(d)(1)
- The Facility Inspection Tool (FIT)/CASH FIT Guidebook
- County Office Inspections
 - "All Schools are *Williams* Schools"
- The Emergency Repair Program (ERP)
 - \$800 million for immediate health and safety projects



First Cut, Last Restored

- Budget Underfunding
- Legislative Exemptions
- RRMA Calculation



Budget Flexibility 2008

- Allows school districts to use state M&O funding for operational expenditures
- Department of Education (CDE) and Legislative Analysts' Office (LAO) studies report school M&O funding is first cut/last restored.
- Requirement for full 3% RRMA contribution scheduled to return 2015-16 – ultimately did not.



From Revenues and Limits to the Local Control Funding Formula (LCFF)

- LCFF represents the most significant change in K-12 school finance in four decades.
- Output vs. Inputs



Primary LCFF Goals

1. Move away from system of rule compliance measured by audits and enforced through penalties (revenue limits) to an accountability system based on local needs and measured by progress toward annual accountability goals.
2. Improve student academic performance by providing more resources to districts that serve high-needs students, and gives districts more authority to decide how to spend education funding and hold them accountable for results.
3. School districts required to use Supplemental and Concentration funds to "increase or improve services" for low-income, English learners, and foster youth "in proportion to the increase in funds" they receive for these students.



Eight State Priorities: Key for School Facilities and Maintenance

- "Good Repair" Standard included in school conditions.
- "Good Repair" not defined by the state.
- In the context of the LCAP, "Good Repair" is a local indicator.



Public Input

- School Board must hold a public hearing before adopting the LCAP at a later public meeting.
- Required to establish a Parent Advisory Committee for parent outreach.
- Districts where English learners comprise at least 15% of enrollment must also consult an English Learner Advisory Committee.



State Board of Education (SBE) Implementation

- Debate about how to best measure and improve schools.
- Equity Advocates vs. School Administrators
 - Specificity vs. Flexibility
- Shifts from a one-dimensional school rating under the API/NCLB toward a broader notion of what constitutes a quality education.



State Board of Education (SBE) Implementation (continued)

Evaluation Rubrics:

1. A set of statewide and district performance indicators measuring the eight state priorities identified by the formula.
2. Benchmarks that define levels of performance by districts, schools and student subgroups for each state indicator.
3. Criteria for determining which low-performing school district would need technical help from a county office of education and which would require intensive intervention.
4. Information on model practices.



Indicators

State

- Uniform, reliable data that enables statewide comparisons of schools and districts

Local

- Use data that are not yet collected statewide or are not valid for cross-district comparisons.
- School Conditions
 - *Williams Issues* – assignment of teachers, distribution of standards-aligned textbooks, and the operation of safe, clean and functional facilities.
- Implementation of Common Core and other academic standards.
- Parent Engagement
- School climate through local surveys of parents, teachers, and students.



Current Issues

- LCAP “Dashboard”
 - January 2017
- Advocacy for School Maintenance
- Public Input
 - USC study indicates more than half of voters polled have not heard or read about the LCFF.



Contact Information

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Legislative Advocate
Coalition for Adequate School Housing (CASH)
ipadilla@m-w-h.com



CSFC

FIT 2.0

September 30, 2016

Jema Estrella
Director, Facilities and Construction
(562) 922-8981



Los Angeles County
Office of Education

FIT 2.0

- General Background on the *Williams* Settlement
- Why does the FIT matter?
- History
- Proposed Changes to the FIT
- CASH FIT Guidebook

General Background



○ Williams Legislation

- May 2000: Class-action lawsuit (*Williams v. California*) claimed the state's poorest children were being denied equal access to the basics of a quality education (instructional materials, teacher assignments, and facilities)
- A package of laws were enacted in 2004 to settle lawsuit

“Every school is a *Williams* school”

General Background



○ County Office Responsibilities

- Annually visit decile 1-3 ranked schools (currently based on the 2012 API)
 - Previously, list was updated every three years
 - CDE will provide direction on how future cohorts will be determined due to changes in testing (API does not exist anymore)
 - 25% of visits are unannounced
- Determine that school facilities are 'clean, safe and functional'.
- Determine accuracy of SARC data
- Report on findings

General Background



○ School District Responsibilities

- To post the UCP in every classroom
- Inspect and correct deficiencies in all schools to ensure good repair
- Report findings in annual SARC
- LCFF and LCAP reference Williams language (Good Repair)

“Every school is a *Williams* school”

Good Repair Criteria



The FIT has 15 categories, with 8 general sections which are used to determine the overall condition of a school facility

- Playground/School Grounds
- Windows/Doors/Gates/Fences

<div>STATE OF CALIFORNIA</div> <div>FACILITY INSPECTION TOOL</div> <div>RAILROAD FACILITY CONDITION TRENDS EVALUATION</div>	<div>STATE ALLOCATION BOARD</div> <div>OFFICE OF PUBLIC SCHOOL CONSTRUCTION</div>
<div> <div>Part I</div> <div>GOOD REPAIR STANDARD</div> </div>	<div> <div>Page 1 of 4</div> </div>
<p>(C) If understood statement is true, then "Y" is an extreme deficiency (marked as an "X") on the Evaluation Cell resulting in a "Poor" rating for the applicable category.</p>	
<p>Gas Leaks</p> <p>Gas systems and pipes appear safe, functional, and free of leaks.</p> <p>Examples include but are not limited to the following:</p>	<p>Overall Cleanliness</p> <p>2nd/3rd grooms, hallways, common areas, and individual rooms appear to be clean and orderly. Examples include but are not limited to the following:</p>
<ul style="list-style-type: none"> There is no odor that would indicate a gas leak. (X) Gas pipes are not loose and appear to be in good working order. (X) 	<ul style="list-style-type: none"> Areas (X) evaluated for use of accumulated clutter, dirt, and grime. Areas (X) evaluated for use of unabsorbed liquid.
<p>Mechanical Systems</p> <p>Heating, ventilation, and air conditioning systems (HVAC) as applicable are functional and unobstructed. Examples include but are not limited to the following:</p>	<ul style="list-style-type: none"> Restrooms, drinking fountains, and food preparation or serving areas appear to have been cleaned each day that school is in session. Other
<ul style="list-style-type: none"> The HVAC system is operational. (X) The filters are vented (no mechanical or manual ventilation). The ventilation units are unobstructed and vents and grills are without evidence of excessive dirt or grime. There appears to be an adequate air supply for all classrooms, work spaces, and facilities (i.e., no strong odor or pressure, i.e., no stuffy air). Interior temperatures appear to be maintained within normally accepted ranges. The ventilation units are not generating any excessive noise or vibrations. 	<p>Pest/Vermine Infestation</p> <p>Rest or vermine infestation are not evident.</p> <p>Examples include but are not limited to the following:</p>
<ul style="list-style-type: none"> There are no evidences of a major rest or vermine infestation. (X) There are no holes in the walls, roof, or ceilings. No dead or trapped rest or vermine are present. Odor caused by a rest or vermine infestation is not evident. There are no live rodents observed. 	<p>Electrical (Interior and Exterior)</p> <p>There is no evidence that any of the school has a power failure. (X)</p>
<p>Sewer</p> <p>Sewer line stoppage is not evident. Examples include but are not limited to the following:</p>	<ul style="list-style-type: none"> 2 Electrical systems, components, and equipment appear to be working properly. Examples include but are not limited to the following:
<ul style="list-style-type: none"> There are no obvious signs of flooding caused by sewer back-up in the facilities or in the school grounds. (X) The sanitary system controls odors as desired. 	<ul style="list-style-type: none"> There are no exposed electrical devices. Electrical equipment is properly covered and secured from unauthorized access. (X) Other
<p>Interior Surfaces (Floors, Ceilings, Walls, and Window Examples include but are not limited to the following:</p>	<ul style="list-style-type: none"> Lighting appears to be adequate and working properly, including night lights. Examples include but are not limited to the following:
<ul style="list-style-type: none"> Walls are free of hazards from tears and holes. Flooring is free of hazards from torn carpeting, missing floor tiles, holes Ceiling is free of hazards from missing tiles and holes. There is no evidence of water damage (e.g. no condensation, dampness, staining, warping, peeling, minor repairs, etc.) Other 	<ul style="list-style-type: none"> Lighting is present or is adequate for the following: Lighting is not flickering. There is no unusual heat or noise from the light fixtures. Other
<p>STATE OF CALIFORNIA</p>	<p>forms/worksheets/ft_ws_ksh_rev_15</p>

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SCHOOL FACILITY CONDITIONS EVALUATION (REV 8/20)	Page 4 of 4
<p>Restrooms Restrooms in the vicinity of the area being evaluated appear to be accessible during school hours, clean, functional and in compliance with 58 B02 (BC Section 35292.5). The following are examples of compliance with 58 B02:</p> <ul style="list-style-type: none"> a. Restrooms are maintained and cleaned regularly. b. Restrooms are fully operational. c. Restrooms are stocked with toilet paper, soap, and paper towels. d. Restrooms are open during school hours. e. Other <p>Sinks/Fountains (Inside and Outside) Drinking fountains appear to be accessible and functioning as intended. Examples include but are not limited to the following:</p> <ul style="list-style-type: none"> a. Drinking fountains are accessible. b. Water pressure is adequate. c. A leak is not evident. d. There is no moss, mold, or excessive staining on the fixtures. e. The water is clear and without unusual taste or odor. f. Other <p>Fire Safety The fire equipment and emergency systems appear to be functioning properly. Examples include but are not limited to the following:</p> <ul style="list-style-type: none"> a. The fire equipment appear to be in working order (e.g., there are no missing or damaged fire extinguishers). (X) b. Emergency alarm appear to be functional. (X) c. Emergency exit signs function as designed with no obstructions. (X) d. Fire extinguishers are current and placed in all required areas. e. Fire alarms and stations are clearly visible. f. Other <p>Hazardous Materials (Interior and Exterior) There does not appear to be evidence of hazardous materials that may pose a threat to pupils or staff. Examples include but are not limited to the following:</p> <ul style="list-style-type: none"> a. Hazardous chemicals, chemical waste, and flammable materials are stored properly in locked and labeled containers. (X) b. Paint is not peeling, chipping, or cracking. c. There does not appear to be damaged tiles or other circumstances that may indicate asbestos exposure. d. Surfaces (including floors, ceilings, walls, window casings, HVAC grills) appear to be free of mildew, mold odor and visible mold. e. Other <p>Structural Damage There does not appear to be structural damage that has created or could create hazardous or unreliable conditions. Examples include but are not limited to the following:</p> <ul style="list-style-type: none"> a. Secure canopies are not exposed. (X) b. Ceiling & floors are not missing or missing beyond their intended design. (X) c. Cracks, beams, supports for portable classrooms, ramps, and other structural building members appear to be intact, secure and functional as designed. (X) d. There is no visible evidence of severe cracks, chipping, mold, or damage that threatens the structural soundness. (X) e. Other <p>Roofs (observed from the ground, inside/outside the building) Roof systems appear to be functioning properly. Examples include but are not limited to the following:</p> <ul style="list-style-type: none"> a. Roofs, gutters, roof drains, and down spouts are free of visible damage. b. Roofs, gutters, roof drains, and down spouts are intact. c. Other <p>Playground/School Grounds The playground equipment and school grounds in the vicinity of the area being evaluated appear to be clean, safe, and functional. Examples include but are not limited to the following:</p> <ul style="list-style-type: none"> a. Significant cracks, trip hazards, holes and deterioration are not found. b. Open "O" necks, protruding bolt ends, and sharp pointages are not found in the playground equipment. c. Seating, tables, and equipment are functional and free of significant cracks. d. There are no signs of drainage problems, such as flooded areas, eroded soil, water damage to asphalt, or clogged storm drain inlets. e. Other <p>Windows/Doors/Gates/Fences (Interior and exterior) Conditions that pose a safety and/or security risk are not evident. Examples include but are not limited to the following:</p> <ul style="list-style-type: none"> a. There is no exposed broken glass accessible to pupils and staff. (X) b. Entry doors and gates are functional and do not pose a security risk. (X) c. Windows are intact and free of cracks. d. Windows are functional and open, close, and lock as designed, unless there is a valid reason they should not function as designed. e. Doors are intact. f. Doors are functional and open, close, and lock as designed, unless there is a valid reason they should not function as designed. g. Gates and fences appear to be functional. h. Gates and fences are intact and free of holes and other conditions that could present a safety hazard to pupils, staff, or others. i. Other 	

www.Documents.DGS.CA.gov/OPSC
forms/worksheets/fit_wrksht_rev.xls

FIT Rating System

- The FIT's rating system is based on: "good", "fair" or "poor" for each of the 15 categories and 8 groupings
- A rating of "exemplary", "good", "fair" and "poor" is the overall rating based on the entire site



Ratings Formula

- For each of the 15 categories:
"Percentage of areas in *Good Repair*" = the total # of check marks divided by (Total # Areas Evaluated – N/A's)
- For each of the 8 sections:
"Percentage of areas in *Good Repair*" = the average of the categories within each section
- Overall Rating = the average of the 8 sections

***Note: An "Extreme Deficiency" in a category will result in an automatic zero for the entire section.**

Rating Percentages

Section/Category:

Good	90% - 100%
Fair.....	75% - 89.99%
Poor.....	0% - 74.99%

Overall:

Exemplary.....	99% - 100%
Good	90% - 98.99%
Fair.....	75% - 89.99%
Poor.....	0% - 74.99%

Verifying Repairs



- Education Code (EC) 1240(c)(2)(K)(ii) gives the county superintendent the option of returning to the school to verify repairs
- LACOE will follow-up after 30 days for *Extreme Deficiencies* identified during a facility inspection

Significance of the FIT

- Adopted by **OPSC** in 2007 and revised in 2009
- Used to determine “*Good Repair*” as defined in the Education Code 17002(d)(1)
- Used for inspections by County Offices of Education for decile 1-3 Williams inspections
- Used by Districts to fulfill **SARC** and **LCFF / LCAP** requirements for all schools

What is “Good Repair”



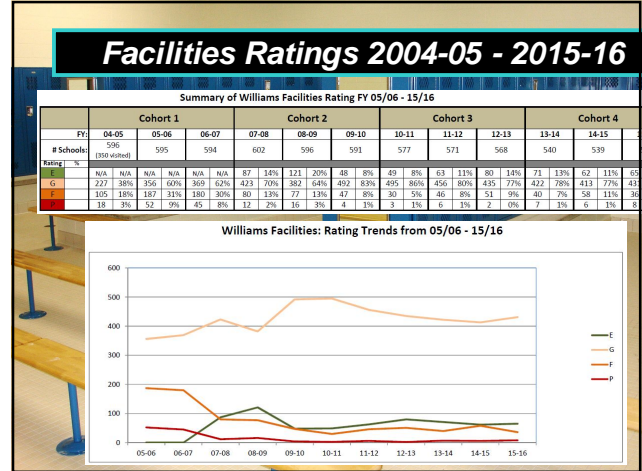
EC 17002(d)(1):

“Good Repair” can be defined as a facility that is maintained in a manner that it is **clean, safe, and functional**. Determination is based on a school facility inspection using the Facility Inspection Tool (FIT) developed by the Office of Public School Construction (OPSC) and approved by the board. A local evaluation instrument that meets the same criteria can also be used.

What is the SARC?



- **All California schools** are required to prepare an annual School Accountability Report Card (**SARC**) which provides information about the school including the condition of facilities in regards to needed maintenance to ensure **good repair**
- The **FIT** or an equivalent evaluation instrument can be used to fulfill the facilities requirement
- Use a recent (within one month) FIT



CASH FIT 2.0

○ Mission Statement

Create a viable instrument for school M&O Departments to identify, address, and fund immediate and ongoing threats to Health and Safety at California school facilities

CASH FIT 2.0

Objectives

- Go from Williams to LCAP "Beyond the FIT"
- Redefine the formula to count all deficiencies in the score

CASH FIT 2.0 Proposals

- Combine categories "Gas" and "Sewer"
- Add categories:
 - Plumbing (under Systems)
 - Earthquake Safety (under Seismic)
 - Hazardous Materials/Items
 - Maintenance Practices or Maintenance Level
- Add "conditions" so that good repair cannot be achieved if any category is poor
- Redefine the mathematical formula to count all deficiencies or define the degree of issues per room inspected

CASH FIT Guidebook

Updates needed
Review links
Consistency with FIT
Add "Best Practices
for LCAP"



LACOE Survey



CONVERSATION

Advocating Effectively for Facilities Funding in the LCAP Process

Stephen Turner, Director of Maintenance &
Operations
Mendocino County Office of Education

Local Control Accountability Plan (LCAP)– briefly

A three year plan, *formulated with stakeholder input*, adopted annually by the district board, and each school within, describing both the following:

- Annual goals with progress indicators, for all pupils & each subgroup ...to be achieved for each of the state priorities, and any additional local priorities identified by the governing board
- Specific actions, service and expenditures the district will take during each year of the LCAP to achieve the goals...including enumerating any specific actions necessary that year to correct any deficiencies in regard to...state priority #1

LCAP State Priorities influenced by facilities

1. Basic services: (Williams)
 - properly credentialed teachers,
 - Access for students to standards aligned instructional material, and
 - school facilities are maintained at a minimum in good repair as measured by *the FIT*. However local standards can and should be higher!
5. Pupil Engagement
 - School attendance rates
6. School Climate
 - Local measures including...pupil, parent and teacher sense of safety and school connectedness

Applying the LCAP process to Facilities

- Identify your stakeholders
- Meet with stakeholders to:
 - Review existing program & services and progress toward established goals
 - Receive input regarding revisions and/or additional goals
- Revise goals, actions and measurable progress indicators as needed
- Develop cost estimates
- Review revisions with stakeholders, prioritize & seek support for funding
- Implement after Board adoption
- Monitor progress

Who are your stakeholders?

- Facilities staff
- Teachers and site staff
- Students, parents
- Specific programs and their stakeholders
- Significant subgroups as defined by LCAP
- Board & Superintendent
- Districts
- Community taxpayers
- Others?



Meet with stakeholders to review progress toward existing goals and seek input

Mission: Maintenance and Operations facilitates educational success for all students by providing safe and clean educational environments, kept in good repair, that complement instructional methods. We support and collaborate with districts by providing direct services, expertise, advice, and professional development opportunities. Additional responsibilities include work safety, site security, risk management, emergency preparedness, legal, and environmental compliance.

Focus Area: Student/School/Community Educational Opportunities	Needs: Priority 1, Basic Services Goal: Good Repair Statutory Function(s): Williams Settlement Inspection	
Actions:	Fidelity/Outcomes:	Barriers/Obstacles:
2. Assure facilities at all MOOE and "Williams" schools support the LEA's LCAP implementation of Common Core Standards by being in good repair, safe, clean, comfortable, accessible, attractive and appropriate for students and staff.	2. Williams Schools have shown marked improvement over the years. MOOE: Installed new carpeting, windows and presentation/display technology in Birch building (River Center). New roof FB CTE shop and planning the facilities work program for this summer	2. Implementation of LCFF created uncertainty in programs and needs

Continuing the process

Revise/Add Goals as needed, create measures and cost estimates. Examples:

Project or Program	Measurable Outcome	Estimated Cost	State Priority/ Funding
Replace flooring in classrooms	Project completed	\$4,000 per room	#1 Basic Services Base \$
Improve classroom cleanliness as defined by site developed goals	Daily cleaning goals completed satisfactorily	Additional custodian required \$50,000 annually	#1 Basic Services Base \$
Create Reading Lab with new furnishings and equipment	Project completed	\$25,000 per classroom	#1 Basic Services & #5 Engagement Supplemental \$
Implement Emergency Response Plan	Program goals established and met	Redirecting staff time, materials expense	#1 Basic Service # 6 School Climate Base \$

Review and Prioritize with Stakeholders

Continued Process

- May require additional meetings
- Priorities vary among stakeholder groups and programs
- Facilities provides a Multi-Tiered System of Support by meeting basic needs and providing enhancements for safety and engagement as needed

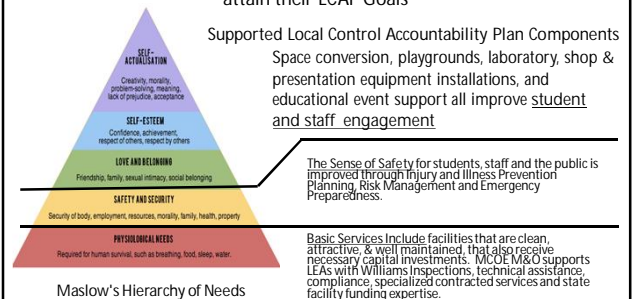
Speak the language!

Sample Priorities

1. Safety & Good Repair
2. Preserving facility Investment
3. Supporting new teaching strategies
4. Supporting needs of significant sub-groups
5. Multi-year equipment & systems replacement (Deferred Maintenance)

Progress on LCAP Goals- Facilities, Maintenance & Operations

M&O activities provide a Multi-Tiered System of Support for LEAs to attain their LCAP Goals



LCAP Three Year Planning Timeline

Year 1	Year 2	Year 3
<ul style="list-style-type: none"> July-Aug: <ul style="list-style-type: none"> Summer Construction planned & funded yr. 0 Sep- Oct <ul style="list-style-type: none"> Facility Inspections Fac. Proj. List Yr. 2 Nov- Dec <ul style="list-style-type: none"> Progress on goals Jan-Feb <ul style="list-style-type: none"> Mid-year budget rev. Bid summer const. yr. 2 Mar-May <ul style="list-style-type: none"> LCAP Stakeholder Process Budget priorities LCAP revisions June <ul style="list-style-type: none"> Public hearings Yr. 2 LCAP/Budget adopted 	<ul style="list-style-type: none"> July-Aug: <ul style="list-style-type: none"> Summer Construction Sep- Oct <ul style="list-style-type: none"> Facility Inspections Fac. Proj. List Yr. 3 Nov- Dec <ul style="list-style-type: none"> Progress on goals Jan-Feb <ul style="list-style-type: none"> Mid-year budget rev. Bid summer const. yr. 3 Mar-May <ul style="list-style-type: none"> LCAP Stakeholder Process Budget priorities LCAP revisions June <ul style="list-style-type: none"> Public hearings Yr. 3 LCAP/Budget adopted 	<ul style="list-style-type: none"> July-Aug: <ul style="list-style-type: none"> Summer Construction Sep- Oct <ul style="list-style-type: none"> Facility Inspections Fac. Proj. List Yr. 4 Nov- Dec <ul style="list-style-type: none"> Progress on goals Jan-Feb <ul style="list-style-type: none"> Mid-year budget rev. Bid summer const. yr. 4 Mar-May <ul style="list-style-type: none"> LCAP Stakeholder Process Budget priorities LCAP revisions June <ul style="list-style-type: none"> Public hearings Yr. 4 LCAP/Budget adopted

Conclusion

- Utilize the on-going LCAP process to develop long range facility plans that build in the lead-time required for major repairs and the extended planning process required to expand current sites or construct new schools
- Develop and maintain relationships with stakeholders to maximize support
- Continually communicate that facilities provide the foundation of security needed for students to feel safe and free to engage their curiosity (Maslow)
- Develop measurable standards to demonstrate progress and prove the value of the investment in facilities (response time, value of in-house staff vs. contracted repairs, projects accomplished).
- Regularly report progress and successes to Stakeholders.

Remember, we are doing
it for the students!

Good Luck & Thank You!

Stephen Turner, Director of Maintenance & Operations

sturner@mcoe.us

Mendocino County Office of Education

CSFC

LCAP

September 30, 2016

Jema Estrella
Director, Facilities and Construction
(562) 922-8981



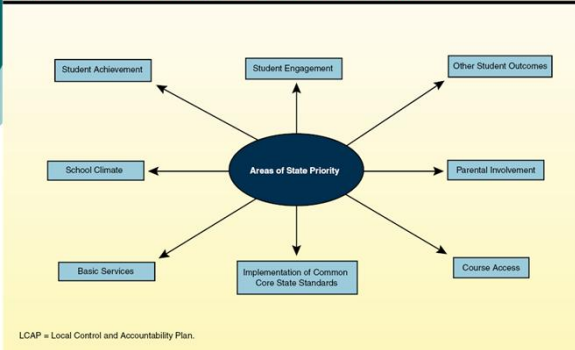
Los Angeles County
Office of Education

LCAP

- Participation in LA County
- Best Practices

Figure 7

Eight Areas of State Priority Must Be Addressed in LCAPs



Word on the street...

...very few Districts identified **"facilities"** as a goal in LCAP.



LA County

- 79 out of 80 school districts included a statement on facilities or good repair
- What did such statement look like?
- The answers vary...

Examples

Survey says:
What would it take for you to be able to say that
your child's school is the best in the world?

Goal #2 says:
Facilities Remodeling Plan which includes
parent engagement

Examples

The physical room environment lends itself to
student collaboration:

- ☐ Yes
- ☐ No
- ☐ N/A

Examples

What are our staff members doing in support of
students?

Examples

GOAL 2:
OUTCOME 3 Students will have access to facilities
that are "good" as measured by the FIT reports.

Maintain high quality condition of facilities and
grounds. Maintenance staff to complete FIT
inspections yearly.

Budgeted expenditure = \$4,678,571
Salary materials repairs related to facility upkeep

Examples

GOAL:	Conditions of Learning #3 (CL3) Attain overall facility ratings of "good" or "exemplary" repair for 100% of schools each year.	Related State and/or Local Priorities: 2.8, 4, 5, 6, 7, 8, 9, 10 COE only: 9, 10
Expected Need:	The Williams case requires that school facilities are maintained in good repair.	
Goal Applies to:	Schools: <input checked="" type="checkbox"/> All Schools Applicable High Subgroups: <input type="checkbox"/> All Students	

Expected Annual Measurable Outcomes:	100% of schools in "good" or "exemplary" repair. Metric: Facility Inspection Tool School Reports			
Actions/Services	Scope of Service		Budgeted Expenditures	
Provide general support to schools in their efforts to implement the LCAP, including basic plant services, maintenance business services, building maintenance workers, and equipment replacement.	All Schools	Base	Cort sal	\$100,000
	Districtwide	Base	Class sal	\$90,600,000
		Base	Fmp Ben	\$15,700,000
		Base	Books/Sup	\$2,500,000
		Base	Svc/Other	\$17,700,000
Supplementary services are directed to largest schools, where a substantial proportion of students are minority and low-income. These resources are intended to expedite repairs in high-need areas and contribute to the culture/climate of the sites.	All Schools	Supp	Cort sal	
	Districtwide	Supp	Class sal	\$253,500
		Supp	Emp Ben	\$335,000
		Supp	Books/Sup	\$505,000
		Supp	Svc/Other	
Provide general support to schools in their efforts to implement the LCAP, including basic plant services, maintenance business services, building maintenance workers, and equipment replacement.	All Schools	Base	Cort sal	\$100,000
	Districtwide	Base	Class sal	\$90,600,000
		Base	Fmp Ben	\$15,700,000
		Base	Books/Sup	\$2,500,000
		Base	Svc/Other	\$17,700,000

Examples

Expected Annual Measurable Outcomes:	<ul style="list-style-type: none"> No more than 1% will be inappropriately assigned. Maintain 100% of standards-aligned instructional materials. 100% of our schools at Good or Exemplary per the William Audit--Facilities <p>Metric: Results of the Williams Assignments Monitoring Report (2015-2016) Metric: Resolution of the Sufficiency of Textbooks and Instructional Materials (2015-2016) Metric: Facilities Inspection Tool School Reports</p>
--------------------------------------	--

2.2 Provide standards-aligned instructional materials. These materials will help teachers teach more effectively and provide access. 2.3 Provide well-maintained facilities. Facilities will help teachers teach more effectively and provide access.	IPA-Wide All OR: Low Income pupils English Learners Foster Youth Redesignated fluent English proficient Other Subgroups	\$500,000, Books, materials and supplies, Funded by State. Expenditure for facilities reported in 7.1
7.1 Ensure school facilities are safe, clean and maintained in good repair (as determined by the facilities inspection tool (7.1)), begin and implement the Maintenance Schedule, Repair, and Renovation schedule. These renovations and expansions will provide for an increase in instructional services (e.g. Project Based Learning, Computer Labs, Universal wireless accessibility, and modification of classrooms to support unduplicated pupil subgroups).	\$1,000,000 (transfer to Deferred Maintenance, Funded by LCFF State Materials, SPP, Funded by LCFF Base	\$1,000,000, Construction, TK/K classrooms, Funded by LCFF Base \$1,000,000, Furniture and supplies, TK/K
7.2 Audit facilities' needs again to determine additional staffing needs, including space considerations for school-based mental health partners and their service delivery. These deliveries of services will address the needs of our unduplicated pupil subgroups as well.	All OR: Low Income pupils English Learners Foster Youth Redesignated fluent English proficient Other Subgroups	\$50,000 Materials, Funded by LCFF S & C Grant \$10,000 Consultant, Fund by LCFF S & C Grant

Word on the street...

Good repair is merely a **minimum standard** and urged school district leaders to go "above and beyond" that level when drafting plans.

Jeff Vincent, Center for Cities and Schools, UC Berkeley

Survey July 2016

- Williams Facilities Meeting
- 13 out of 44 staff did not participate in LCAP at their district
- Is this enough?



BEST PRACTICES

...is there a roadmap?
...how do we get there?



1. Advocacy

- What's your level of involvement?
 1. Established
 2. Working on it
 3. Still thinking
- Outreach within the District/COE
- If we're not in the room, we won't understand the priorities
- Fit your role to district priorities



1. Advocacy

- Be authentic
 - "Don't ask stakeholders for input that you don't have a plan for using."
- Educate stakeholders on the relationship between LCAP and facilities or M&O
- Keep the focus on students
 - "How will this help us improve outcomes for students?"



2. Accountability

- Use the FIT
- Maintain a 3-year maintenance plan
- Be ready with facilities metrics, surveys, data, etc.
- Know age of buildings, equipment replacement dates, the needs of users today
- Identify actions and services needed
- Estimate costs



3. Equity

- Is RRMA sufficient for your district or COE?
- Is it adequate for needs?



4. Transparency

- Are needs clearly identified?
- Are actions and services identified?
- Are there measurable outcomes?
- Are expenditures identified?



5. Commitment

- LCAP's first years have been a learning experience for everyone
- Maintain a commitment to move the district or COE forward
- Maintain a commitment of engagement with stakeholders and the quality of LCAP
- Perform the work you committed to doing and update stakeholders



6. Focus

- Adult voice is often a proxy for students
- Students care and understand
- Consider students' voice and energy
- Ask them

7. Visibility

- Maintain a 3-year facilities maintenance plan
- Identify capital infrastructure needs
- Revise the plan as necessary
- Restore maintenance and custodial staff as needed but after understanding the district's priorities

8. Preparation

- Develop facility standards (not Ed Specs)
- Compare facility standards to FIT results
- When there is a gap, go back to #1 Advocacy



CONVERSATION





The 2016 Annual Summit

15 Minute Break

Sheraton Grand Hotel
September 30, 2016

▶ CSFC 2016 Annual Summit

California Department of Education Update

Fred Yeager



GROUND LEASES AND FACILITY AGREEMENTS

Lindsay Currier - Riverside County Office of Education
Brian W. Smith - Bowie, Arneson, Wiles & Giannone

Overview

- RCOE Facility Lease Agreements Overview/Exhibits
- Ground Leases
- Facility Use/Support Agreements
- Legal Perspective
- Best Practices
- Open Discussion

RCOE Facility Agreements Overview

- RCOE Snapshot
 - ▣ 23 School Districts in Riverside County
 - ▣ Ground Leases – 71
 - Head Start - 12
 - Migrant Head Start - 7
 - Career Tech Education - 4
 - Juvenile Hall - 2
 - ▣ Leroy Green 40 Year Ground Leases (LPP) – 46
 - Special Education - 41
 - Community School - 5
 - ▣ Facility and Support Agreements – 17 District Agreements
 - ▣ Facility Use Agreements (Income) – 7

Leroy Green 40 Year Ground Leases – Lease Purchase Program

- Leroy Green 40 Year Ground Leases (LPP) – 46
 - ▣ Special Education - 41
 - ▣ Community School - 5
- Challenges with expiring ground leases
 - ▣ Agreements across the county with various school districts
 - ▣ 10 Special Education ground leases expiring by 2023
 - ▣ Current environment is difficult to achieve Special Education Integration
 - ▣ Districts already having discussions to take over classrooms
 - ▣ Some agreements specific others state square footage on campus

Leroy Green 40 Year Ground Leases – Lease Purchase Program (Cont.)

- Options
 - ▣ Extend agreement
 - ▣ Turn over to district
 - ▣ Remove property
- Opportunities
 - ▣ Forces the integration discussion and universal design
 - ▣ Potential funding from Prop 51 to construct/modernize joint projects
- Begin discussions NOW so have time to plan

Facility & Support Agreements

- Executed when RCOE leases space from district
- Agreements with 17 of our 23 Districts
 - ▣ Multiple sites on one agreement with the district
- Annual lease cost options (Old SELPA Rate)
 - ▣ Space - \$2,000/classroom
 - ▣ Custodial - \$2,378
 - ▣ Utilities (Gas, Water, Electric) - \$750
 - ▣ Repairs - \$817
 - ▣ Grounds Support - \$412
 - ▣ Admin Fee 5% - \$317
- Total = \$6,674/classroom per year

Facility Use Agreements

- Executed when districts are using county owned space (income agreements)
- Agreements with 9 of our 23 school districts
- Typical agreement charges only for direct use of space at \$2,000/classroom annually

Legal Perspective

- Lease Negotiations
 - ▣ Long-term agreements: be specific and clear
 - ▣ Keep successors in mind
 - ▣ Anticipate future changes in circumstances
 - ▣ Be realistic: understand other party's needs
 - ▣ Consider requirements associated with funding
 - ▣ Start with your form of agreement if possible

Legal Perspective (Cont.)

- Specific Clauses
 - ▣ Initial construction and installation
 - ▣ Exclusive-use and shared-use areas
 - ▣ Coordination of activities and events
 - ▣ Responsibility for services
 - ▣ Allocation of costs
 - ▣ Allocation of risks
 - ▣ Ownership of property
 - ▣ Exit ramp: termination

Best Practices

- Gather termination dates
- Develop and maintain relationships NOW
- Discuss future needs with your districts
- Negotiate a fair standard rate
- Share risk
- Set up your successor for success
- Document everything!
- Work with legal counsel

Contact Information

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- Brian W. Smith
Bowie, Arneson, Wiles & Gianone
949 851 1300
BWSmith@bawg.com

Discussion



The 2016 Annual Summit

*Lunch will be served in
Morgan's Restaurant*

Sheraton Grand Hotel
September 30, 2016

CSFC Summit

Energy/ Proposition 39 Update

Anna Ferrera
SEC Executive Director



SCHOOL ENERGY COALITION



School Energy Coalition: Who We Are

- Formed in 2011 – Schools Districts, Community Colleges and Associate Members statewide
- Our Mission: Funding and technical assistance for school energy and water projects that create utility bill savings for K-14 schools.
- Advocacy before State and Federal agencies on Legislation and Rates from the LEA perspective
- Provide up-to-date information to SEC Members regarding Proposition 39 implementation and other energy and water concerns.



2016 Cap and Trade

- Addressing Climate Change and lowering greenhouse gas (GHG) emissions continues to be a high priority for the State.
- SB 32 (Pavley) requires the State Air Resources Board (ARB) to ensure that statewide GHG emissions are reduced to 40% below the 1990 level by 2030. Signed with much fanfare by the Gov.
- In addition, the Gov and the Legislature agreed on how to spend remaining \$1.4 billion of unallocated auction revenue - \$900 million of for fiscal year 2016-17 and reserving \$462 million for appropriation in future years.
- Concern continues over lower revenue in last auction round. It remains to be seen whether auction revenue will rebound given legal challenges over whether it is defined as a tax on business and therefore should have required a 2/3 vote by the Legislature.
- Weighted toward transportation concerns and disadvantaged communities.



Cap and Trade: Companion Bill

- AB 197 (Garcia) is the companion to SB 32 (Pavley). Legislature concerned about having more control over this program and funding.
- The bill will add two Members of the Legislature to the State Air Resources Board as ex officio nonvoting members, and require the state board to establish the initial staggered terms.
- The bill would also create the Joint Legislative Committee on Climate Change Policies consisting of at least three Members of the Senate and at least three Members of the Assembly and would require the Committee to ascertain facts and make recommendations to the Legislature and to the houses of the Legislature concerning the state's programs, policies, and investments related to climate change, as specified.



School Energy Legislation

- SB 1207 (Hueso) ECAA Extension – Extends the Energy Conservation Assistance Act (ECAA) framework that includes the low-interest loan program well-used by school districts for energy efficiency projects throughout the state. Signed by the Governor.
- AB 1928 (Campos) Resets deadlines for CEC to establish water efficiency performance standards and labeling for landscape irrigation equipment by Jan. 1, 2018. Signed by the Governor.
- AB 1637 (Low) Increases the funding available for the Self-Generating Incentive Program (SGIP)/battery storage incentive program. This bill is on the Governor's Desk.
- AB 2868 (Gatto) Accelerates Battery Storage Statewide . Govs Desk
- SB 1041 (Hueso) School Electricity - To provide for a "just and reasonable" school electricity rate that reflects the costs of providing that service. Dead: Held in Appropriations
- AB 2120 (Weber) Intervenor Comp – Would have allowed school district "consortiums" and COEs to apply for reimbursement for resources expended on CPUC energy proceedings. Held in Sub



State Electricity Transmission Regionalization

- The State held discussions about the idea of creating a regional transmission system joining the California System Operator (CAISO) with PacificCorp utilities, a company that currently serves six Western states.
- Many concerned parties, including consumers and publicly-owned utilities, expressed deep concerns over this idea and what it might do to rates and independence over the management of the statewide transmission grid.
- The discussion was tabled, but Governor expressed strong interest in taking this up again next year.



Proposition 39: Original State Legislative Objectives

- Create good-paying energy efficiency and clean energy jobs in California.
- Leverage existing energy efficiency and clean energy programs to increase economic and energy benefits.
- Provide full public accounting for money spent.

Source: California Energy Commission



Proposition 39: State and District Goals

- Success for the State through *energy* savings and job creation
- Success for districts through *cost* savings
- Ongoing savings for the lifetime of the project in light of anticipated electricity rate increases
- Schools may invest savings back into facilities and maintenance given the lack of state bond funding
- Changing the way we look at our school facilities going forward



Proposition 39: Eligibility

- Eligible Projects: Energy efficiency measures and clean energy installations – Recommend Efficiency First
- Eligible Applicants: LEAs: County Offices of Education, School Districts, Charter Schools, State Special Schools and Community Colleges
- All Facilities Within the LEA: School site facilities include: classrooms, office facilities, auditoriums, multi-purpose rooms, gymnasiums, cafeterias, kitchens, pools, and special purposes areas



2016-17 Governor's Budget January Proposal Supports Funding for Prop 39 – Focused on K14

	2013-14	2014-15	2015-16	2016-17 Approved
K-12 ADA Grants	\$381 M	\$279 M	\$313.4 M	\$398.8M
Community Colleges	\$47 M	\$37.5 M	\$39.6 M	\$49.3M

Allocations are expected to be announced by the CDE by October 30, 2016

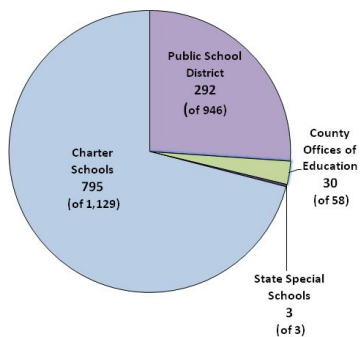


Proposition 39 Highlights 2016

- New Final Deadline for accepting Energy Expenditure Plans (EEP) is August 1, 2017.
- SIR Change: From 1.05 to 1.01
- Maintenance Percentage Change: Cost savings from 2 to 3 percent of project cost
- Zero Net Energy (ZNE): Changed from LEA wide to schoolsite. Those that qualify may use alternative methodology for determining the energy cost savings when one schoolsite is ZNE.



LEAs Not Participating: Discussion



A total of 1,120 (of 2,136) LEAs not participating, as of August 30, 2016.



Down the Final Stretch: School Districts Prepare for Reporting under Program

- Keep reporting in mind throughout when expending Prop 39 funds. No sole source contracting.
- Review and make use of the CEC's online and final reporting tools and review what is expected in the Guidelines and in the Handbook. Become familiar with these tools.
- Continue to discuss with your staff or consultant about how to track and record savings for final reporting, and future projects – master planning.
- SEC alerts: Be first to know when state actions are being contemplated or taken on energy and water and Prop 39.



Project\$ are advancing!



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Questions?



Contact Information

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*A former appointee and Senior
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Department of Energy and
former staff to the California
State Senate on energy issues.*



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► CSFC 2016 Annual Summit

CSFC Discussion: The Evolving Role of COEs: Services to Districts

- *What services does your COE provide to districts?*
- *What services and programs might you consider in the future, given the changes brought by LCFF?*
- *How does this affect what we want from a future state facilities program?*
- *What COE needs should be addressed?*



▶ CSFC 2016 Annual Summit

Californians for School Facilities Update



Thank you for Attending the Summit!

Please take a moment to fill out your
evaluation form.

Sheraton Grand Hotel
September 30, 2016