



Facilities Planning

Facilities Planning

The Irvine Unified School District serves approximately 32,300 students and residential development continues to increase. The District's 10 year projection estimates student growth of 9,000 students. Given the dynamics of significant changes in local community development, as well as essential educational programs offering improvements, it is imperative that IUSD be proficient in enrollment projections, school site acquisition planning, and projecting facility needs.

In addition to planning new facilities, IUSD has many schools that are eligible for modernization. These modernizations require special planning in order to access eligible funds and modernize schools in a manner that minimizes school interruptions. Fortunately, IUSD has had resources to modernize many schools over the years.

Special programs and student growth require the addition of relocatable classrooms. These additions involve coordination between schools and the community to ensure appropriate placement.

Construction planning is not the only requirement for an effective facilities program. A sound financial plan is critical to implementing both an effective short-term and long-term facilities plan. IUSD uses Community Facilities District (CFD) resources, developer fees, redevelopment revenues, state funding, surplus property proceeds and more recently will utilize bond proceeds as of a result of the passage of the School Facilities Improvement Measure E to fund the many projects throughout the District.

Portola High School



Beacon Park K-8 School



Eastwood ES School





Facilities Planning

Community Facilities Districts (CFDs)

The District finances new schools by establishing Community Facilities Districts (CFDs) under the Mello-Roos Community Facilities Act of 1982. IUSD has partnered with the Irvine Company and New Home Company (Lambert Ranch) on several CFD projects to ensure Irvine communities have quality schools.

CFD Development/School Planning

During the new community planning phase, the Irvine Company and IUSD meet to determine student generation rates based on community product types. After the community profile is established, the CFD is formed. The formation of the CFD allows for the subsequent sale of bonds for school financing.

Once the student generation rates are determined, schools are planned. The school planning process includes: school site determination, size of school, development of construction plans, timeline for construction, and the determination of financing sources for the project.

Heritage Fields Mitigation

On July 21, 2011, the Irvine Unified School District and Heritage Fields El Toro, LLC, entered into a mitigation agreement pertaining to the future development planned to occur in and around the Great Park. The agreement includes triggers and language that ensures adequate school facilities are provided and/or paid for by Heritage Fields to support the students generated from new home developments.

Heritage Fields has entitlement approval for 9,500 new homes in Irvine, with 7,093 homes planned to be constructed within IUSD. The current plan, proposed by the developer is broken down below.

As of May 6, 2016:

| | |
|-----------------------------------|-------|
| Units completed in IUSD | 930 |
| Senior units to be built in IUSD | 572 |
| Units planned to be built in IUSD | 5,591 |
| Total IUSD Units | 7,093 |
| Total Saddleback Valley USD Units | 2,407 |
| Total Heritage Fields Units | 9,500 |



Facilities Planning

State School Funding

Because the Irvine Unified School District continues to have student growth, IUSD is eligible for State School New Construction Funds. Through the State School Building program, IUSD receives 50% of land value and a portion of construction costs. To access these monies, IUSD uses CFD and developer fees to provide the district's share of funding for new schools.

CFDs are a tremendous asset to IUSD because they allow access to State funds and provide the financing for excellent schools.

Schools Financed by CFD's

- Alderwood Elementary
- Canyon View Elementary
- Culverdale Elementary
- Cypress Village Elementary
- Oak Creek Elementary
- Plaza Vista K-8
- Portola Springs Elementary
- Stonegate Elementary
- Vista Verde K-8
- Westpark Elementary
- Woodbury Elementary
- Jeffrey Trail Middle School
- Northwood High
- Irvine HS Classroom Addition
- Northwood HS Classroom Addition
- Portola High
- Eastwood Elementary (2017)

State School Funding Changes

Conversations about the future of the School Facility Program (SFP) and the state's role in funding school facilities have been ongoing. Currently, there is a \$9 billion statewide school bond that will be placed on the November 2016 ballot. Under the proposed measure, the current methodology of the SFP will apply, if approved by voters.

The Irvine Unified School District is in the fortunate position of having mitigation agreements in place to provide for necessary school facilities, even if there is no State funding. IUSD will continue to submit funding applications to the Office of Public School Construction in hopes any eligible project could be grandfathered under a new school funding program.



Facilities Planning

Facilities Planning Goals

- To analyze current and anticipated development and their projected impact on the District's existing and future facilities planning efforts, directions and requirements.
- To organize all facility planning-related issues and strategies in a format that:
 - ❖ Is portrayed in a simple and concise manner
 - ❖ Is updated on an annual basis
 - ❖ Enables the District to project facility needs
 - ❖ Promotes collaboration amongst the District's development and planning constituents
- To create a clear facilities plan that meets the ongoing student housing requirements.
- To provide a plan that clearly delineates the financial needs for current and future facility requirements.
- To plan high quality schools that align with the district's educational goals and approved educational specifications.

New School Openings

Based on estimated residential development assumptions.

Fall 2016:

- Beacon Park K-8 School
- Portola High School

Fall 2017:

- Eastwood Elementary School

Fall 2019:

- K-8 School #2 in Heritage Fields
- Elementary School #2 in Portola Springs

TBD:

- Elementary School In Los Olivos



Facilities Planning

New Construction Projects

The following projects are approved or pending approval by the Board of Education. Estimated completion dates are in parentheses.

- Beacon Park K-8 School (2016)
- Portola High School (2016)
- Creekside Landscape and Parking Lot Expansion (2016)
- Cypress Village Elementary School (4) Classroom Villa Addition (2016)
- Portola Springs Elementary School (4) Classroom Villa Addition (2016)
- Canyon View Elementary School Portable Replacement (2017)
- Rancho San Joaquin Middle School Music Classroom (2017)
- Maintenance & Operations Modernization (2017)
- Portola Springs Elementary School (4) Classroom Villa Addition (2017)
- Eastwood Elementary School (2017)
- Portola Springs Elementary School #2 (2019)
- Heritage Fields K8 School #2 (2019)

Modernizations

Under the current State Modernization Funding program, eligible school sites may obtain funding under a 40% local/60% State funding allocation. If funding comes available, the following schools are eligible for modernization:

- Meadow Park Elementary School (2008)
- Irvine High School Buildings AB and AC (2012)
- Woodbridge High School Buildings C, E, K, and M (2012)
- Brywood Elementary School (2013)
- Springbrook Elementary School (2014)
- Westpark Elementary School (2014)
- South Lake Middle School (2019)



Facilities Planning

Facilities Master Plan

The Facilities Planning and Construction Services staff has emphasized the need to clearly define short and long-term facility goals through the use of a Comprehensive Facilities Master Plan. With the Facilities Master Plan (FMP) was completed in 2012, and updated to 2015 dollars.

The FMP is a living document and does require updating when projects are completed and when project needs are identified. With the success of passing the School Facilities Improvement District Measure E, many of the high priority facilities needs will be addressed.

As shown on VI-8, the Irvine Unified School District has been highly successful at maximizing available state funding sources to help offset the local costs of building and modernizing schools.

Measure E - School Facilities Improvement Measure

On June 7, 2016 the voters residing within the School Facilities Improvement District approved the \$319 million school facilities bond Measure E. The bond measure will fund critical facilities needs for our aging school facilities. The types of projects to be funded include (partial listing):

- Modernize facilities over 25 years of age for sites never modernized.
- Enclose open classrooms.
- Construct visual and performing arts/media arts elective labs and construct/upgrade high school theaters.
- Construct music classrooms.
- Construct/Upgrade science labs and elective spaces.
- Construct/upgrade classrooms.
- Construct multipurpose rooms.
- Construct/upgrade food services.
- Construct/Upgrade site specific support facilities.
- Construct innovation or design labs.

California state law requires that a Citizens Oversight Committee be appointed by the Board of Education to monitor bond expenditures and ensure bond revenues are allocated in compliance with the voter approved measure. The committee provides transparency and maintains public confidence in the use of Measure E bond funds.

The funding provided through Measure E may be issued in four bond series over 12 years. Within each bond issuance there is a deadline of three years to expend the funds. The first bond issuance is anticipated in fall 2016.



Facilities Planning

Residential Products Remaining in IUSD

Residential Units Monitored by Staff include:

- 12,751 Irvine Company
- 7,093 Heritage Fields Units
- 4,812 IBC, UCI

-Source: Developer Business Plans

Enrollment Projection Data

Staff will continue to monitor demographic changes/trends and how that affects assumptions for enrollment projections and new school planning.



Facilities Planning

Moderate Enrollment Projection

| Grade | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| TransK | 111 | 213 | 416 | 377 | 365 | 387 | 408 | 430 | 446 | 457 | 459 | 458 | 455 | 452 |
| K | 1893 | 1955 | 1939 | 2143 | 2186 | 2324 | 2454 | 2587 | 2687 | 2758 | 2771 | 2763 | 2748 | 2729 |
| 1 | 2295 | 2255 | 2351 | 2287 | 2507 | 2603 | 2727 | 2853 | 2973 | 3038 | 3039 | 3027 | 3007 | 2985 |
| 2 | 2106 | 2447 | 2361 | 2446 | 2410 | 2677 | 2772 | 2893 | 2995 | 3084 | 3085 | 3065 | 3043 | 3020 |
| 3 | 2310 | 2196 | 2546 | 2494 | 2548 | 2556 | 2824 | 2917 | 3020 | 3093 | 3122 | 3103 | 3075 | 3049 |
| 4 | 2255 | 2448 | 2339 | 2603 | 2608 | 2696 | 2706 | 2975 | 3042 | 3118 | 3135 | 3145 | 3118 | 3087 |
| 5 | 2199 | 2338 | 2521 | 2462 | 2701 | 2738 | 2823 | 2833 | 3083 | 3125 | 3153 | 3154 | 3158 | 3128 |
| 6 | 2166 | 2287 | 2439 | 2595 | 2551 | 2823 | 2859 | 2941 | 2932 | 3159 | 3158 | 3171 | 3165 | 3166 |
| 7 | 2281 | 2274 | 2461 | 2523 | 2714 | 2706 | 2985 | 3008 | 3086 | 3046 | 3228 | 3205 | 3210 | 3201 |
| 8 | 2159 | 2404 | 2367 | 2541 | 2616 | 2848 | 2833 | 3111 | 3113 | 3166 | 3083 | 3250 | 3220 | 3223 |
| 9 | 2133 | 2224 | 2438 | 2410 | 2608 | 2711 | 2945 | 2926 | 3197 | 3181 | 3192 | 3097 | 3260 | 3227 |
| 10 | 2251 | 2213 | 2238 | 2450 | 2452 | 2677 | 2782 | 3009 | 2996 | 3245 | 3189 | 3190 | 3087 | 3250 |
| 11 | 2041 | 2310 | 2218 | 2267 | 2506 | 2537 | 2764 | 2862 | 3086 | 3053 | 3263 | 3196 | 3190 | 3084 |
| 12 | 2180 | 2094 | 2298 | 2261 | 2272 | 2520 | 2550 | 2772 | 2880 | 3097 | 3052 | 3257 | 3188 | 3181 |
| Subtotals: | 28380 | 29658 | 30932 | 31859 | 33044 | 34803 | 36432 | 38117 | 39536 | 40620 | 40929 | 41081 | 40924 | 40782 |
| Pct Chg: | | 4.5% | 4.3% | 3% | 3.7% | 5.3% | 4.7% | 4.6% | 3.7% | 2.7% | 0.8% | 0.4% | -0.4% | -0.3% |
| SDC: | 515 | 494 | 427 | 450 | 458 | 473 | 484 | 494 | 503 | 511 | 509 | 508 | 502 | 498 |
| Totals: | 28895 | 30152 | 31359 | 32309 | 33502 | 35276 | 36916 | 38611 | 40039 | 41131 | 41438 | 41589 | 41426 | 41280 |
| Capacity: | 32808 | 34120 | 34301 | 35524 | 39050 | 40000 | 40000 | 41000 | 41250 | 41250 | 41250 | 41250 | 41250 | 41250 |
| Open Seats: | 3913 | 3968 | 2942 | 3215 | 5548 | 4724 | 3084 | 2389 | 1211 | 119 | -188 | -339 | -176 | -30 |

Source: IUSD16Mod (Recent Development) As of 7/7/16



Facilities Planning

| Project | State Funds Eligible | District Share to Date | % District Share | Project Total to Date |
|--|----------------------|------------------------|------------------|-----------------------|
| Eastwood ES ES | \$ | \$44,479,683 | 100% | \$44,479,683 |
| Central Kitchen/Culinary Arts (1) | \$ 467,937 | \$10,889,339 | 96% | \$11,357,276 |
| Northwood HS Expansion (1) | \$ 4,141,489 | \$ 3,909,193 | 49% | \$ 8,050,682 |
| Jeffrey Trail MS Relos 2015 (Classrooms) (1) | \$ 1,084,008 | \$ 895,337 | 45% | \$ 1,979,345 |
| Cypress Village Relos 2015 (Classrooms) (1) | \$ 1,214,046 | \$ 491,227 | 29% | \$ 1,705,273 |
| Portola HS (1) | \$121,135,763 | \$ 4,865,904 | 11% | \$136,001,667 |
| Irvine HS Expansion (1) | \$ 5,590,756 | \$ 5,396,938 | 49% | \$ 10,987,694 |
| Portola Springs ES (1) | \$ 29,024,728 | \$43,930,388 | 60% | \$ 72,955,116 |
| Cypress Village ES (1) | \$ 24,224,567 | \$36,319,347 | 60% | \$ 60,543,914 |
| Northwood HS Culinary Arts | \$ 422,315 | \$ 664,484 | 61% | \$ 1,086,799 |
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| TOTALS / AVERAGE | \$187,305,609 | \$161,841,840 | Avg 56% | \$349,147,449 |

Footnotes

- (1) No State Funding rec'd as of FY 14-15; however, applications have been submitted to the State
- (2) Project includes previously purchased land in Planning Area 5 (2/6/93) that was later exchanged with Irvine Company for current MS location in PA 40.
- (3) Project includes CDBG monies received from City of Irvine (Santiago Hills=\$420,674, Sierra Vista=\$550,521, Deerfield=\$504,397)