

TO: Board of Education
FROM: Constance Hubbard, Superintendent
SUBJECT: Review of District Facilities

I. **SUPPORT INFORMATION**

The Board is in the process of reviewing next steps in review of District facilities needs short and long term. Following is a summary of the information that includes a history of what has been done, current status of projects, and options for next steps. The Board will review the information and provide direction to staff as to next steps for consideration.

History:

- **[2006 Master Plan \(ATI\)](#)**

Approved by the Board of Education in 2006, the PUSD Master Plan was the culmination of a series of architectural and engineering assessments of PUSD facilities that began in 2000. The Master Plan identified both seismic risk and accessibility needs and provided the basis for the March 7, 2006 ballot measure authorizing the SSBP. The Master Plan was used to organize and plan the SSBP, defining the scope and priority level of individual projects, and estimating project costs. All structural seismic safety risks were addressed in the SSBP, although several accessibility and fire and life safety code compliance issues remain. The development of the plan was financed from the Capital Facilities Fund (operated by the District with money set aside for the replacement of the Witter Field turf and track in 2007-08 when the turf warranty was due to expire). The Capital Facilities fund was then reimbursed from the proceeds of the first bond issuance from Measure E that was approved by the voters in 2006. To view the draft Master Plan, click on the title, "2006 Master Plan (ATI)."

- **[2008 Mini Master Plan \(murakami/Nelson\)](#)**

Approved by the Board of Education in 2008, the Mini Master Plan identified *functional* needs of each school site, such as the capacity to accommodate increasing student enrollment, and infrastructure to accommodate increased use of technology in the classrooms. The purpose of this Plan was to inform decisions regarding SSBP projects based on the long-term goals of the school sites and the District. In anticipation of significant alterations to the walls, electrical and mechanical systems, and technology infrastructure in our buildings (in conjunction with seismic safety upgrades), functional needs that could be addressed while attending to seismic work were done at the same time. The

requirement to address accessibility upgrades while seismic work was in progress was also anticipated. The District applied for State funding for which there was modernization eligibility as part of the seismic project to supplement upgrades that were done at each site. Many of the projects included in the Mini Master Plan were completed as part of the SSBP work, while others have not been addressed. To view the plan, click on the title "2008 Mini Master Plan (murakami/Nelson)"

Current:

- **2014 Proposal to Update Mini Master Plan (murakami/Nelson)**

This proposed update would incorporate the projects completed during the SSBP and the Modernization Program, and add projects and priorities identified by the PUSD Administration, site principals, and school community in a series of public meetings. murakami/Nelson estimates that this update would take roughly four months and cost \$78,000 to complete. Attached is a copy of the proposal as presented by murakami/Nelson and is an option for consideration for the Board as a next step. Funding for the updated plan would come from the remaining Modernization Funds, reducing funds available for modernization projects at sites.

- **PUSD Deferred Maintenance Plan**

Deferred maintenance occurs when building systems or other infrastructure reach the end of their useful life and need replacement, but replacement is delayed due to either a lack of resources or more pressing funding priorities. Deferred maintenance of school facilities increases the risk of disrupting the educational program (for example, when systems break down unexpectedly and emergency repairs are needed) and necessitating even more extensive and costly work in the future.

Until the 2013-14 school year, the State provided an annual dollar-for-dollar matching grant to school districts to help pay for defined categories of deferred maintenance. The approved uses included comprehensive roofing projects and certain plumbing, electrical, and HVAC upgrades. (As discussed below, the approved uses did not include replacement of athletic fields.)

To qualify for this deferred maintenance grant, each district was required to develop a five-year plan to identify how the money would be spent. Prior to 2013-14, the State's annual matching grant to PUSD was \$95,000, and PUSD's total annual deferred maintenance budget was \$190,000.

Starting in 2013-14, the State no longer allocates funds for deferred maintenance, and districts are no longer required to have a five-year plan for these projects. Although no longer mandated to do so, PUSD continues to conduct annual inspections of facilities to identify deferred maintenance projects, and continues to allocate \$190,000 per year to address them. Currently, PUSD's deferred maintenance plan identifies needed roof repair at each site.

- **PUSD Capital Facilities Fund**

The Capital Facilities Fund includes funds that provide for the eventual replacement of Witter Field and similar projects that were neither included in bond-funded construction programs nor classified by the State as “deferred maintenance.” PUSD allocates approximately \$50,000 per year in the CFF specifically for Witter Field. In addition, the District collects facility rental fees; donations from local lacrosse, soccer, and baseballs clubs; and contributions from the City of Piedmont for athletic facilities preservation, all of which are deposited in the CFF “Witter Field” account. PUSD is now close to achieving its goal of raising \$700,000 by the end of 2015 for Witter Field turf and track replacement scheduled per the expiration of the warranty.

- **How well the facilities support educational programs.**

The District is surveying staff as to identified needs for a 21st Century education that includes Common Core and digital learning opportunities. Initial results will be shared. Details of needs would be part of the development of a Master Plan and would include specifications as determined by the California Department of Education (CDE) in conjunction with the Office of Public School Construction (OPSC) and the Division of the State Architect (DSA).

- **Capacity of facilities to accommodate increasing enrollment.**

The District continually considers the possibility of changing enrollment for staffing, planning, and other purposes. Nonetheless, it is difficult to predict demographic shifts and related changes in school enrollment in Piedmont for two reasons: First, birth rate and other data that is typically used to predict changes in school enrollment is based on zip codes; here, the two Piedmont zip codes are shared with Oakland, which has significantly different population trends. Second, even if birth rate data were available for Piedmont, it may not be a useful predictor because many families move to Piedmont once their children reach school age in order to access the educational offerings of the District.

The capacity of facilities to accommodate changing enrollment is a significant issue for PUSD, where student population grew by 150 over the last four years. This is unusual growth for Piedmont. Also, although only 40% of Piedmont residents have students in the schools, this percentage may increase at any time.

- **State funding for modernization projects.**

The District may be eligible to receive additional State matching funds to help pay for another round of modernization of the school facilities. During the SSBP, the District received \$17 million in State modernization and seismic safety funds. District consultants estimate the eligibility for additional modernization funding

(which is based on the age of buildings, student population, and past receipt of State modernization funds) as follows:

SCHOOL	MINIMUM			MAXIMUM		
	60% STATE GRANT	REQUIRED 40% DISTRICT MATCH	TOTAL	60% STATE GRANT	REQUIRED 40% DISTRICT MATCH	TOTAL
PHS	\$1,456,421	\$970,947	\$2,427,368	\$1,839,477	\$1,226,318	\$3,065,795
PMS	\$2,229,403	\$1,486,269	\$3,715,672	\$3,153,799	\$2,102,532	\$5,256,331
MHS	\$734,317	\$489,545	\$1,223,862	\$922,185	\$614,790	\$1,536,975
TOTALS	\$4,420,141	\$2,946,761	\$7,366,902	\$5,915,461	\$3,943,640	\$9,859,101

- **State funding for energy efficiency projects.**

Under the California Clean Energy Jobs Act (Proposition 39), the District will receive approximately \$100,000 per year for the next five years to improve energy efficiency and promote “clean energy generation” in schools. This year, the District is using Prop 39 funding to buy LED lighting, which is expected to pay for itself within three years.

Going forward, the District will consider using this funding to explore “clean energy generation” options in PUSD.

- **Bonding capacity for capital improvements.**

As discussed at the October 8, 2014 Board meeting, KNN estimates that PUSD’s available bonding capacity will increase significantly. Estimates are:

- \$18.5 million in 2014-15;
- \$26.3 million in 2015-16;
- \$34.8 million in 2016-17;
- \$43.4 million in 2017-18;
- \$52.4 million in 2018-19; and
- \$61 million in 2019-20.

Next Steps:

Board Goals (#1: Adapt and Improve Educational Program Delivery, and #6: Invest in and Preserve School Facilities and Infrastructure) address the importance of insuring that facilities in the District are adequate for all students to access a 21st Century education.

The Board options/impacts as to next steps include:

- Option: Approve the update of the Mini-Master Plan as proposed by murkami/Nelson

Impact:

- Builds on information already gathered and documented
 - Cost would come from the Modernization Fund and reduce the availability of funds for other projects in the District
 - May not be comprehensive enough for purposes of long-range planning in terms of bond authorization requests to the community for the next 5-10 years.
- Option: Issue an RFP for the development of a comprehensive District Master Plan for use by the Board in the planning for facilities and bond authorization into the future.

Impact:

- Cost will likely be in the range of \$300,000 - \$500,000 and source of funds not readily identifiable. Examples of District Master Plans can be accessed via websites for San Leandro and Albany Unified School Districts
 - It could be used as a long term planning tool for the community to understand the needs of the District and the future planned requests for bond authorization.
 - In this era of change, how long term is reasonable to plan for the needs of the District to maintain flexibility in program adaptability.
- Option: Schedule public forums in which the community can provide input as to needs of the District. Use the input from the community and staff to develop a plan for a short term plan to address immediate needs.

Impact:

- May not be comprehensive enough for use in long range planning.
- Does not include professionals with knowledge of DSA and OPSC requirements.

The Board may have suggestions for additional options as to next steps. The intent is to begin the conversation and to provide direction to staff.

II. **RECOMMENDATION: INFORMATION**