

Facilities Assessment and Implementation Plan

Summary and Board Review

May 2020



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Overview

The Escalon Unified School District commissioned a Facilities Implementation Plan (FIP) to guide the next level of facility improvements district-wide and at each school site.

The Facilities Implementation Plan integrates the District's vision for education initiatives with the ongoing educational program, establishes a facilities improvement program to support the educational program and provides a funding and sequencing program to fund its implementation

The work program for the Facilities Implementation Plan:

- Conducts an analysis of educational programs
- Assesses the ability of available facilities to house the programs
- Identifies funding sources and preliminary sequencing plan
- Provides options for Board consideration
- Identifies proposed improvements
- Seeks community input
- Establishes a plan to construct and improve school facilities

This presentation reviews a summary-of the District's facilities, proposed improvements, and proposed financing

District Mission, Vision, and Values

The District's Mission and Educational Vision

The mission of the District is to “ensure that all students learn at high levels.” The vision for the District is:

“We maintain high expectations and a rigorous and relevant academic focus for all learners through purposeful, collaborative relationships. Our students are highly literate, innovative thinkers who understand the need for continuous self-improvement in their pursuit of excellence. They are socially responsible and value working with others to build positive and productive relationships. They are inspired and prepared to thrive amidst the challenges of the 21st century.”

Values

- Collaboration: We collaborate to promote a shared responsibility and accountability so that all students learn.
- Effective Teaching: We provide structured ongoing staff development to improve professional practice so that all students learn.
- Rigorous/Relevant Curriculum: We prioritize our resources to provide challenging and meaningful learning experiences so that all students learn.
- Professionalism: We hold ourselves to a high professional standard so that all students learn.
- Community: We partner with our community as fellow stakeholders so that all students learn.

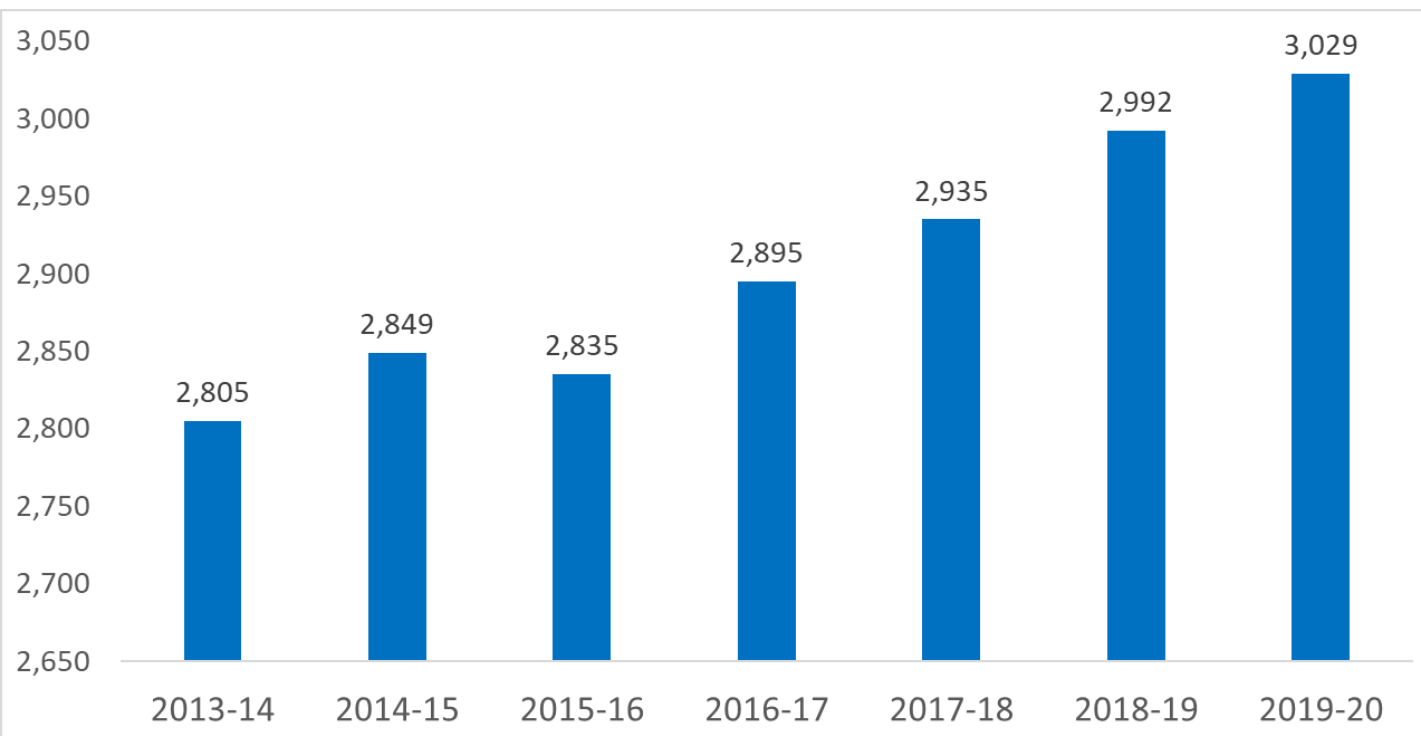
Enrollment

- The District and Charter have a total enrollment of 3,029 students for the 2019-2020 school year
- The District has experienced positive enrollment growth, adding 224 students since 2013-2014
- State TK-12 enrollment has also decreased over the last 4 years (0.3%), but County TK-12 enrollment increased (3.1%)
- This projection is based on the birth rates within the District which have yet to fully manifest in the TK/K enrollment
- Enrollment is anticipated to grow as new programs become available in the future

Enrollment by Grade 2018-19

Grade	Enrollment
TK	60
K	246
1	240
2	226
3	226
4	218
5	228
TK-5 Total	1,444
6	258
7	226
8	214
6-8 Total	698
9	211
10	227
11	211
12	201
9-12 Total	850
Total	2,992

District Historical Enrollment



Classroom Inventory & Student Capacity

		State Loading Standard				Local Loading Standard							
	2019-20	State	Perm.	State	Excess	Maximum	Perm.	Port.	Total	Est. Local Capacity		Total Local	Excess
School	Enrollment	Loading	CRs	Capacity	Capacity	Loading	CRs	CRs	CRs	Perm.	Port.	Capacity	Capacity
TK/K - 5th													
Collegeville ES	157	25	5	125	(32)	28	5	3	8	139	83	222	65
Dent ES	633	25	38	950	317	28	38	4	42	1,053	111	1,164	531
Farmington ES	109	25	3	75	(34)	28	3	5	8	83	139	222	113
Van Allen ES	338	25	12	300	(38)	28	12	5	17	333	139	471	133
Subtotal	1,237		58	1,450	213		58	17	75	1,607	471	2,079	842
TK/K - 12th													
Escalon Charter*	331	26	0	0	(331)	31	0	6	6	0	188	188	(143)
Subtotal	331		0	0	(331)		0	6	6	0	188	188	(143)
6th - 8th													
El Portal MS	631	27	18	486	(145)	35	18	7	25	630	245	875	244
Subtotal	631		18	486	(145)		18	7	25	630	245	875	244
9th - 12th													
Escalon HS	809	27	30	810	1	35	30	11	41	1,050	385	1,435	626
Vista HS	26	27	0	0	(26)	35	0	2	2	0	70	70	44
Subtotal	835		30	810	(25)		30	13	43	1,050	455	1,505	670
Total	3,034		106	2,746	(288)		106	43	149	3,287	1,359	4,647	1,613

* A portion of these students are located at Collegeville ES, Dent ES, and El Portal MS.

- The District's schools were built over different generations and reflect the design principles and standards of their time
- Today, there are 149 classrooms throughout the District: 106 permanent classrooms (71%) and 43 portable classrooms (29%)
- Based on State and local loading standards, the District has a capacity to house 2,747 and 3,287 students, respectively, in permanent classrooms; this substantially exceeds its current and projected enrollment

Educational Specifications

- ❑ Educational specifications for facilities are required by Education Code sections 14001 and 14030
- ❑ Educational specifications outline essential educational concepts and detailed facility requirements so that the “form” of school facilities effectively follows the “function” required by the educational program
- ❑ School districts have wide latitude in the design of their schools; they must ensure, however, that the design is consistent with the California Code of Regulations, Title 5 standards
- ❑ These standards include quantifiable minimums for various school site attributes, including site acreage and classroom square footage
- ❑ Specifications aid in anticipating activities, evaluating existing school sites and estimating costs associated with the modernization and new construction of school facilities
- ❑ Draft Educational Specifications for existing schools configured as TK-5, 6-8, and 9-12 schools, are presented in the following slide
- ❑ They meld local and previously designed components
- ❑ Facilities previously constructed in the District may have been built to previous specifications and standards; the following educational specifications reflect the District’s intent for future facilities

Summary of Proposed Educational Specification

The tables summarized the proposed Educational Specification for the District's schools

			Rural*	Urban*	6-8	9-12
			TK-5	TK-5		
		Enrollment	250	700	800	1,200
		SQFT	Number of Classrooms By Grade			
Room Type	Kindergarten	1,350	2	5	-	-
	General Purpose	960	8	23	29	29
	Special Ed/ SDC	960	1	1	1	1
	Special Ed/ RSP	480	1	1	1	1
	Science Labs	1,200	-	-	3	5
	Band Choir	1,800	-	-	1	1
	Pathway/ CTE	1,200-2,500	-	-		10

**The education specification distinguishes the elementary school located in the (Urban) and the schools located outside of the city limits (Rural)*

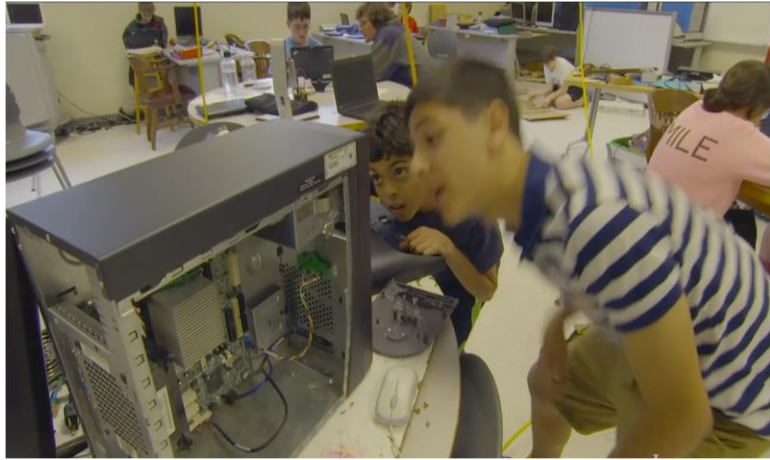
		Square Footage of Use By Grade			
		Rural*	Urban*	6-8	9-12
		TK-5	TK-5		
Room Type	Administration	2,605	3,305	3,405	5,605
	Multipurpose Room	4,575	6,550	6,750	6,000
	Library Media Center	2,930	2,930	2,480	10,565
	Gymnasium	-	-	7,050	29,505
	Total Built Area	23,930	51,625	59,090	150,100

**The education specification distinguishes the elementary school located in the (Urban) and the schools located outside of the city limits (Rural)*

Summary of 21st Century Learning Environments

The District intends to implement 21st Century Learning Environments at all schools over time as funds become available

- ❑ The design of learning spaces should foster creativity, investigation, and inquiry, with:
 - ❑ Open, flexible, multi-functional learning spaces that support individualized and project-based learning
 - ❑ Enhanced furnishings and equipment that support differentiated instruction techniques
 - ❑ Optimized learning environments with solutions that enhance science labs, innovate math and writing workspaces
- ❑ These spaces should build an effective bridge between modern technology and educational goals, such that:
 - ❑ Mobile devices are preloaded with digital textbooks and interactive applications
 - ❑ District bandwidth capacity and cloud computing support 24/7/365 academic learning

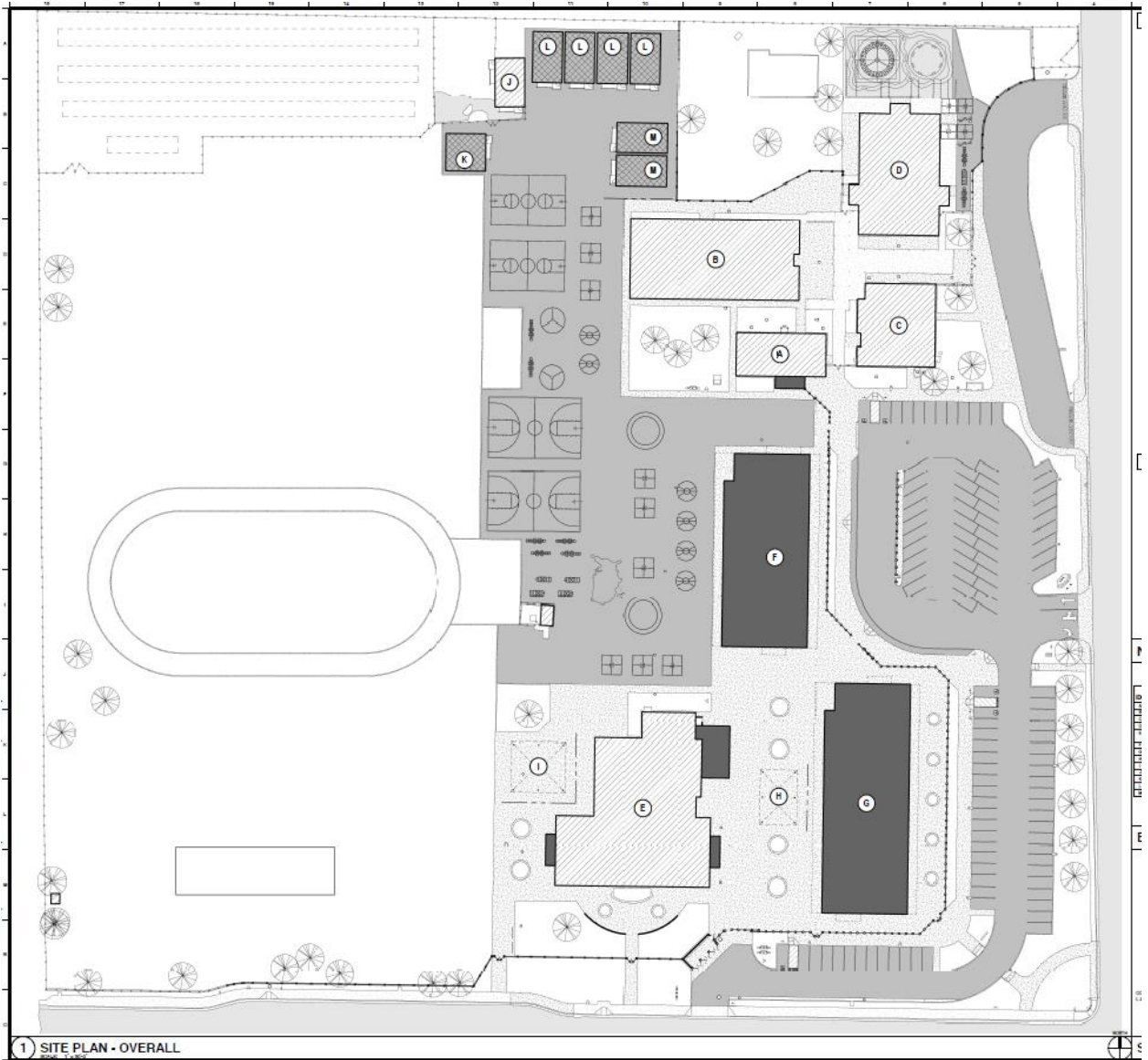


Key Findings- Facilities Assessment + General Needs

On-site assessments for District schools were conducted in July 2019 to investigate needs and areas of interest, key observations include:

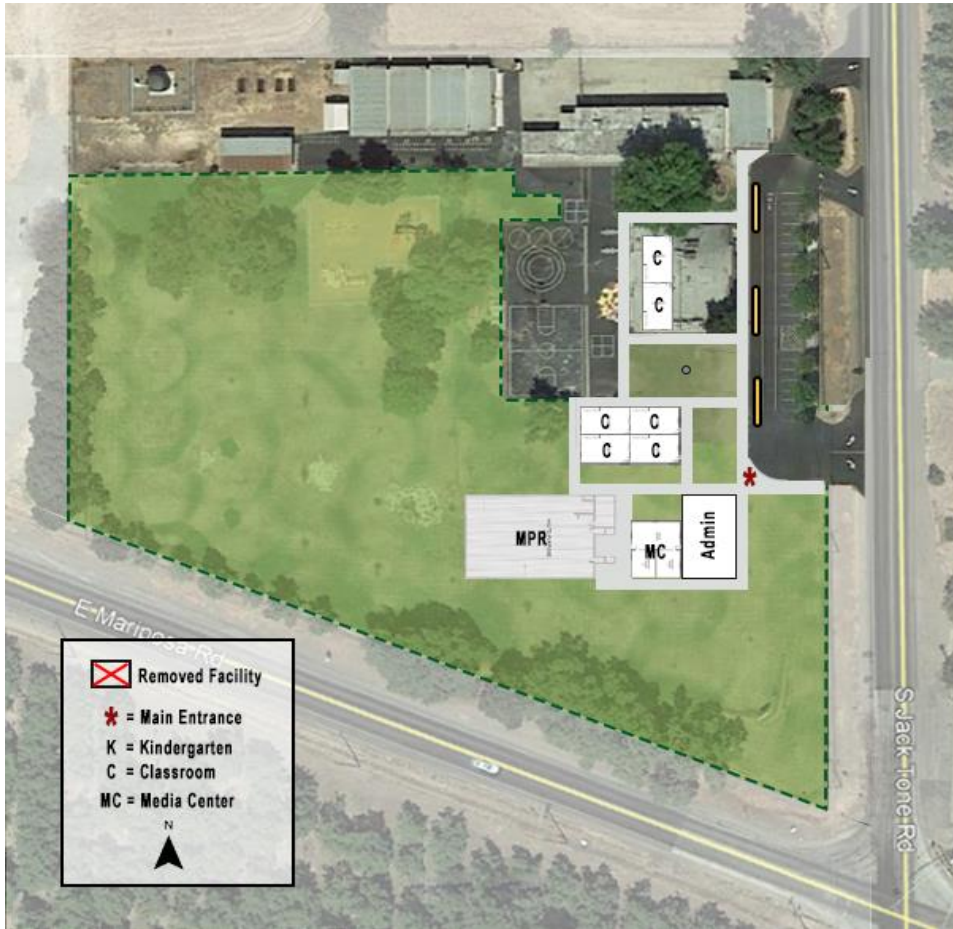
- ❑ The District's school facilities were built across several generations and reflect the age, design principals, and design standards of their time
- ❑ The District desires to maintain and improve the functionality of its campuses and to configure them for optimal use for projected enrollment needs
- ❑ The District has excess capacity at every school site, which is primarily found in portable classrooms, many of which exceed their useable life
- ❑ Dent Elementary requires immediate improvements; modernization plans have been approved by DSA and additional funds are needed
- ❑ There is a need to increase the capacity at Collegeville ES; modernization plans have been finalized and submitted to DSA, but do not cover all improvements and additional classrooms needed on the campus
- ❑ The District currently maintains several older portable facilities that may be removed to increase State aid eligibility and construct new permanent classrooms where feasible
- ❑ There is a need to renovate site-specific support spaces, restrooms, and infrastructure at facilities, including the MPRs at El Portal Middle School, Collegeville Elementary, and Farmington Elementary

Dent Elementary



- ❑ Phase 1 improvements are complete
- ❑ Future anticipated improvements include the construction of two new classroom buildings and overall site improvements

Collegeville Elementary



- ❑ Construction of new MPR, media center, admin building with new school front and improved parking
- ❑ Construct new permanent classrooms and restrooms
- ❑ Convert existing cafeteria and kitchen into permanent classrooms
- ❑ Modernize and provide 21st Century upgrades to existing permanent classrooms
- ❑ Modernize restrooms throughout campus
- ❑ New bell, clock, and public address system
- ❑ New electrical service and well

Farmington Elementary



- ❑ Modernize and provide 21st Century upgrades to existing permanent classrooms
- ❑ Modernize admin building
- ❑ Modernize MPR building
- ❑ Modernize restrooms throughout campus
- ❑ New bell, clock, and public address system

Van Allen Elementary



- ❑ Modernize and provide 21st Century upgrades to existing permanent classroom facilities
- ❑ Renovate restrooms throughout campus

El Portal Middle



- ❑ Replacement of portable classrooms with new permanent classrooms
- ❑ Reroof and modernize MPR building (lighting, flooring, sound system)
- ❑ Modernize restrooms throughout campus
- ❑ New bell, clock, and public address system

Community Meetings and Response

- ❑ A series of six community meetings were held January 21-23, 2020 at El Portal Middle School, Van Allen Elementary School, and Dent Elementary School. Each school hosted two sessions, one immediately after school and one in the evening. At each meeting, a 20 minutes presentation was made by Superintendent Ron Costa and a representative from CFW.
- ❑ An additional three meetings were held February 7, 10, and 11, 2020 at Collegeville Elementary, Escalon High School, and Farmington Elementary. At these meetings, the presentation was made by Superintendent Costa.
- ❑ Many teachers, parents, and community members attended the meetings, with three of the meetings having 20 or more attendees; the second meeting at Dent was attended by more than 40 people.
- ❑ The presentation highlighted recent facilities projects completed by the District, the Facilities Assessment and Implementation Plan process and findings, the proposed projects selected by the Board, and the potential funding sources
- ❑ The projects and work of the District was well received by the meeting attendees.

Comments and Questions from Community Meetings

I'm a teacher at Collegeville, and the dual language teachers want to show support for the projects.

When will the construction begin?
Which project is first?

Removing old portables is important.

Is the District getting enough growth to justify the projects?

I'm really excited about these projects.

How much will this cost?

The portables at El Portal are bad. I am glad that these projects will replace them.

Available Resources: Local G.O. Bonds

- ❑ Districts may issue G.O. bonds based on their assessed value (A.V.) and bonding capacity
- ❑ The District's current total A.V. is approximately \$2.42 billion and has increased at an average growth rate of 5.0% over the last 5 years and 4.8% during the last 15-year period
- ❑ Based on a statutory debt limit of 1.25% of total (A.V.), the District's current overall bonding capacity is approximately \$60.5 million
- ❑ Approximately \$23.9 million in existing bonds is outstanding, 40 percent of the statutory bonding capacity
- ❑ The District's net bonding capacity is approximately \$36.6 million

Fiscal Year 2019/20		Historical Assessed Value		
		Fiscal Year	Total	% Δ
ASSESSED VALUATION		2005	\$1,232,847,470	6.35%
Secured Assessed Valuation	\$2,328,597,499	2006	\$1,402,086,239	13.73%
Unsecured Assessed Valuation	\$91,090,902	2007	\$1,572,760,092	12.17%
		2008	\$1,719,268,957	9.32%
		2009	\$1,744,302,148	1.46%
DEBT LIMITATION		2010	\$1,773,584,689	1.68%
Total Assessed Valuation	\$2,419,688,401	2011	\$1,745,932,537	-1.56%
Applicable Bond Debt Limit	2.50%	2012	\$1,725,323,571	-1.18%
Bonding Capacity	\$60,492,210	2013	\$1,751,427,828	1.51%
Outstanding Bonded Indebtedness	\$23,933,772	2014	\$1,809,911,815	3.34%
		2015	\$1,932,165,311	6.75%
		2016	\$2,091,896,956	8.27%
NET BONDING CAPACITY	\$36,558,438	2017	\$2,156,761,679	3.10%
% of Capacity Current Used	39.57%	2018	\$2,251,542,486	4.39%
		2019	\$2,316,939,859	2.90%
		2020	\$2,419,688,401	4.43%
			5-Year Average	4.98%
			10-Year Average	3.06%
			15-Year Average	4.79%

Bond Program Overview

- ❑ The District has 4 outstanding G.O. bond series at a combined tax rate of \$34.10 per \$100,000 A.V.
- ❑ The plan explores all funding sources, but additional funding in the form of a local bond will be required to complete needed projects
- ❑ The District has expressed an interest in minimizing the increase in tax rates for any new bond program
- ❑ On that basis, the plan proposes increasing the current tax rate by approximately \$22, for a total of \$56 per \$100,000 of assessed value; this would generate approximately \$21.9 million in two bond series, issued as current interest and capital appreciation bonds
- ❑ The program assumes a 4% A.V. growth rate, a 30-year term, and ongoing utility revenues of \$265,000 per year to support the bond

Series	Type	Sale Date	Principal Amount	Principal Outstanding	Repayment Ratio ⁽¹⁾	Years Remaining	Comments
2002 Election (Prop. 39 Election)						Authorization:	\$7,500,000
New Money Issues							
2003	Tax-Exempt GO Bond	2/25/2003	\$7,499,157	\$0	1.84	0	
Total			\$7,499,157				
Refunding Issues							
2012	Tax-Exempt GO Bond	8/1/2012	\$5,890,000	\$4,930,000	1.34	7	2003
Total				\$4,930,000	1.63	7	
						Remaining Authorization:	\$0
2002 Election 2019-20 Tax Rate (Preliminary): \$7.20							
2012 Election (Prop. 39 Election)						Authorization:	\$19,500,000
New Money Issues							
2013A	Tax-Exempt GO Bond	2/28/2013	\$9,995,820	\$9,638,772	2.49	22	
2015B	Tax-Exempt GO Bond	12/16/2015	\$5,470,000	\$5,365,000	1.75	20	
2017C	Tax-Exempt GO Bond	12/13/2017	\$4,030,000	\$4,000,000	1.71	0	
Total			\$19,495,820	\$19,003,772	2.12	22	
						Remaining Authorization:	\$0
2012 Election 2019-20 Tax Rate (Preliminary): \$26.90							
All Elections Total			\$26,994,978	\$23,933,772	1.92	22	
Aggregate 2019-20 Tax Rate (Preliminary): \$34.10							

*Sources: Electronic Municipal Market Access (EMMA), Thomson Reuters, County

⁽¹⁾ Repayment ratio upon issuance of bonds

Identified Sources of Funding

Funds on Hand:

- ❑ The District currently has approximately \$3.7 million in anticipated fund balances that can be used for districtwide facilities improvements
 - Fund 21 – Building – \$0.9 million
 - Fund 35 – County School Facilities – \$2.8 million
- ❑ Estimates are as of May 2020

State Aid:

- ❑ The District has previously submitted funding applications for the projects underway at Dent, using approximately \$4.7 million of Districtwide new construction eligibility and \$5.1 million of modernization eligibility
- ❑ The District has additional new construction eligibility beyond what was submitted for Dent
- ❑ The District has modernization eligibility at many of its school sites

Developer Fees:

- ❑ The District is collecting developer fees, which can be used on eligible facilities improvements across the District; the District currently has approximately \$340,000 in developer fees on hand

Proposed Program Sources

- The District has approximately \$3.7 million in existing fund balances available for construction projects
- The District has also identified approximately \$20.2 million in State aid eligibility
- Based on identified projects and available sources of funding, the District would need to seek approval of a local bond in the amount of approximately \$21.9 million to cover the funding shortfall

Program Sources of Funding	Initial Phase	Subsequent Phase	Total
Local Funding			
Existing Fund Balances - Fund 21 - Building	\$ 900,970		\$ 900,970
Existing Fund Balances - Fund 25 - Developer Fees	\$ 340,694		\$ 340,694
Existing Fund Balances - Fund 35 - County School Facilities	\$ 2,772,379		\$ 2,772,379
Local Funding Subtotal	\$ 4,014,043	\$ -	\$ 4,014,043
State Funding			
Submitted New Construction Funding - Dent ES		\$ 4,671,640	\$ 4,671,640
Submitted Modernization Funding - Dent ES		\$ 5,066,054	\$ 5,066,054
New Construction Eligibility - Districtwide		\$ 4,730,508	\$ 4,730,508
Modernization Eligibility - Collegeville ES		\$ 1,021,050	\$ 1,021,050
Modernization Eligibility - Farmington ES		\$ 1,027,796	\$ 1,027,796
Modernization Eligibility - Van Allen ES		\$ 2,227,112	\$ 2,227,112
Modernization Eligibility - El Portal MS		\$ 1,489,465	\$ 1,489,465
State Funding Subtotal	\$ -	\$ 20,233,625	\$ 20,233,625
General Obligation (G.O.) Bonds			
Estimated Future G.O. Bond Proceeds	\$ 16,400,000	\$ 5,500,000	\$ 21,900,000
General Obligation (G.O.) Bonds Subtotal	\$ 16,400,000	\$ 5,500,000	\$ 21,900,000
Total Sources	\$ 20,414,043	\$ 25,733,625	\$ 46,147,668

Proposed Program Uses

Proposed Program Uses	Initial Phase	Subsequent Phase	Total
Dent ES			
Future phased improvements	\$ 17,255,703		\$ 17,255,703
Dent ES Subtotal	\$ 17,255,703	\$ -	\$ 17,255,703
Collegeville ES			
Construct new cafeteria/media center/admin building w/ new parking & school front	\$ 772,287	\$ 6,950,583	\$ 7,722,870
Construct new permanent classrooms and Restrooms	\$ 273,063	\$ 2,457,565	\$ 2,730,628
Modernization and 21st Century upgrades to existing classrooms	\$ 62,500	\$ 562,500	\$ 625,000
Renovate restrooms throughout campus	\$ 53,200	\$ 478,800	\$ 532,000
New bell, clock, and public announcement systems	\$ 4,475	\$ 40,275	\$ 44,750
New electrical service & well	\$ 28,125	\$ 253,125	\$ 281,250
Convert existing cafeteria into general purpose classrooms	\$ 46,257	\$ 416,317	\$ 462,574
Additional site improvements (playfield)	\$ 25,000	\$ 225,000	\$ 250,000
Collegeville ES Subtotal	\$ 1,264,907	\$ 11,384,165	\$ 12,649,072
El Portal MS			
Replace portable classrooms with new permanent classrooms		\$ 6,175,000	\$ 6,175,000
Modernize MPR building (lighting, flooring, sound system)		\$ 505,880	\$ 505,880
Reroof MPR building		\$ 311,220	\$ 311,220
Renovate restrooms throughout campus		\$ 798,000	\$ 798,000
New bell, clock, and public announcement systems		\$ 178,563	\$ 178,563
El Portal MS Subtotal	\$ -	\$ 7,968,662	\$ 7,968,662
Farmington ES			
Modernize admin building		\$ 385,560	\$ 385,560
Modernize MPR building		\$ 1,373,558	\$ 1,373,558
Renovate restrooms throughout campus		\$ 432,000	\$ 432,000
Modernize and 21st century upgrades to existing classrooms		\$ 625,000	\$ 625,000
New bell, clock, and public announcement systems		\$ 39,938	\$ 39,938
Farmington ES Subtotal	\$ -	\$ 2,856,055	\$ 2,856,055
Van Allen ES			
Modernize and 21st century upgrades to existing classrooms		\$ 500,000	\$ 500,000
Removate restrooms throughout campus		\$ 532,000	\$ 532,000
Van Allen ES Subtotal	\$ -	\$ 1,032,000	\$ 1,032,000
Districtwide Subtotal	\$ 18,520,610	\$ 23,240,882	\$ 41,761,492
Program Reserve	\$ 1,893,433	\$ 2,492,743	\$ 4,386,176
Total Uses	\$ 20,414,043	\$ 25,733,625	\$ 46,147,668

Possible Next Steps

- Board provides input on proposed Plan
- CFW delivers the final written Facilities Assessment and Implementation Plan to the District for adoption
- CFW conducts a survey of voters
- Board calls election for new bond program
- Upon successful election, bonds are sold
- District implements facilities improvement program