

PGUSD Board  
Study Session  
on School  
Facilities  
Programming  
and Funding

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**Presenters**

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Dr. Tom Duffy, Murdoch Walrath and  
Holmes/CASH

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Joe Dixon, Dixon Smart School  
House/CASH

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Juan Barroso, DCA Architects

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Jon Anderson, PGUSD

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Joshua Jorn, PGUSD

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# Introductions

## **Dr. Tom Duffy-** Murdoch Walrath and Holmes/CASH

Legislative Director for CASH and a partner in the education facilities consulting firm of Murdoch, Walrath and Holmes. Tom has served in public education for over 30 years. Tom started his career as teaching assistant in the Los Angeles Unified School District, then became a Special Education Program administrator/Business administrator for the Ventura County Superintendent of Schools Office, he then served the Moorpark Unified School District as the Assistant Superintendent of Business Services, and finally the Superintendent of the District for 12 years.

Tom has a history of active involvement in school facility legislation and state bond campaigns. As past Chair of the Coalition for Adequate School Housing (CASH), Tom represented CASH members and all CA LEA's on the State Allocation Board's (SAB) Implementation Committee.



# Introductions

**Joe Dixon** - Joe Dixon, Dixon School House/CASH

A fixture in California School Facilities for over 30 years. Joe is the former Associate Superintendent of Facilities and Government Affairs for Santa Ana Schools.

Joe is now the President of Dixon Smart School House whose focus is supporting of K-12 schools around facility needs assessments, master planning and program management.

Joe is a past CASH Board Chair, former CASH Federal Network (CFN) Chair and current Board member to CFN.



# Introductions

**Juan Barroso** – Managing Partner at Derivi Castellanos Architects (DCA)

Juan brings over 20 years of professional experience in civil engineering, city and school district planning, business management and business development. He is highly skilled in the areas of cost estimating, K12 design and program management, and has delivered of over 200 successful K12 projects throughout the state of California.

Derivi Castellanos Architects supports many K12 Districts in Monterey County where their focus is Architectural planning, master planning and development of educational specifications.



# 2020 PGUSD Measure D (Series A – D)

Joshua Jorn

# What was the intent of Measure D?

*“To replace outdated plumbing/electrical systems, upgrade fire alarms and emergency communication systems; repair/replace roofs and modernize classrooms at schools throughout the district, shall the Pacific Grove Unified School District measure authorizing \$30 million of bonds be adopted with legal rates, yearly levies of less than 3 cents per \$100 of assessed valuation through approximately 2039 (generating an average of \$2.1 million dollars per year), annual audits, independent oversight and no estimated increase in current tax rates”*

# Pacific Grove Unified School District

## \$30 Million Bond Without An Increase To Current Tax Rates

(831) 646-6610

Fgusd.org/2020-maintenance-bond

### Playgrounds

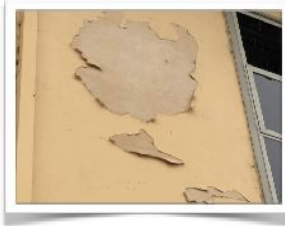
Bond dollars will be used to replace old and deteriorating playgrounds throughout



the district to current safety and ADA standards. Existing playgrounds will have fall material replenished or replaced.

### Painting

District wide peeling and chipping paint will be repainted.



### Flooring

Replace worn tile and carpeting in classrooms and hallways.



H V A C  
Classroom heating and air quality.



Rain Gutters  
Roofs and gutters that have met their lifespan.



Maintenance Vehicles  
Replacement of maintenance vehicles and large equipment.

## Scope Listed in Measure D Plan

- Exterior Paint
- Dry Rot Repair
- Gutters
- Slurry Seal and Stripping
- Playgrounds
- Flooring
- Roofs
- Gutters
- Public Address Systems
- Fire Alarm Systems
- Pool Heater
- Phone Systems
- Elevators and Conveyance Code Violations
- Irrigation and vegetation replacement
- Basement Ground Sealing
- Window Replacement
- HVAC

# What Remains the Focus?



Does the District pivot to solely focus on mechanical systems removal and replacement?

Soft costs were not correctly estimated in the Measure D Plan if the pivot is to design and engineer systems replacement.



Does the District mid way through the delivery of Measure D, reprioritize based on a new Needs Assessment?

How would PGUSD absorb the soft costs associated with planning items being covered later in this presentation?



What does the District do to address building envelope issues which have grown in scope and cost over time due to avoidance?

The construction industry is seeing a 15-20% escalator/annum in project related expenditures whereby LEA's must cover less scope with increase to project related expenses.



# Deferred Maintenance 5-Year Plans

Jon Anderson

# Deferred Maintenance Facilities Assessment

- **A Deferred Maintenance Facilities Assessment is a process for identifying the present condition of a facility which will allow a District to create a longterm plan to address deficiencies with a systematic approach.**
- **Building a District Assessment**
  - Contract with a professional consulting firm
  - Self-perform by District staff
- **This is the first step for developing an effective long term Deferred Maintenance and Preventative Maintenance Plan**

# The ever-moving target

## A 5-year plan should be seen as guide

- Stringent adherence is not realistic
- Goal setting versus reality
- No guarantees that the plan will not change with circumstance

## Developing long term plans is difficult

- Shifting priorities
- Changing needs
- Unexpected acts of God
- Regulatory changes
- Changes in Faculty, Staff, Student & Community Expectations

## Periodic Review

- The Goal is to revisit the plan every other year to see how you are tracking progress
- Don't expect to accomplish it all
- Do your best to remain timely in delivery

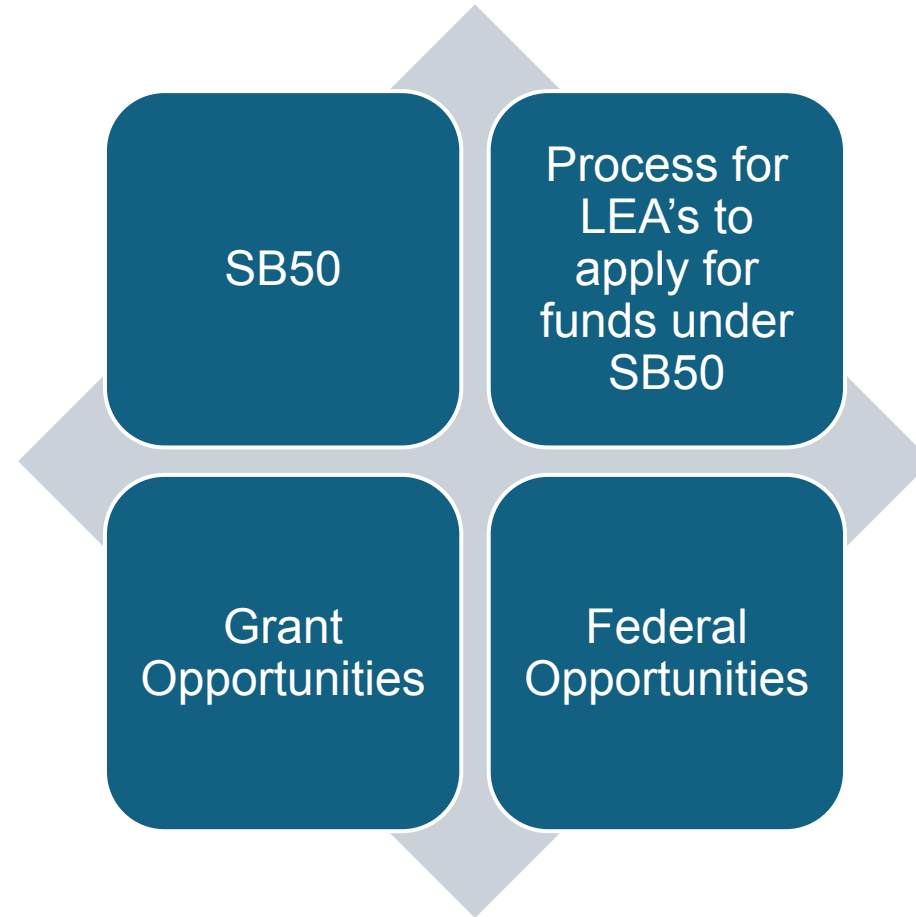
# Prioritization List of Projects – Criteria Focus

- **What drives our priorities**
  - **Priority One** – Safety items or critical to prevent additional damages or expenditures such as Building Envelope.
  - **Priority Two** – Tasks of high importance such HVAC, Plumbing & Electrical infrastructure. PGUSD Forestry & Energy savings.
  - **Priority Three** – Items such as interior finishes such as flooring & paint. Playgrounds, athletic facilities. Auditoriums & Restrooms.
  - **Priority Four** – Classroom furniture and fixtures.
  - **Priority Five** – Office furniture & grounds improvements.
- ❖ See [5 Year Deferred Maintenance Plan](#) and [Draft 5 Year Outlook on Facilities](#)

# State and Federal Funding Programs for Schools

Dr. Tom Duffy

# State Funding Program



# Delivery Methods



Traditional Low Bid (Lump Sum Contracts)



Design Build



Lease Lease-Back (current complications)



Energy Services Agreement (Govt 4217)



Informal Bidding (CUPCCA)

# Adhering to Bidding Requirements



USE OF LOCAL  
DOLLAR ONLY



STATE FUNDED  
MATCH



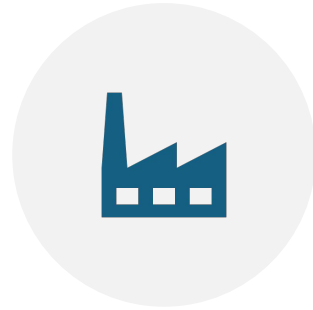
# Facility Master Plans and Needs Assessments

Joe Dixon

# Topics for Discussion



WHAT IS A FACILITY  
MASTER PLAN (FMP)



WHY HAVE A FMP?



ESSENTIAL  
COMPONENTS OF A  
FMP?



BENEFIT OF A FMP TO  
THE BOARD AND  
DISTRICT?

# What is a Facility Master Plan

It is a compilation of information, policies, and statistical data about a school district. It is organized to provide:

- (1) Continuous basis for planning educational facilities that will meet the changing needs of a community
- (2) Alternatives in allocating facility resources to achieve the district's goals and objectives. It is used for planning facilities needs for either pupil enrollment growth or decline.

*-California Department of Education*

# Why have a Facility Master Plan?



## Long Term Planning

Up to 10 years  
Updated periodically



## Resource Allocation

Objective appraisal of current  
school facilities



## Bond Measure Planning

Trust in the community  
Leveraging local bonds with state  
funds



## Effective Decision Making

Data-based decisions

# Components of a FMP

- Demographic Study
  - Enrollment projections
- Capacity Analysis
  - Number of teaching stations currently in the district
- Needs Analysis
  - Current building code compliance
  - Repairs, replacements, rehabilitation
- Educational Specification
  - Instructional delivery goals
  - Statutory obligation (DSA/CDE)
- Finance and Funding
  - Current funding available and options

# District Estimated cost of a FMP



\$30,000/Site (low end)

# Educational Specifications

Juan Barroso

# What is an Educational Specification?

Educational Specifications are interrelated statements that communicate to the architect what educators believe is required of a proposed educational facility to support a specific educational program.

They serve as the link between the educational program and the school facilities.

They translate the physical requirements of the educational program into words that enable the architect to visualize the educational activity to be conducted so that the architectural concepts and solutions support the stated educational program.



# Example of an Educational Specification for a Maker Space

- High ceilings to accommodate large projects and equipment
- Mobile workstations to allow the space to be reconfigured
- Enhanced ventilation to remove dust and particulates
- Large roll-up door to move projects and equipment in/out
- Sink for handwashing
- Hard floor surface to allow rolling equipment
- Windows for visibility from adjacent classrooms



## Educational Specification for 21<sup>st</sup> Century Classroom

Enhanced acoustics to promote focus and learning

Natural lighting and outdoor views to enhance comfort and learning

Moveable furniture to allow the space to be reconfigured

Sink for handwashing

Resilient flooring to reduce dust and particulates

Adjacent, covered outdoor learning patio



Albany Middle School  
Albany Unified School District

## Educational Specification for Outdoor Classroom

One outdoor classroom for every pod of four classrooms

Seating for 30 students

Exterior wireless access point for reliable internet connectivity

Protection from the sun

Windows for visibility from adjacent classrooms

Landscaping to reduce heat island effects

Student and staff restroom nearby and accessible from exterior



Riego Creek Elementary  
School

Roseville City School District

# The Impact of School Facilities on Student Engagement and Learning

**Better facilities (lighting, higher air exchange, better acoustics, and modernized indoor and outdoor learning environments) directly correlate to:**

- Increased student achievement
- Mitigation of learning loss
- Mitigation of absenteeism
- Higher staff retention
- A more engaged population of educators and learners

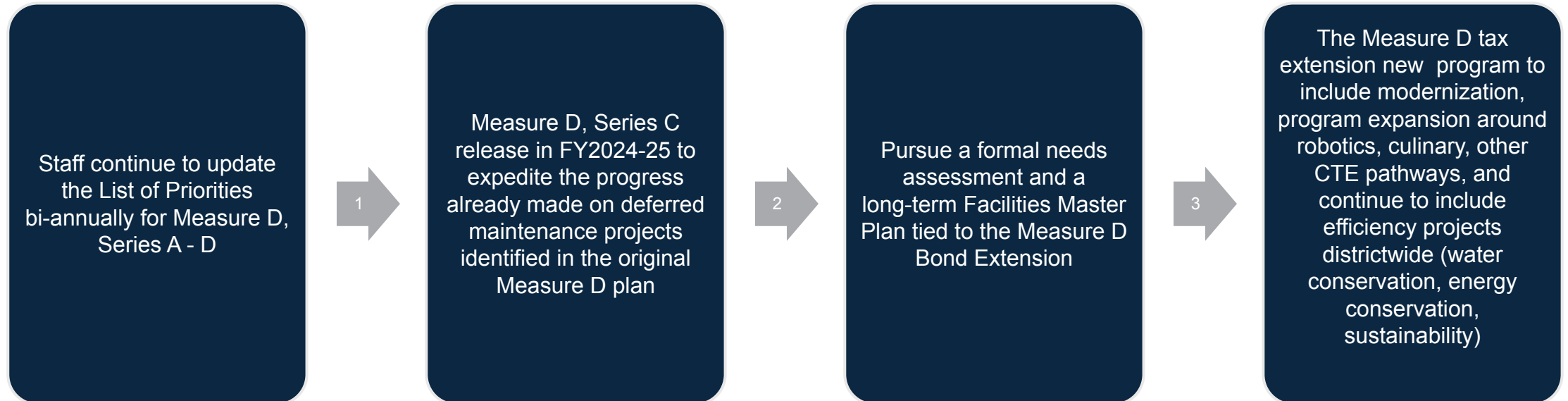
*-California School Facilities Research Institute*

*-Center for Cities and Schools Berkley*

# Wrap Up

- Tonight we covered
  - Measure D, Series A-D
    - Developed from a Deferred Maintenance Needs Assessment
  - Deferred Maintenance 5+ Year Plan Development
    - Prioritizing projects based on categorized 1-5
  - State and Federal Funding Opportunities for an LEA
    - Some regulatory differences with using state dollars blended with local
  - What is a Facilities Master Plan, and why do LEA's use these as a tool for program development
  - What is an Educational Specification, and why are LEA's required by CDE to use these as a tool for program development

# District Recommendations



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## PREPARING FOR NOVEMBER 2024 BOND EXTENTION

November 2024 Election (Presidential Election)

