

Sylvan Union School District Long-Range Facilities Master Plan

Part 1 - Facilities Expansion

May 30, 2017

Sylvan Union School District
Business Services Department
605 Sylvan Avenue
Modesto, CA 95350

Notes:

1. This plan draft provides an update from the Facilities Master Plan last updated in 2003
2. Items in Red require further investigation.
3. List of Exhibits are not included, but will be included with the next update planned for August, 2017.
4. The May 30, 2017 Draft provides a complete overview of all known planned housing developments and the development's potential impact on enrollment. Planned housing starts have not changed since presented to the board in 2015, except for the Crossroads West Subdivision which has been updated in this plan.
5. The Crossroads West projected housing has been updated with new information received in Mach 2017.

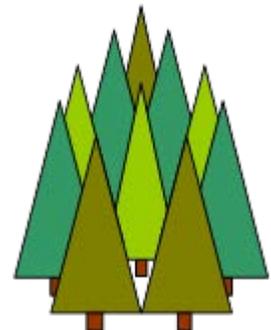


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Long-Range Facility Master Plan

Executive Summary

Work on this Long-Range Facilities Master Plan began in the Summer of 2014. Current Enrollment, New Hosing, and Projected Enrollment have been provided to the Board of Trustees over the past three years, and this document is an update to the last Long Range Facility Master Plan prepared by the Business Services Department in 2002. District Enrollment grew rapidly between during 2000 to 2008 and through early planning and the 2002 Facilities Master Plan, the district was able to strategically plan for and build three new elementary schools and one middle school from 2003 through 2007. District Enrollment n from 6,692 in 2000, to 8,701 in October 2016, an increase of 2,009. The District was able to manage this growth through strategies identified in Section IV - *Options/Solutions*. The attendance boundary process discussed in Section VII - *Bringing New Facilities Online*, was used with great success for the boundary adjustment necessitated by the opening of Freedom Elementary School.

The Long-Range Facilities Master Plan is a tool to aid staff in implementing strategies for growth. As the District grows, the plan should be reviewed and updated as needed. There is no hard and fast recipe that a district can follow to manage growth. Sylvan was in a strong growth cycle from 1997 through 2010. Although growth has slowed since 2010, it is projected to remain strong over the next several years when the Village One housing resumes in the Tivoli area of the subdivision. An additional large subdivision is in the preliminary stages in Crossroads referred to as “Crossroads West” in Riverbank. Staff will need to monitor this growth in both areas very carefully.

The District will most likely need to build three more schools over the next 10-15 years. The district’s schools are nearing capacity. It is not clear when either Tivoli or Crossroads West will actually build. Based on information provided by the developers of the Crossroads Community in Riverbank, building could be expected to begin in the next five years, with complete build out anticipated over the following 10 years. It is anticipated that these homes from both subdivisions will generate approximately 1,362 K-5 students and 808 middle school students.

If the District approaches the projected growth proactively, it will be manageable. Conversely, if neighborhoods come on line rapidly and the District has not kept pace with the development, the District could find itself in a facilities crunch especially at the middle school level. Staff needs to monitor growth, provide timely information to the Board of Trustees, and utilize the strategies identified in this plan to manage the growth that is on the horizon. Finally, the Board of Trustees will need to make decisions regarding school site locations and the timing of property purchases.



Belpassi School Early 1900's

Financing mechanisms for new schools are in place, but may need to be altered, and cooperative planning has taken plan with the cities and developers. To its credit, the District has been very proactive in the area of facilities planning over the past 15+ years, and some of the major hurdles facing districts that are growing have already been cleared. Continued success in the area of facilities planning can be achieved by continued proactive planning, responsiveness to changing demographics, and timely decision making.

Executive Summary Update

Yvonne Perez

Assistant Superintendent Business Services

May 28, 2017

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History, Purpose, and Overview

The Sylvan Union School District is located in the northeast portion of Modesto in the county of Stanislaus serving students in grades kindergarten through eight. The District was formed in 1946 with the consolidation of Belpassi, McHenry, and Cole School Districts. The first school, Sylvan Elementary, opened its doors to students on November 15, 1949. The average daily attendance that first year was 243.



The Sylvan Union School District covers a geographic area of approximately 21.02 square miles and spans a part of the City of Riverbank, the City of Modesto, and some unincorporated areas of Stanislaus County. What began as a rural district serving primarily an agricultural community has grown to serve over 8,077 students with thirteen schools. Although the district is experiencing a small decline in enrollment, the Sylvan Union School District is expected to continue to grow as former agricultural land is converted into housing developments.

The purpose of the Long-Range Facilities Master Plan is to provide a framework for dealing with both facility expansion (growth) and modernization issues. This plan is intended to serve as a guide and suggest possible courses of action to be taken as the District expands and ages.

The Long-Range Facilities Master Plan can be separated into two main categories:

1. Facilities Expansion
2. Facilities Modernization

Expansion issues are generally dependent on external factors such as the rate of the community population growth and development. Modernization needs are more a function of technological advancement, changing teaching requirements and the age of the facility.

Facilities Expansion

In June 1999 (rev. 4/2016), the District completed its School Facility Needs Analysis. This document was compiled in response to SB 50. SB 50 (Chapter 407, 1998), provides for new school facilities fees to be assessed by eligible school districts against new residential development. The analysis identified:

- Projected Development
- Projected New Housing Square Footage
- Projected Student Generation From New Housing
- New School Site Requirements

The information provided in this analysis will be used as a basis for projecting the growth figures that will be used in developing the expansion portion of the Facilities Master Plan. Because enrollment growth happens over time, expansion scenarios can be divided into two general categories:

1. Construction of New Permanent Facilities
2. Interim (temporary) Housing Options.

While permanent facilities are easier to plan for than interim housing, they are more difficult to finance. Conversely, interim housing is easier to pay for, but more difficult to plan for because of changing needs and enrollment fluctuations. The challenge for the District is to find and fund appropriate solutions for the growth that the District will face over the coming years.

The expansion portion of the plan will work to identify and answer the following questions:

1. What do we have?
2. What we will need?
3. What can/should we do?
4. When should we do it?
5. How do we pay for it?
6. Now that we have it, what do we do?

Facility Modernization

Facility Modernization is a general term that encompasses a multitude of projects ranging from capital improvement projects, major repairs, upgrades, and maintenance to infrastructure; such as: HVAC, electrical capacity expansion, and computer network wiring. Modernization projects tend to be driven more by site needs and the age of the facility than by the external factors that drive facility expansion.

As modernization plans are formulated and developed, the plan for each site should be structured to bring it into conformity with the standards adopted by the District for its schools and support services. Districtwide facility standards will be developed as a part of this modernization plan. These standards will then serve as the driving mechanism behind modernization planning.



Sherwood Elementary Circa 1963

This modernization plan is not an independent process, but will work in concert with the other plans in the District such as “The Three Year Educational Plan” and “The Deferred Maintenance Plan”. The plan and the process developed in this document should serve as a guide for the projects and help identify what should be done at each site.

The modernization portion of the plan will work to identify and answer the following questions:

1. What do we have?
2. What we will need?
3. What can/should we do?
4. When should we do it?
5. How do we pay for it?



Somerset Middle School - Opening Day 1966

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**Current Facilities
(What do we have?)**

Existing Facilities

The Sylvan Union School District currently operates 10 elementary schools and three middle schools. The current grade configuration is K-5 for all the elementary schools and 6-8 for the middle schools. All schools are on a traditional calendar. The District administrative offices are housed at a separate location on Sylvan Avenue. The Food Service department is located on the campus of Sylvan Elementary School. The Corporation Yard, which includes the warehouse, vehicle service bay, workshop, maintenance and transportation department offices, bus parking, and equipment yard, is located at the southern portion of the Sylvan Elementary site on Coffee Road. A District map is included as **Exhibit 1**.

The District purchased property on which Elementary School #11 will be constructed. This property is located at the corner of Aria Way and Bridgewood Way, situated North of Sylvan Avenue, and East of Oakdale Rd in Village One. It is approximately 11 acres in size and is identified in the City of Modesto Village One Specific Plan as an elementary school site.

School Characteristics

The physical characteristics of each school and the original construction dates are set forth in the following table.

School Facilities Characteristics

School	Grade	Acreage	Building Area Square Feet*	Year Constructed
C.F. Brown	K-5	9.71	43,261	1971
Orchard	K-5	11.07	48,405	1994
Sherwood	K-5	10.12	42,567	1963
Somerset Middle School	6-8	23.51	82,121	1966
Standiford	K-5	9.00	39,874	1960
Stockard Coffee	K-5	10.00	42,991	1975
Sylvan**	K-5	11.67	43,500	1949
Elizabeth Ustach Middle School	6-8	17.20	86,066	1993
Woodrow	K-5	9.98	48,237	1965
Dan Savage Middle School	6-8	20.30	96,464	2007
Mary Ann Sanders	K-5	10.01	50,452	2006
Crossroads	K-5	10.15	54,295	2007
Freedom	K-5	8.99	42,280	2003
District Office	Support	1.75	9,856	1975, 2010
Corporation Yard***	Support	**	12,599	2010
Food Services	Support	**	11,171	2009
Totals		163.46	754,139	

*Includes relocatable classrooms **Corporation Yard included with Sylvan.

Class Size Standards

The District currently employs state loading standards of an average of 24 students per room for transitional kindergarten through third grade in regular education classrooms and an average of 32 students for grades four through eight.

Special education and resource class sizes vary by program and by site. Ideally these classes typically contain 10 to 12 students. These programs sometimes use smaller rooms instead of regular classrooms as much as possible.

Operating Capacity

Theoretical operating capacities, for purposes of this document, are calculated using the District's class size standards and available space. These derived figures, in the form of raw numbers, have not been adjusted by individual site requirements.

In this document, theoretical capacity is divided into the following two categories:

1. Standard (Operating) Capacity (Net Capacity)
2. Impact (Operating) Capacity (Gross Capacity)

Standard Capacity is defined as the maximum utilization of all available teaching stations (classrooms).

Impact Capacity is defined as maximum utilization of all potential teaching spaces (classrooms and other areas) to the extent that educational quality is not compromised. In essence, the following question was asked: To what extent can the District maximize use of the facility space available without it resulting in a detriment to educational quality?

Standard Capacity

The theoretical standard capacity for elementary schools is calculated by multiplying the average classroom loading times the number of classrooms. The theoretical standard capacity calculations for middle schools are more complex than for elementary schools and involve adjustments for additional factors, such as, scheduling, special use classrooms (music), physical education classes, etc.

Rooms designated as pullout rooms, computer labs, libraries, and counseling centers are not included in standard capacity calculations. Although these support spaces fulfill critical educational needs, it is important to understand that they do not contribute to the calculated standard capacity of the schools.

Impact Capacity (Gross Capacity)

Theoretical impact capacity looks at the entire facility and the space available, not just classrooms. Questions such as:

- How can each space be utilized to its maximum potential?
- How can schedules and room uses be altered to add more teaching stations?
- Could spaces normally reserved for other uses be used as classrooms?

Theoretical impact capacity takes the standard capacity and adds in the spaces that could be utilized in the event that all potential spaces are needed for teaching. These potential spaces could be “captured” from pod rooms, pull out classrooms, etc. For both the standard and impact capacity, each site has been evaluated on a case-by-case basis to determine the most efficient use of the space available.

Campus Capacities

Standard and impact capacities for each school site vary from year-to-year depending on grade configurations, enrollment, room use, and class size standards. For this reason, campus capacities should be calculated and evaluated each year.

In addition, other less obvious factors, such as, utility and power availability, food service capabilities, and class schedule flexibility, etc., affect actual campus capacity. Even though a campus shows a calculated theoretical capacity of any given number, placing that many students on the same campus may create safety, administrative, traffic, transportation, and/or supervision problems.

To have the maximum loading of students in every class in every period of the day at every school may not be feasible due to scheduling, etc. For this reason, not every campus can operate at the maximum calculated impact capacity, and in some cases, the standard capacity may overtax the site.

Each campus should be evaluated on a case-by-case basis. All factors contributing to capacity should be taken into consideration to determine what loading level is appropriate for each site. The appropriate loading level for each campus will change from year to year. **Exhibit nos. 2 through 5** are presented to illustrate where space might exist. These figures were generated on a space availability basis only and have not been adjusted for any site-specific factors that might exist.

State Capacity

For the purposes of funding new schools, the Office of Public School Construction (OPSC) calculates enrollment, capacity, and funding eligibility for each District using a complex set of formulas. These formulas are found on the following OPSC forms:

- ❑ SAB 50-01 Enrollment Certification/Projection
- ❑ SAB 50-02 Existing Building Capacity
- ❑ SAB 50-03 Eligibility Determination

All districts that apply for funds from the OPSC under the State School Facility Program are required to complete these forms. The funding arm of the OPSC, the State Allocation Board,

approved the Sylvan Union School District's enrollment, capacity, and funding eligibility on June 26, 2002. **The District's capacity as calculated on Form SAB 50-02 is 6,148. See Appendix A for SAB Forms 50-01, 50-02, and 50-03.**

As will be shown later, the capacities calculated by the District for this report are significantly more than the figure determined by the State on SAB 50-02. It is important to keep in mind that "capacity" as calculated on the State forms is much different from the "standard" and "impact" capacities discussed above and shown in the appendix. - **The capacity calculated on Form SAB 50-02 is used to determine construction eligibility on Form SAB 5030.** This eligibility translates to funding dollars for new construction. It is therefore advantageous when seeking State construction funding for the District to have as low of a capacity as possible when compared against enrollment.

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Projected Enrollment (What will we need? - Part I)

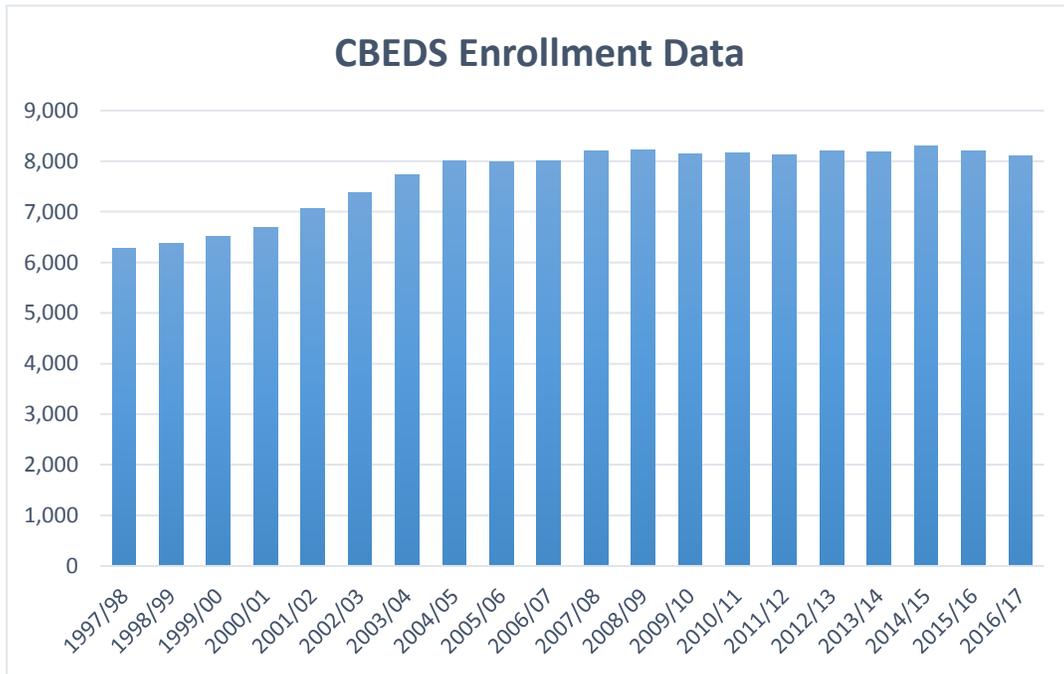
Growth Trends

Prior to projecting where the District's enrollment will be going over the next decade, it is important to take a look at where it has been. The table below lists growth trends over the last 20 years, and provides a projection for the next 2 years.

School Year	Enrollment (CALPADS)	Annual Change	Cumulative	Percentage Change
1997/98	6,282	-118	2,098	-1.84%
1998/99	6,373	91	2,189	1.45%
1999/00	6,515	142	2,331	2.23%
2000/01	6,692	177	2,508	2.72%
2001/02	7,071	379	2,887	5.66%
2002/03	7,377	306	3,193	4.33%
2003/04	7,733	356	3,549	4.83%
2004/05	8,014	281	3,830	3.63%
2005/06	7,991	-23	3,807	-0.29%
2006/07	8,006	15	3,822	0.19%
2007/08	8,211	205	4,027	2.56%
2008/09	8,214	3	4,030	0.04%
2009/10	8,139	-75	3,955	-0.91%
2010/11	8,170	31	3,986	0.38%
2011/12	8,126	-44	3,942	-0.54%
2012/13	8,194	68	4,010	0.84%
2013/14	8,190	-4	4,006	-0.05%
2014/15	8,294	104	4,110	1.27%
2015/16	8,195	-99	4,011	-1.19%
2016/17	8,107	-88	3,923	-1.07%
2017/18	8,156	49	3,972	0.60%
2018/19	8,151	27	4,108	0.33%

10 Yr Average	1998-2008	2.73%
10 Yr Average	2008-2018	0.17%
20 year Average	1987-2017	1.21%

The following graphical illustration shows that while the district has experienced slight declines in enrollment, enrollment over all is remaining consistent.



Growth when occurring is primarily in select areas; therefore the impact is not spread evenly throughout the district. Future projected growth based on identified housing projects will affect certain schools more than others and will require bussing to schools to accommodate anticipated growth in the Northern and Eastern areas of the district.

Student Generation Rates

Single family student generation rates to calculate future facility needs are calculated by comparing the number of new homes built and occupied during the five-year period to the number of students enrolled by grade. Multiple-family student generation rates are based on two separate projects completed and occupied in northeast Modesto during the past ten years.

The student generation rates for the District are as follows:

Grades	Single Family Dwellings	Multi-Family Dwellings
K-5	.280	.083
6-7-8	.150	.111

For each new single home constructed, approximately 1/4th of an elementary student and 1/6th of a middle school student is added to the District’s enrollment. For each multi-family dwelling constructed, approximately 1/10th of an elementary student and 1/10th of a middle school

student is added to the District’s enrollment. For every 100 single-family homes constructed, approximately 28 elementary and 15 middle school students are generated.

The following table illustrates the calculation for student generation for the planned Crossroads West Development.

CROSSROADS WEST STUDENT GENERATION PROJECTION							
Land Use	Acreage	Units/Acre	Estimated Units	Generation Rate for Elementary	Projected Enrollment Grades TK-5	Generation Rate for Grades 6-8	Projected Enrollment Grades 6-8
LDR	111.92	8.00	895.36	0.28	250.70	0.15	134.304
MDR	119.91	12.00	1,438.92	0.28	402.90	0.15	215.838
HDR	10.50	16.00	168.00	0.083	13.94	0.11	18.648
Total	242.33				667.54		368.79
Current Riverbank Students attending Middle School							600.00
Projected Riverbank Middle School Students at full build out							968.79

Projected Growth - New Housing

The projected number and size of new housing units to be built over the next five years was determined based on approved subdivision maps with Modesto City and City of Riverbank regarding likely construction of additional housing over the next 10-15 years.

The Sylvan Union School District updates projected occupancy schedules for all subdivisions within its jurisdiction every two years through contacts with the developer or city and county planning staff, in consultation with Modesto City Schools.

Looking over the next five years, 396 family units are potentially slated to be built in already entitled specific plan areas. Using the student generation rate from above, housing for an additional 143 elementary students and 104 middle school students must be planned in order to meet the demands of possible short term growth.

The summarized table on the following page, illustrates the impact of new housing in the short term.

Years 1-5 Projected Housing Starts

		Lots	Elementary	Middle	Total	School Affected
Cornerston Project	Riverbank	115	32.2	17.25		
KB Homes			9.545	12.765		
Sean MacDiarmid			41.745	30.015	71.76	Crossroads
916-945-3886						Ustach
SIFA 1998-1						
075-099-0-53						
In-Progress						
Rose Villa	Modesto	114	Elementary	Middle		Stockard Coffee
Corner of Mable and Oakdale			31.92	17.1		Sylvan
KB Homes			9.462	12.654		Ustach
Shawn			41.382	29.754	71.14	
916-945-3886						
SIFA 1994-1						
Wisdom Place	Modesto	16	Elementary	Middle		Orchard
Wisdom and Merle			4.48	2.4		Savage
Barbara J. De LaMare			1.328	1.776		
DF Engineering, Inc.			5.808	4.176	9.98	
209-529-7450						
APN: 077-007-037						
Developer Fees						
Hillglen Parks	Modesto	62	Elementary	Middle		Freedom
Southeast Corner of Caden/Hillglen			17.36	9.3		Ustach
Florsheim Land Company			5.146	6.882		
SIFA 1994-1			22.506	16.182	38.69	
075-099-0-53						
10 acres						
Lincoln Parks	Modesto	58	Elementary	Middle		Freedom
SW Corner of Kodiak & Lincoln Oak			16.24	8.7		Ustach
Florsheim Land Company			4.814	6.438		
SIFA 1994-1			21.054	15.138	36.19	
077-062-001						
9.5 Acres						
Trails at Dry Creek	Modesto	31	Elementary	Middle		Freedom
Near Clause and Briggsmore			8.68	4.65		Savage
California Builder Services			2.573	3.441		
Developer Fees			11.253	8.091	19.34	
Total Projected Students from New Housing			Elementary	Middle		
			143.748	103.356	248.00	
Current Enrollment			5,159	2,948	8,107.00	
Total Projected Students Years 1-5			5,303	3,051	8,354.10	

Long Range Growth (Five Years & Beyond)

Looking out over the next five years, 3,193 family units are potentially slated to be built in the Tivoli area, an already entitled specific plan area. Using the student generation rate from above, housing for an additional 695 elementary students and 440 middle school students must be planned in order to meet the demands of long-range growth.

Crossroads West is a new subdivision currently under development in the City of Riverbank. Based on preliminary plans prepared by the City of Riverbank planner, 2,501 units are planned. Using the student generation rate from above, housing for an additional 667 elementary students and 369 middle school students must be planned in order to meet the demands of long-range growth.

6-20 Years Projected Housing Starts						
			Lots	Elementary	Middle	New Elementary
Tivoli	Modesto	LD	2,185	611.80	327.75	
		HD	1,008	83.66	111.89	
				695.46	439.638	1,135.10
Crossroads West	Riverbank	LD	895	250.60	134.25	New Elementary
		MD	1,438	402.64	215.70	New Middle
		HD	168	13.94	18.648	
						-
			667.18	368.60	1,035.78	
Total Projected Students from New Housing Years 1-20				1,506.39	911.59	2,417.98
Current Enrollment				5,159	2,948	8,107.00
Total Projected Students Years 1-20				6,665.39	3,859.59	10,524.98
<i>Difference</i>						2,417.98

Taking into consideration growth projections over the next five years and beyond, it is possible for new housing developments to generate 2,418 new students (1,506 elementary students and 911 middle school students). Assuming enrollment trends remain at their current level, the District's total projected enrollment will reach 10,525 students at build-out of currently identified development areas. The time frame for completion of this development is estimated between five and twenty years. The table below summarizes these enrollment projections.

Projected Enrollment Summary

Grade Configuration	Enrolment October 1, 2016	Projected Add. Enrollment At Build-Out	Total Enrollment
Elementary (K-5)	5,159	1,506	6,665
Middle School (6-7-8)	2,948	912	3,860
Total	8,107	2,418	10,525

In light of the projected enrollment and the cost of facilities, these numbers and figures should be viewed as guidelines for planning and not an exact prediction of what will be needed. What is important, is the magnitude of the District's need for facilities, a general understanding of the school configuration, and a demonstration of the impact of new housing development on the District.

As shown in the table above, capacity for approximately 1,506 additional elementary students and 912 middle school students will be needed by the time the District reaches build-out. This translates into two elementary sites and one middle school site.

Facility Requirements (What will we need? – Part II)

New Facility Requirements - Schools

Prior to discussing facility requirements, mention needs to be made of the new State School Facility Program and State construction eligibility. As mentioned previously, the District's capacity as calculated on the **OPSC's Form SAB 50-02 is 6,148**. When the District applies to the OPSC for funding on the next school, new five-year enrollment projections will be recalculated and updated using the October 2002 CBEDS data on a new Form SAB 50-01, Enrollment Certification/Projection.

It is important to keep in mind that the enrollment, capacity, and eligibility as calculated on State forms SAB 50-01, 50-02, and 50-03, do not necessarily correlate to the enrollment and capacity discussed in this report. Though related, they are somewhat different.

Elementary and Middle Schools

New elementary schools are designed to accommodate approximately 800 students. New middle schools are designed to house approximately 1,200 students. Current mapped subdivision lots within the District will generate 144 elementary students and 104 middle school students over the next five years if the planned houses are constructed. Based on these figures, the District has sufficient capacity to accommodate projected growth in the next five years.

Current mapped subdivision lots within the District will generate 1,506 elementary students and 912 middle school students over the next 6-20 years if the planned houses are constructed. Based on these figures, the District will need to build two elementary schools and one middle school.

The District participates in the Schools Infrastructure Financing Agency (SIFA) with the Modesto City High School District. SIFA is a Mello-Roos agency created to partially finance the construction of new school facilities from developer fees generated by new construction within the District's boundaries. Modesto City Schools Planning Department has indicated a new SIFA agreement would need to be written for any future schools. Since enrollment growth actually determines facility needs, the timing of the construction of new facilities is not easy to pinpoint. The financing aspect of the SIFA agreement will be discussed in Section VI - Funding.

Costs

There are four basic components to the cost of a new school:

1. Land Acquisition Costs
2. Site Development Costs
3. Design Costs
4. Construction Costs
5. Furniture and Equipment Costs

Land Acquisition Costs - Based on consultation with local appraisers and recent land sales activity, property that will need to be acquired in the future for school sites is ranging from **\$100,000 per acre to \$150,000 per acre**. For the purposes of this calculation, a mid-range of **\$125,000 per acre** is used. Elementary schools sites are generally 10 acres in size and middle schools are generally 20 acres in size. Based on this information, land acquisition costs are as follows:

<u>Site</u>	<u>Estimated Land Acquisition Costs</u>
Elementary	10 acres @ \$270,000 per acre = \$2,700,000
Middle School	20 acres @ \$270,000 per acre = \$5,400,000

Site Development Costs - Site development costs are things such as curbs, sidewalks, utility extensions, road improvements, etc. These costs are highly dependent on the exact location of the site and its proximity to finished roads and other infrastructure and utilities. Until the specific design for each site has been completed and the timing of the school development relative to surrounding properties are known, an exact site development cost for all sites cannot be determined. Site development costs are estimated to be approximately **\$1,300,000**. Based on that information, the following site development costs have been determined:

<u>Site</u>	<u>Estimated Site Development Costs</u>
Elementary Site	\$1,620,000
Middle School Site	\$2,160,000

Design Costs – Design costs are usually based on a percentage of the construction cost. Typically, architects charge approximately 7% to 8%. It is possible to negotiate a fixed fee. Based on the estimated construction costs, design costs for use herein are figured at 8% of the construction cost. They are as follows:

<u>School</u>	<u>Estimated Design Costs</u>
Elementary	\$1,715,368
Middle School	\$3,279,776

Construction Costs – School construction can vary significantly depending on the design, type of construction, and educational requirements of each specific site. In general, current estimated construction costs for a new school range from **\$400 to \$450 per sq ft**. **\$425 per sq ft** was used in this estimate.

<u>School</u>	<u>Estimated Construction Costs</u>
Elementary (50,452 sq ft)	\$21,442,100
Middle School (96,464 sq ft)	\$40,997,200

Furniture and Equipment Costs – Furniture and equipment are fairly easy to estimate. Furniture and equipment costs are budgeted as follows:

<u>School</u>	<u>Estimated Furniture and Equipment Costs</u>
Elementary	\$900,000
Middle School	\$1,140,000

Summary of Estimated Costs

The total estimated cost to purchase and construct both elementary and middle schools is shown in the table below. Land and construction costs fluctuate considerably over time, primarily escalating. These figures are current as of the date of this document and should be updated regularly.

Component	Elementary School	Middle School
1. Land Acquisition	2,700,000	5,400,000
2. Site Development	1,620,000	2,160,000
3. Design	1,715,368	3,279,776
4. Construction	21,442,100	40,997,200
5. Furniture and Equipment	900,000	1,140,000
Totals	\$28,337,468	\$52,976,976

Planned Capacity

The following table compares the projected enrollment and projected capacity of identified sites for the District at build-out. Build-out can be defined as when all currently planned housing development has been completed. As more areas are slated for development, the District will need to work with the cities of Modesto and Riverbank to plan for additional school sites, and have them identified in the developing area's specific plans. All areas currently slated for development have identified school sites to cover the students generated by the new housing.

Facility Name	Total Gross Square Ft	Total Perm Bldg Area	Total Portable Bldg Area	Grades	General	Special	Enroll-	Gross	Net
					Ed Enroll	Day Class Enroll	ment Total	Capacity at 24 per class	Capacity at 24 per class
					10/01/17	10/01/17	10/01/17		
Elementary									
Coleman F. Brown Elementary	40,838	34,118	6,720	K-5	457	52	509	672	605
Crossroads Elementary	54,292	50,452	3,840	K-5	845	0	845	840	756
Freedom Elementary	50,970	44,250	6,720	K-5	657	27	684	720	648
Mary Ann Sanders Elementary	50,452	50,452	-	K-5	540	30	570	696	626
Orchard Elementary	46,818	39,138	7,680	K-5	569	16	585	672	605
Sherwood Elementary	41,420	36,620	4,800	K-5	428	35	463	600	540
Standiford Elementary	37,212	33,372	3,840	K-5	405	18	423	576	518
Stockard Coffee Elementary	39,342	31,662	7,680	K-5	426	42	468	576	518
Sylvan Elementary	34,875	34,875	-	K-5	241	19	260	504	454
Woodrow Elementary	37,895	35,015	2,880	K-5	393	0	393	552	497
Projected Enrollment New Housing	434,114	389,954	44,160		4,961	239	6,706	6,408	5,767
									(939)
Middle Schools									
Elizabeth Ustach Middle School	83,968	67,648	16,320	6-8	1053	47	1,100	1,200	1,080
Daniel J. Savage Middle School	96,464	96,464	-	6-8	839	59	898	984	886
Somerset Middle School	87,852	81,132	6,720	6-8	922	39	961	1,104	994
Projected Enrollment New Housing	268,284	245,244	23,040		2,814	145	3,871	3,288	2,960
									(911)
								Total Gross Capacity	9,696
								Total Net Capacity	8,727

Facility Replacement Requirements – Relocatable Classrooms

While the replacement of facilities is not something that schools have to face often nor can it really be considered “expansion,” districts that have opted to utilize relocatable classrooms over the past 30 years will need to look at the replacement of these buildings at some point. The Sylvan District owns a total of 62 relocatable classrooms at various campuses throughout the District.

A relocatable classroom has a life span of approximately 25 years. The advantage to utilizing relocatable classrooms is that they are relatively inexpensive initially and they can be brought on-line in a very short period of time. One of the primary reasons that relocatables have been used is that the old State School Building Program required a certain percentage of all new construction to be relocatable. The following table shows the schools, number of relocatable classrooms, and the age of the relocatables.

Schedule of District Owned Relocatable Classrooms and Approximate Ages

School	Number of Relocatable Classrooms	0-10 Years Old	10-15 Years Old	15-20 Years Old	20+ Years Old
C.F. Brown	7			7	
Crossroads	6	2	4		
Orchard****	8			8	
Sherwood**	5			4	1
Freedom	7		7		
Somerset*	10			10	
Standiford**	4				4
Stockard Coffee	6			6	
Sylvan	0				
Ustach	17				17
Woodrow**	3			3	
District Office	3	1	2		
Corporation Yard	0				
Totals	76	3	13	38	22

* Includes 3 Childcare Relocatable Classrooms

The library buildings at Sherwood, Woodrow, and Standiford are relocatable buildings and have been installed on raised concrete foundations. They were all installed around 1975. The Woodrow library was re-located to permanent space, and the old library is used for storage.

The 20’s wing at Stockard Coffee consists of two relocatable buildings set on wood foundations at grade. This wing contains six classrooms, three small pull-out rooms, and two restrooms. It was modernized in 2012. These two buildings were constructed in 1979 and 1988. For the purposes of counting classrooms, the building is being counted as having eight classrooms.

The entire 30's wing at Orchard is constructed as a relocatable structure set at ground level to match the other buildings. This building is being counted as eight classrooms also.

The long-term costs and disadvantages associated with relocatable classrooms are not as apparent as the incentive of their low initial purchase and installation costs. The very design of the structure does not lend itself to energy efficiency since they are more costly to heat and cool than permanent structures. They tend to be noisy because the HVAC units are mounted on the rear wall and are vented directly through the wall. Climate control is difficult and the rooms tend to be too warm or too cool.

Most relocatables are constructed with a rigid metal frame and 2' x 4' wood studs with T-111 plywood siding. Relocatable buildings are generally installed on wood foundations that are set directly on the ground. The wood floors can be "bouncy" and noisy when walked on. The wood siding and direct grade installation makes them very vulnerable to water damage. A good number of relocatables throughout the District are in need of siding repairs due to the water damage.

Relocatable classrooms generally begin showing signs of wear and age after about 10 years. As illustrated in the previous table, the District has several relocatable classrooms over 15 and 20 years old and a number of classrooms between 10 and 15 years old. As these classrooms reach the 20-year mark, the District has been refurbishing the units to extend the life. If properly cared for, it is possible for relocatable classrooms installed on wood foundations to last 30-40 years. At some point between the 30 and 40 year mark, the District should be prepared to replace relocatable classrooms.

The ideal thing would be to replace these classrooms with permanent structures. See the next section, Options/Solutions, for a discussion of this option. The prohibitive factor to this option would be funding. The cost to replace an existing relocatable classroom with a new one would be in the neighborhood of \$100,000 to \$120,000. The cost to construct a permanent classroom would be between \$384,000 and \$432,000 (assumes a total of 960 square feet per classroom at \$400-450 per sq. ft. construction cost). With the dramatic difference in initial cost, it is easy to see why school districts turn to relocatable classrooms for their housing needs.

Proposed Relocatable Replacement Schedule

Age of Relocatable	No. of Classrooms	Replacement Year	Coast of Replacement	
			With Relocatable	With Permanent
20+ Years Old	22	2022	\$2,420,000	\$8,976,000
15-20 Years Old	38	2027	\$4,180,000	\$15,504,000
10-15 Years Old	13	2032	\$1,430,000	\$5,304,000
0-10 Years Old	3	2042	\$330,000	\$1,224,000
Total Cost, Today's \$			\$8,360,000	\$31,008,000

Cost of Relocatable Classroom Replacement	
With Relocatable	\$110,000
With Permanent	\$408,000

New Facility Requirements – Administrative and Support Services

Administrative Offices

Administrative offices for the Sylvan Union School District are located at a separate facility at 605 Sylvan Avenue. The facility sits on approximately 1.75 acres and has a total of 6,980 square feet. The facility is comprised of one permanent structure and **four** relocatable buildings. The following departments and offices are housed at the District Office:



- Superintendent's Office
- Curriculum Department
- Human Resources/Personnel
- Technology Department
- Payroll Department
- Student Support Services
- Business Department
- Board Room

The District Office has several primary issues that need to be addressed. They are as follows:

1. Office Space – As the district grows additional district office administrators may be necessary. The District Office does not have space to add additional work space.
2. Storage – The office suffers from a shortage of floor space for filing cabinets and storage, although file storage has been reduced significantly over the last few years through digital storage. Digital file storage opened up space to add staff as the district grew.
3. Conference Room – The District Office does not have a formal conference room and one should be included in any expansion project.
4. Training Space – There is a significant shortage of training space.
5. Departmentalization – Any major construction work at the District Office should seek to create separate geographic department areas.
6. Room for Expansion – The site provides very little room for expansion.
7. Inadequate Restrooms – Large training events are hosted at District Office. There are only 3 toilet fixtures for women, and 1 toilet fixture for men. Additional restroom space is necessary.

There are two (20') storage containers behind the trash enclosure. Installation of the two containers alleviated some of the storage needs at the District Office, but ongoing, easily accessible record storage will continue to be an issue. The two storage containers were purchased between 2002 and 2005 and require new roofs and siding.

Parking - The parking lot is adequate for the regular day-to-day traffic that visits the office. When a meeting or special event takes place, overflow parking occurs on the street in the surrounding neighborhood. The parking lot was expanded in 2010. Even with this expansion, additional spaces are needed to adequately handle parking needs if there is a large meeting. The

parking facility could easily be expanded to provide additional parking if needed. It should be noted that street parking is not available in front of the District Office.

Room for Expansion - The main building is in very sound condition. The building was designed as an open floor plan with moveable walls. This appears to have worked well but the wall panels are now somewhat mismatched due to the varying finishes and the relocations that have taken place over the years.

Electrical and data systems are fed from the permanent walls or from overhead. The phone system is “maxed out” is over 25 years old and will need to be completely replaced. If a major remodel or addition is considered, the addition of permanent walls to replace some of the relocatable partitions should be considered.

Additional space at the District Office was added in 2010 by 2 triple wide relocatable buildings placed on a concrete foundation. With the growth that has occurred in the district, additional office space was needed. Even with the 2010 expansion project, the District Office has reached capacity and additional space is needed as described. Departmental needs and recommendations will be discussed individually below.

Superintendent’s Office – The Superintendent’s “Office” consists of two people, the Superintendent and the Superintendent’s assistant. The Superintendent’s Assistant is housed in a cubicle. Because of the sensitive nature of work in this office, an enclosed office with a door would better meet the needs of this department.

Curriculum Department and Student Support Services - The Curriculum Department is housed in the 2010 expansion project that added 2,880 sq ft of relocatable building space. The Department consists of twenty people, the Assistant Superintendent, her assistant, the Coordinator of Categorical Programs, her assistant, the Director of Special Education, and his two assistants, and 4 program specialists, the Director of Technology, and 4 technology specialists, the Director of Professional Development/Induction, and two Induction Specialists. There is one small conference room that is used consistently throughout the year. Space in this building is inadequate to house the number of program staff required.

Human Resources and Student Support- This department consist of eight people. The Assistant Superintendent of Human Resources, and her assistant, the Director of Human Resources, the Director of Student Support Services, two Human Resource Technicians, one receptionist, and one student data technician. The primary issues facing this department is the lack of a small conference room for sensitive employee meetings, new employee meetings, and a space for clerical and para required testing for potential new hires. An additional office was added in 2015.

Business Services Department - The Business Department currently consists of nine people. The Assistant Superintendent of Business Services, and her assistant, the Director of Fiscal Services, an Accountant, three Payroll Technicians, and two Account Payables Technicians. They occupy two offices and seven cubicles on the main floor. File cabinet requirements have been significantly reduced due to conversion to digital storage to free up floor space. As with most of the other departments, space is very limited with no room for expansion.

Board Room and Training Room - The Board Room and Training Room were added in the 2010 expansion project that added 2,880 sq ft of relocatable building space. The Board Room and

Training Room are separated by an expandable wall. When the expanded wall is open, the size is adequate for almost all meetings. Because the space is a relocatable building, the acoustics are a problem, especially when the HVAC is running. Another problem is that the temperature is difficult to regulate. This building was added without a restroom. Restroom space is inadequate when large meetings/trainings are conducted. Attendees must access the main building for restrooms.

Administrative Offices Summary

The primary issue facing the District Office is a lack of space. The best long-term solution involves the expansion of the existing facility to add restrooms, additional office space, and an additional fully equipped training room. The direction that is taken at the District Office will depend largely on the availability of funds.

Funding for this type of project would have to come from outside the normal revenue streams and would most likely involve a bond measure. Funding options are discussed in Section VI.

Corporation Yard

The Corporation Yard is conveniently located in the middle of the District at the south edge of Sylvan Elementary School, and was built in 2010. Three departments are housed at the Corporation Yard. They include:

- Maintenance and Operations
- Transportation
- Warehouse

The Corporation Yard has three primary issues that need to be addressed. They are as follows:

1. Space/Storage – The Corporation Yard has very little adequate storage and/or work space.
2. The Warehouse space is not sufficient to store surplus, such as usable equipment and furniture.
3. Room for Expansion – The physical buildings offer very little room for expansion.
4. Bus Parking is at the maximum - As the district grows, additional buses and storage will be needed.

Maintenance and Operations

The Maintenance and Operations Department is comprised of the maintenance and grounds crews and is housed at the Corporation Yard. The department consists of a Maintenance and Operations Supervisor, and his assistant, 4 Maintenance Technicians, and 6 grounds crewmembers. Office, administrative, and break room space is sufficient for the department and no additional office space is anticipated in the near future.

The primary need in the Maintenance and Operations Department is for a separate workshop and interior storage space for supplies and equipment. Currently the workshop and interior storage space is shared. Vehicles and grounds equipment are parked inside this space at the end of each work day to avoid vandalism and equipment theft.

Transportation

The Transportation Department shares the facility with the Maintenance and Operations Department at the Corporation Yard. The Transportation Department has three primary facility issues:

1. Need for a bus washing station
2. Cramped Bus Parking With Little Room for Expansion
3. Traffic Congestion/Ease of Access From Coffee Road

The bus garage was built to support a bus lift for bus maintenance and repairs and is sufficient.

Cramped Bus Parking With Little Room for Expansion - Bus parking space is very limited and there is very little room for expansion if additional buses are acquired.

Traffic Congestion/Ease of Access From Coffee Road - As traffic has increased on Coffee Road over the years, the street access has become much more difficult. It is not uncommon for buses to have to wait, especially during start and dismissal times at Sylvan School, to exit and/or enter the yard. Traffic accessing the Sylvan site for children does not yield to the buses and often blocks the access making it difficult for the buses to enter and exit.

It may be possible to expand the Corporation Yard by capturing some land from Sylvan Elementary School.

Warehouse

The warehouse has 4,000 square feet of floor space. This amount of space has been sufficient in the short term but is inefficient to meet all the storage needs of the District. Additional storage for surplus furniture and equipment is needed.

When a large shipment is received, it is very difficult to process because there is no convenient place to receive it and temporarily store it while it is being inventoried and/or distributed.

Corporation Yard Summary

The Corporation Yard expansion that occurred in 2010 made excellent headway in providing quality spaces for the support departments. As the district grows the space will be inadequate to allow for growth.

Childcare

The District currently operates after school childcare programs in the multipurpose rooms at the following schools:

- Standiford
- Woodrow
- Orchard
- Sylvan

- Sherwood
- Stockard Coffee
- Freedom
- Crossroads
- Mary Ann Sanders
- CF Brown

In addition to the after school programs, a full day program is housed in three relocatable classrooms at the southwest corner of the Somerset Middle School campus.

The three relocatable classrooms are 20+ years. The playground equipment and fall material need to be replaced. Updating to the classrooms and replacing the playground equipment and fall surface are scheduled to be completed by August 2017. Over the next few years, the portables will need to be replaced, or significantly overhauled.

If the District decides that it wants to expand the program to serve more students at a central location, it may want to look into constructing a permanent facility. This could be constructed at an existing site or a future school site.

Food Service

The Food Service Facility was built in 2009 to serve as a central kitchen, and is a state of the art kitchen. It was built with enough space to prepare 10,000 meals. Currently about 6,000 meals are prepared on a daily basis. The department contract with the Stanislaus County Office of Education to provide meals to Headstart Programs in Modesto, Riverbank, and Oakdale.

New Facility Requirements - Alternative Education

At this time, the alternative education program is housed at Woodrow Elementary.

At some point in the future, the District may determine that it would be advantageous to open/operate a Community Day School. If it is determined that conducting the Alternative Education Program within the confines of the District is in the best interest of the students and the District, facilities for this program will have to be secured.

There is considerable latitude for housing Alternative Education students. The main caveat is that the facility has to be separate from existing facilities; i.e., the students attending a Community Day School cannot be housed along with other students on the same campus. It is possible to house them in a storefront or in a separate area on an existing campus if a waiver is obtained. Ideally, they should be housed at a separate facility. The District does not currently have a facility to support this program.

New Facility Requirements - Pre-School Program

At this time, the district does not operate a pre-school program for general education students, but may have an interest in the future.

New Facility Requirements – Ustach Middle School

The MPR/Gym is inadequate for a student population of 950 students, and was not built to house 1,000+ students. As 17 relocatable classrooms were added to the campus, the kitchen, serving area, cafeteria, gym, and restrooms did not expand. The spaces as described that provide services to all students on campus are inadequate. A new cafeteria and classroom building should be built.

Cost Estimates/Summary

Cost Estimates for identified needs are shown in **Exhibit 12 (TBD)**

DRAFT

Options/Solutions (What can/should we do?)

As stated in the introduction, the purpose of the Long-Range Facilities Master Plan is to provide a framework for dealing with both facility expansion (growth) and modernization issues. Options for accommodating growth and the feasibility of their implementation will be discussed in this section. An overview of the strategies to house additional students is outlined below. These options are broken down between strategies for elementary and middle schools and are not shown in any particular order. There are two broad categories of strategies that the District will need to employ, long-term and short-term.

Long-term (LT) growth strategies should be implemented to handle the growth of students produced by new housing development over the long-range. It is assumed this growth will continue in an upward direction well into the future. Long-term growth will require the construction of new schools and permanent facilities.

Short-term (ST) growth strategies will be required to handle the cyclical influx of students arriving between the construction of new schools. These strategies can be viewed as sort of a holding tank, or flexible housing capacity, that allows for expansion, but will not be needed on an ongoing basis. These facilities may or may not be permanent. It can be assumed that new permanent facilities would not be constructed to house this undulating student population.

The strategies discussed below are identified, as long-term (LT) and short-term (ST). Some strategies could be used for both long-term and short-term needs. Some of the strategies have been used in the past.

These strategies are presented here as options that can be implemented depending on the appropriateness of the particular situation that the District is facing. Needs change over time and options that are relevant today, may not be relevant several years from now. For this reason, options as opposed to recommendations are presented. It is understood that staff would carefully weigh the pros and cons of any option it contemplated implementing.

In the event that relocatable classrooms are considered as an option for housing additional students, it is important to note that the addition of relocatable classrooms will negatively affect the District's State construction eligibility in most circumstances.

Possible Strategies/Options for Housing Additional Students at All Schools

1. Construct Additional Schools (LT) – Construct new schools on property owned or to be purchased by the District.
2. Expand Permanent Facilities at Existing Sites (LT) – Add new permanent buildings at existing sites.
3. Add Modular/Relocatable Facilities at Existing Sites (ST) – Add new relocatable classrooms at existing sites. These could be leased or purchased. Relocatable buildings have a

serviceable life span of approximately 20-30 years and should not be considered a permanent housing solution.

4. Add State Leased Modular/Relocatable Facilities at Existing Sites (ST) – Relocatable classrooms that will not count against the District's new construction eligibility can be leased from the State, but State relocatable classrooms are only available under impact situations. In addition, State relocatables are not always available.
5. Bus Transfer of Overload (ST) – Temporarily bus students to other schools if the school of attendance is full at that grade level. This can be done on a student-by-student or class basis.
6. Adjustment of Attendance Boundaries (LT & ST) – Redraw school attendance areas to assign excess students to schools that have space.
7. Impose Double Sessions (ST) – Students are divided into two groups and function as two separate schools; i.e., one attending in the morning and one in the afternoon. There is no time overlap between the two groups.
8. Take Back Classrooms from the County (LT & ST) – The County Office of Education currently uses five classrooms at Woodrow and two at Ustach for their own programs. We are not required to provide this space for them and can ask to have these classrooms back.

Possible Strategies/Options for Housing Additional Students at Middle Schools

1. Move Sixth Grade Back to the Elementary Schools (ST) – The sixth graders are currently housed at the middle schools. If they were moved to the elementary campuses, more capacity would be provided for 7th and 8th graders.
2. Extend the School Day (7th and 8th Grades Only) (ST) – Lengthen the student day from six or seven periods to eight, nine, or more periods. Students would attend in staggered groups or have free periods between some classes.
3. Add Relocatable Classrooms at Dan Savage Middle School (ST) – If relocatable classrooms were added at Dan Savage, this would allow for growth at the Middle School level in the short term. This option may be exercised in conjunction with option no. 2 above.
4. Convert an Elementary School to a K-8 School (LT) – Convert the K-5 school to a K-8 school. Upper grade classrooms would likely have to be self-contained under this scenario. This would take pressure off of the Middle School. Attendance boundaries would be redrawn and the current K-5 students would be shifted to other schools.
5. Construct Elementary School No. 11 as a K-8 School (LT & ST) – Add additional capacity at Elementary School No. 11 to house middle school students. Once the next middle school is opened, the 6 – 8 graders could be moved to the middle school. This would provide additional capacity for K-5 students if the 6-8 graders were moved.

Feasibility of Strategies/Options - All Schools

1. Construct Additional Schools (LT)

There is a financing mechanism in place; i.e., the Schools Infrastructure Financing Agency (SIFA). The separate Mello-Roos Districts will provide for the construction of the following:

- 69% of the cost of a third 800 student elementary school in Village One area.
- 53% of a 1200 student middle school to serve the new development in the Riverbank area.

The two Riverbank schools are in a separate CFD from the schools in Village One. The timeline for development of these two schools is independent of the schools in the Modesto CFD.

2. Expand Permanent Facilities at Existing Sites (LT)

This option is really only limited by available financial resources. The District would most likely have to pass a general obligation bond measure or extend the current bond measure in order to bring this option to fruition. Other financing options may be available and will be discussed in the funding section of the report.

The feasibility of constructing permanent classroom facilities at existing school sites should consider such factors as available space (land), current enrollment, projected enrollment, ease of accessibility and traffic, and projected neighborhood growth.

A standardized classroom building containing a minimum of six to eight classrooms and an approximate size of 10,000 square feet could easily be developed and adapted to the various sites. The standardization of the structure would enjoy a cost savings and provide for equity among sites that receive new facilities. This building could be similar to the five multipurpose buildings completed by the District in 1998.

The construction of permanent classrooms provides the most cost effective long-term solution to housing additional students because additional land does not have to be purchased. Additional capacity equivalent to the construction of a new school could be realized if an eight classroom building were added to three sites.

This option may be considered for the replacement and/or elimination of relocatable classrooms. The inventory of relocatable classrooms owned by the District is aging. There are a number of relocatables in the District that are in need of major repairs/upgrades.

3. Add Modular/Relocatable Facilities at Existing Sites (ST)

The addition of new relocatable classrooms at existing sites should not be viewed as a permanent solution for growth. Relocatable buildings have a serviceable life span of approximately 20-30 years. They generally cost more to operate and maintain and are very susceptible to damage from water.

The primary advantage of the relocatable classroom is the ease of installation and the relatively small cost of installation. Another advantage is that relocatables can be moved among sites as enrollment shifts.

Given the attractiveness of financing, short time-line for construction, and ease of installation, this option should be considered viable for short-term housing. If classrooms were purchased for interim needs, the classrooms could be used to replace aging relocatables at other sites once they were no longer needed.

4. Add State Leased Modular/Relocatable Facilities at Existing Sites (ST)

Leasing classrooms from the State is advantageous because State construction eligibility is not affected. The downside is that classrooms are not always available.

5. Bus Transfer of Overload (ST)

If space is not available at any student's school of residence, the District is currently enrolling those students in schools that have available space. Bus transportation is then provided for those students attending schools outside of their school of attendance. The District is currently doing this on an as needed basis.

6. Adjustment of Attendance Boundaries (ST & LT)

This option is viable only if some schools in the District have considerable excess capacity that can be utilized by adjusting attendance areas. All of the schools in the District are currently very close to capacity. In addition, geographic attendance areas do not need to be balanced. This option is rather involved and has the potential to create resistance in the community. Attendance boundaries were adjusted for the 2013/2014 school year

7. Impose Double Sessions (ST)

Dividing students into two groups to function as two separate schools, one attending in the morning and one in the afternoon, would pose some very significant challenges. The school would be open from 6 or 7 in the morning to 6 or 7 in the evening. The areas of scheduling, transportation, additional personnel, extended hours of operation, childcare, etc., would have to be looked at very closely. The impact on the community would have to be carefully reviewed.

8. Take Back Classrooms from the County (LT & ST)

The Stanislaus County Office of Education uses 7 classrooms for their programs.

Feasibility of Strategies/Options – Middle Schools

1. Move Sixth Grade Back to the Elementary Schools (ST)

Relocation of the sixth graders to the elementary schools would be a departure from the current philosophy in the District. In some ways, this option simply shifts the impact to the

elementary sites. Because all of the sites are operating near capacity, additional housing would have to be provided for these students at each of the elementary sites.

This may be viable once Elementary School #11 is opened because there will be available space at the current K-5 sites. It must be kept in mind that this "available" space will be needed to house new K-5 students in several years as new housing is completed. The impact to the community from a change like this would be significant.

2. Extend the School Day (7th and 8th Grades Only) (ST)

Extending the school day would pose many of the same problems as imposing double sessions. Scheduling around lunch would be difficult. Free time between classes would create supervision problems

3. Add Relocatable Classrooms at Ustach (ST)

If the anticipated growth from new housing continues, it will become necessary to add relocatable classrooms at the middle schools. The classrooms could be phased in as needed, but relocatables should be planned for in order to accommodate the growth that is anticipated. Classrooms would most likely be placed on the field or blacktop at considerable cost to install the utility infrastructure.

4. Convert an Elementary School to a K-8 School (LT)

This option is a break in philosophy from the middle school model. It creates some scheduling and supervision issues. Existing campuses are not set up to accommodate 7th and 8th grade programs including athletic programs.

5. Convert an Elementary to a Middle School (LT)

This option contains challenges similar to the option listed above. The existing K-5 students would be moved to other K-5 campuses, and the school would be set up as a middle school. As with the option above, the campus is not set up to accommodate 7th and 8th grade programs, including athletic programs.

6. Construct Elementary School No. 11 as a K-8 School (ST)

This option could provide a stop-gap measure for the middle school crunch. It would be a departure from the current traditional middle school configuration. This option could prove to be advantageous in the event that more space for middle school students is needed before space is needed for elementary students. Once the middle school is constructed, the 6-8 grade students could be moved to the new middle school.

Timeline **(When should we do it?)**

Unfortunately for school districts, funding generally follows growth. It is nearly impossible to construct new schools and have them ready and waiting for new students to arrive as neighborhoods are being developed. For this reason, expansion timelines are usually driven by some combination of needs and funding availability. The need for facility expansion in the Sylvan Union School District can be generalized as follows:

- ✓ Growth and Development is Driven by the Economy
- ✓ Strong Economy = Property Development
- ✓ Property Development = Subdivision Activity
- ✓ Subdivision Activity = Increased Student Enrollment

Given that expansion funding follows growth in most circumstances, the goal is to have the facility expansion follow the growth as closely as possible. In the period of time that precedes new facility construction, facilities will become more efficiently utilized as more students are housed in existing facilities. Once a new facility is constructed, the pressure for additional space will be temporarily relieved until such time as growth begins to drive the need for additional facilities again. This cyclical need for facilities is affected by many factors from interest rates and the economy to the type, size, and cost of the homes being constructed, all of which are difficult to predict.

Because expansion strategies are difficult to calendar, the timelines developed below should be reviewed and updated on an annual basis or more often if needed. It should be kept in mind that the implementation process, more than the actual date of the action, is what should be followed.

Many factors will contribute to the implementation of items identified on the timeline including: general economic trends, passage of state-wide and local bond measures, continued subdivision growth, new subdivision annexations to the SIFA Mello-Roos districts, availability and selection of school sites, and direction/policy decisions from the Board of Trustees.

Timelines for long-term growth strategies (LT) are developed to handle the steady increase in enrollment over a period of years. Timelines for short-term growth strategies (ST) are aimed at alleviating the cyclical pressure that increases in that period of time that precedes new facility construction. This time frame may vary from several months to several years. Funding for short-term strategies can be provided from internal sources. Funding for long-term strategies is usually, if not always, provided for from external sources.

Timelines

Proposed Five Year Timeline

2018/2019

- ❑ Recalculate State Funding Eligibility – Done Annually (LT)
- ❑ Complete and Adopt the Facilities Expansion Portion of the Long Range Facilities Master Plan (LT & ST)
- ❑ Continue to engage in planning activities with the City of Riverbank, City of Modesto, and Modesto City Schools for the Tivoli and Crossroads West Developments (ST & LT)
- ❑ Complete HVAC Upgrades and minor modernization reconstruction for Orchard Elementary (ST)

2019/2020

- ❑ Recalculate State Funding Eligibility – Done Annually (LT)
- ❑ Continue to engage in planning activities with the City of Riverbank, City of Modesto, and Modesto City Schools for the Tivoli and Crossroads West Developments (ST & LT)
- ❑ Determine Funding Plan for Ustach Middle School

2020/2021

- ❑ Recalculate State Funding Eligibility – Done Annually (LT)
- ❑ Evaluate Growth and Enrollment (ST & LT)
- ❑ Continue to engage in planning activities with the City of Riverbank, City of Modesto, and Modesto City Schools for the Tivoli and Crossroads West Developments (ST & LT)
- ❑ Design HVAC Upgrades and minor or complete reconstruction for Ustach Middle School

2021/2022

- ❑ Recalculate State Funding Eligibility – Done Annually (LT)
- ❑ Evaluate Growth and Enrollment (ST & LT)
- ❑ Construct HVAC Upgrades and minor or complete reconstruction at Ustach Middle School
- ❑ Continue to engage in planning activities with the City of Riverbank, City of Modesto, and Modesto City Schools for the Tivoli and Crossroads West Developments (ST & LT)
- ❑ Identify and prepare a comprehensive facility needs assessment to begin laying the groundwork for a possible GO Bond Measure

2022/2023

- ❑ Recalculate State Funding Eligibility – Done Annually (LT)
- ❑ Evaluate Growth and Enrollment (ST & LT)
- ❑ Continue to engage in planning activities with the City of Riverbank, City of Modesto, and Modesto City Schools for the Tivoli and Crossroads West Developments (ST & LT)
- ❑ Evaluate Growth and Enrollment
- ❑ Begin Laying Groundwork for Possible GO Bond Measure

Funding (How Do We Pay For It?)

Funding sources for facility expansion can be grouped into two broad categories, internal funding sources and external funding sources. Internal funding sources are monies available through regular revenue streams. External funding sources are monies secured from sources outside the District's normal revenue provisions. External funding sources usually, but not always, carry a cost, generally in the form of interest, for the use of the funds made available.

Prior to discussing funding options for facilities expansion, mention needs to be made of the District's current debt obligations. The District had the following long-term facilities related debt outstanding as of June 30, 2016.

General Obligation Bond \$38,589,619

This indebtedness affects the District's borrowing ability and bonding capacity in that the District's total bonding capacity is reduced by the amount of the current outstanding bond obligation. Payments from the General Fund are made each year. The debt service for the bond is paid by the property owners in the District and appears on their annual property tax bill.

Long-term expansion funding is a process that needs to follow a well-defined path. It is imperative that the purpose, process, and timeline be established and effectively communicated to the residents of the District. The project or intended use of the funding must be clearly established beforehand, and the project must drive the funding. The funding process exists only because a defined need for it exists.

Internal Sources

General Fund

The General Fund is the primary source of unrestricted revenue for the District. Generally items such as salaries, utility costs, supplies, and all non-categorical expenses, etc., are paid for from the General Fund. The General Fund is not usually looked at for the provision of facility expansion funding.

Special Reserve for Capital Outlay/Capital Projects

This fund was established in August 1991 to provide funding for new and replacement furniture and equipment and capital improvements at existing schools. Transfers from the General Fund were made over the years in various amounts as needs were identified. The annual transfer includes \$25,000 to replace equipment, \$200,000 to replace buses. This fund was established by Resolution 1991/92-#3. It was revised by Resolution 1994/95-#2. The fund was revised to provide for funding for new construction, equipment, technology, furniture, and improvements to existing facilities. This fund's balance is comprised of monies received from a developer mitigation agreement that has now expired and a lease arrangement with a cellular phone company that has now expired for ground space at the Corporation Yard. The fund is currently

being used to account for transfers for capital type equipment replacement, bus replacement and E-Rate match requirements.

Bond Fund (Existing)

The Bond Fund was established in 1988 to fund the construction of Orchard Elementary School, Ustach Middle School, and five multipurpose buildings at the elementary schools. The Bond Fund has been fully expended. In the short term no future deposits are anticipated for this fund.

Internal Sources – Summary

Fund balances for internal sources of funding are shown in the table below. The District does not have a significant level of internal funding to support facility expansion.

Existing Fund Balances June 30, 2017 Estimated Balance

Fund Number	Fund Name	Balance June 30, 2017 est
0000	General Fund	N/A
0K07	Special Reserve for Capital Outlay/Capital Projects	251,976
0G01	Bond Fund	0

External Sources

State School Facilities Program

The new construction program provides State funds on a 50/50 State and local sharing basis for public school capital facility projects in accordance with statute. Eligibility for State funding is based on a district's need to house pupils and is determined by criteria set in School Facility Program legislation (SB50).

Education Code Section 17072.10 establishes the "new construction grant" per unhoused pupil for new construction projects. The State Allocation Board approved the annual adjustment to the grant on **January 3, 2002**. The adjusted grants are as follows:

- \$5,720 For Each Elementary School Pupil.
- \$6,050 For Each Middle School Pupil (Include 6th Grade, If part of a 6-8 School).

This "new construction grant" amount is intended to provide the State's share for all necessary project costs with the exception of site acquisition, utilities, and off-site and service-site development. The necessary project costs include, but are not limited to, funding for design, the construction of the building, general-site development, educational technology, unconventional

energy, tests, inspections, and furniture/equipment. The grant amount is adjusted for inflation each year.

Eligibility for State funding is determined on Form SAB 50-03, see **Section A**, Current Facilities-State Capacity and Appendix A, SAB Forms. The District’s eligibility, as approved by the State Allocation Board on **June 26, 2002**, is as follows:

<u>Grades</u>	<u>Eligibility</u>	<u>Grant</u>	<u>Amount</u>
Elementary K-6	1,709	\$5,720	\$9,775,480
Middle School 7-8	619	\$6,050	\$3,744,950

The District’s eligibility will be recalculated on an annual basis. The amount received from the State will be “matched” with the SIFA funds for use in constructing the new schools in the SIFA districts.

The availability of funding from the State School Facilities Program is dependent on the passage of statewide bond measures and the demand for the funds raised through the bond sale proceeds.

Capital Facilities Fund (Developer Fees)

Developer Fees are collected on residential development within the District’s boundaries, excluding those areas inside the SIFA districts. This source of revenue is only about \$30,000 – \$35,000 per year because most development is taking place in the areas included in the SIFA districts. Developer Fees are collected from small pockets of new construction and room additions over 500 square feet.

On February 24, 2016, the State Allocation Board adjusted the 2016 maximum Level One Assessment for development:

Residential	\$3.48
Commercial	\$.56

Government Code Section 65995 authorizes school districts to collect Level 1 fees of no more than 3.48 per square foot for residential development and \$.56 for commercial/industrial. This figure is the maximum a school district may lawfully levy on new residential development. The increase is sanctioned under Government Code Sections 65995 and 53080.

The District used this fund to pay for the installation of the 12 State leased relocatables that were installed in 2001/2002.

The Capital Facilities Fund (Developer Fee) balance on June 30, 2016 was \$162,339.

General Obligation Bond

The laws affecting a general obligation bond (GO bond) changed with the passage of Proposition 39. Proposition 39 lowered the voting requirement from a two-thirds majority to 55% majority, but also put into place some new accounting and accountability requirements. The tax limitation for elementary districts is \$30 per 100,000 assessed valuation per bond measure. Districts with existing GO bonds may seek additional authorization under Proposition 39.

As of June 30, 2016, the Sylvan Union School District had \$38,589,619 in outstanding facilities-related debt. The Sylvan District's total assessed value for the 2016-2017 fiscal year is \$6,058,437,412. The District's legal bonding capacity is 1.25% of its assessed value reduced by its outstanding facilities-related debt. The current bonding capacity of the Sylvan Union School District under a two-thirds majority vote is \$37,140,849 and is calculated as follows:

Total Assessed Valuation	\$6,058,437,412
	<u> x 1.25%</u>
Gross Bonding Capacity	\$75,730,468
Less: Facilities Related Debt	<u> - \$38,589,619</u>
Net Bonding Capacity	\$37,140,849

Bonding capacity would be approximately the same under the Proposition 39, 55% majority vote. Bonding capacity will continue to increase each year as the total assessed valuation increases and the amount of facilities related debt decreases.

Bond Extension

A bond extension is a variation of the GO bond discussed above. The existing bond repayment timeline is simply extended. As property values increase over time, the tax rate of the existing fixed payment decreases in relationship to the assessed valuation thereby providing additional bonding capacity. This capacity is captured and the existing repayments are extended.

The primary advantage is that no additional fees are charged to the homeowner. The disadvantage is that not as much money can be raised at one time. A bond extension is secured in the same manner as a GO bond, through a bond measure. A bond extension is subject to the same criteria as a GO bond.

External Sources – Summary

It can be assumed that some type of external funding source or combination of sources will need to be secured in order to finance facility expansion. Typically, districts look to a general obligation bond measure for this type and level of funding. If the District decides to pursue a bond measure, a bond consultant should be hired to review and evaluate the feasibility of placing a bond measure on the ballot. In addition, the consultant should help guide the District through the entire bond process.

It is important to understand that the construction budgets established for the new schools, which are to be financed by the SIFA, should not be considered sufficient to cover all of the costs to construct and equip a new school. The District will need to plan on finding additional financing to augment the monies available from SIFA. The table below illustrates the estimated cost of construction, the percentage of cost the SIFA budget is supposed to cover, the SIFA budget amounts, and the estimated unfunded balances for each school.

As funding percentages go up, the unfunded amounts shown in the last column will be reduced. With the exception of the SIFA percentages and budget numbers, the figures shown below are

estimates only. Careful planning and design strategies coupled with efficient construction methods should be employed to maintain construction costs. Uncertainty with land prices continues to be a concern. Raw land prices are volatile. The estimated unfunded balance assumes that no additional subdivisions will annex to SIFA and that additional sources of financing will need to be secured.

**Budget/Estimated Cost of Construction Comparisons
2002/2003 Dollars**

School	Estimate Cost of Construction	Budget Percentage to be Financed by SIFA	SIFA Budget 2002/2003	Estimated Unfunded Balance
Elementary No. 11	\$13,610,000	100%	\$11,492,088	\$2,117,912
Middle School No. 4*	\$20,910,000	53%	\$10,410,103	\$10,499,897
Total Unfunded				\$23,650,608

* A site has not been identified for this school.

The Planning Department of Modesto City Schools, the agency that manages the SIFA Joint Powers Agreement provided the following information on May 4, 2017:

The Rate and Method of Apportionment of the special tax has not changed since its adoption in April of 1998. The original list of authorized facilities for CFD 1998-1 identified “up to 53% of the cost of a middle school for the Sylvan Union School District”. Because this CFD was created in 1998, after the earlier two SIFA CFD’s (1994 and 1997), the elementary school (Freedom) was determined to be first in Sylvan’s priority access to capital funding from SIFA CFD 1998-1. The middle school last.

Because construction or financing from SIFA was not eminent by Sylvan, the Project Status Report prepared by SIFA was not changed to reflect the reduction (53% down to 43%) in the amount of a middle school generated by CFD 1998-1 until July 1, 2010. Again, this did not and will not change the RMA. The Mello-Roos Act allows the agency to adjust the “amount” of authorized facilities based on annexations of developable land to a CFD and thus adjust the authorized facilities obligation if the market did not bear the original number of units estimated, without changing the RMA.

SIFA CFD 1998-1 has only generated \$2.5 million available for the Sylvan Middle School #4, toward its total \$21.44 million obligation. With Crossroads complete, another financing analysis is needed to determine when the existing units will generate its 43% of this school, through the collection over time of the annual special tax alone or if annual special tax from CFD 1998-1 can support the issuance of a bond to complete the obligation.

A reconciliation of the housing units in CFD 1998-1 is not necessary to proceed with the evaluation of school mitigation and obligation from Crossroads West. It will stand alone. The number of housing units and number of students generated from Crossroads West will be an independent analysis and obligation. Whatever the number is determined to be, 30%, 40% or 75%, that will be the obligation of Crossroads West housing units toward funding a middle school.

The reality of the timing of capital funding for school construction is complicated, based on the housing market, state funding and other local capital financing tools. Ultimately Sylvan will make most of these decisions related to the elementary and middle schools.

Please also note this discussion is based on the potential for formation of a Mello-Roos CFD. In the event that does not happen, State mandated Developer Fees in effect at the time of construction would be applied. State mandated developer fees are only intended to fund less than 50% of school costs. In addition to generating less than half the cost of the school project, developer fees are generated over long periods of time with the school construction occurring at the end of development.

In contrast, the purpose of the Mello-Roos Act is to provide for the issuance of debt in phased developments or projects, such as housing, that will develop over a period of time, in order to finance public facilities when they are needed.

Summary and Recommendations

The District is fortunate that it has a financing mechanism set up in the form of a Mello-Roos District. Even though the SIFA will not provide 100% of the funds necessary, the bulk of the funds necessary for facility expansion are covered by the Mello-Roos Community Facilities District. The District cannot readily expect to cover the long-term expansion and construction needs from internal sources. External sources of capital will be necessary to complete the facility expansion process that is outlined in this plan.

While it is not impossible to construct a school within the established SIFA budgets, it will be a challenge to maintain the existing level of educational programming and stay within the established budget. Proper planning, design, and a budget minded architect are all keys to the success of a school construction project. It would be better to plan for the need than to arrive unprepared with a budget shortfall.

The District should begin the process of preparing to place a bond measure on the ballot within the next several years. Much investigation and preliminary work will need to be done, and the District should not be caught in the position of having to “throw” a bond measure together quickly. A deliberate public relations effort will need to be engaged to pave the road for a successful bond campaign. This process may span several years and may require more than one attempt at passing.

Bringing New Facilities On-Line (Now that we have it, what do we do with it?)

Now that we know:

- ✓ What we currently have.
- ✓ What we will need.
- ✓ What we are going to do.
- ✓ When we should do it, and how we are going to pay for it, the only thing left to do, is to do it.

The process of bringing new facilities on-line is a little more complicated than just doing it. A well-planned process is critical for a smooth transition to the opening of a new facility or school. This section will attempt to outline some guidelines to assist in the process of bringing new facilities on-line.

Start-up Funding

In addition to the costs of acquiring new property and constructing new facilities, there are two types of costs that need to be planned for:

1. Onetime Start-Up Expenses
2. Ongoing Operational Expenses

The District has a mechanism for saving some of the monies necessary for this process in the Special Reserve for Capital Projects and Special Reserve for Capital Outlay Funds. Both of these Special Reserve Funds were established with the purpose of setting aside the monies necessary to cover these types of start-up expenses. Both of these funds could be used as a type of “savings account” to place the money being set aside for use in the start-up of new facilities.

Start-Up Expenses (One-time)

Start-up expenses are costs for things such as equipment, furniture, instructional materials, etc. Though furniture and equipment are normally included in the budget for new construction, the allowance from the State is usually not sufficient and is not designed to cover things such as custodial equipment, TV’s, overhead projectors, computers, etc. A detailed budget should be put together and planned so that the District has sufficient monies available to purchase the required items during the year preceding the opening of the school.

One way to plan for these onetime expenditures is to develop a “build-in” process in the budget in the years preceding the opening of the new school. For example, if it is determined that the start-up expenses are going to be \$500,000, then \$100,000 could be put away each year for the five years preceding the opening of the school. The primary goal is to recognize and plan for the expenses.

Operational Expenses (Ongoing)

It has been said that the opening of a new school should not create any new ongoing expenses because all of the teachers that will be teaching at the new school are already in the District. While there is some truth to that statement, there are other expenses in addition to teacher salaries that will be incurred on an ongoing basis, such as:

- Utility Costs
- Insurance
- Office and Administrative Salaries
- Custodial Salaries
- Custodial Supplies

One way to plan for this is to build up the budget by setting aside an increasing amount each year beginning five or so years prior to the opening of the new school. Assuming that ongoing expenses for the new school will be \$500,000, \$100,000 can be set aside in the budget the 5th year preceding, \$200,000 the 4th year, \$300,000 the 3rd year, and \$400,000 the 2nd year. During the year the school is opened, the \$500,000 necessary to operate the school is then included as the new school operational budget. The budget amounts in years five, four, three, and two can be spent each year as onetime monies during the year that they are budgeted or saved for expenses related to the opening of the new school.

This process builds into the budget the discipline and funding necessary to operate a new school without the dramatic jolt of having to add half a million dollars to the budget in a single year. As the time approaches to open the new school, the monies that are set aside the year before the opening can be used to offset the onetime start-up expenses discussed above.

An analysis of the ongoing expenses of similar schools in the District and the anticipated expenses of the new school should be undertaken. A detailed budget for the new facility should be developed from this analysis in advance so that it can be incorporated into the regular budget process the year the school is to come on-line.

Start-Up Process

Much is involved in the process of opening a new school. Prior to opening the doors that first day of school, a process of planning and preparation spanning approximately one year will have been invested beforehand. Books, paper, pencils, and other supplies must be purchased and shelves stocked. Furniture will be purchased and assembled. Computers will be installed and brought on-line and phone lines will be connected. Teachers and support staff will be hired and/or reassigned from other sites. Orientation meetings will be held with staff and parents. Attendance areas will be adjusted. New bus routes will be established.

Attendance Boundary Analysis and Adjustment Guidelines

Whenever a new school is opened, attendance boundaries are redrawn. Boundaries are sometimes adjusted from time-to-time for other reasons, but this section is included here primarily for the purposes of bringing a new school on-line. The goal of this section is to outline a process and procedure to follow when it comes time to redraw the intra-district attendance boundaries. Intra-district attendance boundaries are those divisions between school attendance areas within the District. This does not have any effect on the external boundary of the District itself.

History has shown that these types of changes can have a major impact on a community and the neighborhoods that are affected by the change. For this reason, a cooperative process that involves, the Board of Trustees, District staff, teachers, parents, students, and community members should be developed. A boundary adjustment should be viewed as a district or community wide undertaking because all students could potentially be affected by the change.

Consideration should also be given to the effect any boundary changes could have on Modesto High School District. Changes would primarily affect Beyer High School and Enochs High School. Sylvan graduates currently feed to three different high schools, Beyer, Enochs, and Davis. Needless to say, adjusting attendance boundaries is a big undertaking that involves many players. Care must be taken to involve all affected parties in the process.

In an article, titled “*Seven factors you’d better not forget when changing attendance boundaries*”, which appeared in the September 1989 issue of The American School Board Journal, Timothy F. Hyland offers some sound advise about attendance boundary adjustments. His seven factors are summarized below:

1. *Life Span* – All attendance boundaries, no matter how well planned, have a limited life span.
2. *Effective Date* – Sufficient time should be allowed to plan for and implement the changes, usually 12 months or more prior to the effective date.
3. *Ethnic Balance* – Neighborhood demographics should be taken into consideration when adjusting boundaries.
4. *Resource Equity* – Do all students have access to the district’s resources equally? Are some schools more “crowded” than others? Attendance boundaries can be used to help bring equity among schools.
5. *Program Impact* – Any redistricting plan should reexamine the recent history of how instructional space has been used and how programs and services have affected or captured classroom space over the years. Is the existing space being utilized efficiently?
6. *Public Impact* – Communication with the public throughout the boundary adjustment process is quintessentially important. Impact to the community should be carefully considered and minimized if at all possible.

7. *Financial Impact* – The costs of opening and operating a new facility should be broken down into onetime and ongoing expenses. A financial analysis of the costs should be conducted and an accurate budget developed for all costs including the transportation impacts associated with a boundary change.

These seven factors should be kept in mind throughout the entire process of evaluating and adjusting intra-district attendance boundaries. As stated above, the most important element in the entire process is communication. While the ultimate decision rests with the Board of Trustees, input from all affected parties and groups must be considered. Almost every school district has had some experience that has provided them with the hindsight of how not to make a boundary adjustment. The process discussed in this section borrows from a number of sources in an attempt to present an easy to follow approach when adjusting or redrawing attendance boundaries.

The Process

The basic process to follow, subject to adjustment, is presented below. The goal of the entire process is to develop a workable plan that can be recommended to the Board for approval with minimal public resistance. While it will be nearly impossible to please all the parties affected by a boundary adjustment, the plan presented to the Board must be something that they can approve. If the plan draws a large negative backlash from the community, the Board will be hard-pressed to approve something that is so unpopular.

The process outlined below was put together to provide a vehicle for developing and carrying to the Board a sound workable boundary adjustment plan. The timeline for the entire process should begin at least 12 months before the adjustment is to take place.

The Steps:

1. Present to the Board of Trustees for information and discussion:
 - ✓ The need for the boundary adjustment
 - ✓ The intent to form an advisory committee to assist District Administration in formulating a recommendation to the Board
 - ✓ The committee's charge and responsibility
 - ✓ The proposed parameters for the committee to consider
 - ✓ The proposed list of committee participants
 - ✓ The committee's proposed meeting schedule
 - ✓ The proposed timeline and target date(s) for the change.
2. Make revisions as necessary based on feedback received from the Board of Trustees.
3. Secure the Board of Trustees' approval and authorization to commence the process.
4. Commence the process and committee meetings.

5. Evaluate options and develop recommendations. Prepare a draft boundary adjustment plan and implementation timeline.
6. Present draft options and recommendations to District leadership.
 - ✓ Revise and adjust as necessary based on feedback.
7. Present draft options and recommendations to District staff at large.
 - ✓ Revise and adjust as necessary based on feedback.
8. Present draft options and recommendations to the parents and the public.
 - ✓ Revise and adjust as necessary based on feedback.
9. Present draft options and recommendations to the Board of Trustees.
 - ✓ Revise and adjust as necessary based on feedback.
10. Present final plan document to the Board of Trustees for approval.
11. Implement boundary adjustment plan.

Boundary Adjustment Advisory Committee

A Boundary Adjustment Advisory Committee (BAAC) should be formed to include a cross-section of individuals that will be affected by the change. The purpose or charge of the BAAC is to:

Provide a community perspective and input on a variety of issues related to the proposed attendance boundary adjustment to assist District Administration in formulating a recommendation to the Board of Trustees.

It is important to note that the purpose of the committee is to assist staff in the formulation of a recommendation. It is not the committee's job to make the recommendation to the Board. The ultimate recommendation should come from the Superintendent and District staff. The recommendation should consider and incorporate, in as much as reasonably possible, the input of the committee. The following individuals are offered as suggested members of the committee:

- Assistant Superintendent of Business
- Assistant Superintendent of Human Resources
- Principal - Middle School
- Principal – Elementary School
- Principal - New School to Be Opened
- Principals - Elementary Schools (Attendance Areas Likely to Be Affected)
- Supervisor of Transportation
- CSEA Representative
- SEA Representative
- Parent Representatives from each of the Middle Schools
- Parent Representatives - Elementary Schools (Attendance Areas Likely to Be Affected)
- PTA President - Middle School
- PTA Presidents - Elementary Schools (Attendance Areas Likely to Be Affected)

- Representative From Modesto High School District
- Representative From the Real Estate Community
- Other Members?

Committee Parameters

Well-defined parameters of what the committee will be asked to look at should be established along with the charge from the Board of Trustees to form the committee.

Parameters for consideration by the committee:

1. The boundary plan must achieve a long-term balance of enrollment to capacity at all schools.
2. Socio-economic and ethnic balance among schools should be a consideration.
3. Attendance areas should be contiguous and work to maintain neighborhood/community identity.
4. Boundaries should be drawn to minimize transportation time and cost.
5. Adjustments to boundaries should consider the safety and welfare of the students as it pertains to the routes students take to school.
6. Growth potential over the next seven to ten years should be considered to minimize the likelihood of future changes.
7. The boundary plan should be consistent with Board Policies and honor any previous commitments concerning boundary adjustments.
8. Impact to the Modesto City High School District should be considered.
9. Sufficient time should be allowed to plan and implement the changes.

Once the committee has completed its work, District staff will prepare a draft plan of the proposed changes for presentation. This document should be reviewed with staff, parents, and the community at large. Feedback received during the review process should be considered and the plan revised/adjusted as necessary prior to presentation in final form to the Board of Trustees.