Board of Education
Paul Bokota
Lauren Brooks
Betty Carroll
Ira Glasky, President
Sharon Wallin
AGENDA

Enrollment Update
- Process to Prepare Enrollment Projections
- Enrollment Trends Actual vs Projected
- Alderwood & Oak Creek Community Update

Developer Business Plan Update
- Irvine Company
- Heritage Fields
- Other Developments

State Funding Update

Project Update
- Completed Projects
- Current Projects
- Site Enhancements
ENROLLMENT UPDATE
ENROLLMENT PROJECTION PROCESS

Today
• Review Enrollment Compared to Projections

Next Steps
• Begin to Prepare 2018 Enrollment Projections
• Used for Timing of New School Openings (Within Mitigation Agreements)

Spring 2018 Study Session
• Enrollment Projection Update
• Changes to New School Openings
## Enrollment Growth October 2016 to 2017

<table>
<thead>
<tr>
<th>Grade Level</th>
<th>CBEDS 2016 Enrollment</th>
<th>CBEDS 2017 Enrollment</th>
<th>Growth</th>
<th>% Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>TK - 6th*</td>
<td>18,128</td>
<td>18,949</td>
<td>821</td>
<td>4.5%</td>
</tr>
<tr>
<td>7th - 8th</td>
<td>5,259</td>
<td>5,373</td>
<td>114</td>
<td>2.2%</td>
</tr>
<tr>
<td>9th - 12th</td>
<td>9,818</td>
<td>10,177</td>
<td>359</td>
<td>3.7%</td>
</tr>
<tr>
<td>Total**</td>
<td>33,205</td>
<td>34,499</td>
<td>1,294</td>
<td>3.9%</td>
</tr>
</tbody>
</table>

*Includes Transitional Kindergarten  
**Does not include Preschool and RSJ home school students, DHH  
CBEDS - California Basic Education Data System
ENROLLMENT UPDATE

Enrollment Growth

Enrollment Growth 1996/97-2011/12
5,622 Students in 15 years

Enrollment Growth 2012/13-2017/18
5,427 Students in 5 years

Sources: DataQuest, California Department of Education
Oct 4, 2017 Weekly Enrollment Report - Includes TK-12, SDC
ENROLLMENT UPDATE

Enrollment Growth

Enrollment Growth 1996/97-2011/12
24.9% Student Growth in 15 years

Enrollment Growth 2012/13-2017/18
22.4% Student Growth in 5 years

Sources: DataQuest, California Department of Education
Oct 4, 2017 Weekly Enrollment Report - Includes TK-12, SDC
TK-12 ENROLLMENT PROJECTIONS STUDY SCENARIOS

Moderate (Recent Development Gen Rates)
• Illustrative of most aggressive growth in District
• Used for the planning of facilities
• Used in the process of creating/changing boundaries

Developer (Districtwide Gen Rates)
• Illustrative of assumptions of the Irvine Company and FivePoint mitigation agreements
• Used for timing of new school openings (within mitigation agreements)

Conservative (Recent Development Gen Rates)
• Illustrative of less aggressive growth in District (20% lag in development)
• Used for District staffing
• Used for General Fund budgeting

Geographic Projections
• Illustrative of projected students within a geographic boundary
Enrollment vs Conservative Projections – Fall 2017

<table>
<thead>
<tr>
<th>Grade Level</th>
<th>Actual Enrollment</th>
<th>Conservative Projected Enrollment</th>
<th>Variance</th>
<th>% Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>TK - 6th</td>
<td>18,949</td>
<td>18,615</td>
<td>334</td>
<td>1.76%</td>
</tr>
<tr>
<td>7th - 8th</td>
<td>5,373</td>
<td>5,360</td>
<td>13</td>
<td>0.24%</td>
</tr>
<tr>
<td>9th - 12th</td>
<td>10,177</td>
<td>10,245</td>
<td>-68</td>
<td>-0.67%</td>
</tr>
<tr>
<td>Total*</td>
<td>34,499</td>
<td>34,220</td>
<td>279</td>
<td>0.82%</td>
</tr>
</tbody>
</table>

School Actual Conservative Variance % Variance

<table>
<thead>
<tr>
<th>School</th>
<th>Actual</th>
<th>Conservative</th>
<th>Variance</th>
<th>% Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creekside HS</td>
<td>89</td>
<td>90</td>
<td>-1</td>
<td>-1.12%</td>
</tr>
<tr>
<td>Irvine HS</td>
<td>2,055</td>
<td>2,144</td>
<td>-89</td>
<td>-4.33%</td>
</tr>
<tr>
<td>Northwood HS</td>
<td>2,247</td>
<td>2,224</td>
<td>23</td>
<td>1.02%</td>
</tr>
<tr>
<td>Portola HS</td>
<td>863</td>
<td>883</td>
<td>-20</td>
<td>-2.32%</td>
</tr>
<tr>
<td>University HS</td>
<td>2,494</td>
<td>2,502</td>
<td>-8</td>
<td>-0.32%</td>
</tr>
<tr>
<td>Woodbridge HS</td>
<td>2,429</td>
<td>2,402</td>
<td>27</td>
<td>1.11%</td>
</tr>
<tr>
<td>Total</td>
<td>10,177</td>
<td>10,245</td>
<td>-68</td>
<td>-0.67%</td>
</tr>
</tbody>
</table>

*Does not include Preschool, RSJ home school students, and DHH Students

Sources: 2017 Weekly Enrollment Report October 4, 2017, IUSD17Cnsv(RecDev), & IUSD17MOD (RecDev)
## Enrollment Trends Actual vs Projected

### Enrollment vs Moderate Projections (Aggressive) – Fall 2017

<table>
<thead>
<tr>
<th>Grade Level</th>
<th>Actual Enrollment</th>
<th>Moderate Projected Enrollment</th>
<th>Variance</th>
<th>% Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>TK - 6th</td>
<td>18,949</td>
<td>18,965</td>
<td>-16</td>
<td>-0.08%</td>
</tr>
<tr>
<td>7th - 8th</td>
<td>5,373</td>
<td>5,443</td>
<td>-70</td>
<td>-1.30%</td>
</tr>
<tr>
<td>9th - 12th</td>
<td>10,177</td>
<td>10,391</td>
<td>-214</td>
<td>-2.10%</td>
</tr>
<tr>
<td>Total*</td>
<td>34,499</td>
<td>34,799</td>
<td>-300</td>
<td>-0.87%</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>School</th>
<th>Actual</th>
<th>Moderate</th>
<th>Variance</th>
<th>% Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creekside HS</td>
<td>89</td>
<td>90</td>
<td>-1</td>
<td>-1.12%</td>
</tr>
<tr>
<td>Irvine HS</td>
<td>2,055</td>
<td>2,164</td>
<td>-109</td>
<td>-5.30%</td>
</tr>
<tr>
<td>Northwood HS</td>
<td>2,247</td>
<td>2,258</td>
<td>-11</td>
<td>-0.49%</td>
</tr>
<tr>
<td>Portola HS</td>
<td>863</td>
<td>927</td>
<td>-64</td>
<td>-7.42%</td>
</tr>
<tr>
<td>University HS</td>
<td>2,494</td>
<td>2,528</td>
<td>-34</td>
<td>-1.36%</td>
</tr>
<tr>
<td>Woodbridge HS</td>
<td>2,429</td>
<td>2,424</td>
<td>5</td>
<td>0.21%</td>
</tr>
<tr>
<td>Total</td>
<td>10,177</td>
<td>10,391</td>
<td>-214</td>
<td>-2.10%</td>
</tr>
</tbody>
</table>

---

*Does not include Preschool, RSJ home school students, and DHH students.

Sources: 2017 Weekly Enrollment Report October 4, 2017, IUSD17Cnsv(RecDev), & IUSD17MOD (RecDev)
Actual Enrollment vs Moderate (Aggressive) vs Conservative – Fall 2017

Difference between Moderate and Conservative against actual = 0.03%

*Does not include Preschool and RSJ home school students
Sources: 2017 Weekly Enrollment Report October 4, IUSD17Cnsv(RecDev), & IUSD17MOD (RecDev)
ALDERWOOD & OAK CREEK COMMUNITY UPDATE
# ALDERWOOD ENROLLMENT UPDATE

## Alderwood ES Community Update

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Alderwood</td>
<td>839</td>
<td>825</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Quail Hill</td>
<td>686</td>
<td>699</td>
</tr>
<tr>
<td>Los Olivos</td>
<td>104</td>
<td>103</td>
</tr>
<tr>
<td>Laguna Altura/Hidden Canyon</td>
<td>140</td>
<td>167</td>
</tr>
<tr>
<td>Total</td>
<td>930</td>
<td>969</td>
</tr>
</tbody>
</table>

Note: Alderwood ES Student Capacity – 939
Los Olivos community is within Cypress Village attendance area.

- Enrollment in geographic data may not align to actual school enrollment due to school choice, special programs, and displacements.

IUSD17Mod Recent Development Open Enrollment Plot October 2016 (CBEDS) & October 2017
### Oak Creek ES Community Update

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Oak Creek ES</td>
<td>912</td>
<td>919</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Oak Creek</td>
<td>820</td>
<td>808</td>
</tr>
<tr>
<td>Spectrum</td>
<td>211</td>
<td>246</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,031</strong></td>
<td><strong>1,054</strong></td>
</tr>
</tbody>
</table>

Note: Oak Creek ES Student Capacity – 1001
Capacity includes 2017 Relocatable Project

- Enrollment in geographic data may not align to actual school enrollment due to school choice, special programs, and displacements.

IUSD17Mod Recent Development Open Enrollment Plot October 2016 (CBEDS) & October 2017
## EXISTING STUDENTS LIVING IN ALDERWOOD/OAK CREEK GEOGRAPHIC AREA

### Los Olivos/Spectrum Communities

<table>
<thead>
<tr>
<th>Community</th>
<th>2017 (CBEDS GEOGRAPHIC PLOT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Olivos Community</td>
<td>103</td>
</tr>
<tr>
<td>Spectrum Community</td>
<td>246</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>349</strong></td>
</tr>
</tbody>
</table>

### Alderwood Elementary School

<table>
<thead>
<tr>
<th>Community</th>
<th>2017 (CBEDS GEOGRAPHIC PLOT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quail Hill Community</td>
<td>699</td>
</tr>
<tr>
<td>Laguna Altura/Hidden Canyon Community</td>
<td>167</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>866</strong></td>
</tr>
</tbody>
</table>

### Oak Creek Elementary School

<table>
<thead>
<tr>
<th>Community</th>
<th>2017 (CBEDS GEOGRAPHIC PLOT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oak Creek Community</td>
<td>808</td>
</tr>
</tbody>
</table>

Source: IUSD17Mod Recent Development Geographic Projections
DEVELOPER BUSINESS PLAN UPDATE

Developer updated business plans:
- Irvine Company
- FivePoint
- City of Irvine (Irvine Business Complex)
- UC Irvine
- County Projects (West Alton)

Development changes impacting IUSD planning:
- Traveland (Removed)
- Heritage Fields District 1S (Base Camp)
- Los Olivos
TRAVELAND COMMUNITY UPDATE

COMMUNITY MAP

<table>
<thead>
<tr>
<th>School</th>
<th>5 Year Enrollment Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greentree ES</td>
<td>290</td>
</tr>
<tr>
<td>Venado MS</td>
<td>70</td>
</tr>
<tr>
<td>Irvine HS</td>
<td>130</td>
</tr>
<tr>
<td>Total</td>
<td>490</td>
</tr>
</tbody>
</table>

Traveland multi-family units removed
## LOS OLIVOS COMMUNITY UPDATE

### COMMUNITY MAP

<table>
<thead>
<tr>
<th>Product Type</th>
<th>2017 Business Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-Family</td>
<td>3,531</td>
</tr>
<tr>
<td>Single Family Attached</td>
<td>169</td>
</tr>
<tr>
<td>Total</td>
<td>3,700</td>
</tr>
</tbody>
</table>

Existing Los Olivos Community

Potential School

Community Park

Residential

Park

Residential

Residential

Potential School
HERITAGE FIELDS COMMUNITY UPDATE

COMMUNITY MAP

- Beacon Park K8 (Complete)
- Cadence Park K8 (Construction)
- Heritage Fields K8#3 (Planning)
- Portola High School (Complete)
- Pavilion Park (Complete)
- Beacon Park (Substantially Complete)
- Parasol Park (Occupied/Construction)
- Altair (Construction)
- Cadence Park (Construction)
- District 5 (Planning)
- District 1 West (Planning)
- Base Camp (Planning)
STATE FUNDING UPDATE
STATE SCHOOL FACILITY PROGRAM – PROP 51

NEW CONSTRUCTION FUNDS $3 BILLION

MODERNIZATION FUNDS $3 BILLION

CTE $500 M

APPROVED BY CALIFORNIA VOTERS NOVEMBER 8, 2016

• $500 M CHARTER SCHOOLS
• $2 B COMMUNITY COLLEGE
WHICH LIST IS WHICH?

**PRE** PROP 51 APPROVAL

- **UNFUNDED LIST**
  - A.K.A. “TRUE UNFUNDED LIST”

**POST** PROP 51 APPROVAL

- **UNFUNDED LIST (LACK OF AB55 LOANS)**
  - These projects were fully processed
  - There are no IUSD projects on this list
  - Funded in Aug. 2017 bond issuance $450 M
  - Not subject to new grant agreement

- **ACKNOWLEDGED LIST**

- **WORKLOAD LIST**
  - These projects had not been processed previously
  - OPSC is currently processing applications in order of date received
  - IUSD estimated total applications $297 M
  - Subject to new grant agreement and audit process
SUMMARY OF PROP 51 BOND FUNDS AND IUSD ELIGIBLE PROJECTS

- **IUSD CTE FUNDS**
  - Measure E: Pursuing
    - Series 1: Max $10.5 M
  - Remaining $500 Million

- **IUSD MOD FUNDS**
  - Measure E: Submitted
    - Workload: $1.4 M
  - Remaining $1.04 Billion

- **NC FUNDS**
  - Unfunded/Workload $1.22 Billion
  - Remaining $1.78 Billion

- **CTE FUNDS**
  - Remaining $500 Million

- **Measure E: Submitted**
  - Series 1: $16.2 M

- **Pending**
  - Series 1: $10.4 M
  - Other: $32 M

- **IUSD NC FUNDS**
  - Submitted
    - Workload: $297.3 M

- **Measure E: Pending**
  - Series 1: $24.2 M

- **Prop 51 Bond issuance is expected 2018 ($800 M each year)**

- **The first IUSD project in line for funding is:**
  - CYES $24.2 M

*SAB/OPSC records as of September 2017*

Four CTE Filing Rounds of $125 M Each
Submitting WHS & CHS by 11/29/17
Scores published by CDE 2/14/2018
Presentation to SAB Board June 2018
**PROCESS FOR OBTAINING FUNDS**

1. **OPSC NOTIFICATION**
   - OPSC will notify IUSD that review of a project has begun.
   - The notification will be sent to authorized signatories via email.

2. **UPDATE 50-01 “ELIGIBILITY DETERMINATION”**
   - The District has 60 days to provide the updated 50-01 form to OPSC.
   - 50-01 form is updated annually in November by IUSD.

3. **OPSC SUBMITAL REVIEW**
   - OPSC will issue a “15-day” and a “4-Day” letter asking for clarification or modifications based on current regulations.

4. **PROJECT MOVES FROM WORKLOAD LIST TO UNFUNDED LIST**
   - SAB agenda item for approval.

5. **PRIORITY FUNDING ROUND LETTER**
   - Once on the Unfunded List, IUSD can submit its Priority Funding Round letter during the next available window (2x a yr. May/June & Nov./Dec.).

6. **APPROVAL OF FINAL PRIORITY FUNDING ROUND LIST**
   - SAB agenda item for approval.

7. **PROJECT MOVES FROM UNFUNDED LIST TO APPORTIONED LIST**
   - Pending bond sale availability, project moves from Unfunded List to the Apportioned List.

8. **GRANT AGREEMENT**
   - OPSC to issue Grant Agreement to IUSD.
   - IUSD to sign and return.

9. **SUBMIT 50-05 “FUND RELEASE AUTHORIZATION”**
   - IUSD to submit “Fund Release Authorization” form to request apportionment. Can be submitted simultaneously with the Grant Agreement.
   - Funds released approximately 2 months after 50-05 is submitted.

10. **SUBMIT 50-06 “EXPENDITURE REPORT”**
    - IUSD to submit “Expenditure Report” form to OPSC.

11. **AUDIT REGULATIONS PENDING, EXPECTED FEB. 2018**
    - Best Case: 1 Yr from OPSC Notification

**Prop 51 Bond Issuance**

- All currently submitted IUSD projects are on this list.
- The District has 60 days to provide the updated 50-01 form to OPSC.
- Funds released approximately 2 months after 50-05 is submitted.
## STATE FUNDING UPDATE

<table>
<thead>
<tr>
<th>Site Name</th>
<th>50-04 Date Received</th>
<th>Total State Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA 40 Elementary</td>
<td>08/28/13</td>
<td>$24,224,567</td>
</tr>
<tr>
<td>Northwood High</td>
<td>01/10/14</td>
<td>$4,141,489</td>
</tr>
<tr>
<td>Irvine High</td>
<td>09/02/14</td>
<td>$5,590,756</td>
</tr>
<tr>
<td>Portola Springs High</td>
<td>01/08/15</td>
<td>$121,135,763</td>
</tr>
<tr>
<td>Portola Springs Elementary</td>
<td>04/13/15</td>
<td>$29,024,728</td>
</tr>
<tr>
<td>Beacon Park K-8</td>
<td>04/29/15</td>
<td>$36,311,027</td>
</tr>
<tr>
<td>Northwood High (Culinary Arts)</td>
<td>07/22/15</td>
<td>$422,315</td>
</tr>
<tr>
<td>Creekside High (Culinary Arts)</td>
<td>07/22/15</td>
<td>$467,937</td>
</tr>
<tr>
<td>Jeffrey Trail Middle</td>
<td>08/05/15</td>
<td>$1,084,008</td>
</tr>
<tr>
<td>Cypress Village Elementary</td>
<td>08/05/15</td>
<td>$1,214,046</td>
</tr>
<tr>
<td>Portola Springs Elementary</td>
<td>06/01/16</td>
<td>$1,368,069</td>
</tr>
<tr>
<td>Cypress Village Elementary</td>
<td>08/01/16</td>
<td>$840,177</td>
</tr>
<tr>
<td>PA 5B Elementary</td>
<td>08/01/16</td>
<td>$28,885,049</td>
</tr>
<tr>
<td>Portola Springs Elementary</td>
<td>08/03/17</td>
<td>$948,994</td>
</tr>
<tr>
<td>Santiago Hills Elementary</td>
<td>08/23/17</td>
<td>$335,448</td>
</tr>
<tr>
<td>College Park Elementary</td>
<td>08/23/17</td>
<td>$470,630</td>
</tr>
<tr>
<td>Culverdale Elementary</td>
<td>08/23/17</td>
<td>$597,498</td>
</tr>
<tr>
<td>Rancho San Joaquin Middle</td>
<td>08/24/17</td>
<td>$331,928</td>
</tr>
<tr>
<td>Cadence Park K-8</td>
<td>09/06/17</td>
<td>$41,372,337</td>
</tr>
<tr>
<td><strong>New and Mod Combined</strong></td>
<td></td>
<td><strong>$298,766,766.00</strong></td>
</tr>
<tr>
<td><strong>Mod Total:</strong></td>
<td></td>
<td><strong>$1,403,576.00</strong></td>
</tr>
<tr>
<td><strong>New Total:</strong></td>
<td></td>
<td><strong>$297,363,190.00</strong></td>
</tr>
</tbody>
</table>
PROJECT UPDATES
COMPLETED PROJECTS
COMPLETED PROJECTS

- Eastwood ES
- Woodbridge HS – Relos
- Oak Creek ES – Relos
- Portola Springs ES – Villa, Parking Lot, and Solar
- Canyon View ES – Phase 1 – Villa Utility Work
- Cypress Village ES – Solar
- Rancho San Joaquin MS – Music Classroom & CTE Project
- Jeffrey Trail MS – CTE Project
- Sierra Vista MS – CTE Project
COMPLETED PROJECTS
EASTWOOD E.S.
COMPLETED PROJECTS

EASTWOOD E.S.

Learning Courtyard
COMPLETED PROJECTS
EASTWOOD E.S.

Typical Classroom
COMPLETED PROJECTS
WOODBRIDGE H.S.

New Relocatable Classrooms
COMPLETED PROJECTS

OAK CREEK E.S. – RELOS

New Relocatable Classrooms
COMPLETED PROJECTS
PORTOLA SPRINGS E.S.

New Villa Classrooms
COMPLETED PROJECTS
PORTOLA SPRINGS E.S.

New Parking Lot
Solar Panels In The Parking Lot
COMPLETED PROJECTS
CYPRESS VILLAGE E.S.

Solar Panels In The Parking Lot
COMPLETED PROJECTS
RANCHO SAN JOAQUIN M.S.

Before - New Music Classroom
COMPLETED PROJECTS
RANCHO SAN JOAQUIN M.S.

CTE Broadcast Room - Exterior
COMPLETED PROJECTS
RANCHO SAN JOAQUIN M.S.

CTE Broadcast Room - Interior
COMPLETED PROJECTS

JEFFREY TRAIL M.S.

Engineering Classroom
COMPLETED PROJECTS
SIERRA VISTA M.S. - CTE PROJECT

Broadcast Room
CURRENT PROJECTS
CURRENT PROJECTS

Projects in Planning
• Portola Springs 2nd School (PA6 North ES)
• Canyon View ES Villa
• Heritage Fields School #3
• Irvine Childcare Project Expansion

Projects in Construction
• Cadence Park School
CANYON VIEW ES VILLA
Heritage Fields School #3

- Location – District 5
- Currently in Preplanning
- Special Education Hub

Irvine Childcare Project Expansion

- Eastshore Elementary School
- Portola Springs Elementary School
- Stonegate Elementary School
Construction Progress
SITE ENHANCEMENTS
SITE ENHANCEMENTS

Vista Verde Media Center

Woodbury Media Center

Woodbury STEAM Labs
Questions?