

SANTA ANA UNIFIED SCHOOL DISTRICT
1601 EAST CHESTNUT AVENUE
SANTA ANA, CA 92701

SPECIAL STUDY SESSION

The Special Study Session of the Santa Ana Unified School District Board of Education will convene at Santa Ana Unified School District, 1601 E. Chestnut Ave., Santa Ana, California, in the Board Room, located on the First Floor at 6:00 p.m. – 9:00 p.m., Tuesday, March 17, 2015.

AGENDA

6:00 P.M. CALL TO ORDER

PLEDGE OF ALLEGIANCE

PUBLIC PRESENTATIONS (Pursuant to Government Code 54954.3)

- Individuals or groups may make presentations or bring matters to the Board's attention that is within the Board's subject matter jurisdiction. Individual speakers are allowed three minutes to address the Board on agenda or non-agenda items.

DISCUSSION ITEMS:

- 1.0 History and Structure of Developer Fees
- 2.0 History and Structure of Emergency Repair Program (ERP)
- 3.0 Update on Valley Sports Complex
- 4.0 Capital Facilities Planning

ADJOURNMENT

FUTURE MEETING: The next Regular Meeting of the Board of Education will be held on Tuesday, March 24, 2015, at 6:00 p.m.



Santa Ana
Unified School District

Special Study Session

Facilities Planning and Construction

March 17, 2015





Santa Ana
Unified School District

HISTORY AND STRUCTURE OF DEVELOPER FEES



WHAT ARE DEVELOPER FEES?

Statutory mechanism providing fees to a school district to accommodate students resulting from new development.

- Allowed by Senate Bill 50 and Ed. Code 17620
- School districts collect fees for new construction, renovation, and reconstruction to mitigate impact
- Level 1, 2, and 3 fees
- Fees collected prior to the issuance of the city building permit



FEE LEVELS

Level 1	Minimum amount allowed to be collected set by statute and adjusted by SAB biennially (even years).
Level 2	Increased fees allowed only if meet certain criteria. Intended to provide 50% of cost to house student.
Level 3	Only allowed if SAB finds that state funds for new construction are no longer available.



LEVEL 1 FEE

- Fee Justification Study (establish “nexus”)

Residential - \$3.36 per sq. ft.

Commercial/Industrial - \$0.54 per sq. ft.

(State Allocation Board updated May 2014)



LEVEL 2 FEE - REQUIREMENTS

- School Facilities Needs Analysis (establish “nexus”)
- District must meet at least 2 of the 4 requirements:
 - 1) Substantial enrollment on multi-track year-round schedule
 - 2) Held a local GO bond election within the past 4 years which received at least 50% + 1 of all votes cast
 - 3) Issued debt or incurred obligations for capital outlay in a specified percentage of the district’s local bonding capacity
 - 4) At least 20% of teaching stations are relocatable classrooms



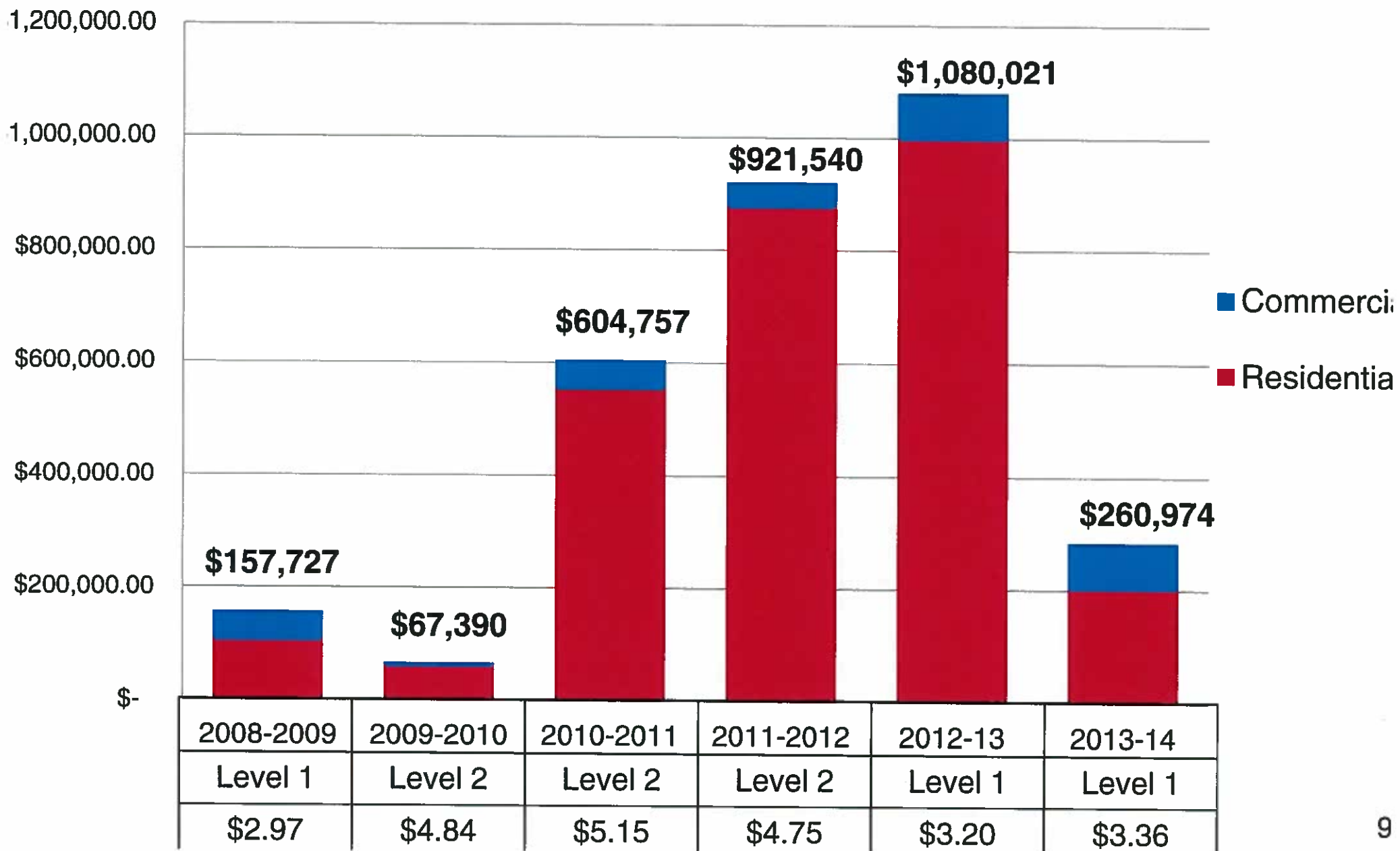
REPORTING

- **Annual year-end report** (Govt. Code Section 66006)
- **5-year report** (Govt. Code Section 66001(d))
 - Reports must be made available to the public within 180 days after last day of fiscal year



2013-14 DEVELOPER FEE REPORT

	Reportable Fees
Beginning Balance (07/01/13)	\$ 2,696,151.06
Reportable Fees Collected	\$ 280,701.94
Interest and Other Income	\$ 2,958,823.34
Total Assets	\$ 5,935,676.34
Expenditures	\$ 3,430,762.39
Ending Balance (06/30/14):	\$ 2,504,913.95





Project	Status	Anticipated Fees
Santa Ana:		
South Coast Speed Wash (2402 S Bristol St) 21,790 SF car wash	2 nd round of plan review	\$11,113
The Depot at Santiago (923 N Santiago St) 70 rental units plus 9,000 SF retail/office	Plan review complete	Approx. \$200K
Main Place Mall interior remodel	Under construction	Exempt – no new sq. footage
Park View at Town and Country Manor (555 E Memory Ln) 8-story/ 174-senior living units	CC approved June '14	Exempt – senior housing
Mater Dei parking structure	Plan review	Exempt – no new sq. footage
The Madison (200 N Cabrillo Park Dr) 5-story multi-family	2 nd round of plan review	\$600K-\$1M
Santa Ana Lofts (1200 N Main St) Re-use of existing 9-story bldg.	Plan review	Approx. \$350,000
Artist Gateway (117 S Sycamore St) 2-story / 14 live/work lofts	Plan review	Approx. \$85,000
Legado at The Met (200 E First American Way) 5-story / 284-unit multi-family	Plan review	\$1.7M
The Heritage (2001 E Dyer Rd) 1,240 MF & 18,060 SF retail/restaurant	Environmental review	\$2.1-\$4.2M
Subtotal:		\$5 million - \$7.5 million
Irvine/Newport Development Area (INDA)		
Milani Apartments (18831 Von Karman) 5-story / 287 units	PC approved Nov'14	\$600K-\$950K
Elements – Phase 1 (Jamboree & Campus) 1,600 units total	Approved	\$1.3-\$2.7M
Campus & Von Karman Apartments (Colton) 876 units	Under review	\$1.5-\$2.9M
Uptown Newport (4321 Jamboree Road) 1,244 units & 11,500 SF retail	Grading underway	\$2.1 - \$4.2
Subtotal:		\$5.5 million – \$10.75 million

Note, anticipated fees may change based on project square footage and economic/market conditions.



HISTORY AND STRUCTURE OF EMERGENCY REPAIR PROGRAM (ERP)



Background:

- 2000 – *Williams v. California*
 - State denying students fundamental right to an education under the California Constitution by failing to provide the basic tools
- 2004 – Williams Settlement - \$800 million
- 2007/08 – SAUSD submitted ERP funding applications



As background, the Williams Lawsuit Settlement and subsequent legislation created the Emergency Repair Program (ERP) to enable school districts - primarily urban school districts - funding to make critical health and safety repairs. The targeted schools are in the lowest 3 tiers in test scores which typically are attended by economically disadvantaged children.

The Emergency Repair Program (ERP) provides grant and/or reimbursement funding to Local Educational Agencies (LEAs) for the cost of repairing or replacing existing building systems or structural components that are broken or not functioning properly and that pose a health and safety threat to students and staff at eligible school sites. Funds will be made available annually through the Budget Act and the program will operate until \$800 million has been allocated.

Santa Ana Unified School District (SAUSD) has over 30 school sites that qualify under the ERP regulations. SAUSD hired professional services to inspect and identify critical health and safety needs at all campus' that qualify for ERP. Applications and supporting documentation was provided to the Office of Public School Construction for review and finally to the State Allocation Board for apportionment. Approved projects were then placed on a list in date order for funding. SAUSD's projects were mostly grouped together in date order, and have languished on the list since ERP funding was cut off by the state.

Governor Brown's January budget proposal included funding for ERP at \$188 million. There are 50 SAUSD projects totaling an estimated \$48,050,928 that would be funded if the administration's budget proposal for ERP is approved by the legislature. Altogether, SAUSD has \$73,869,571 of ERP projects on the unfunded approved list at the state. The governor has proposed providing funding for all approved ERP projects in the subsequent budget year.

In addition to providing equitable school facilities for disadvantaged children, the ERP program would provide high paying jobs and stimulate the economy. Regulations require that ERP projects are completed within eighteen months of funding (21 months if Division of State Architect approval is required) thus improving the state economy quickly.

SANTA ANA UNIFIED SCHOOL DISTRICT
Summary of State Funding Requests

SCHOOL NAME	PACKAGE NUMBER	PROJECT SCOPE	PROGRAM FROM WHICH FUNDS WILL BE REQUESTED	ESTIMATE OF STATE FUNDS		APPLICATION SUBMITTAL DATE	OPSC APPLICATION NUMBER	SAB APPORTIONMENT DATE	DATE FUNDS SHOULD BE REC'D BY DISTRICT	FUNDS REC'D BY DISTRICT	DATE WORK MUST BE COMPLETED & EXPENDITURE REPORT DUE	COMMENTS	
				GRANT	REIMB.								
VALLEY HS	101	Roofing of Buildings Not Yet Repaired/Replaced	ERP	\$2,854,273	\$0	9.10.07	6186670-00-00	1.30.08	3.15.08	\$2,854,273	1.30.08		
	102	Roofing of Buildings U & P which have been Replaced	ERP	\$0	\$289,484	7.18.07	6186670-00-06	12.12.07	1.30.08	\$289,484	12.12.08	Need to complete 61-04	
	104	Asphalt	ERP	\$2,129,870	\$0	7.18.07	6186670-00-07	12.12.07	1.30.08	\$2,129,870	12.12.08		
	105	Fencing	ERP	\$73,857	\$0	2.14.08	6186670-00-150	Aug-Oct 2009	Oct-Nov 09				Date of appt. based on current workload list & funding availability
	106	Broken Window Repairs	ERP	\$65,115	\$27,598	3.3.08	6186670-00-150	Aug-Oct 2009	Oct-Nov 09				Date of appt. based on current workload list & funding availability
	107	Wrestling Room Repairs	ERP	\$0	\$63,528	3.3.08	6186670-00-150	Aug-Oct 2009	Oct-Nov 09				Date of appt. based on current workload list & funding availability
	108	New Gas Line Required	ERP	\$0	\$59,853	3.3.08	6186670-00-150	Aug-Oct 2009	Oct-Nov 09				Date of appt. based on current workload list & funding availability
	109	Site Sewer System	ERP	\$0	\$108,611	3.3.08	6186670-00-150	Aug-Oct 2009	Oct-Nov 09				Date of appt. based on current workload list & funding availability
	110	Broken Water Valves	ERP	\$0	\$30,278	3.3.08	6186670-00-150	Aug-Oct 2009	Oct-Nov 09				Date of appt. based on current workload list & funding availability
	111	Boiler Repairs	ERP	\$0	\$38,307		6186670-00-150	Aug-Oct 2009	Oct-Nov 09				Need all info
VALLEYCIE/ROP	112	Heating	ERP									Need signature. Date of appt. based on current workload list & funding	
	113												
	114												
	115												
	116												
	117												
	118												
Subtotal				\$5,123,215	\$1,093,800					\$5,253,737			
CARR INT. (NO add'l projects eligible)	201	Roofing	ERP	\$914,441	\$0	10.1.07	6186670-00-13	est May 2008	7.5.08	\$0		Awaiting OPSC review. Receipt of funds dependent on quickness of \$100 mil addition	
	202	Painting/Asphalt	ERP	\$172,173	\$0	9.27.07	6186670-00-10	est April 2008	6.5.08	\$0		Awaiting OPSC review	
	203	Storm System	ERP	\$305,786	\$0	9.27.07	6186670-00-11	est April 2008	6.5.08	\$0		15-day letter due March 31st	
	204	Fencing	ERP	\$138,866	\$0	9.27.07	6186670-00-12	est April 2008	6.5.08	\$0		Awaiting OPSC review	
Subtotal				\$1,127,216	\$0					\$0			
TAFTE S	301	Decorative, but Falling Beams	ERP	\$0	\$0							Need all info.	
Subtotal				\$0	\$0					\$0			
SANTA ANA HS	402	Electrical - Entire Campus	ERP	\$2,254,836	\$0	2.14.08	6186670-00-T80	Aug-Oct 09	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	403	Fire Alarm	ERP	\$1,186,371	\$0	3.3.08	6186670-00-T80	Aug-Oct 09	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	404	Public Address System	ERP	\$620,760	\$0	2.14.08	6186670-00-T80	Aug-Oct 09	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	405	Roofing	ERP	\$0	\$0							Need all info	
	406	Boiler Repair	ERP	\$4,605,825	\$0	3.3.08	6186670-00-T80	Aug-Oct 09	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	407	Asphalt	ERP	\$711,137	\$0	3.13.08	6186670-00-T80	Aug-Oct 09	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
Subtotal				\$9,648,449	\$0					\$0			
SADDLEBACK HS	501	Mold Damage	ERP	\$3,189,488	\$0	7.19.07	6186670-00-02	12.12.07	1.30.08	\$3,189,488	12.12.08		
	502	Painting/Asphalt	ERP	\$85,267	\$0	3.3.08	6186670-00-T80	Aug-Oct 09	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	503	Roofing	ERP	\$4,240,566	\$0	3.3.08	6186670-00-T80	Aug-Oct 09	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	504	Old Portables (12-13 ports)	ERP	\$14,685,278	\$0	3.12.08	6186670-00-T80	Aug-Oct 09	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	505	Electrical - Entire Campus	ERP	\$878,348	\$0	3.12.08	6186670-00-T80	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	506	Fencing	ERP	\$28,832	\$0	3.4.08	6186670-00-T80	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	507	Heating	ERP	\$502,717	\$0	3.12.08	6186670-00-T80	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	508	Storm Drain System	ERP	\$24,794,598	\$0							Need all info	
Subtotal				\$24,794,598	\$0					\$3,182,498		Date of appt. based on current workload list & funding availability	
CAVERES	602	Heating	ERP									Need all info	
	603	Playground Equipment/LOW PRIORITY	ERP									Need all info	
Subtotal				\$0	\$0					\$0			
DIAMOND ES	702	Low Voltage Fire Alarm and PA System	ERP									Need all info	
	703	Asphalt/Concrete	ERP	\$153,900	\$0		6186670-00-T80	Aug-Oct 2009	Oct-Nov 09			Need signature. Date of appt. based on current workload list & funding availability	
	704	Fencing	ERP	\$37,215	\$0		6186670-00-T80	Aug-Oct 2009	Oct-Nov 09			Need signature. Date of appt. based on current workload list & funding availability	
	706	Playground Equipment	ERP									Need all info	
Subtotal				\$191,115	\$0					\$0			
EDISON ES	801	Roofing	ERP									Need all info	
	802	Asphalt/Concrete	ERP	\$171,243	\$0	3.13.08	6186670-00-T80	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	804	FAPA	ERP									Need all info	
Subtotal				\$171,243	\$0					\$0			
FRANKLIN ES	901	Roofing	ERP									Need all info	
	903	Asphalt/Concrete	ERP									Need all info	
	904	Fencing	ERP									Need all info	
	905	Heating	ERP									Need all info	
	907	Playground Equipment	ERP									Need all info	
Subtotal				\$0	\$0					\$0			
FREMONT ES	1001	Roofing	ERP	\$3,128,553	\$0	3.4.08	6186670-00-T80	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	1002	Heating	ERP									Need all info	
	1003	Playground Equipment	ERP									Need all info	
Subtotal				\$3,128,553	\$0					\$0			
GARFIELD ES	1101	Roofing	ERP	\$388,546	\$0	3.3.08	6186670-00-T80	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	1102	Storm Drain System	ERP									Need all info	
Subtotal				\$388,546	\$0					\$0			
GRANT ES	1201	Roofing	ERP									Need all info	
Subtotal				\$0	\$0					\$0			
HOOVER ES	1301	Roofing	ERP	\$1,973,348	\$0	3.13.08	6186670-00-T80	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	1302	Asphalt/Concrete	ERP	\$200,848	\$0	3.13.08	6186670-00-T80	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability	
	1304	Storm Drain System	ERP									Need all info	
	1305	Playground Equipment	ERP									Need all info	
Subtotal				\$2,178,997	\$0					\$0			

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				GRANT	REVENUE							
JACKSON ES	1401	Roofing	ERP	\$1,622,342	\$0	3.3.09	61/66670-00-TBD	Aug-Oct 2009	Oct-Nov 09			
	Subtotal			\$1,622,342	\$0							Date of appt. based on current workload list & funding availability
LATHROP INT	1601	Roofing	ERP	\$1,412,536	\$0		61/66670-00-TBD	Aug-Oct 2009	Oct-Nov 09			Need signature. Date of appt. based on current workload list & funding availability
	1602	Asphalt/Concrete	ERP									Need all info.
	Subtotal			\$1,412,536	\$0							Need all info.
MARTIN ES	1701	Roofing	ERP									Need all info.
	1702	Low Voltage	ERP									Need all info.
	1703	Asphalt/Concrete	ERP									Need all info.
	1704	Fencing	ERP									Need all info.
	1705	Site Plumbing	ERP									Need all info.
	1706	Playground Equipment	ERP									Need all info.
	Subtotal			\$0	\$0							Need all info.
MONTE VISTA ES	1801	Roofing	ERP	\$1,029,429	\$0	3.12.06	61/66670-00-TBD	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability
	1802	Asphalt/Concrete	ERP									Need all info.
	1803	Fencing	ERP									Need all info.
	1804	Playground Equipment	ERP									Need all info.
	Subtotal			\$1,029,429	\$0							Need all info.
REMBINGTON ES	1901	Roofing	ERP									Need all info.
	1904	Asphalt/Concrete	ERP									Need all info.
	1905	Fencing	ERP									Need all info.
	1908	Roofing	ERP									Need all info.
	1909	Playground Equipment	ERP									Need all info.
	Subtotal			\$0	\$0							Need all info.
WILLARD INT	2001	Roofing	ERP	\$1,306,376	\$0		61/66670-00-TBD	Aug-Oct 2009	Oct-Nov 09			Need signature. Date of appt. based on current workload list & funding availability
	2002	Electrical - Entire Campus	ERP									Need all info.
	2003	Fire Alarm/PA	ERP									Need all info.
	2004	Asphalt/Concrete	ERP	\$240,207	\$0	3.4.06	61/66670-00-TBD	Aug-Oct 2009	Oct-Nov 09			Need all info.
	2005	Fencing	ERP	\$51,780	\$0	3.4.06	61/66670-00-TBD	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability
	2006	Heating	ERP									Date of appt. based on current workload list & funding availability
	2007	Site Plumbing	ERP									Need all info.
	Subtotal			\$1,598,369	\$0							Need all info.
ADAMS ES	2101	Asphalt Repairs	ERP									Need all info.
	2102	Fencing	ERP									Need all info.
	2103	Playground Equipment	ERP	\$218,942	\$0	3.3.06	61/66670-00-TBD	Aug-Oct 09	Oct-Nov 09			Date of appt. based on current workload list & funding availability
	2104	Storm Drain System	ERP									Need all info.
	Subtotal			\$218,942	\$0							Need all info.
HARVEY(CARL) ES	2201	Playground Equipment	ERP									Need all info.
	Subtotal			\$0	\$0							Need all info.
LINCOLN ES	2301	Roofing	ERP	\$1,173,152	\$0		61/66670-00-TBD	Aug-Oct 2009	Oct-Nov 09			Need signature. Date of appt. based on current workload list & funding availability
	2302	Asphalt/Concrete	ERP	\$64,183	\$0		61/66670-00-TBD	Aug-Oct 2009	Oct-Nov 09			Need signature. Date of appt. based on current workload list & funding availability
	2303	Fencing	ERP	\$78,237	\$0		61/66670-00-TBD	Aug-Oct 2009	Oct-Nov 09			Need signature. Date of appt. based on current workload list & funding availability
	2304	Storm Drain System	ERP	Need M&G letter								Need signature. Date of appt. based on current workload list & funding availability
	Subtotal			\$1,323,542	\$0							Need all info.
MONROE ES	2403	Playground Equipment	ERP									Need all info.
	2404	Fencing	ERP									Need all info.
	Subtotal			\$0	\$0							Need all info.
ROOSEVELT ES	2501	Roof	ERP									Need all info.
	2504	Playground Equipment	ERP									Need all info.
	Subtotal			\$0	\$0							Need all info.
SIERRA INT	2601	Roof	ERP									Need all info.
	Subtotal			\$0	\$0							Need all info.
WASHINGTON ES	2701	Roof	ERP									Need all info.
	2702	Fire Alarm/PA	ERP									Need all info.
	2703	Asphalt/Concrete	ERP									Need all info.
	2704	Fencing	ERP									Need all info.
	2706	Storm Drain System	ERP									Need all info.
	2707	Playground Equipment	ERP									Need all info.
	Subtotal			\$0	\$0							Need all info.
WILSON ES	2801	Roof	ERP	\$1,798,250	\$0	3.3.06	61/66670-00-TBD	Aug-Oct 09	Oct-Nov 09			Date of appt. based on current workload list & funding availability
	2802	Asphalt/Concrete	ERP									Need all info.
	2803	Fencing	ERP									Need all info.
	2804	Storm Drain System	ERP									Need all info.
	2805	Playground Equipment	ERP									Need all info.
	Subtotal			\$1,798,250	\$0							Need all info.
MCFADDEN INT	2901	Roof	ERP									Need all info.
	2902	Electrical	ERP									Need all info.
	2903	Asphalt/Concrete	ERP									Need all info.
	2904	Fencing	ERP									Need all info.
	Subtotal			\$0	\$0							Need all info.
	3001	Roof	ERP	\$1,369,973	\$0		61/66670-00-TBD	Aug-Oct 2009	Oct-Nov 09			Need signature. Date of appt. based on current workload list & funding availability
	3009	Electrical	ERP									Need all info.
	3008	Fire Alarm/PA	ERP									Need all info.

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				GRANT	REMB.							
SPURGEON INT	3004	Asphalt/Concrete	ERP	\$500,054	\$0	3.4.08	6166670-00-180	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability
	3005	Fencing	ERP	\$138,950	\$0	3.4.08	6166670-00-180	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability
	3006	Heating	ERP									Need all info.
	3007	Site Storm Drain System	ERP	\$115,283	\$0	3.25.08	6166670-00-180	Aug-Oct 2009	Oct-Nov 09			Date of appt. based on current workload list & funding availability
	3008	Playground Equipment	ERP									Need all info.
	Subtotal			\$2,137,215	\$0							Need all info.
SEPULVEDA ES	3101	Roof	ERP							\$0		Need all info.
	3102	Asphalt/Concrete	ERP									Need all info.
	3103	Fencing	ERP									Need all info.
	3104	Storm Drain System	ERP									Need all info.
	3105	Playground Equipment	ERP									Need all info.
	Subtotal			\$0	\$0					\$0		Need all info.
KENNEDY ES	3201	Roof	ERP							\$0		Need all info.
	Subtotal			\$0	\$0					\$0		Need all info.
PIO PICO ES	3301	Roof	ERP							\$0		Need all info.
	3302	Asphalt/Concrete	ERP									Need all info.
	3303	Storm Drain System	ERP									Need all info.
	Subtotal			\$0	\$0					\$0		Need all info.
HENNINGER ES	3401	Asphalt/Concrete	ERP							\$0		Need all info.
	3402	Playground Equipment	ERP									Need all info.
	Subtotal			\$0	\$0					\$0		Need all info.
WALKER ES	3501	Site Plumbing	ERP							\$0		Need all info.
	3502	Playground Equipment	ERP									Need all info.
	Subtotal			\$0	\$0					\$0		Need all info.
KING ES	3601	Fencing	ERP							\$0		Need all info.
	Subtotal			\$0	\$0					\$0		Need all info.
DAVIS ES	3701	Roof	ERP							\$0		Need all info.
	3702	Asphalt/Concrete	ERP									Need all info.
	3703	Fencing	ERP									Need all info.
	Subtotal			\$0	\$0					\$0		Need all info.
CENTURY HS	3801	Roof								\$0		Need all info.
	Subtotal			\$0	\$0					\$0		Need all info.
TOTAL	158 Applications			\$7,397,893	\$1,982,800					\$8,346,736		
				Total:	\$58,447,463							

Submitted
This Week
Next Week

ERP Funding

	<u>Received</u>	<u>Not Yet Funded</u>
1st Issuance ERP Funding	8/25/2014 \$ 35,522,776.00	
2nd Issuance ERP Funding	10/17/2014 \$ 12,528,152.00	
3rd Issuance ERP Funding		\$ 25,818,643.00
	<u>\$ 48,050,928.00</u>	<u>\$ 25,818,643.00</u> <u>\$ 73,869,571.00</u>

1st and 2nd Issuance	<u>Grant</u>	<u>Spent</u>	<u>Balance</u>
- Completed Projects	\$ 15,965,812.00	\$ 15,896,805.43	\$ 625,245.57
- Martin Asphalt/Concrete	131,759.00		131,759.00
- Adams Asphalt Repairs	210,007.00		210,007.00
- Adams Playground	169,527.00	96,098.00	73,429.00
- Century Roof	6,680,126.00		6,680,126.00
- Franklin Asphalt/Concrete	67,441.00		67,441.00
- Franklin Fencing	6,821.00		6,821.00
- Fremont Heating	482,791.00		482,791.00
- Fremont Roofing	3,126,553.00	1,446,124.00	1,680,429.00
- Hoover Asphalt/concrete	203,648.00	110,067.00	93,581.00
- Lathrop Asphalt/Concrete	280,745.00		280,745.00
- Lathrop Roofing	1,412,536.00	264,042.00	1,148,494.00
- Lincoln Asphalt/Concrete	84,153.00	-	84,153.00
- Lincoln Roofing	915,037.00	174,943.00	740,094.00
- Martin Fencing	50,235.00		50,235.00
- Martin Roofing	1,930,724.00	373,732.00	1,556,992.00
- McFadden Fencing	78,622.00		78,622.00
- Remington Roofing	1,366,904.00		1,366,904.00
- Roosevelt Roof	685,738.00		685,738.00
- SAHS Asphalt	711,137.00		711,137.00
- SHS Paving	965,957.00	572,957.00	393,000.00
- SHS Bldg	7,986,332.00	1,534,780.91	6,451,551.09
- SHS Fencing	175,886.00	75,886.00	100,000.00
- Spurgeon Roofing	1,382,975.00	258,980.00	1,123,995.00
- Willard Asphalt/Concrete	240,207.00		240,207.00
- Willard Roofing	941,005.00	179,969.00	761,036.00
- Wilson Roof	1,798,250.00	1,236,527.00	561,723.00
	<u>\$ 48,050,928.00</u>	<u>\$ 22,220,911.34</u>	<u>\$ 26,386,255.66</u>

3rd Issuance

- Valley Pool	1,837,633.00	1,837,633.00
- SAHS Restrooms	971,220.00	971,220.00
- SAHS Needs Assessment	1,370,981.00	1,370,981.00
- Saddleback Heating	639,590.00	639,590.00
- Saddleback Needs Assess.	3,643,442.00	3,643,442.00
- Diamond Fire Alarm/PA	367,799.00	367,799.00

- Franklin Portables	4,880,867.00		4,880,867.00
- Lathrop Needs Assessment	275,730.00		275,730.00
- Remington Portables	5,782,547.00		5,782,547.00
- McFadden Asphalt/Concrete	893,920.00		893,920.00
- McFadden Portables	3,692,548.00		3,692,548.00
- DavisAsphalt/Concrete	188,729.00		188,729.00
- Century Bleacher Replacement	695,926.00		695,926.00
- Century Needs Assess.	577,711.00		577,711.00
	<u>25,818,643.00</u>	-	<u>25,818,643.00</u>



Santa Ana
Unified School District

Update on Valley Sports Complex



Status of Construction:

Start Date: July 2014

Finish Date: August 2015

Percentage Complete: 25% as of March 10, 2015

Project Description: GB Architects has gained approval with the Division of State Architect on the design for the SAUSD Sports Complex at Valley High School and is currently under construction.

Project Statistics:

Approximately 28 acres of athletic facilities, sports field lighting, concessions buildings and parking. Football/soccer stadium, practice field, two baseball fields, and two softball fields.

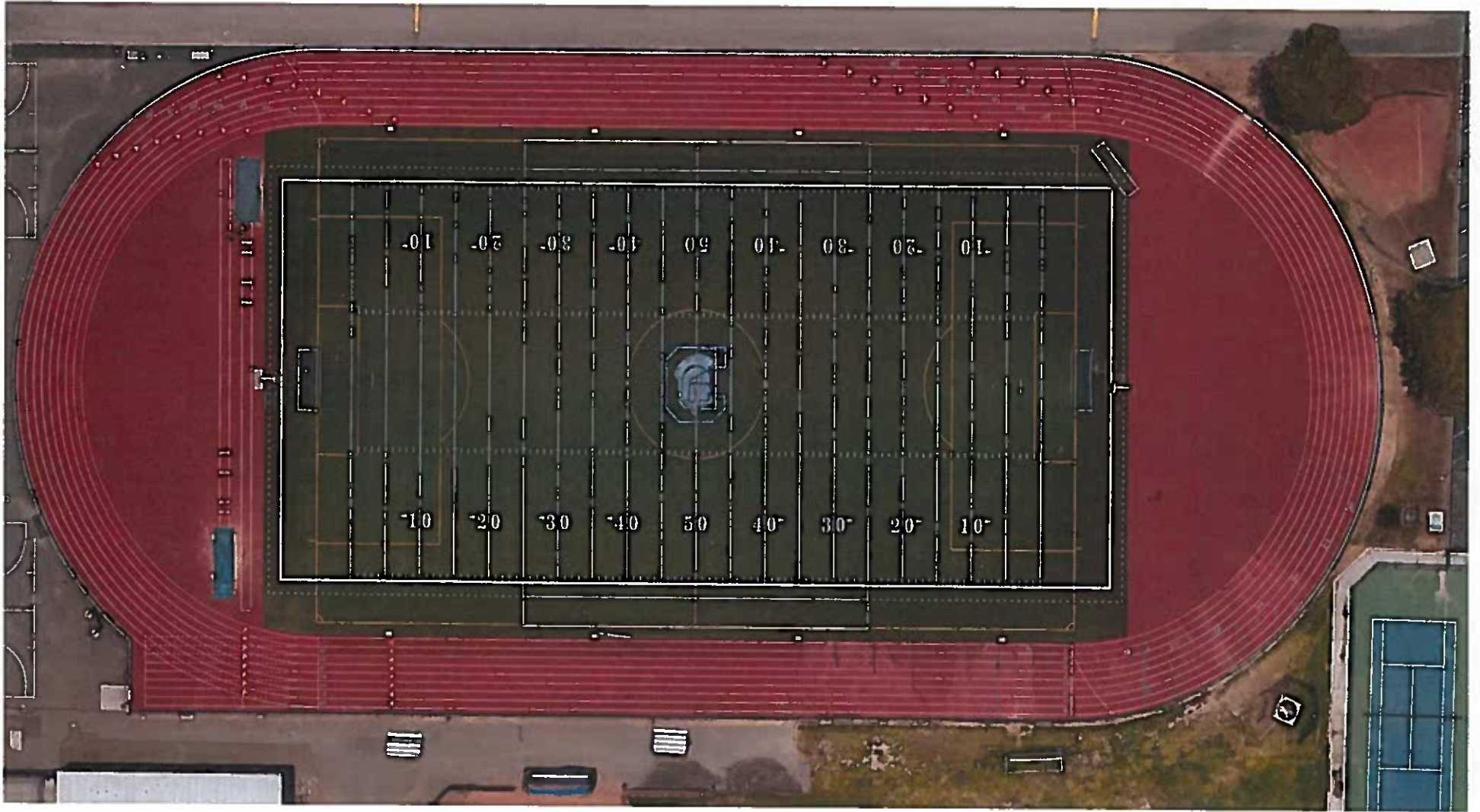
Discussion on use- (district stadium versus school specific)

Field Logo



Santa Ana
Unified School District

**Century High School
Logo**





Santa Ana
Unified School District

**Saddleback High School
Logo**





Santa Ana
Unified School District

**Santa Ana High School
Logo**





- Options:
 - Stadium name
 - Mid-field logo/graphics
 - Scoreboard logo/graphics
 - Finishes for backstops, concession, and stadium
 - Brick
 - Block with a brick band
 - District colors (red); school colors (blue and yellow)
 - Other naming options: dug outs, garden, practice field, exercise park



Santa Ana
Unified School District

VALLEY SPORTS COMPLEX





Santa Ana
Unified School District

Capital Facilities Planning



Cash								
	Prop 39 Fund	Cell Tower Lease Fund	Capital Facilities Fund (Developer Fees, RDA)	Measure G	State School Building Fund	Capital Outlay (ERP, QZAB, Solar, Other Reimb.)	CFD	
	Fund 1		Fund 25	Funds 24, 26, 28, 29	Fund 35	Fund 40	Fund 49	
Est. Year-End Balance	\$2.9M	\$296K	\$10M	\$3M	\$25M	\$5M	\$684K	



- Century stadium
- Overcrowding Relief Grant
 - Alternative Education (Grant site)
 - Franklin
 - King
 - Wilson
- Mitchell modernization/reconstruction
- QZAB solar projects



Status of Construction:

Start Date: March 2015

Finish Date: August 2015

Percentage Complete: 3% as of March 10, 2015

Project Description: This is phase 3 of the Overcrowding Relief Grant (ORG) project. SVA Architects have gained approval with the Division of State Architect on the design for Century High School bleachers.

Project Statistics:

3,000 grandstand seating capacity

Press box

Concession Stand



Status of Construction:

Start Date: June 2014

Finish Date: April 2015 (Phase I); January 2016 (Phase II)

Percentage Complete: 50% as of March 10, 2015

Project Description: This is an Overcrowding Relief Grant project. PJHM Architects has completed the design for Franklin Elementary School ORG project.

Project Statistics:

Construction of a new two-story classroom building; 12 classrooms, elevator and stairs.

Construction of a new kindergarten classroom building; 4 classrooms

New lunch shelter

All new concrete walkways

ADA Access upgrades



Status of Construction:

Start Date: June 2014

Finish Date: April 2015 (Phase I; January 2016 (Phase II)

Percentage Complete: 67% as of March 10, 2015

Project Description: This is an overcrowding Relief Grant project. PJHM Architects has completed the design for King Elementary School ORG project.

Project Statistics:

Construction of a new two-story classroom building; 14 classrooms, elevator and stairs.

Construction of a new kindergarten classroom building; 2 classrooms

ADA Access upgrades



Status of Construction:

Start Date: February 2015

Finish Date: August 2015

Percentage Complete: 5% as of March 10, 2015

Project Description: This is an Overcrowding Relief Grant project. Ghataode Bannon Architects has completed the design for the Alternative Education ORG project.

Project Statistics:

Construction of a new two-story classroom building; 12 classrooms, elevator and stairs.

ADA access upgrades.



Status of Construction:

Start Date: June 2014

Finish Date: August 2015

Percentage Complete: 65% as of March 10, 2015

Project Description: This is an overcrowding Relief Grant Project. The Construction Manager is Balfour Beatty Construction. Lentz Morrissey Architects has completed the design for the Wilson Elementary School ORG project.

Project Statistics:

Construction of a new two-story classroom building; 8 classrooms, elevator and stairs.

All new concrete walkways

ADA access upgrades

New entry features

New lunch shelter



Status of Construction:

Start Date: June 2014

Finish Date: August 2015 (Phase A); August 2015 B (Phase B)

Percentage Complete: 45% as of March 10, 2015

Project Description: This is a modernization project. The Construction Manager is Balfour Beatty Construction. NAC Architecture has completed the design for the Mitchell Child Development project.

Project Statistics:

Construction of 3 new buildings.

Phase A

Building C- Classroom Building

7 Classrooms

Kitchen and Staff Lounge

Teacher workroom and restrooms

Lunch shelter

Playground

Building D- Classroom Building

23 Classrooms

Teacher workroom and restrooms

Phase B

Construction of 1 new building and addition to Administration building.

Building A- Administration Building

Administration offices

Early Start

Student Engagement

Parent Training

Assessment rooms

Restrooms

Building A.1- Administration Building Addition

IBI Offices , Speech Language Pathologists rooms , Restrooms

Building G- Multipurpose Building

Occupational/Physical Therapy

Offices

Storage and Restrooms



Carr Intermediate School

Status: Complete

Century High School

Status: Complete

Heninger Elementary School

Status: Complete

MacArthur Intermediate School

Status: Complete

McFadden Intermediate School

Status: Complete

Segerstrom High School

Status: Complete

Santa Ana High School

Status: Complete

Taft Elementary School

Status: Complete

Thorpe Elementary School

Status: Complete

Valley High School

Start Date: April 1, 2015

Completion: October 1, 2015



Funding Allocated

- Roosevelt/Walker Joint Use Community Center (Prop. 84)
- ERP New Buildings
 - Saddleback P2P
 - Remington P2P
 - McFadden P2P



Status of Construction:

Start Date: To be determined

Finish Date: To be determined

Percentage Complete: 5% as of March 10, 2015

Project Description: PJHM Architects is working with the Division of State Architect on the approval for the Roosevelt/Walker joint use Community Center.

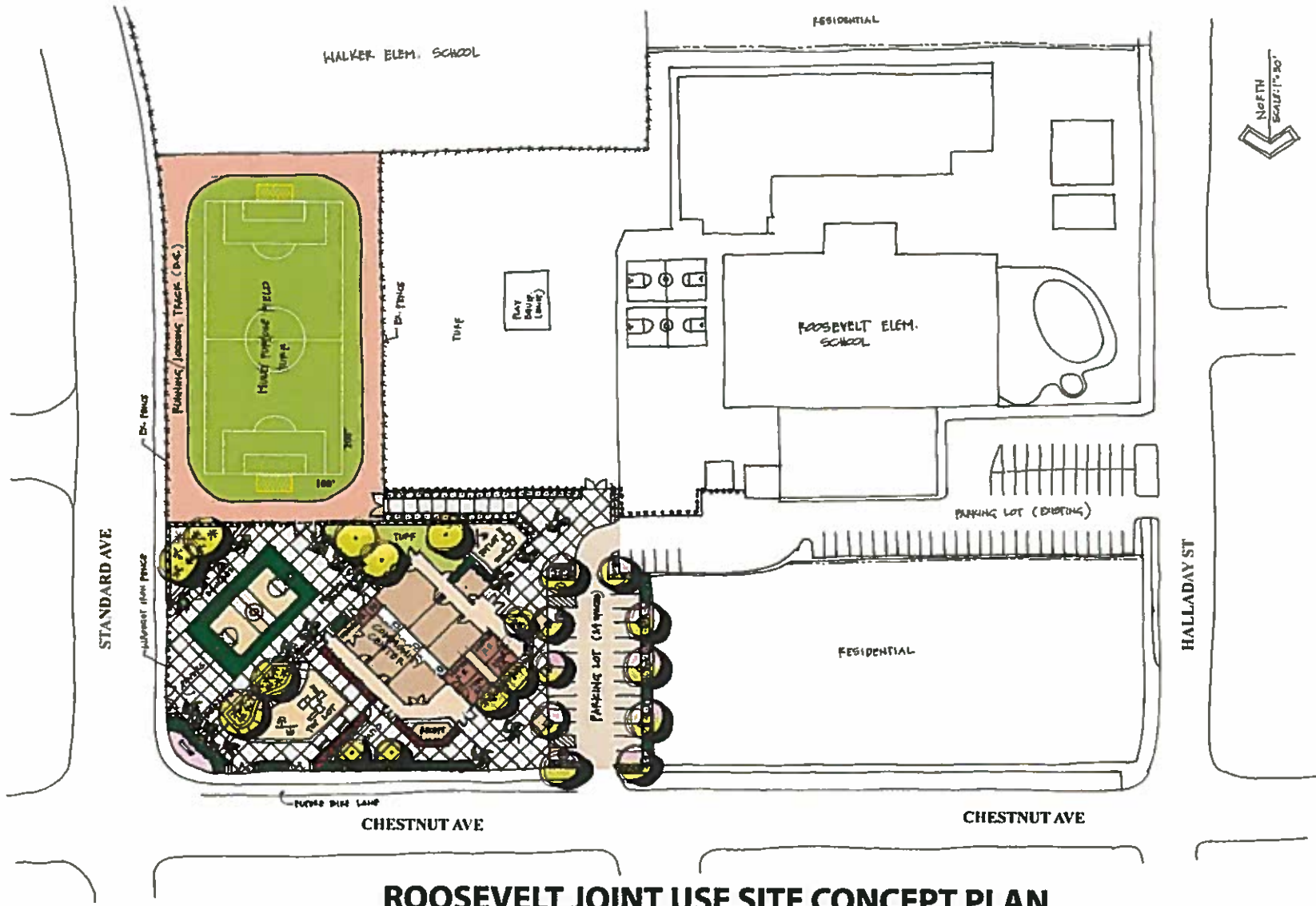
Project Statistics:

Approximately 10,000 SF joint use Facility to include a City Community Center and Preschool

Parking Lot

Hard court play areas

Turf and track improvements





Discussion and future direction.

**Santa Ana Unified School District
JOINT USE AGREEMENTS**

Site	Agency	Agreement description	Term Date	Board Approval Date
Adams Elementary School	Adams Park	Installation of Automatic Irrigation Systems and Sod on Contiguous Properties	12/12/1977	7/19/1977
Angels Park	Lease Agreement	Lease Agreement Between the SAUSD and the City of SA	1/15/2009	
El Sol Academy	Lease Agreement	Lease Agreement Between the SAUSD and the City of SA	10/18/2011 10/1/2060	3/26/2011
Garfield Elementary School	Community Center Joint Use Agreement	Joint Use Agreement Between the City of SA and SAUSD, Community Center	9/11/2012 9/1/2042	9/11/2012
Godinez Fundamental HS	Joint Use Agreement	Performing Arts & Athletics Facilities and the City of SA	5/11/2010	
Greenville Fundamental ES	Eugene Grisette Park	Agreement Between the City of SA and the SAUSD for Installation and Maintenance of Automatic Irrigation Systems and Turf on Contiguous Properties	10/15/1979	6/1/1905
Jackson Elementary School	Windsor Park	Installation of Automatic Irrigation Systems and Sod on Contiguous Properties		
Madison Elementary School	Madison Park	Installation of Automatic Irrigation Systems and Sod on Contiguous Properties		
McFadden	Thornton Park	Recreational purposes	11/17/1986	
Monroe ES	Delhi Park	Joint Use Agreement Between the City of SA and the SAUSD for Maintenance of Yard	11/21/1988	
Monte Vista Elementary school	Jerome Park	Installation of Automatic Irrigation Systems and Sod on Contiguous Properties		
Muir	Portola Park	Additional Parking	11/21/1988	
Roosevelt ES	Roosevelt / Walker	Joint Use Agreement Between the City of SA and SAUSD	6/28/2011	3/12/2013

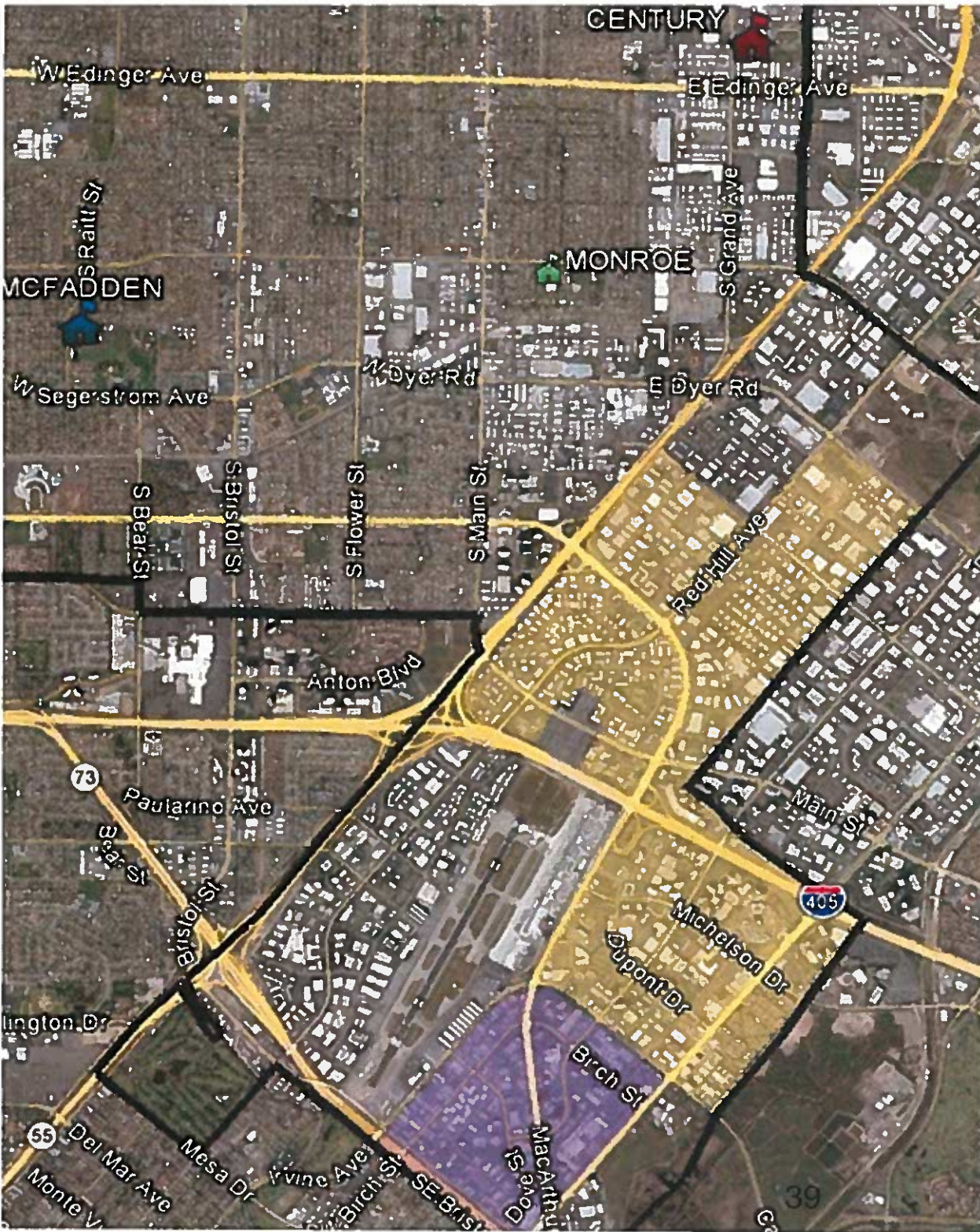
Santa Ana HS	Neal Machander Tennis Center	Lease and Joint Use Agreement Between the City of SA and SAUSD	10/4/1971	9/13/2011
SAUSD Schools	School Facilities	Joint Use Agreement by and Between SAUSD and the City of SA for School and City Facilities	6/19/1905	
Segerstrom HS	YMCA Aquatic Center	Joint Use Agreement and Operation Agreement	4/9/2009	5/24/2009
Segerstrom HS	YMCA Aquatic Center	Facilities Schedule	4/9/2009	5/24/2009
Spurgeon IS	Joint Use Agreement	Agreement Between SAUSD and the City of SA for Spurgeon Intermediate School	11/21/1988	
Valley HS	Athletic Field	Agreement Between the City of SA and the SAUSD for School Athletic Field	8/23/1972	
Valley HS	Athletic Field	Addendum to Agreement Between the City of SA and the SAUSD for Installation of Lighting and Stands on the south Baseball Fields School Athletic Field	9/25/1972	
Willard IS	Joint Use Agreement	Joint Use Agreement by and Between SAUSD and the City of SA for Willard Intermediate School Recreational Facilities	10/7/2011 10/7/2041	10/11/2011
Willard IS	Joint Use Agreement	Joint Use Agreement by and Between SAUSD and the City of SA for Willard Intermediate School (Tennis Court)	11/17/2008 11/16/2033	

Revised: 3/18/13



- Deal points for discussion
- Times of use
- Priority of use
- Utilities
- Routine maintenance
- Capital renewal

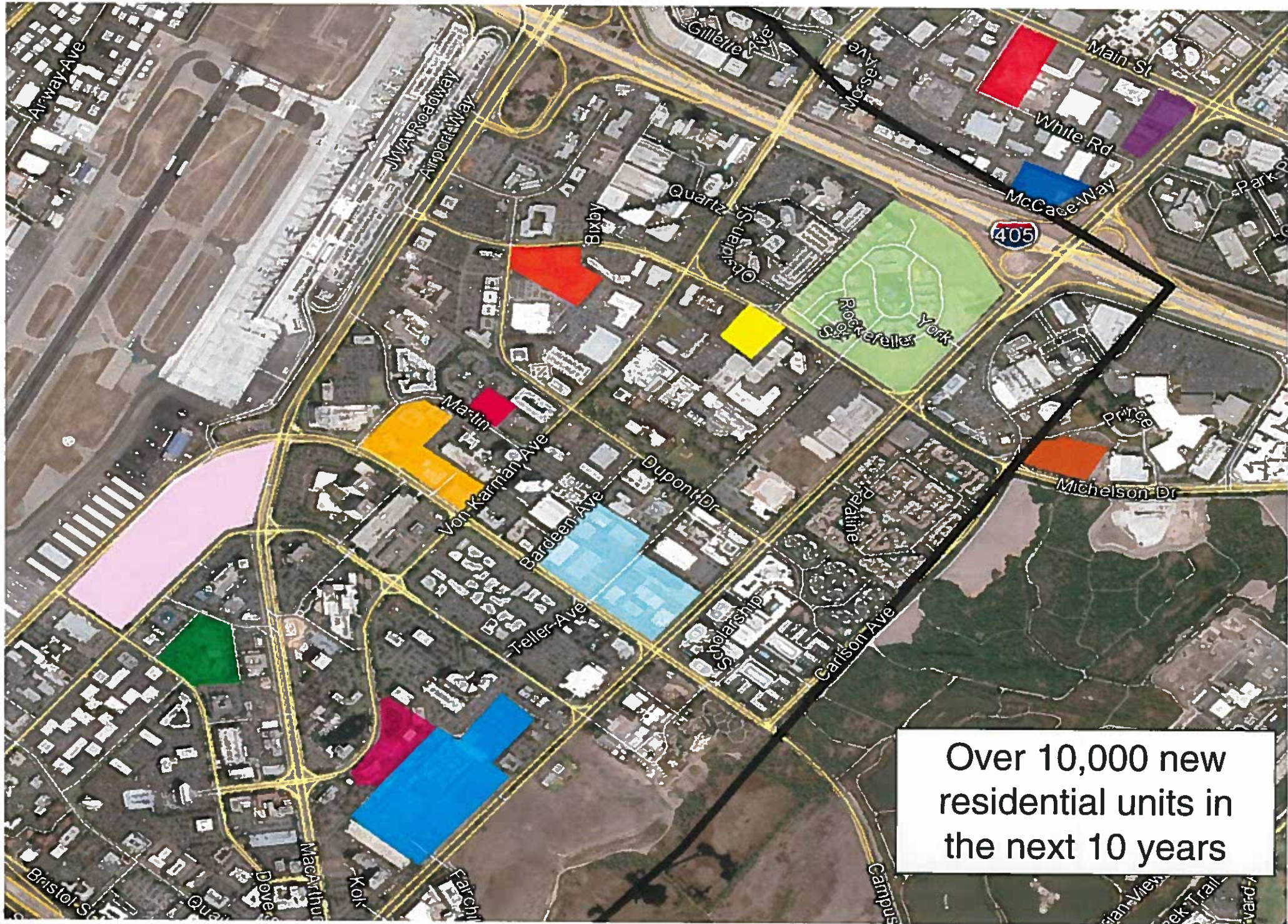
Irvine/Newport Development Area (INDA)



School of Residence	Approximate Driving Distance from the INDA
Monroe Elementary	4.5 miles
McFadden Intermediate	6.0 miles
Century High	5.5 miles

- Irvine Business Complex
- City of Newport

Planned Development



Over 10,000 new residential units in the next 10 years



Planned development:

Expected developer fees (next 5 years) \$5.5 million - \$10.75 million

Options to house students:

Lease an existing building - The facility is required to be compliant with the Field Act, therefore, leasing an existing building is not feasible

Partnership with UCI – Exhausted all efforts

Irvine Ranch Water District land – Exhausted all efforts

Developer-built school - Exhausted all efforts

Purchase land currently designated commercial or residential – Extremely limited options due to planned development and physical constraints (airport, freeway). Would require State matching funds for land acquisition, which is currently unavailable.

Bus students to Monroe, McFadden, and Century



- INDA school - \$40 million (Developer fees + ?)
- Godinez synthetic turf - \$2 million (Fund 25)
– \$1 million from the City
- Segerstrom synthetic turf - \$2 million (Fund 25)
- Century pool - \$5 million (Fund 25)
- Valley P2P - \$15 million (TBD – possibly SFP Savings)



QUESTIONS