



FACILITIES STUDY SESSION

December 15, 2023

Board of Education

Paul Bokota
Lauren Brooks
Jeff Kim
Katie McEwen
Cyril Yu, President



AGENDA

- Enrollment
- Community Development
- Districtwide (Non-Measure E)
- State Funding
- Measure E

Solis Park School
Administration Building



FACILITIES PLANNING PRIORITIES

Enrollment Growth

- Enrollment projections continue to show long term growth north of the 5 freeway and other regions in IUSD as additional new units continue to be planned, constructed, and occupied.
- The projections did not anticipate the extent of actual student enrollment growth. Subsequent projections will take into account the additional actual students generated and assumptions will be updated accordingly.

Universal Pre-K Rollout

- IUSD schools were not initially envisioned to house 4-year old students in its facilities.
- Facilities staff continues to work with Education Services on ways to maximize utilization of classrooms and augmentation to existing facilities that will best support students and staff.
- IUSD does not currently qualify for Pre-K facility dollars under the existing school facilities funding program.

Special Education

- Facilities and Special Education staff are evaluating ways for special education students within each high school attendance area to be able to attend an elementary, middle, and high school that supports each child's unique needs.

Measure E

- All 28 schools within the Measure E School Facilities Improvement District have received improvements.
- Series 1, Series 2, and Augmented Funds to Accelerate Projects (AFAP) improvements have been completed.
- Series 3 improvements are underway at several school sites.
- Series 4 and Series 5 are currently in conceptual planning stages.





ENROLLMENT



PRE-K THROUGH 12 ENROLLMENT PROJECTIONS STUDY SCENARIOS

Aggressive School Enrollment Projections (Recent Development Generation Rates)

- Utilizes most aggressive cohort age through methodology.
- Illustrative of developer business plan dwelling unit development in IUSD (dwelling unit phasing).
- Used for the planning of facilities, creating/changing boundaries, and timing of new school openings (within mitigation agreements).

Conservative School Enrollment Projections (Recent Development Generation Rates)

- Utilizes less aggressive cohort age through methodology.
- Illustrative of developer business plan dwelling unit development in IUSD (20-30% lag in development).
- Used for IUSD staffing and General Fund budgeting.

Geographic/Residential Enrollment Projections

- Illustrative of projected students within a geographic boundary.
- Used for analysis of various planning scenarios.



ENROLLMENT PROJECTIONS

TERMINOLOGY / DEFINITIONS

How do projections impact IUSD decision making?

- Enrollment projections are utilized as a tool to support the need for school openings, facilities expansions, boundary adjustments, human resource allocations, budgetary considerations, and special program locations.

Enrollment

- Within this presentation, enrollment refers to Pre-K through 12th grade students.
- Enrollment is a “snapshot” on the first week of October for the California Basic Education Data System (CBEDS).
- Enrollment is captured by school of attendance, as well as school of residence, to improve enrollment projection accuracy.

Dwelling Units Development

- New homes generate new students.
- Facilities staff actively tracks developer business plans for the year of development, community location, and product type.
- Facilities staff meets with its developer partners, most notably Irvine Company and FivePoint, on an annual basis.

Generation Rates

- $$\frac{\text{Existing Geographic Students Within Product Type}}{\text{Total Geographic Units of Product Type}} = \text{Student Generation Rate Within Product Type}$$
- Facilities staff evaluates new development generation rates to forecast future growth.



PROJECTIONS VS ACTUAL FALL 2023

Aggressive Projections vs Actual Enrollment 2023

| Grade Level | 2023 Projected | 2023 Enrollment | Variance Projected to Enrollment | % Variance |
|-------------|----------------|-----------------|----------------------------------|------------|
| PK – K | 2,937 | 2,839 | -98 | -3.5% |
| 1st - 6th | 17,101 | 17,316 | 215 | 1.2% |
| 7th - 8th | 5,792 | 6,010 | 218 | 3.6% |
| 9th - 12th | 11,167 | 11,387 | 220 | 1.9% |
| Total* | 36,997 | 37,552 | 555 | 1.5% |

Conservative Projections vs Actual Enrollment 2023

| Grade Level | 2023 Projected | 2023 Enrollment | Variance Projected to Enrollment | % Variance |
|-------------|----------------|-----------------|----------------------------------|------------|
| PK – K | 2,843 | 2,839 | -4 | -0.1% |
| 1st - 6th | 16,900 | 17,316 | 416 | 2.4% |
| 7th - 8th | 5,742 | 6,010 | 268 | 4.5% |
| 9th - 12th | 11,063 | 11,387 | 324 | 2.8% |
| Total* | 36,548 | 37,552 | 1,004 | 2.7% |

*Does not include Preschool, NPS, Adult Transition, DHH, includes IVA

Source: Preliminary CBED Data October 2023 and Moderate/Conservative 2023 Projections (RecDev) with SDC distributed into grade level data



ENROLLMENT CHANGE 2022 TO 2023

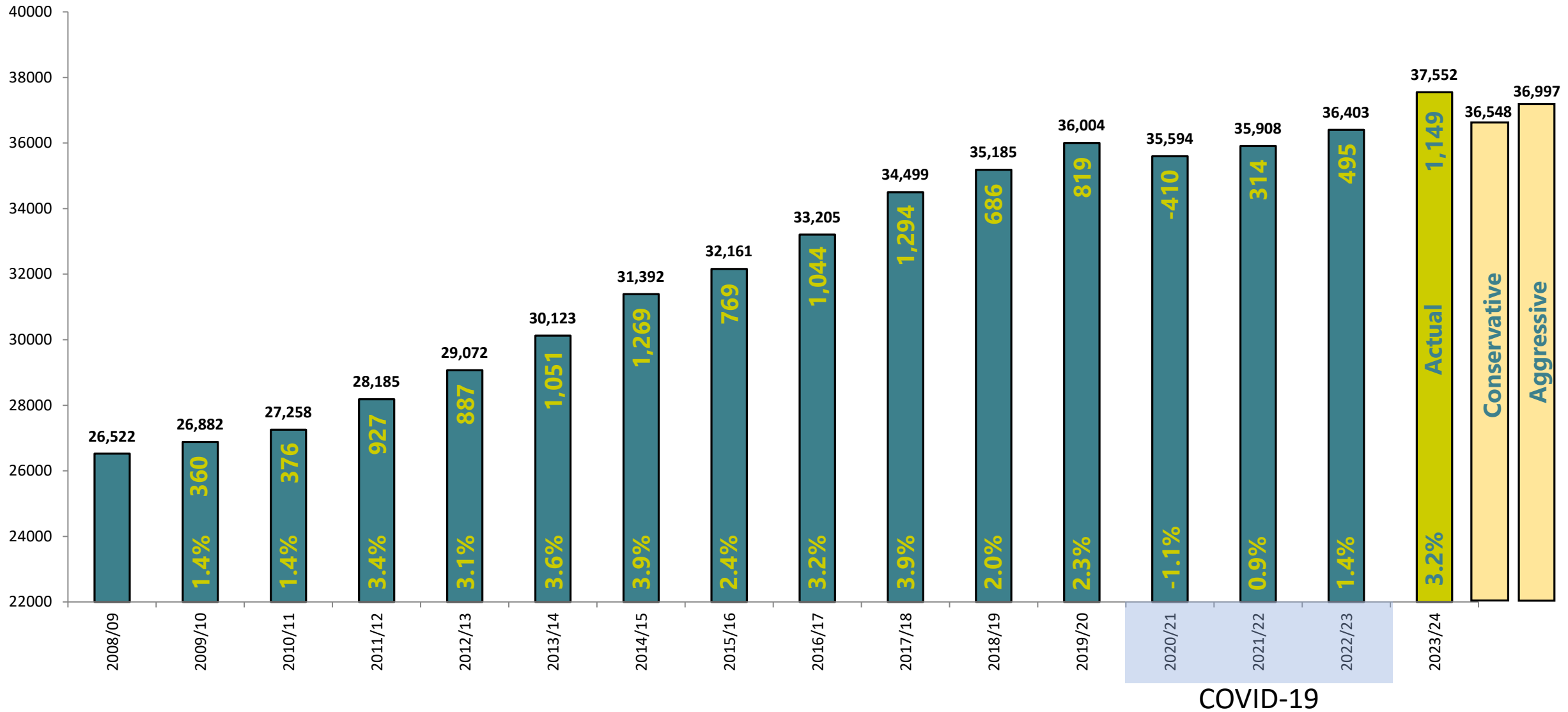
Enrollment Change from October 2022 to October 2023

| Grade Level | 2022 Enrollment | 2023 Enrollment | Change 2022 to 2023 | % Change 2022 to 2023 |
|-------------|-----------------|-----------------|---------------------|-----------------------|
| PK – K | 2,755 | 2,839 | 84 | 3.0% |
| 1st - 6th | 16,947 | 17,316 | 369 | 2.2% |
| 7th - 8th | 5,689 | 6,010 | 321 | 5.6% |
| 9th - 12th | 11,012 | 11,387 | 375 | 3.4% |
| Total* | 36,403 | 37,552 | 1,149 | 3.2% |

*Does not include Preschool, NPS, Adult Transition, DHH, includes IVA
Source: Preliminary CBED Data October 2022 and 2023



ENROLLMENT TRENDS (PK-12)



PROJECTION ASSUMPTIONS VS ACTUAL GROWTH FACTORS

New and Existing Communities

- Projected: Enrollment growth would be limited to areas with new community development. Older communities would overall see declines in enrollment based on recent trends.
- Actual: Enrollment growth occurred in areas with new community development **and** in mature built out communities. **(Exceeded projections)**

Cohort Age Through

- Projected: 1st grade through 12th grade would see cohort growth/decline based on recent trends.
- Actual: 4th grade through 8th grade and 10th grade through 12th grade experienced cohort growth exceeding the recent trend. **(Exceeded projections)**

Immigration

- Projected: Immigration of new students would continue based on recent trends.
- Actual: Immigration of new students exceeded the recent trend. **(Exceeded projections)**

Pre-K and Kindergarten

- Projected: Pre-K would grow based on increased age eligibility. Kindergarten enrollment would remain stable.
- Actual: Pre-K grew based on increased age eligibility. Kindergarten enrollment declined. **(Below projections)**





COMMUNITY DEVELOPMENT



RESIDENTIAL DEVELOPMENTS

- **Irvine Company**
- **Heritage Fields**
- **Other Developments**
 - **Irvine Business Complex**
 - **Gateway Preserve**
 - **UCI Housing**
- **City of Irvine 2045 General Plan Update**

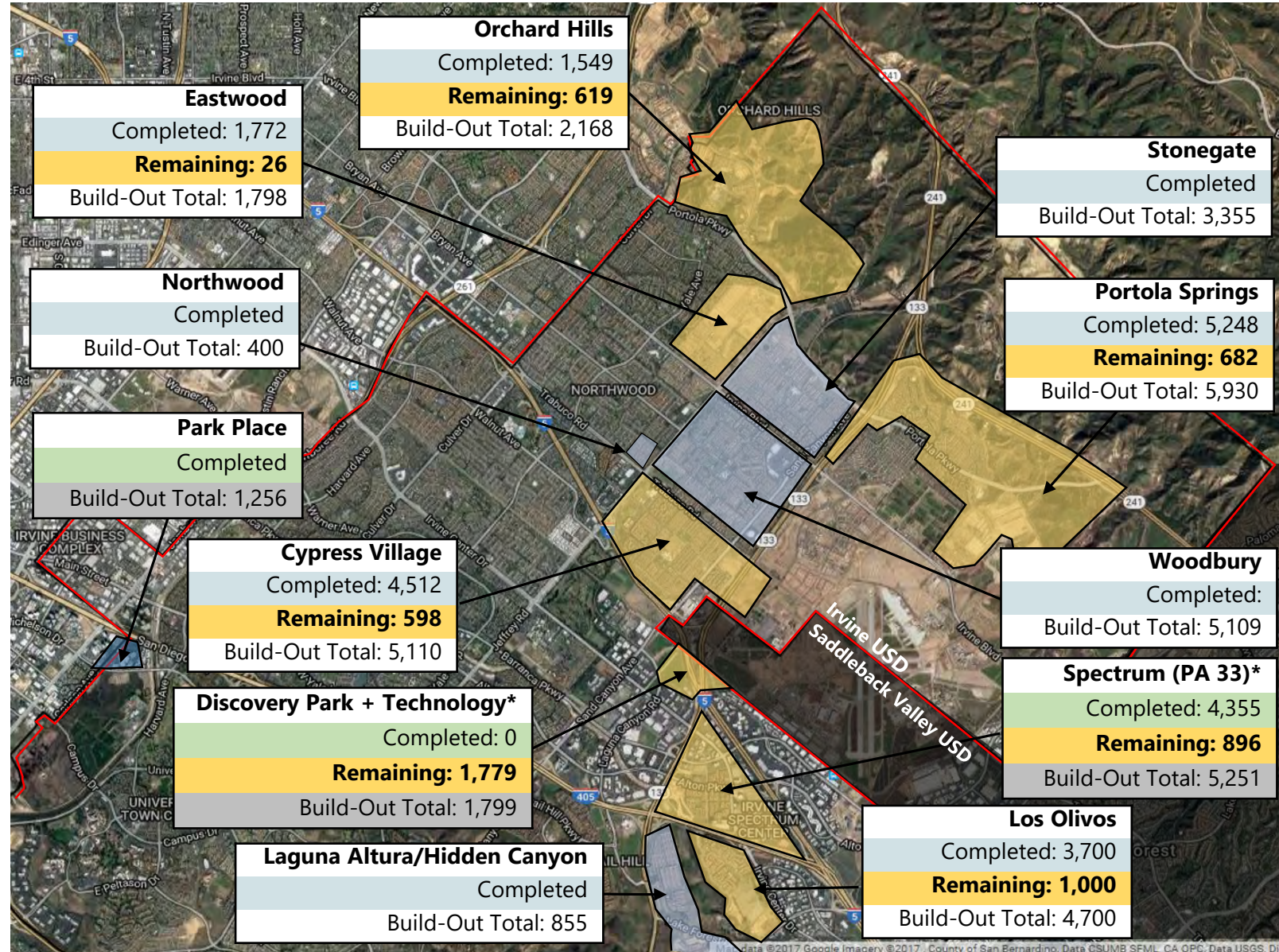


IRVINE COMPANY DEVELOPMENT UPDATE



| Total Unit Build-Out CFD 09-1 | |
|----------------------------------|---------------|
| Development Status | # of Units |
| Completed | 26,500 |
| Remaining | 2,925 |
| Total Buildout | 29,425 |

| Total Unit Build-Out Developer Fees* | |
|---|--------------|
| Development Status | # of Units |
| Completed | 5,611 |
| Remaining | 2,675 |
| Total Buildout | 8,286 |



Source: TIC BP (9/20/23) and March 14, 2023 City of Irvine Staff Report. Completed units are as of October 2023.




HERITAGE FIELDS DEVELOPMENT UPDATE

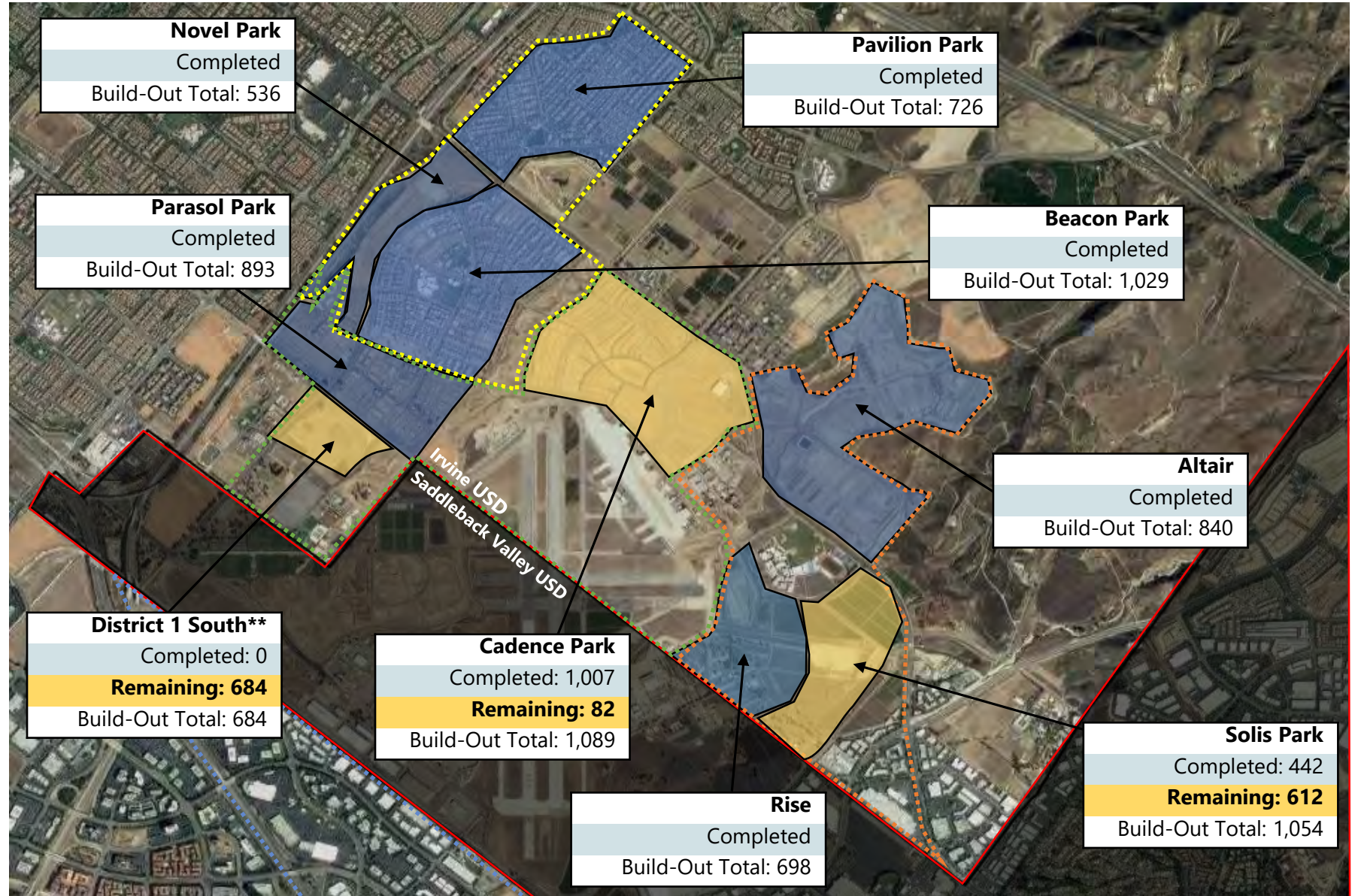


| Total Unit Build-Out | |
|----------------------------|--------------|
| Development Status in IUSD | # of Units |
| Completed | 6,171 |
| Remaining | 1,378 |
| Total Buildout* | 7,549 |

*Excludes 565 senior affordable homes in Pavilion Park and Novel Park.

Total Entitlements in Heritage Fields are 10,500 units between Irvine USD and Saddleback Valley USD (includes Affordable Housing Density Bonus).

| Legend (Attendance Areas) | |
|---|--------------|
|  | Beacon Park |
|  | Cadence Park |
|  | Solis Park |

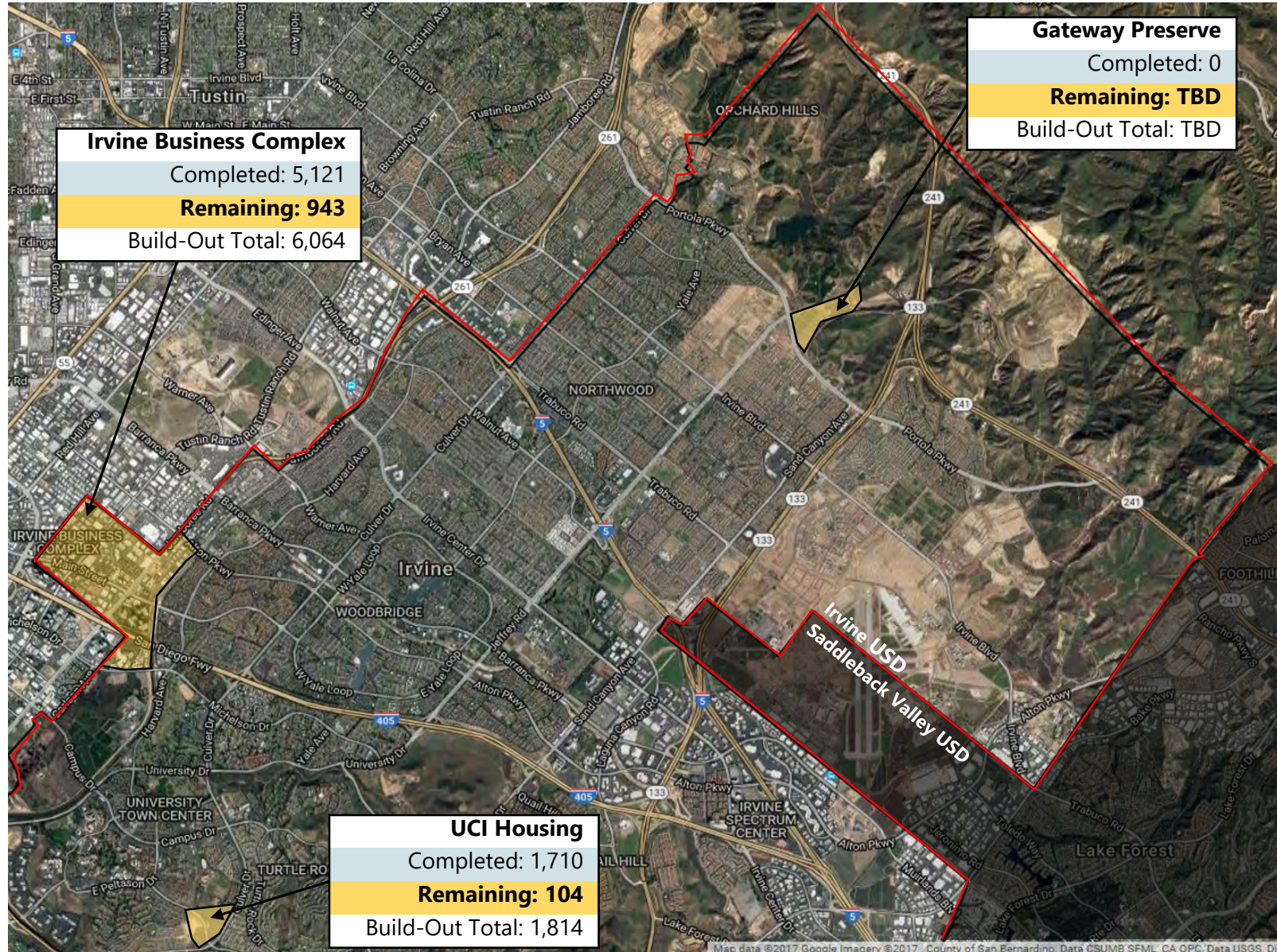


Source: GPN BP (9/25/23). Completed units are through September 2023

OTHER DEVELOPMENTS UPDATE



Does not include unapproved projects as part of Regional Housing Needs Assessment / Housing Element Update from the City of Irvine. Units will be added to enrollment projections once approved through the City of Irvine.



2045 General Plan Update

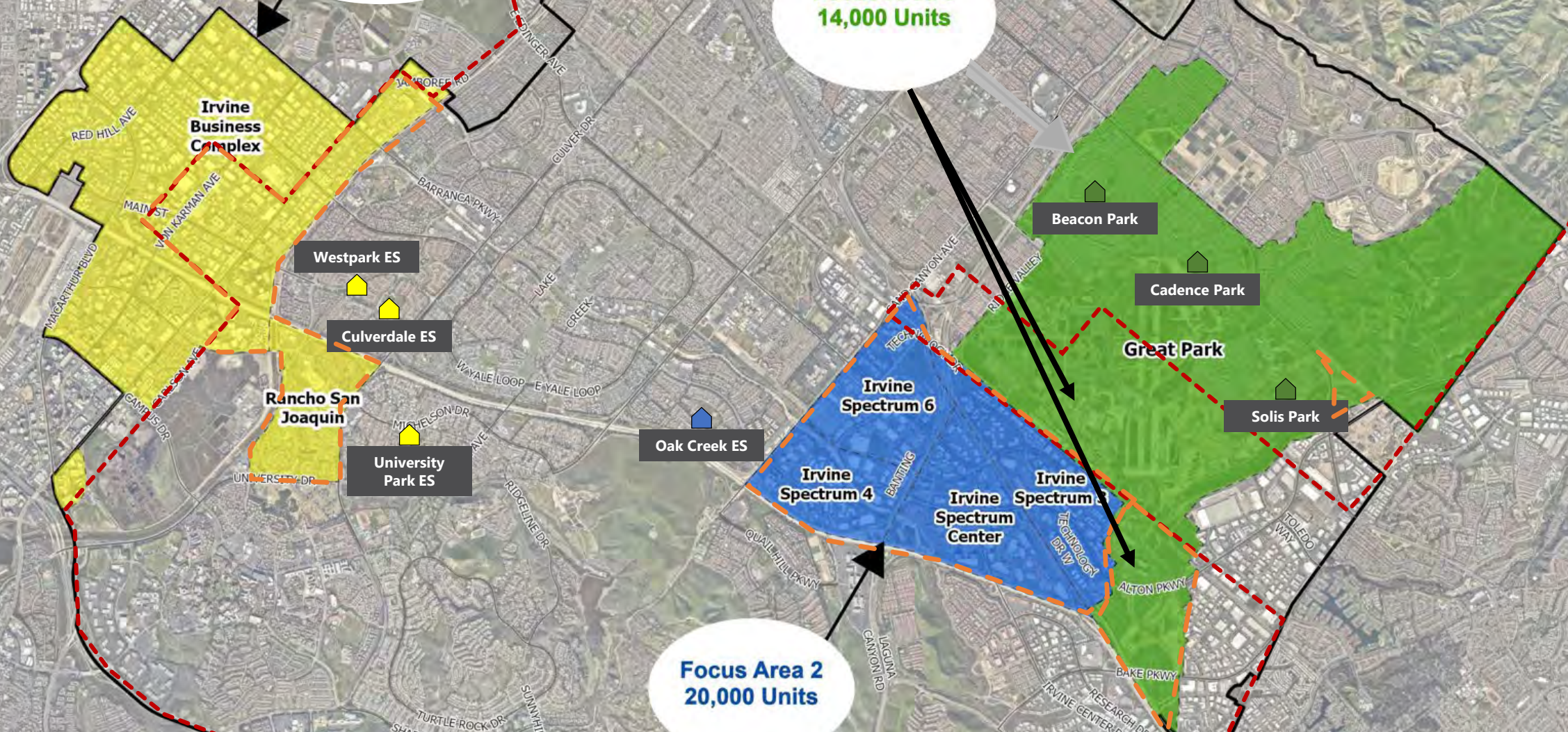
Legend

- IUSD Boundary
- IUSD Focus Areas
- City of Irvine Boundary

Focus Area 1
15,000 Units

Focus Area 3
14,000 Units

Focus Area 2
20,000 Units





DISTRICTWIDE (NON-MEASURE E)



DISTRICTWIDE PLANNING

- **Canyon View Elementary School – Relocatables**
- **Eastwood Elementary School – Villa**
- **Oak Creek Elementary School – Villa**
- **Sierra Vista Middle School – Relocatables**
- **Portola High School – Relocatables and Classroom/Nutrition Services Expansion**
- **Central Kitchen – Facility Expansion**
- **WellSpaces – Phase III**
- **Irvine High School – Woollett Aquatics Expansion (City of Irvine)**



CANYON VIEW ELEMENTARY SCHOOL

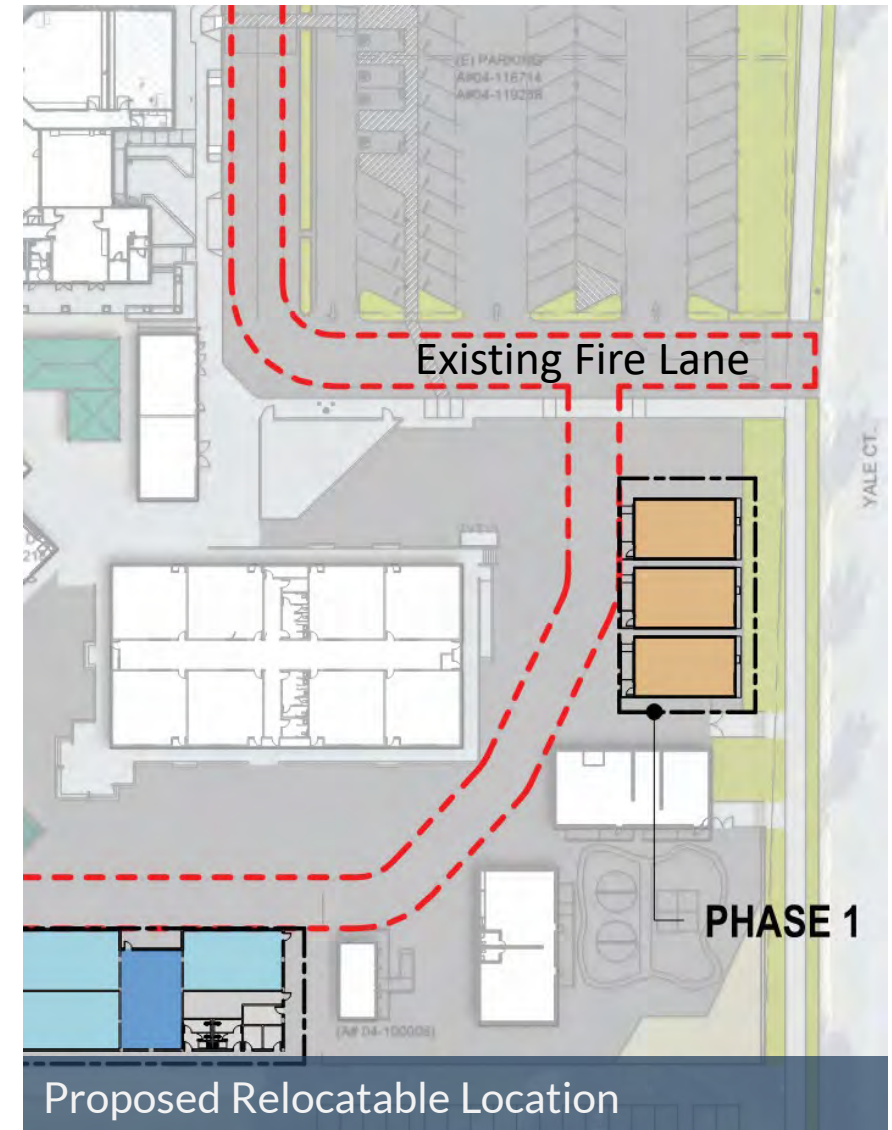
RELOCATABLES (3)

Rationale

- Canyon View ES was master planned to accommodate up to 1,000 general education students in permanent and portable buildings. The current capacity is approximately 815 students.
- New units in the Orchard Hills community continue to be built and occupied.
- For fall 2024, Facilities staff anticipates the need for (3) relocatable classrooms to accommodate growth.

Approximate Cost

- \$700,000 for relocatable expansion (CFD 09-1)
- Facilities staff is also planning a future Pre-K/Kinder expansion classroom and (3) classroom villa expansion pending additional student growth.



EASTWOOD ELEMENTARY SCHOOL

VILLA (8 CLASSROOMS)

Rationale

- Eastwood ES was master planned to accommodate up to 1,000 general education students in permanent and portable buildings.
- Since the school's opening in 2017, three (3) Extensive Support Needs (Autism) classes have been added.
- Current enrollment is 676 Pre-K through 6th grade general and special education students.
- There is a regional need for Pre-K classroom spaces in the northern sphere.

Approximate Cost

- \$8.2 million (CFD 09-1)



OAK CREEK ELEMENTARY SCHOOL

VILLA (8 CLASSROOMS)

Rationale

- At the November 3, 2022 Facilities Study Session, Facilities staff presented that additional units are under consideration for future approval by the City of Irvine within the Oak Creek Elementary School attendance area.
- At the March 14, 2023 City of Irvine Council Meeting, a Memorandum of Understanding (MOU) was executed regarding the additional units.
- At the October 24, 2023 City of Irvine Council Meeting, a zone change and development agreement for the properties were approved.
- The projected net increase in students at Oak Creek Elementary School is approximately 100-120 students under existing assumptions.

Approximate Cost

- Project costs to be determined. All non-CFD related units within IUSD under MOU will generate approximately \$11.5 million in Developer Fees.



OAK CREEK ELEMENTARY SCHOOL

VILLA (8 CLASSROOMS)



Conceptual Overall Site Plan



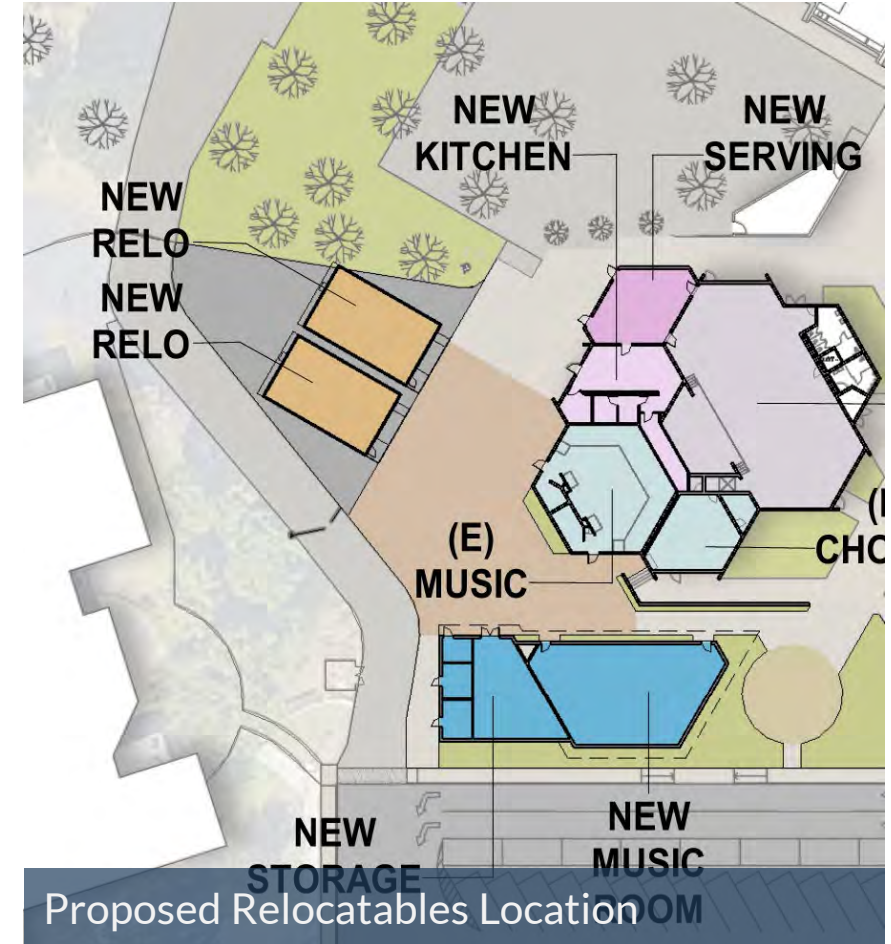
SIERRA VISTA MIDDLE SCHOOL EXPANSION

Rationale

- Sierra Vista Middle School was master planned to accommodate up to 1,200 general education students in permanent and portable buildings.
- To maintain current capacity and provide flexibility for future enrollment additional portables are needed.

Approximate Cost

- \$500,000 for relocatable expansion (CFD 09-1)
- Facilities staff is also evaluating an expanded food services building and a future Measure E Music Expansion



BOARD POLICY 7112 – SCHOOL SIZE

- At the November 3, 2022 Facilities Study Session, Facilities staff presented options for housing students at Portola High School through relocatable and permanent classroom facility expansion.
- In order to meet our goals of adequately serving students with the most efficient use of school capacity within their school community attendance area, it is recommended that elements of Board Policy 7112 – School Size be revised to allow high schools to house a permanent capacity of 2,800 students with infrastructure provisions for relocatable classroom buildings to house a maximum of 3,200 students.



BOARD POLICY 7112 – SCHOOL SIZE CONTINUED

- On September 17, 2013, the Board authorized a temporary increase in maximum enrollment of K-6 and K-8 schools from 1,000 students to 1,200 students. Enrollment trends over the last ten years demonstrate that, in general, families would prefer to attend their community school in lieu of an option to attend a smaller school outside of their attendance area.
- In order to meet our goals of adequately serving students with the most efficient use of school capacity, it is recommended that elements of Board Policy 7112 – School Size be revised to allow K-6 and K-8 schools to house a maximum capacity of 1,200 students.



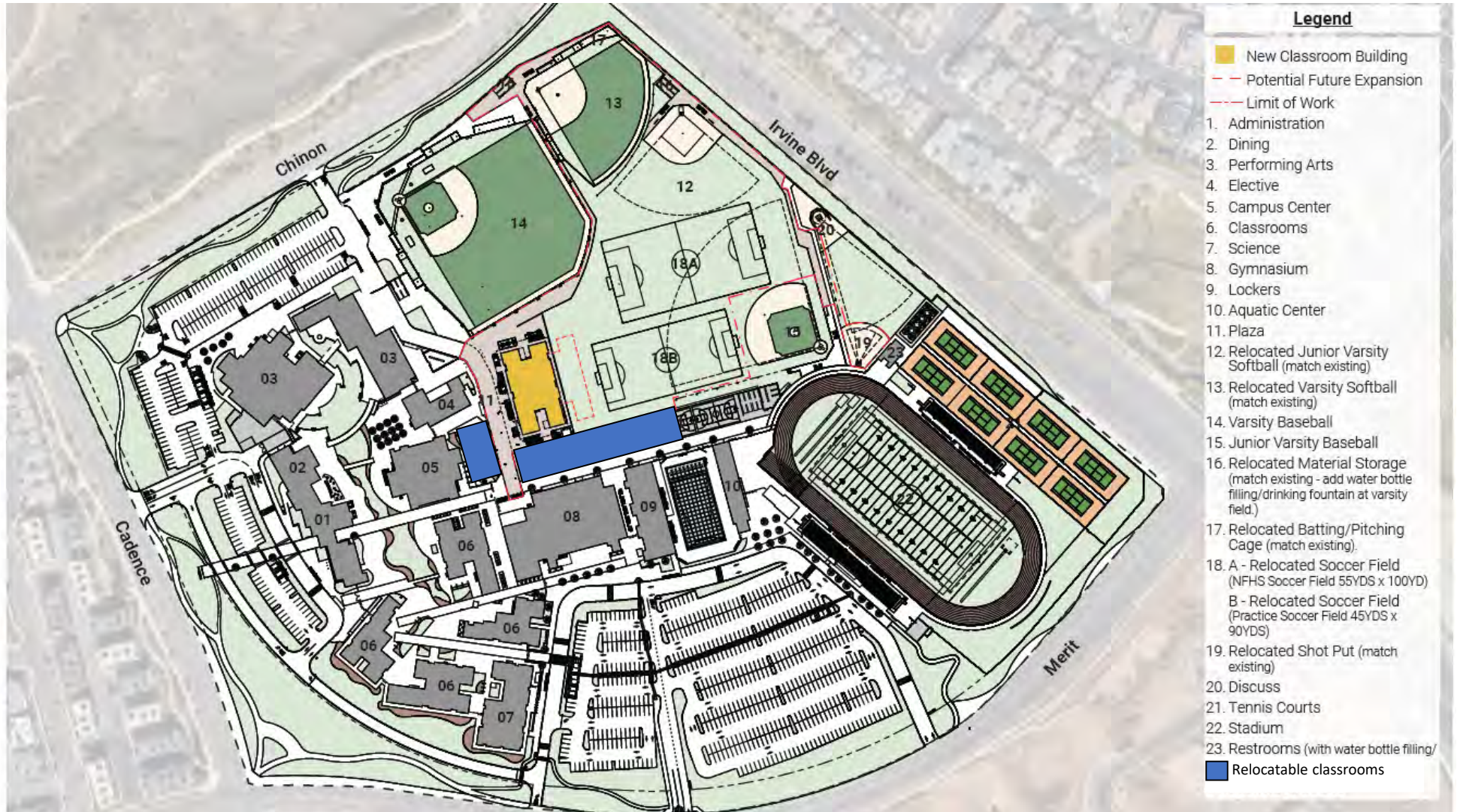
PORTOLA HIGH SCHOOL RELOCATABLES (6)



Leased Relocatables
(6 classrooms)
Summer 2024



PORTOLA HIGH SCHOOL CLASSROOM EXPANSION



Proposed Overall Site Plan



PORTOLA HIGH SCHOOL

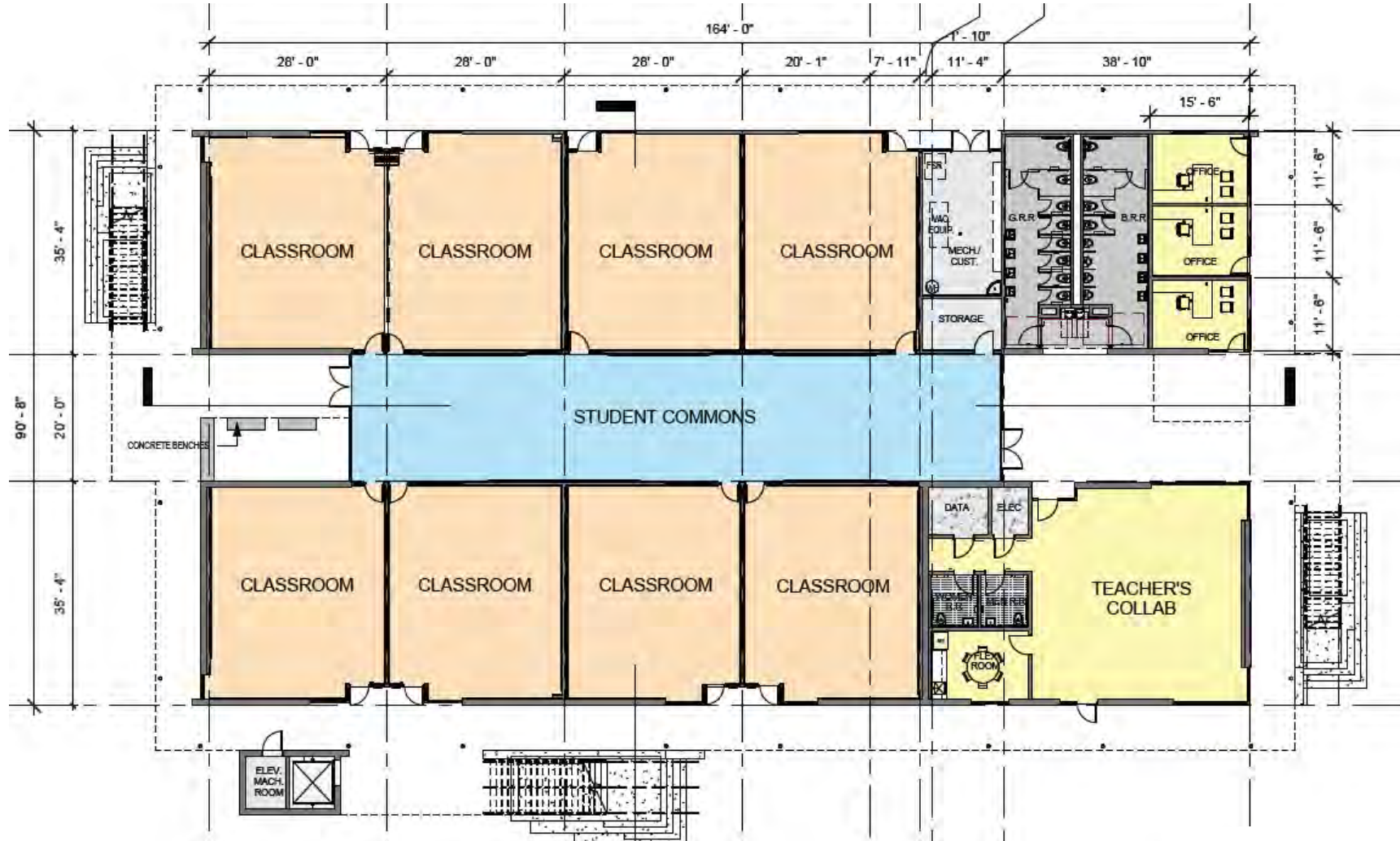
CLASSROOM EXPANSION (16 CLASSROOMS)



Conceptual Exterior Renderings



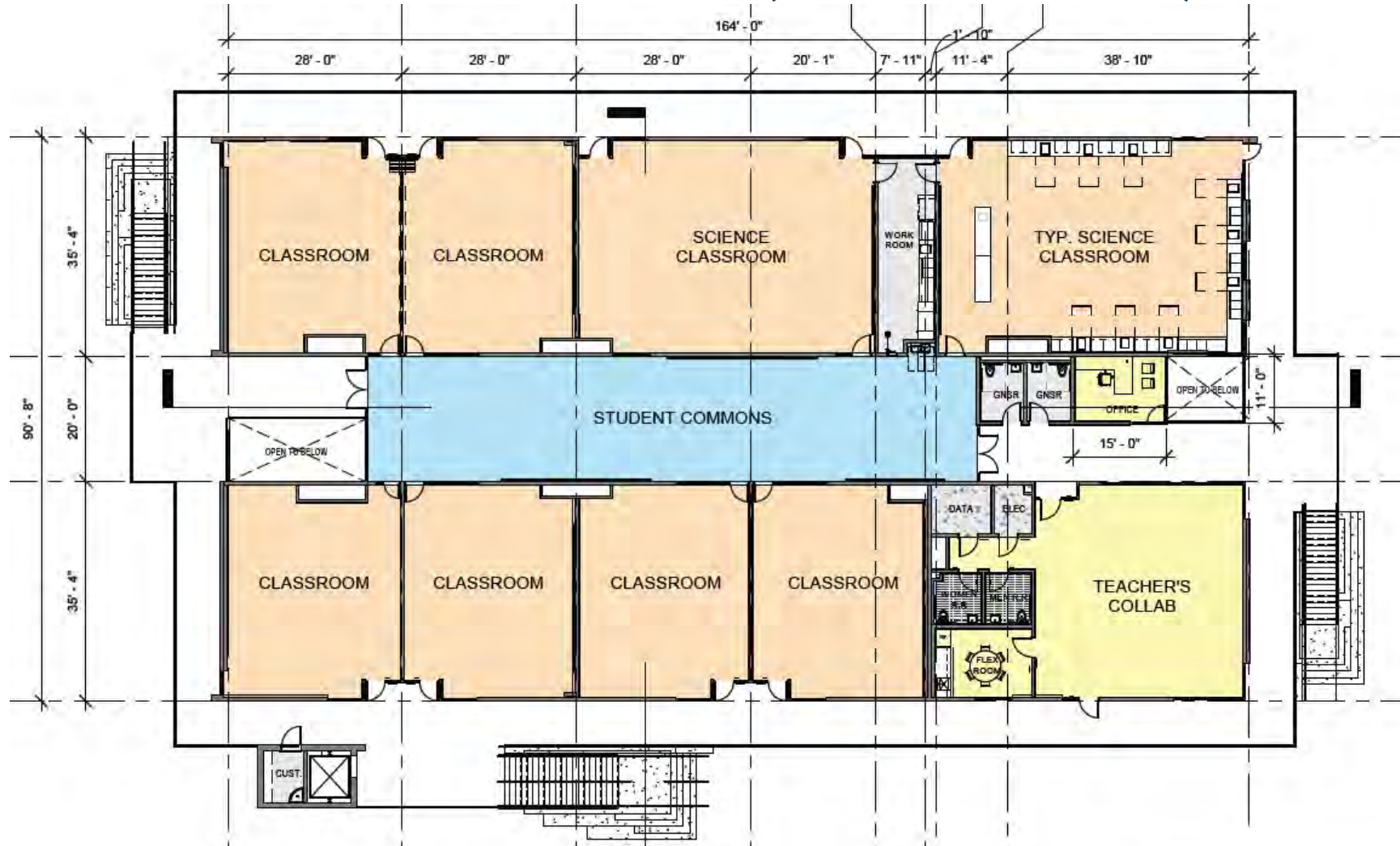
PORTOLA HIGH SCHOOL CLASSROOM EXPANSION (1ST FLOOR)



Proposed First Floor Plan

PORTOLA HIGH SCHOOL

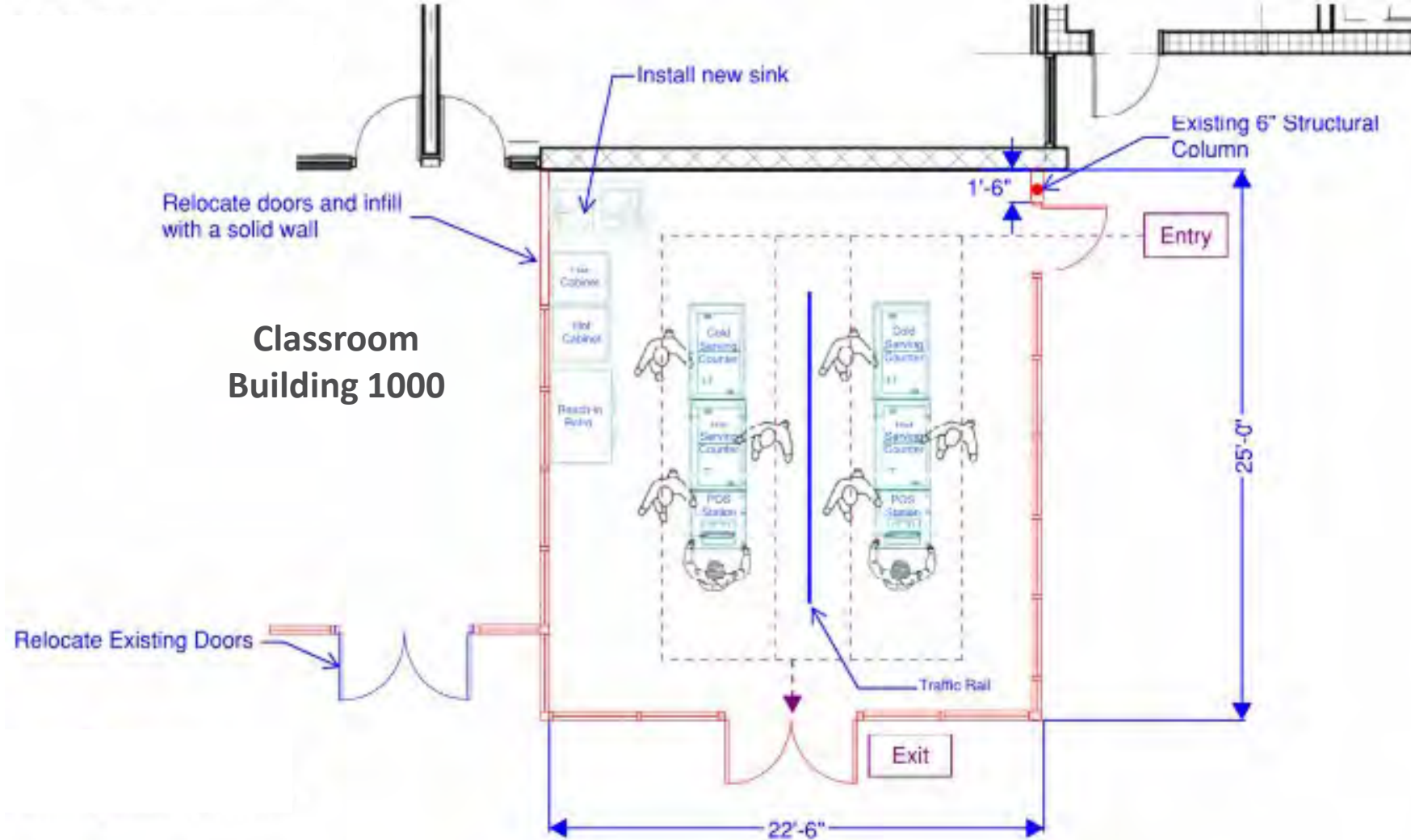
CLASSROOM EXPANSION (2ND FLOOR)



Proposed Second Floor Plan

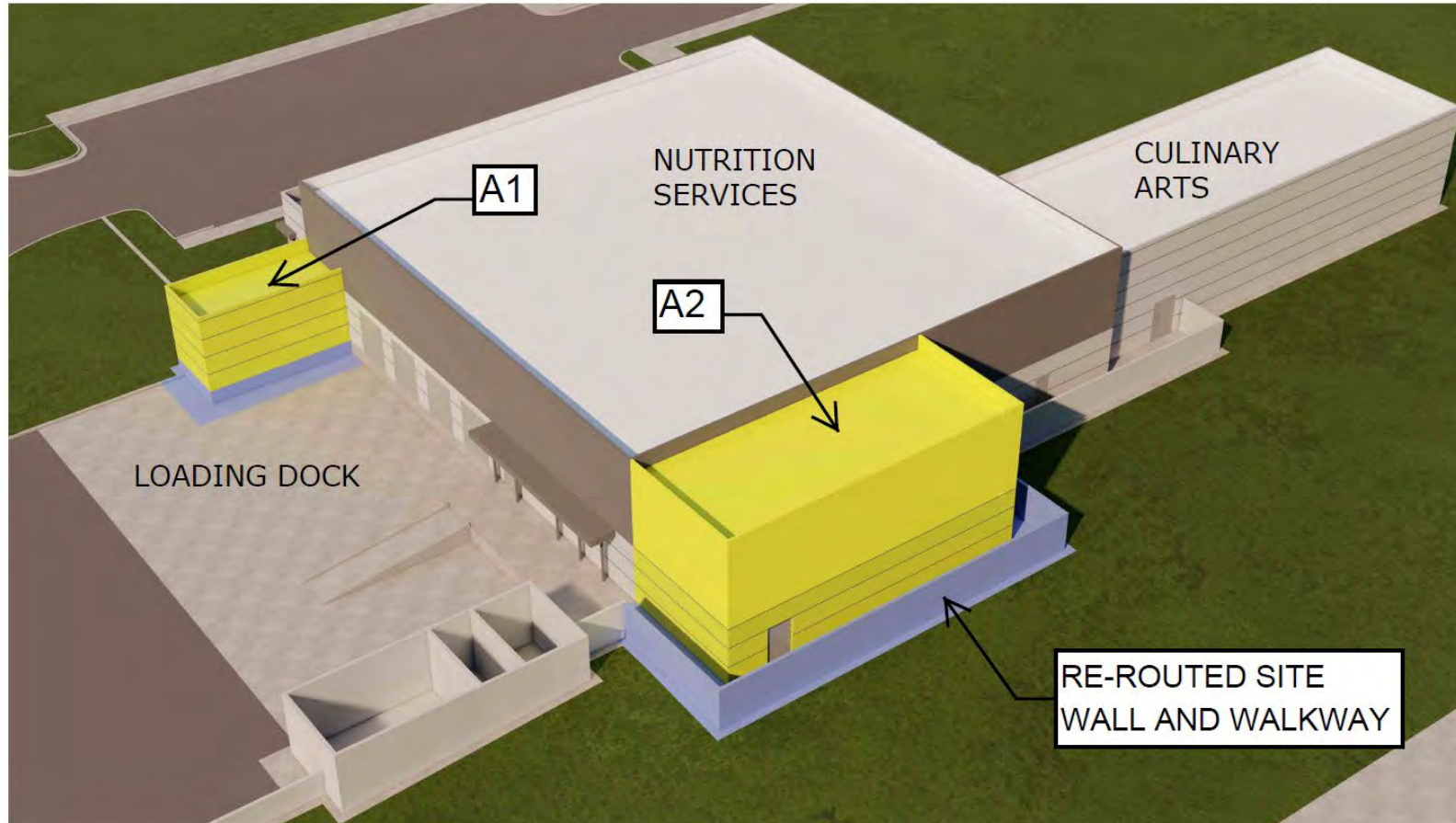


PORTOLA HIGH SCHOOL NUTRITION SERVICES EXPANSION



Proposed Nutrition Services Expansion

CENTRAL KITCHEN FACILITY EXPANSION



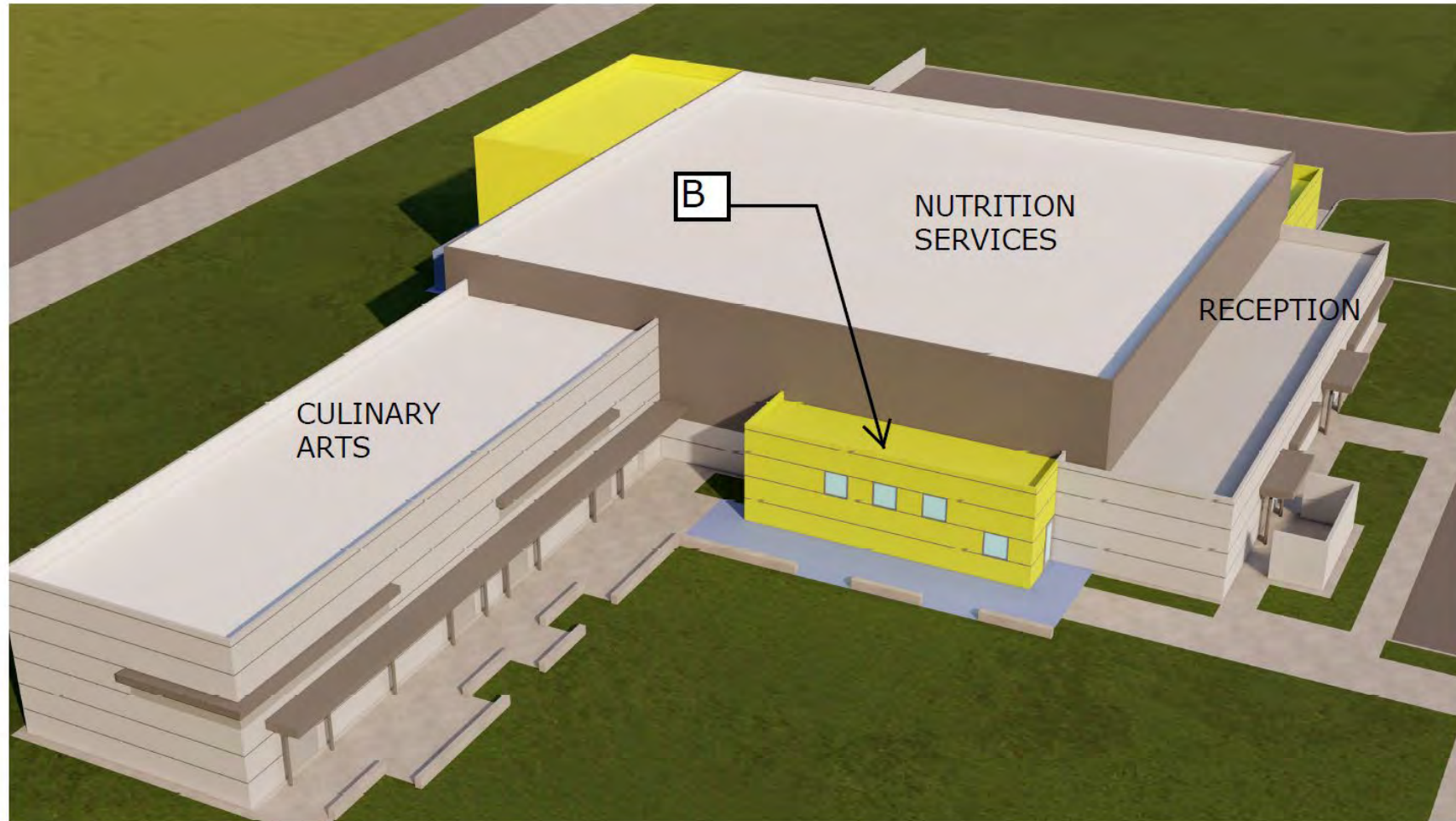
COMPONENT A1 / A2

A1 - EXPANDED DISTRIBUTION COOLER

A2 - EXPANDED FREEZER AND PRODUCE COOLER



CENTRAL KITCHEN FACILITY EXPANSION



COMPONENT B
EXPANDED ASSEMBLY AREA AND OFFICE



WELLSPACES - PHASE III

Rationale

- In Summer 2022, Phase I WellSpace improvements were completed at South Lake MS, Venado MS, Irvine HS, and University HS.
- In Summer 2023, Phase II WellSpace improvements were completed at Plaza Vista School, Lakeside MS, Rancho San Joaquin MS, and Creekside HS.
- In Summer 2024, Phase III WellSpace improvements are tentatively planned at Beacon Park School, Cadence Park School, Portola HS, and Woodbridge HS.
- By fall 2025, all K-8, middle, and high schools are planned to receive a WellSpace.

Approximate Cost

- To be determined



IRVINE HIGH SCHOOL WOOLLETT AQUATICS

Rationale

- On October 24, 2023, Irvine City Council authorized City staff to enter into an agreement to begin the design and construction support services to develop an additional swimming pool at William Woollett Jr. Aquatics Center.
- The proposed project is on IUSD property.



DISTRICTWIDE CONSTRUCTION **(NON-MEASURE E)**

- **Loma Ridge Elementary School – Villa**
- **Creekside Education Center Expansion**
 - **Learning Center**
 - **Music Instrument Checkout**
 - **Adult Education Relocatables - Phase 2**
 - **Overflow Parking Lot**
- **Portola High School – Field Renovation**
- **Playground Equipment – Accessible/Inclusive**



LOMA RIDGE ELEMENTARY SCHOOL VILLA (8 CLASSROOMS)



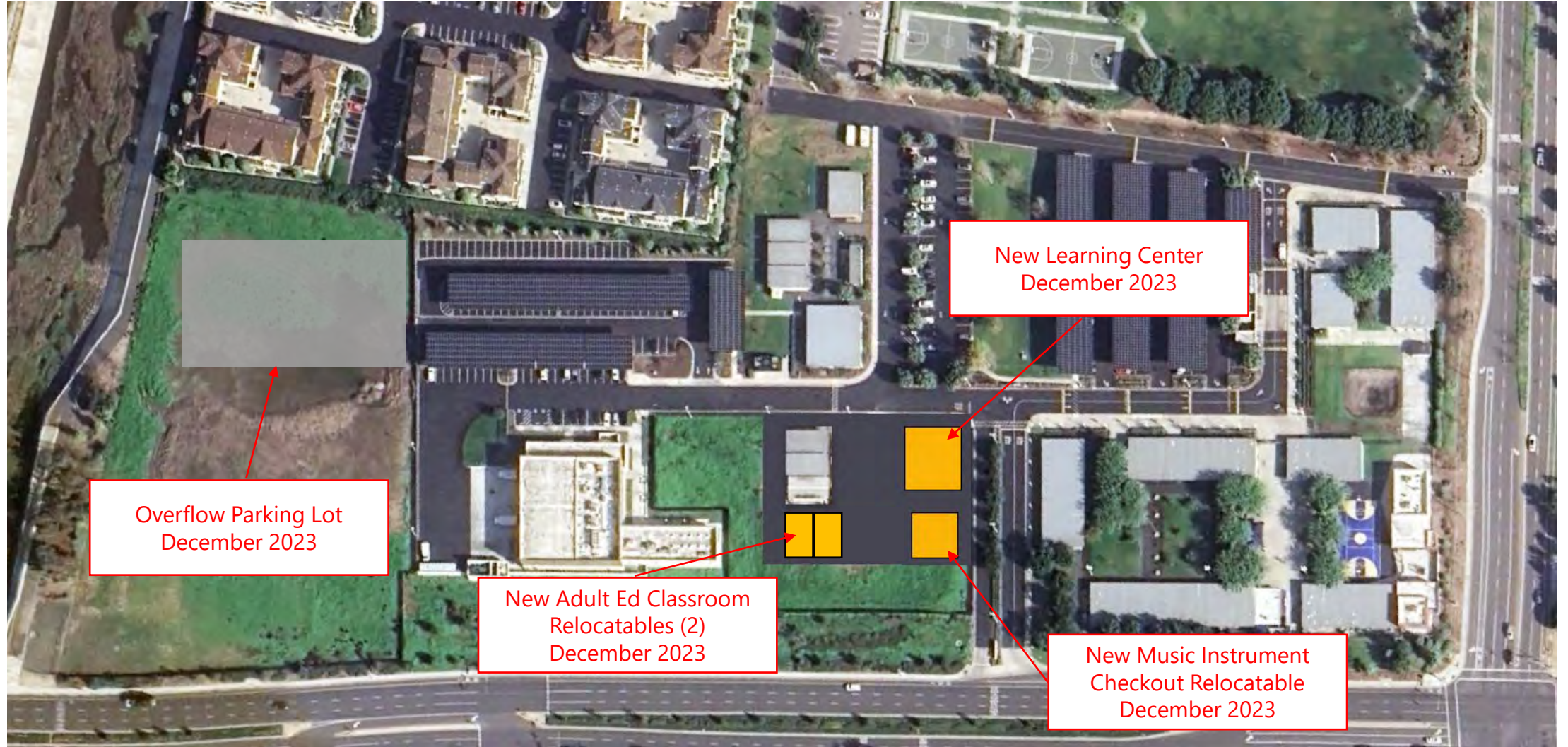
Loma Ridge ES Villa - Exterior



Loma Ridge ES Villa - Interior



CREEKSIDE EDUCATION CENTER EXPANSION



Overflow Parking Lot
December 2023

New Learning Center
December 2023

New Adult Ed Classroom
Relocatables (2)
December 2023

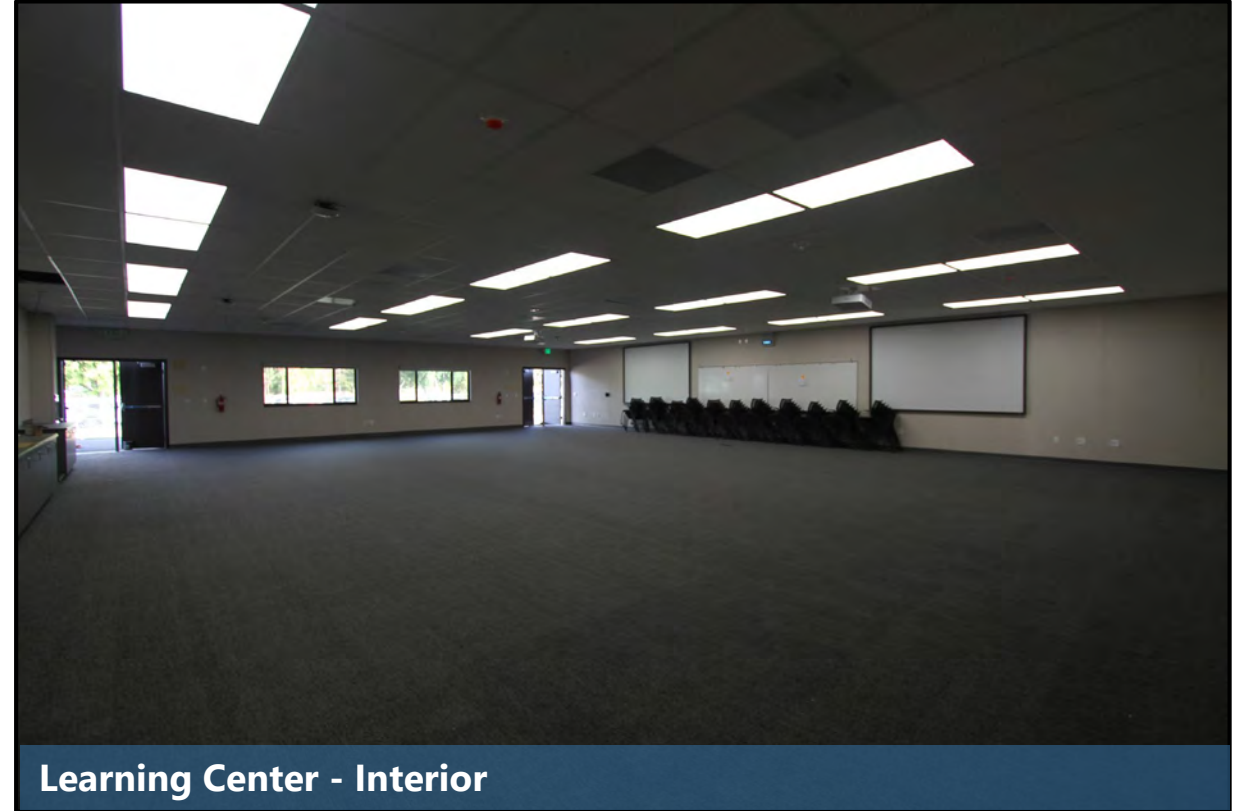
New Music Instrument
Checkout Relocatable
December 2023



CREEKSIDE EDUCATION CENTER LEARNING CENTER



Learning Center - Exterior



Learning Center - Interior



CREEKSIDE EDUCATION CENTER MUSIC INSTRUMENT CHECKOUT



Relocatable - Exterior



Relocatable - Interior



CREEKSIDE EDUCATION CENTER ADULT EDUCATION - PHASE 2



Adult Education Relocatable Classrooms - Exterior



Adult Education Relocatable Classroom - Interior



CREEKSIDE EDUCATION CENTER OVERFLOW PARKING LOT



PORTOLA HIGH SCHOOL FIELD RENOVATION



PLAY EQUIPMENT - ACCESSIBLE / INCLUSIVE



Solis Park School - Sensory Tunnel



Solis Park School - Inclusive Swings



Rube Goldberg Panel



DISTRICTWIDE UPDATE COMPLETED **(NON-MEASURE E)**

- **Bonita Canyon Elementary School – Kindergarten Play Structure**
- **Eastwood Elementary School – Relocatable Classrooms**
- **Portola Springs Elementary School – Relocatable Classroom**
- **Portola Springs Elementary School – Special Education Restroom**
- **Jeffrey Trail Middle School– Relocatable Classrooms**
- **Portola High School – Relocatable Classrooms**
- **ELOP – Sheds and Fencing**
- **ELOP – Temporary Restrooms**
- **Legacy Creekside – Additional Restrooms**
- **WellSpaces – Phase II**
- **Creekside Education Center – North Campus Improvements**
- **District Office – Office Improvements**
- **Support Services – Office Improvements**



BONITA CANYON ELEMENTARY SCHOOL **KINDERGARTEN PLAY STRUCTURE**

Rationale

- The Expanded Learning Opportunities Program (ELOP) began at the start of the 2023-24 school year.
- Bonita Canyon ES was the only Kindergarten play area without a play structure.
- The District must provide appropriate play facilities for Pre-Kinder/Kindergarten students.

Approximate Cost

- \$190,000 (ELOP)



Play Structure in Kindergarten Area



EASTWOOD ELEMENTARY SCHOOL RELOCATABLE CLASSROOMS (2)



Relocatable Classrooms – Exterior



Relocatable Classrooms – Interior



PORTOLA SPRINGS ELEMENTARY SCHOOL RELOCATABLE CLASSROOM (1)



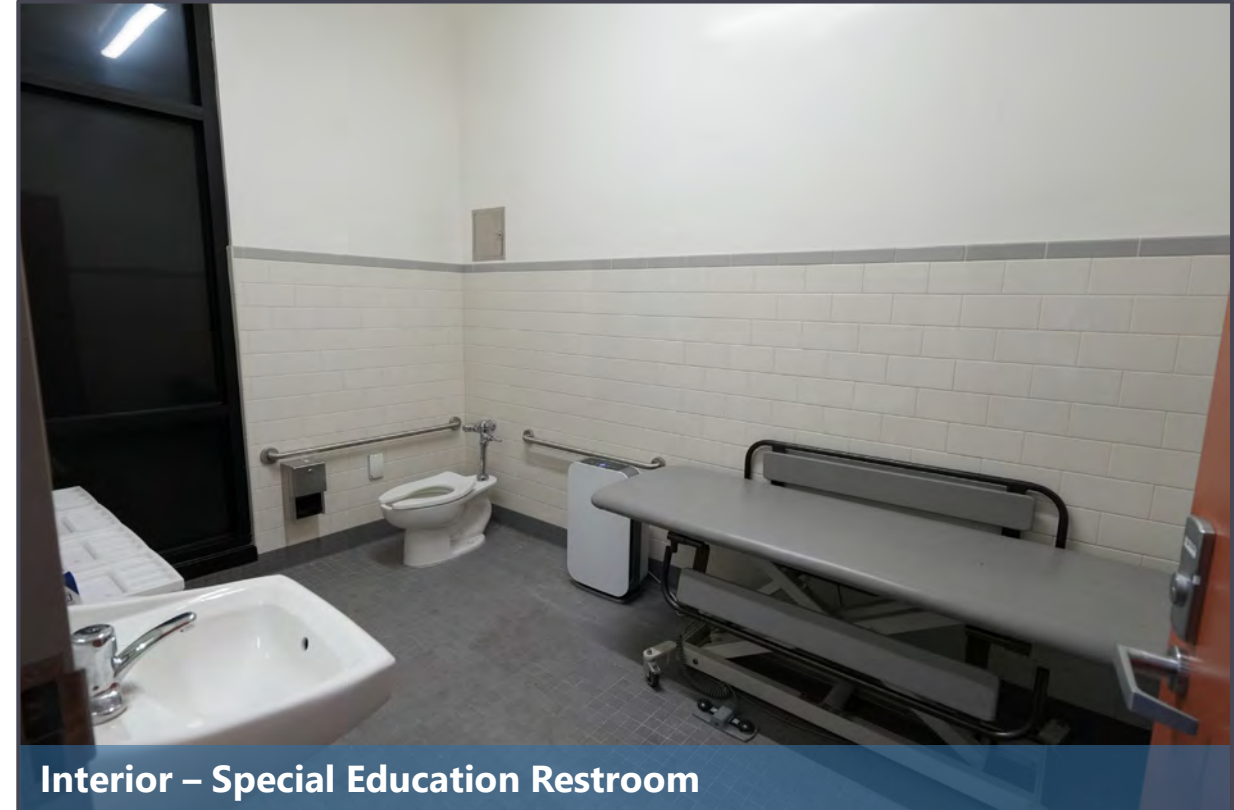
Relocatable Classroom - Exterior



Relocatable Classroom – Interior



PORTOLA SPRINGS ELEMENTARY SCHOOL SPECIAL EDUCATION RESTROOM



JEFFREY TRAIL MIDDLE SCHOOL RELOCATABLE CLASSROOMS (4)



Relocatable Classroom - Exterior



Relocatable Classroom – Interior



PORTOLA HIGH SCHOOL

RELOCATABLE CLASSROOMS (10)



EXPANDED LEARNING OPPORTUNITIES PROGRAM

SHEDS (28 SITES) AND FENCING (6 SITES)



EXPANDED LEARNING OPPORTUNITIES PROGRAM

TEMPORARY RESTROOMS



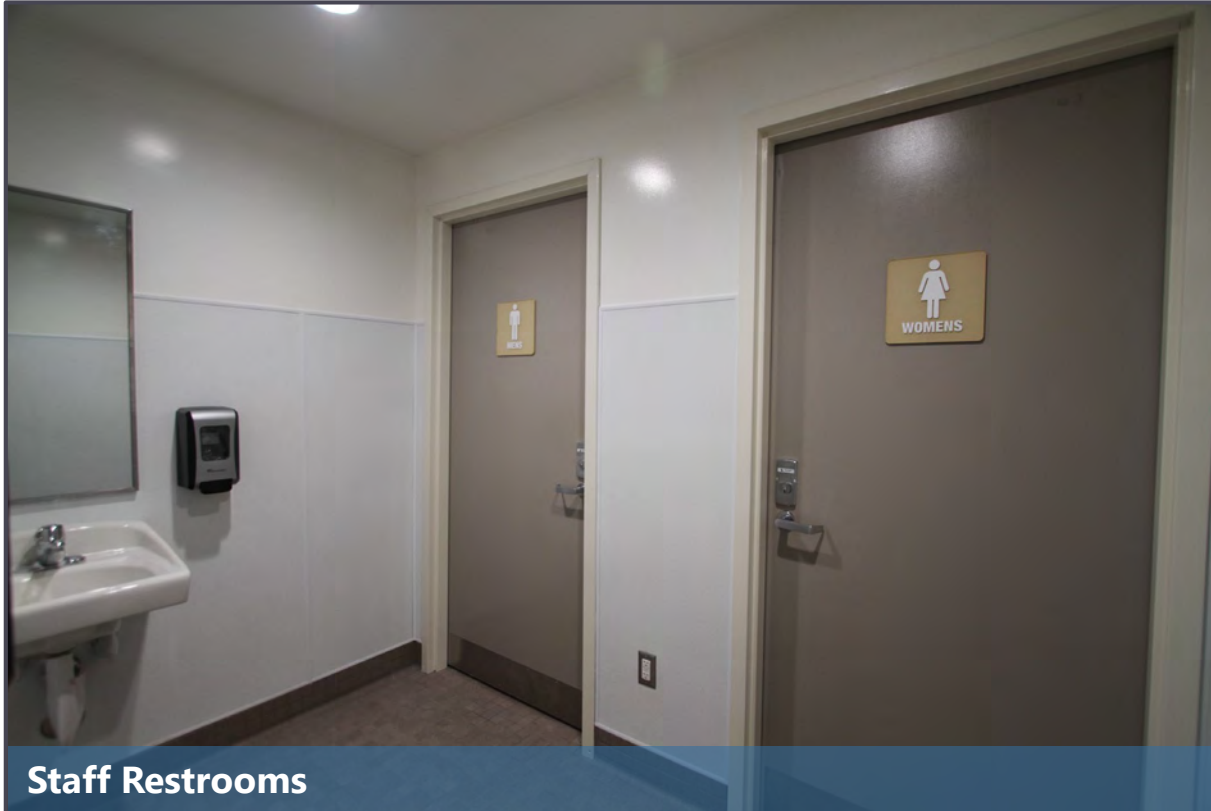
Oak Creek Elementary School



Turtle Rock Elementary School



LEGACY CREEKSIDE ADDITIONAL RESTROOMS



WELLSPACES PHASE II



Plaza Vista School



Rancho San Joaquin Middle School



WELLSPACES PHASE II



Lakeside Middle School



Creekside High School



CREEKSIDE EDUCATION CENTER NORTH CAMPUS IMPROVEMENTS



DISTRICT OFFICE OFFICE IMPROVEMENTS



Student Services / Education Services (1st floor)



Office (2nd floor)



SUPPORT SERVICES OFFICE IMPROVEMENTS



Health Office (Jeffrey Trail MS Campus)



The IUSD Family Counseling Center (Jeffrey Trail MS Campus)





STATE FUNDING UPDATE



STATE FUNDING: AB 247 AND SB 28

Kindergarten Through Community College Public Education Facilities Bond Act of 2024 (AB 247)

- Highlights
 - \$14 Billion
 - Replacement of school buildings at least 50 years old
 - Testing and remediation of lead levels in water fountains and sinks, drinking and food prep
 - Specified assistance to IUSD and county offices impacted by natural disaster (requires Governor to declare state of emergency)
 - Allows the use of New Construction Grants toward new school kitchens, transitional kindergarten classrooms, support spaces for school nurses and counselors to increase access to health care and mental health services
 - Requires Office of Public School Construction (OPSC) staff to process applications within 120 days of receipt

Public Preschool, K-12, and College Health and Safety Bond Act of 2024 (SB 28)

- Highlights
 - \$15.5 Billion shared with UC and Cal State Colleges
 - Similar to AB 247 with key differences
 - Requires Five-Year Master Plan
 - Quarterly processing of funding applications, with priority points that change how projects are ranked and funded



OFFICE OF PUBLIC SCHOOL CONSTRUCTION: NON-MEASURE E

Step 1a: "Acknowledged" List

When no State Funding is available

- Project applications submitted beyond the Proposition 51 Bond Authority
- Subject to IUSD Board Resolution acknowledging exhaustion of funds
- *Waiting for future State Bond*

| STEP 1A: OPSC ACKNOWLEDGED LIST | |
|---|-------------------|
| Site Name | Estimated Funding |
| Total State Funding Acknowledged (Non-Measure E) | \$0 |

Step 1b: "Workload" List

When State Funding is available

- Project applications submitted to OPSC, waiting for staff review
- Anticipate funding under Proposition 51 and General Fund Allocation

| STEP 1B: OPSC WORKLOAD LIST | |
|---|---------------------|
| Site Name | Estimated Funding |
| Solis Park School (New School) | \$47,744,919 |
| Total State Funding Applications (Non-Measure E) | \$47,744,919 |



OFFICE OF PUBLIC SCHOOL CONSTRUCTION: NON-MEASURE E

Step 2: “Unfunded (Lack of AB 55)” List

- Project applications have been fully reviewed by OPSC staff
- Subject to bi-annual Priority Funding Letter
- *Project waiting for State Bond sale (Fall/Spring)*

| STEP 2: OPSC UNFUNDED LIST | |
|--|-----------------|
| Site Name | Amount Approved |
| Total State Funded Applications (Non-Measure E) | \$0 |

Step 3: “Apportioned” List

- Project applications that were previously on the Unfunded (Lack of AB 55) list
- Submitted bi-annual Priority Funding Letter
- Shovel-Ready within 90 days of moving to Apportioned list
- Ready for Fund Release request under Proposition 51 and General Fund

| STEP 3: APPORTIONED LIST | |
|--|-----------------|
| Site Name | Amount Approved |
| Total State Funded Applications (Non-Measure E) | \$0 |



OFFICE OF PUBLIC SCHOOL CONSTRUCTION: NON-MEASURE E

State Grants Received for Non-Measure E

- State Grants Received for Non-Measure E from Proposition 51 Bond funds

| STATE FUNDED PROJECTS (Prop. 51) | |
|--|----------------------|
| Site Name | Amount Received |
| Cypress Village ES (New School) | \$25,660,246 |
| Northwood HS (Expansion) | \$4,785,541 |
| Irvine HS (Expansion) | \$5,834,348 |
| Portola Springs ES (New School) | \$30,701,042 |
| Beacon Park School (New School) | \$39,693,767 |
| Northwood HS (Culinary Arts) | \$497,281 |
| Creekside HS (Culinary Arts) | \$545,953 |
| Jeffrey Trail MS (2015 Villas) | \$1,267,906 |
| Cypress Village ES (2015 Villas) | \$1,140,512 |
| Portola High School (New School) | \$122,916,550 |
| Portola Springs ES (2016 Villas) | \$1,236,192 |
| Cypress Village ES (2016 Villas) | \$1,073,146 |
| Eastwood ES (New School) | \$30,195,387 |
| Portola Springs ES (2017 Villas) | \$1,153,523 |
| Rancho San Joaquin MS (Music CR) | \$398,771 |
| Cadence Park School (New School) | \$42,947,948 |
| Loma Ridge ES (New School) | \$35,516,121 |
| Cypress Village ES (2018 Relos) | \$1,308,548 |
| Total State Funded Applications (Non-Measure E) | \$346,872,782 |

The State Grants funds are through the State School Facility Program currently under Proposition 51 and the General Fund.



OFFICE OF PUBLIC SCHOOL CONSTRUCTION: **MEASURE E**

Step 1a: "Acknowledged" List

When no State Funding is available

- Project applications submitted beyond the Proposition 51 Bond Authority
- Subject to IUSD Board Resolution acknowledging exhaustion of funds
- Waiting for future State Bond (potentially in 2024)

Step 1b: "Workload" List

When State Funding is available

- Project applications submitted to OPSC, waiting for staff review
- Anticipate funding under Prop. 51 and General Fund Allocation

| STEP 1a: ACKNOWLEDGED LIST – Measure E Only | |
|---|--------------------|
| Site Name | Estimated Funding |
| Turtle Rock ES (Series 2: NC) | \$1,392,800 |
| Northwood ES (Series 2: NC) | \$1,304,500 |
| South Lake MS (Series 3A: NC) | \$447,200 |
| South Lake MS (Series 3A: MOD) | \$5,557,000 |
| Oak Creek ES (Series AFAP: NC) | \$469,100 |
| Total State Funding Acknowledged | \$9,170,600 |

| STEP 1b: OPSC WORKLOAD LIST – Measure E Only | |
|--|---------------------|
| Site Name | Anticipated Funding |
| Total State Funded Applications | \$0 |



OFFICE OF PUBLIC SCHOOL CONSTRUCTION: MEASURE E

Step 2: “Unfunded (Lack of AB 55)” List

- Project applications have been fully reviewed by OPSC staff
- Subject to bi-annual Priority Funding Letter
- Projects funded with General Fund Allocation not subject to Unfunded List or Priority Funding Letter

Step 3: “Apportioned” List

- Project applications that were previously on the Unfunded (Lack of AB 55) list
- Submitted bi-annual Priority Funding Letter
- Shovel-Ready within 90 days of moving to Apportioned list
- Ready for Fund Release request under Proposition 51 and General Fund

| STEP 2: OPSC UNFUNDED LIST – Measure E Only | |
|---|-----------------|
| Site Name | Amount Approved |
| Total State Funded Applications | \$0 |

| STEP 3: APPORTIONED LIST – Measure E Only | |
|---|-----------------|
| Site Name | Amount Approved |
| Total State Funded Applications | \$0 |



OFFICE OF PUBLIC SCHOOL CONSTRUCTION: MEASURE E

State Grants Received

- State Grants Received from Proposition 51 Bond funds

| STATE FUNDED PROJECTS (Prop. 51) – Measure E Only | |
|--|-----------------|
| Site Name | Amount Received |
| Creekside High School (Series 1 CTEFP: Const. Tech.) | \$439,400 |
| Woodbridge High School (Series 1 CTEFP: Perf. Arts) | \$3,000,000 |
| College Park ES (Series 1: MOD) | \$527,914 |
| Culverdale ES (Series 1: MOD) | \$784,679 |
| Santiago Hills ES (Series 1: MOD) | \$625,105 |
| Stone Creek ES (Series 1: MOD) | \$896,562 |
| Stone Creek ES (Series 1: NC) | \$727,603 |
| Irvine HS (Series 1: MOD) | \$4,256,129 |
| University HS (Series 1: MOD) | \$735,286 |
| Creekside HS (Series 1: NC) | \$1,166,945 |
| Sierra Vista MS (Series 1: NC) | \$1,671,605 |

The State Grants funds are through the State School Facility Program currently under Proposition 51 and the General Fund.

| STATE FUNDED PROJECTS – Measure E Only (Cont'd.) | |
|--|---------------------|
| Site Name | Amount Received |
| South Lake MS (Series 1: NC) | \$919,005 |
| Eastshore ES (Series 1: MOD) | \$757,980 |
| Eastshore ES (Series 1: NC) | \$833,174 |
| Venado MS (Series 1: NC) | \$2,249,063 |
| Rancho San Joaquin MS (Series 1: MOD) | \$570,899 |
| Rancho San Joaquin MS (Series 1: NC) | \$1,176,896 |
| Springbrook ES (Series 1: MOD) | \$3,472,248 |
| Westpark ES (Series 1: MOD) | \$3,729,015 |
| Brywood ES (Series 1: MOD) | \$3,133,957 |
| Woodbridge HS (Series 1: NC) | \$3,219,613 |
| Springbrook ES (Series 1: NC) | \$1,211,516 |
| Meadow Park ES (Series 1: NC) | \$1,358,675 |
| Meadow Park ES (Series 1: MOD) | \$3,529,201 |
| Brywood ES (Series 1: NC) | \$1,343,490 |
| University Park ES (Series 2: MOD) | \$1,565,006 |
| Bonita Canyon ES (Series 1: MOD)* | \$334,581 |
| Greentree ES (Series 1: MOD)* | \$373,866 |
| Lakeside MS (Series 1: MOD)* | \$364,925 |
| Total State Funds Received | \$44,974,338 |



Woodbridge High School
Performing Arts Center



MEASURE E UPDATE



MEASURE E

ORIGINAL BOND SERIES

- Original Measure E Bond capacity based on annual Assessed Valuation growth within the SFID of 3% - 4.5% to be issued in four Series
 - Yielding projected project funding of \$250.8 Million up to \$319.0 Million
 - Measure E initial budget set at \$250.8 Million
- Annually review Assessed Valuation to determine growth and potential impact to bonding capacity
- Based on growth within the SFID, assumptions increased to annual Assessed Valuation growth of 3.5%
 - Yielding projected project funding *now of \$306.0* Million up to \$319.0 Million
 - Increase number and frequency of Series from four to five



MEASURE E

REVISED BOND SERIES

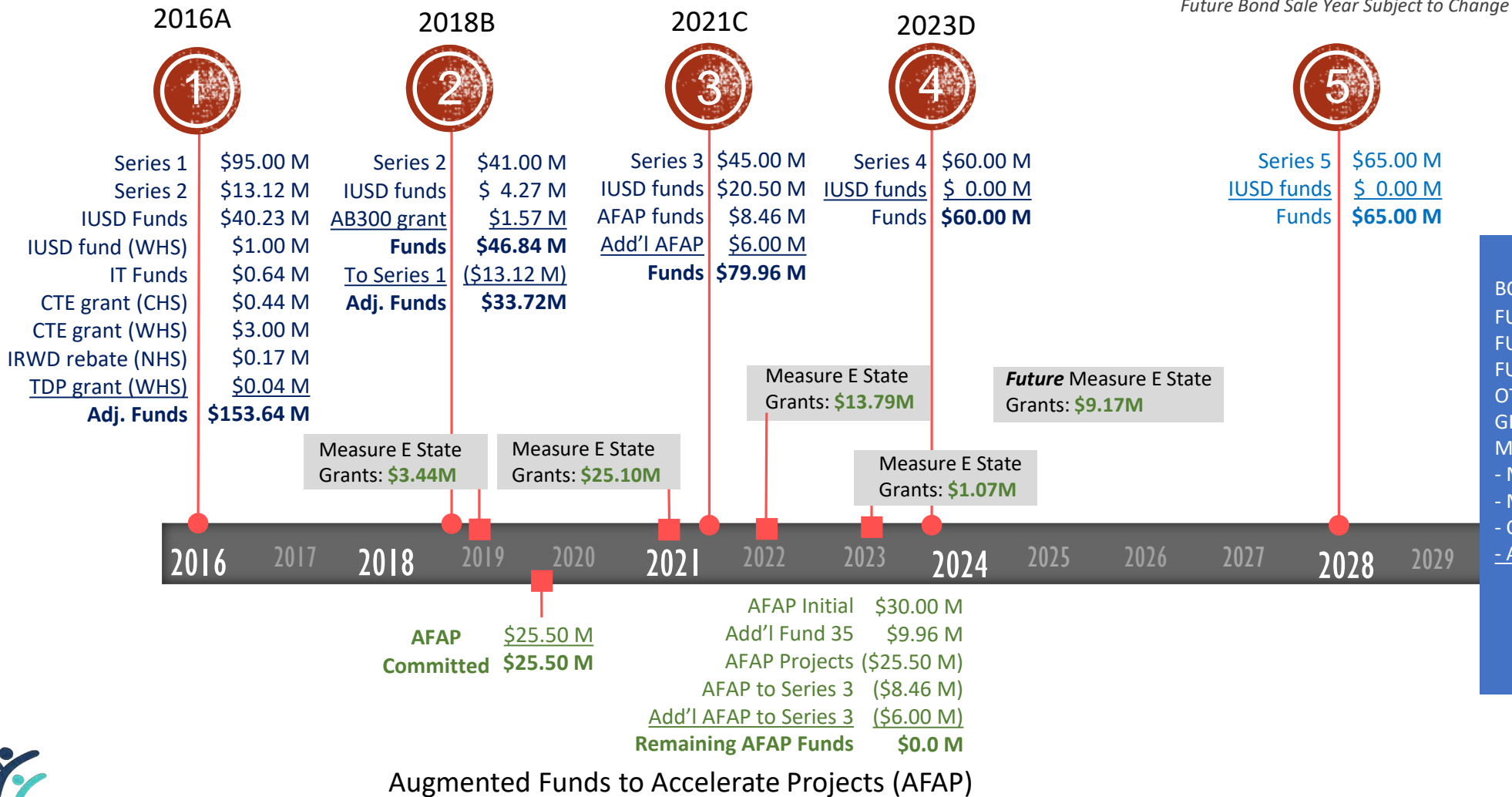
- Series 1 funds received October 26, 2016
- Series 2 funds received September 13, 2018
- Series 3 funds received April 7, 2021
- Series 4 funds received October 25, 2023

| <u>ORIGINAL (2016)</u> | | <u>ISSUED/PROPOSED (2021)</u> | | <u>ISSUED/CURRENT (2023)</u> | |
|------------------------|-------------------|-------------------------------|------------------|------------------------------|------------------|
| 2016 (Series 1) | \$ 95.0M | 2016 (Series 1) | \$ 95.0M | 2016 (Series 1) | \$ 95.0M |
| 2021 (Series 2) | \$ 51.9M | 2018 (Series 2) | \$ 41.0M | 2018 (Series 2) | \$ 41.0M |
| 2025 (Series 3) | \$ 49.4M | 2021 (Series 3) | \$ 45.0M | 2021 (Series 3) | \$ 45.0M |
| 2029 (Series 4) | \$ 54.5M | 2024 (Series 4) | \$ 45.0M | 2023 (Series 4) | \$ 60.0M |
| TOTAL | \$ 250.8M* | 2028 (Series 5) | \$ 55.0M | 2028 (Series 5) | \$ 65.0M |
| | | TOTAL | \$281.0M* | TOTAL | \$306.0M* |

*Maximum Bond Capacity is \$319.0M



MEASURE E FUNDING TIMELINE



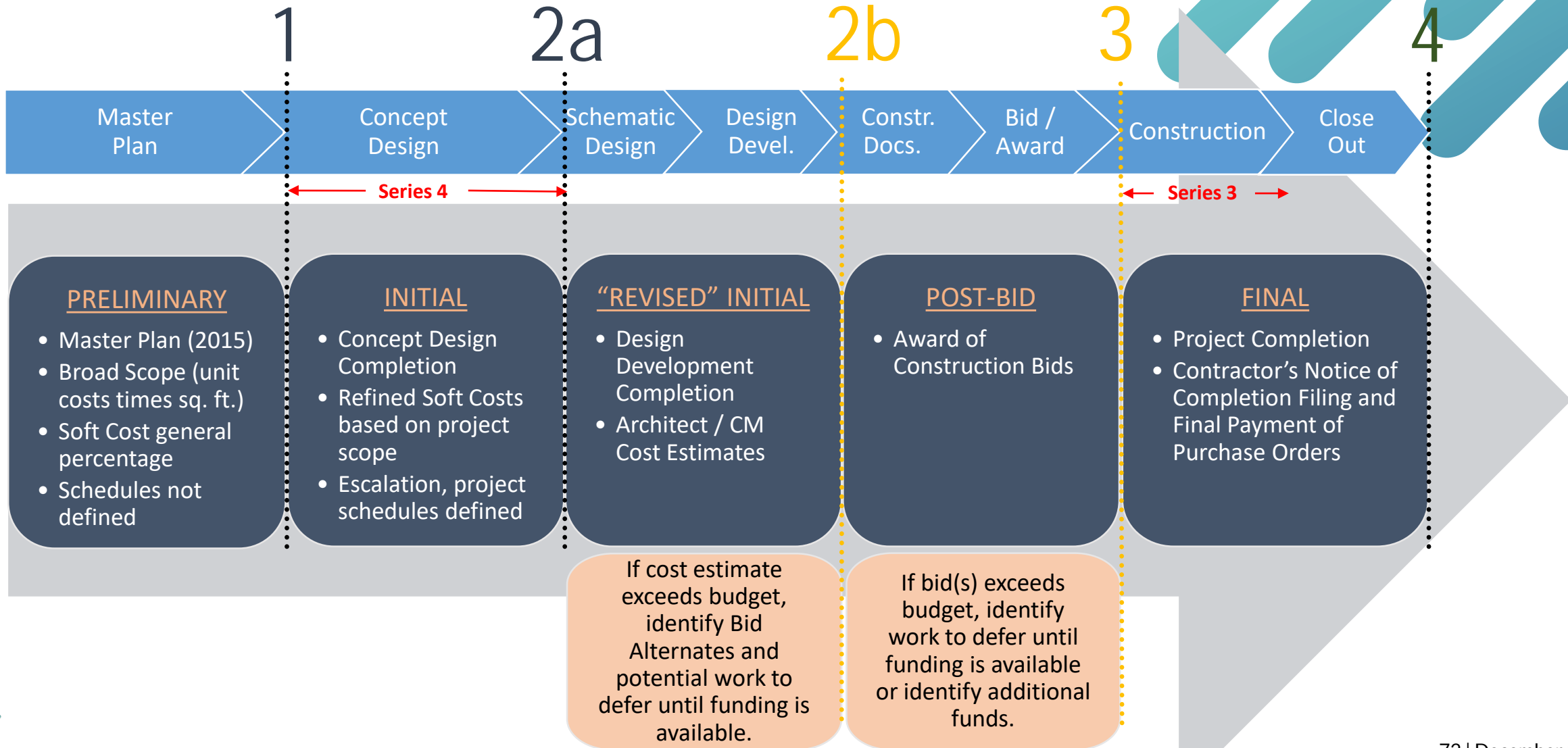
| AVAILABLE FUNDS | |
|-------------------------|-------------------|
| BOND FUNDS | \$ 306.0 M |
| FUND 01 (86-1) | \$ 39.4 M |
| FUND 25 | \$ 13.5 M |
| FUND 40 | \$ 13.1 M |
| OTHER IUSD FUNDS | \$ 0.6 M |
| GRANT/REBATES | \$ 0.2 M |
| MEASURE STATE GRANTS | |
| - Mod / New (AFAP) | \$ 30.0 M |
| - Mod / New | \$ 9.9 M |
| - Career Tech Education | \$ 3.5 M |
| - AB300 Seismic | \$ 1.6 M |
| TOTAL FUNDS: | \$ 417.8 M |

The above figures exclude future State grant for Measure E.



MEASURE E

BUDGET VERSIONS



MEASURE E

BUDGET SUMMARY

| Year | Bond Series or Fund Sources | Funds Available | | | | | | | | | Funds Available Total | Forecasted Funds Committed | Surplus / Deficit by Year | Cumulative Totals |
|--------------------|-----------------------------|-----------------------|----------------------|----------------------|------------------------------|---|------------------------|-------------------|--|---------------------|-----------------------|----------------------------|---------------------------|----------------------|
| | | [A] | [B] | [C] | [D] | [E] | [F] | [G] | [H] | [I] | [J] | [K] | [L] | [M] |
| | | Bonds | District | | | State Grants Received from CTE/AB300 Programs (Fund 35) | Other Grants / Rebates | Other Funds | State Grants Received from Measure E Building Program used for AFAP / Additional Funding (Fund 35) | | Sum A thru I | Forecasted Final Budget | [J-K] | |
| Fund 01 (CFD 86-1) | Fund 25 | | Fund 40 | AFAP | Additional Funds to Series 3 | | | | | | | | | |
| 2016 | Series 1 | \$ 108,115,495 | \$ 23,000,000 | \$ 12,231,276 | \$ 6,000,000 | \$ 3,439,400 | \$ 219,031 | \$ 643,875 | \$ - | \$ - | \$ 153,649,077 | \$ 151,836,436 | \$ 1,812,641 | \$ 1,812,641 |
| 2018 | Series 2 | \$ 27,884,505 | \$ - | \$ 1,268,724 | \$ 3,000,000 | \$ 1,565,006 | \$ - | \$ - | \$ - | \$ - | \$ 33,718,235 | \$ 31,611,186 | \$ 2,107,049 | \$ 3,919,690 |
| 2019 | AFAP | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 25,500,000 | \$ - | \$ 25,500,000 | \$ 21,582,313 | \$ 3,917,687 | \$ 7,837,377 |
| 2021 | Series 3 | \$ 45,000,000 | \$ 16,400,000 | \$ - | \$ 4,100,000 | \$ - | \$ - | \$ - | \$ 4,500,000 | \$ - | \$ 70,000,000 | \$ 85,752,308 | \$ (15,752,308) | \$ (7,914,931) |
| 2023 | State Grants | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 9,969,922 | \$ 9,969,922 | \$ - | \$ 9,969,922 | \$ 2,054,991 |
| 2023 | Series 4 | \$ 60,000,000 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 60,000,000 | \$ 57,900,000 | \$ 2,100,000 | \$ 4,154,991 |
| 2028 | Series 5 | \$ 65,000,000 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 65,000,000 | \$ 50,300,000 | \$ 14,700,000 | \$ 18,854,991 |
| TOTALS | | \$ 306,000,000 | \$ 39,400,000 | \$ 13,500,000 | \$ 13,100,000 | \$ 5,004,406 | \$ 219,031 | \$ 643,875 | \$ 30,000,000 | \$ 9,969,922 | \$ 417,837,234 | \$ 398,982,243 | \$ 18,854,991 | \$ 18,854,991 |



MEASURE E

CHANGE ORDERS (SUMMARY)

“A ‘change order’ refers to an official change of any kind in the original scope of work or terms of a construction contract agreed to by the owner, contractor, and project designer.” Associated General Contractors of America

Measure E construction change orders are often the result of (1) District changes, (2) Design revisions, (3) Unforeseen conditions, and (4) Building code clarifications.

| Final Change Order Percentages (All Series) | | | | | |
|---|---------------------|-------------------|----------------|---------------|----------------|
| School | | Original Contract | Final Contract | Change Orders | Change Order % |
| 1 | Series 1 (complete) | \$ 113,606,920 | \$ 113,852,871 | \$ 245,951 | 0.22% |
| 2 | Series 2 (complete) | \$ 19,978,401 | \$ 19,964,597 | \$ (13,804) | -0.07% |
| 3 | Series 3 (ongoing) | \$ 7,667,780 | \$ 7,968,615 | \$ 300,835 | 3.92% |
| 4 | AFAP (complete) | \$ 13,267,744 | \$ 13,369,594 | \$ 101,850 | 0.77% |
| TOTALS | | \$ 154,520,845 | \$ 155,155,677 | \$ 634,832 | 0.41% |



MEASURE E

FINAL CHANGE ORDERS (SERIES 1)

Final Change Order Percentages (Series 1)

| School | Original Contract | Final Contract | Change Orders | Change Order % | School | Original Contract | Final Contract | Change Orders | Change Order % |
|--------------------------|-------------------|----------------|---------------|----------------|----------------------------|-----------------------|-----------------------|-------------------|----------------|
| 1 Bonita Canyon ES | \$ 687,833 | \$ 661,920 | \$ (25,913) | -3.77% | 14 Westpark ES | \$ 7,535,025 | \$ 7,612,852 | \$ 77,827 | 1.03% |
| 2 College Park ES | \$ 1,947,472 | \$ 1,997,707 | \$ 50,235 | 2.58% | 15 Brywood ES - Mod | \$ 8,022,047 | \$ 8,634,679 | \$ 612,632 | 7.64% |
| 3 Culverdale ES | \$ 1,004,045 | \$ 1,020,602 | \$ 16,557 | 1.65% | 16 Brywood ES - Music | \$ 2,842,214 | \$ 2,773,341 | \$ (68,873) | -2.42% |
| 4 Greentree ES | \$ 1,263,711 | \$ 1,240,335 | \$ (23,376) | -1.85% | 17 Meadow Park ES - Mod | \$ 9,640,387 | \$ 9,856,858 | \$ 216,471 | 2.25% |
| 5 Santiago Hills ES | \$ 1,053,407 | \$ 1,050,915 | \$ (2,492) | -0.24% | 18 Meadow Park ES - Music | \$ 2,889,679 | \$ 2,838,289 | \$ (51,390) | -1.78% |
| 6 Stone Creek ES | \$ 3,155,560 | \$ 3,113,229 | \$ (42,331) | -1.34% | 19 Eastshore ES | \$ 4,522,529 | \$ 4,597,990 | \$ 75,461 | 1.67% |
| 7 Northwood HS | \$ 2,946,419 | \$ 3,055,203 | \$ 108,784 | 3.69% | 20 Venado MS | \$ 3,798,615 | \$ 3,813,274 | \$ 14,659 | 0.39% |
| 8 Irvine HS | \$ 4,704,255 | \$ 4,843,227 | \$ 138,972 | 2.95% | 21 Creekside HS | \$ 3,681,144 | \$ 3,598,072 | \$ (83,072) | -2.26% |
| 9 University HS | \$ 3,533,004 | \$ 3,519,126 | \$ (13,878) | -0.39% | 22 Springbrook ES- Mod | \$ 8,110,543 | \$ 8,413,410 | \$ 302,867 | 3.73% |
| 10 Sierra Vista MS | \$ 3,643,560 | \$ 3,526,896 | \$ (116,664) | -3.20% | 23 Springbrook ES- Music | \$ 3,387,188 | \$ 3,245,008 | \$ (142,180) | -4.20% |
| 11 South Lake MS | \$ 2,753,376 | \$ 2,688,937 | \$ (64,439) | -2.34% | 24 Woodbridge HS-Field Imp | \$ 2,568,204 | \$ 2,651,706 | \$ 83,502 | 3.25% |
| 12 Lakeside MS | \$ 2,279,702 | \$ 2,214,866 | \$ (64,836) | -2.84% | 25 Woodbridge HS-PAC | \$ 23,435,033 | \$ 22,782,163 | \$ (652,870) | -2.79% |
| 13 Rancho San Joaquin MS | \$ 4,201,968 | \$ 4,102,266 | \$ (99,702) | -2.37% | TOTALS | \$ 113,606,920 | \$ 113,852,871 | \$ 245,951 | 0.22% |



MEASURE E

FINAL CHANGE ORDERS (SERIES 2)



| Final Change Order Percentages (Series 2) | | | | | |
|---|--------------------|----------------------|----------------------|--------------------|----------------|
| | School | Original Contract | Final Contract | Change Orders | Change Order % |
| 1 | Bonita Canyon ES | \$ 5,223,926 | \$ 5,197,335 | \$ (26,591) | -0.51% |
| 2 | Northwood ES | \$ 5,436,042 | \$ 5,426,486 | \$ (9,556) | -0.18% |
| 3 | Turtle Rock ES | \$ 4,122,526 | \$ 3,920,458 | \$ (202,068) | -4.90% |
| 4 | University Park ES | \$ 5,195,907 | \$ 5,420,318 | \$ 224,411 | 4.32% |
| TOTALS | | \$ 19,978,401 | \$ 19,964,597 | \$ (13,804) | -0.07% |



MEASURE E

FINAL CHANGE ORDERS (SERIES 3)



| Final Change Order Percentages (Series 3) | | | | | |
|---|-----------------------|-------------------|----------------|---------------|----------------|
| School | | Original Contract | Final Contract | Change Orders | Change Order % |
| 1 | South Lake MS - Mod | \$ 5,367,388 | \$ 5,731,002 | \$ 363,614 | 6.77% |
| 2 | South Lake MS - Music | \$ 2,300,392 | \$ 2,237,613 | \$ (62,779) | -2.73% |
| TOTALS | | \$ 7,667,780 | \$ 7,968,615 | \$ 300,835 | 3.92% |



MEASURE E

FINAL CHANGE ORDERS (AFAP)



| Final Change Order Percentages (AFAP) | | | | | |
|---------------------------------------|--------------------|----------------------|----------------------|-------------------|----------------|
| School | | Original Contract | Final Contract | Change Orders | Change Order % |
| 1 | Canyon View ES | \$ 2,828,297 | \$ 2,886,649 | \$ 58,352 | 2.06% |
| 2 | Deerfield ES | \$ 3,744,720 | \$ 3,774,694 | \$ 29,974 | 0.80% |
| 3 | Oak Creek ES | \$ 2,654,110 | \$ 2,594,372 | \$ (59,738) | -2.25% |
| 4 | Plaza Vista School | \$ 4,040,617 | \$ 4,113,879 | \$ 73,262 | 1.81% |
| TOTALS | | \$ 13,267,744 | \$ 13,369,594 | \$ 101,850 | 0.77% |



MEASURE E

PROGRAM SCHEDULE



Irvine HS - Increment No. 2 Building/Site Improvements (Series 3)



Culverdale ES (Series 3)



Greentree ES and Santiago Hills ES (Series 3 – MPRs Only)



Greentree ES and Santiago Hills ES (Series 3 – Interior Improvements)



Series 4 (tentative schedule – to be further developed)



IRVINE HS (New Performing Arts Center)

3



Measure E
Series 3 Project

Aerial View from Walnut Avenue



IRVINE HS (New Performing Arts Center)

3



Grading at house floor (looking towards house seating)



Grading at house floor (looking towards stage)

Measure E
Series 3 Project



IRVINE HS (New Performing Arts Center)

3



Street View (Walnut Avenue) - Structural steel / metal decking



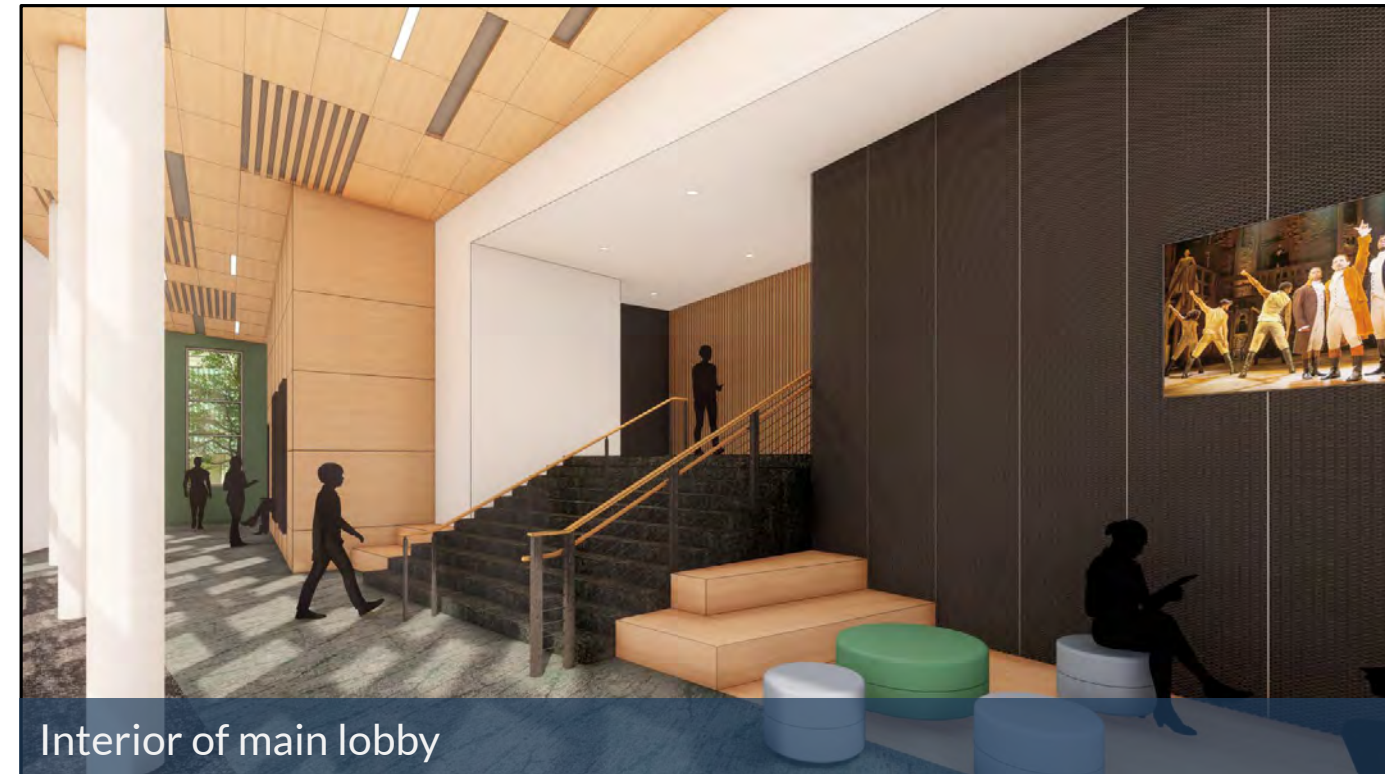
Street View (Walnut Avenue) - Rendering

Measure E
Series 3 Project



IRVINE HS (New Performing Arts Center)

3



Interior of main lobby



Interior of house seating and stage

**Measure E
Series 3 Project**



CULVERDALE ES (Aerial Rendering)

3



**Measure E
Series 3 Project**

Aerial rendering of final site configuration

CULVERDALE ES (New MPR Building / Nutrition Services Exp.)

3



Exterior of new MPR Building – Scaffolding for plaster system



Exterior of new MPR Building - Rendering

Measure E
Series 3 Project



CULVERDALE ES (New MPR Building / Nutrition Services Exp.)

3



Interior of new MPR Building – Wood framing



Interior of new MPR Building - Rendering

**Measure E
Series 3 Project**



GREENTREE ES (Aerial Rendering)

3



Measure E
Series 3 Project



GREENTREE ES (New MPR Building / Nutrition Services Exp.)

3



Exterior of new MPR Building



Interior of new MPR Building

**Measure E
Series 3 Project**



GREENTREE ES (Innovation Lab)

3



Interior of new Innovation Lab



Interior of new Innovation Lab

**Measure E
Series 3 Project**



GREENTREE ES (New MPR Building / Nutrition Services Exp.)

3



Stem wall formwork at front of MPR Building



Stem wall formwork at front of MPR Building

Measure E
Series 3 Project



SANTIAGO HILLS ES (Aerial Rendering)

3



Administration Office ↴

New Multipurpose Building

Aerial View of new MPR Building

Measure E
Series 3 Project



SANTIAGO HILLS ES (New MPR Building / Nutrition Services Exp.)

3



Exterior of new MPR Building



Interior of new MPR Building

Measure E
Series 3 Project



SANTIAGO HILLS ES (Innovation Lab / Shade Structure)

3



Interior of new Innovation Lab



Nutrition Service canopy

Measure E
Series 3 Project



SANTIAGO HILLS ES (New MPR Building / Nutrition Services Exp.)

3



Excavation for concrete foundations



New fire lane access into site

Measure E
Series 3 Project



QUESTIONS

