IRVINE UNIFIED SCHOOL DISTRICT

FACILITIES
STUDY SESSION

May 18, 2021

Board of Education
Paul Bokota, President
Lauren Brooks
Ira Glasky
Sharon Wallin
Cyril Yu
AGENDA

• Enrollment Projection Update
• Districtwide Update (Non Measure E)
• Sustainability Program Update
• State Funding Update
• Measure E Update
ENROLLMENT PROJECTION UPDATE
RESIDENTIAL DEVELOPMENTS

• Irvine Company
• Heritage Fields
• Irvine Business Complex
• UCI Housing
• Regional Housing Needs Assessment/Irvine Housing Element Update
Eastwood
Completed: 1,619
Remaining: 179
Build-Out Total: 1,798

Orchard Hills
Completed: 1,043
Remaining: 1,125
Build-Out Total: 2,168

Portola Springs
Completed: 4,518
Remaining: 1,422
Build-Out Total: 5,940

Stonegate
Completed
Build-Out Total: 3,355

Cypress Village
Completed: 4,413
Remaining: 274
Build-Out Total: 4,687

Los Olivos
Completed: 1,804
Remaining: 1,896
Build-Out Total: 3,700

Laguna Altura/Hidden Canyon
Completed
Build-Out Total: 855

Park Place*
Completed
Build-Out Total: 1,256

Northwood
Completed
Build-Out Total: 400

Woodbury
Completed
Build-Out Total: 5,109

* Spectrum
Completed
Build-Out Total: 4,355

* Includes Spectrum and Park Place Apartments which are not part of the 2009 mitigation agreement but are otherwise subject to mitigation obligations.

Excludes 68 affordable units in Portola Springs to be built by the City through the Irvine Land Trust.

Source: TIC BP (8/20/20). Completed units are as of October 2020.
**HERITAGE FIELDS DEVELOPMENT UPDATE**

<table>
<thead>
<tr>
<th>Development Status in IUSD</th>
<th># of Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed</td>
<td>4,505</td>
</tr>
<tr>
<td>Remaining</td>
<td>2,992</td>
</tr>
<tr>
<td><strong>Total Buildout</strong></td>
<td><strong>7,497</strong></td>
</tr>
</tbody>
</table>

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

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

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**Parasol Park**
- Completed: 893
- Build-Out Total: 893

**Altair**
- Completed: 783
- Remaining: 57
- Build-Out Total: 840

**Rise**
- Completed: 32
- Remaining: 666
- Build-Out Total: 698

**Solis**
- Completed: 0
- Remaining: 1,062
- Build-Out Total: 1,062

**Beacon Park**
- Completed: 32
- Remaining: 666
- Build-Out Total: 1,029

**Cadence Park**
- Completed: 789
- Remaining: 218
- Build-Out Total: 1,007

**Base Camp**
- Completed: 0
- Remaining: 706
- Build-Out Total: 706

**Novel Park**
- Completed: 253
- Remaining: 283
- Build-Out Total: 536

**Pavilion Park**
- Completed
- Build-Out Total: 726

**Paradise Park**
- Completed
- Build-Out Total: 1,029

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Source: GPN BP (1/7/21). Completed units are through September 2020.
What is the Irvine Housing Element Update?
The upcoming October 2021 through October 2029 Housing Element is the sixth update to the City of Irvine Housing Element and is referred to as the 6th Cycle Housing Element. In the update, the City must identify enough potentially developable land suitable for residential use (i.e., site inventory) to meet Irvine’s new Regional Housing Needs Assessment (RHNA) allocation.

How many dwelling units are in the allocation for the City of Irvine?
23,610 units are in the allocation. Any residential building permits pulled after July 2021 will count towards the RHNA allocation. All currently planned TIC and FivePoint entitled future units (6,000-7,000) are in IUSD’s projections.
Where could the remaining allocated units be developed?
The City of Irvine has preliminarily identified the following areas: Irvine Business Complex (IBC), Great Park Neighborhoods, Irvine Spectrum particularly Planning Area 32 (Train Station south of the Great Park) in addition to smaller infill areas and underutilized sites throughout the City. A more detailed draft plan is expected later in the Summer.

What is the timeline for the Housing Element Update?
- Now: City of Irvine staff prepare draft Housing Element
- Summer 2021: Public review of draft Housing Element
- Fall 2021: Adoption of Housing Element (General Plan Update to follow)

Facilities staff anticipates providing a more detailed update at the Fall 2021 Facilities Study Session

Where can I go for more information?
www.cityofirvine.org/HEUpdate
POTENTIAL DEVELOPMENT AREAS (SPECTRUM/PA 32)
COMMUNITY UPDATE
ALDERWOOD AND OAK CREEK
ATTENDANCE BOUNDARY LEGEND 2020/2021
Oak Creek Elementary School Attendance Area
Alderwood Elementary School Attendance Area
Alderwood ES Community Update

<table>
<thead>
<tr>
<th>School</th>
<th>Capacity</th>
<th>CBEDS School Enrollment (Oct. 2020)</th>
<th>Current School Enrollment (May 2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alderwood ES</td>
<td>908</td>
<td>815</td>
<td>798</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Community</th>
<th>CBEDS Geographic Enrollment (Oct. 2020)</th>
<th>Current Geographic Enrollment (May 2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quail Hill</td>
<td>566</td>
<td>575</td>
</tr>
<tr>
<td>Los Olivos</td>
<td>116</td>
<td>113</td>
</tr>
<tr>
<td>Laguna Altura</td>
<td>213</td>
<td>211</td>
</tr>
<tr>
<td>Total</td>
<td>895</td>
<td>899</td>
</tr>
</tbody>
</table>

- **Geographic** enrollment data may not align to actual school enrollment due to school choice, special programs, and displacements.

Source: IUSD Weekly Enrollment Oct. 2020 & May 2021
IUSD21Mod Recent Development Selected Student Plot October 2020 (CBEDS) & May 2021 TK-6
<table>
<thead>
<tr>
<th>School</th>
<th>Capacity</th>
<th>CBEDS School Enrollment (Oct. 2020)</th>
<th>Current School Enrollment (May 2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oak Creek ES</td>
<td>1,001</td>
<td>871</td>
<td>851</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Community</th>
<th>CBEDS Geographic Enrollment (Oct. 2020)</th>
<th>Current Geographic Enrollment (May 2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oak Creek</td>
<td>721</td>
<td>712</td>
</tr>
<tr>
<td>Spectrum</td>
<td>301</td>
<td>309</td>
</tr>
<tr>
<td>Total</td>
<td>1,022</td>
<td>1,021</td>
</tr>
</tbody>
</table>

- **Geographic** enrollment data may not align to actual school enrollment due to school choice, special programs, and displacements

Source: IUSD Weekly Enrollment Oct. 2020 & May 2021

IUSD21Mod Recent Development Selected Student Plot October 2020 (CBEDS) & May 2021 K-6
## COMMUNITY UPDATE ALDERWOOD AND OAK CREEK
### AGGRESSIVE SCHOOL PROJECTIONS

#### Alderwood Elementary School

<table>
<thead>
<tr>
<th>School</th>
<th>2021 (1 Year Projection)</th>
<th>2025 (5 Year Projection)</th>
<th>2030 (10 Year Projection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alderwood ES</td>
<td>844</td>
<td>918</td>
<td>882</td>
</tr>
</tbody>
</table>

Capacity Assumptions: N/A  
Draw Assumptions: Draws all new Los Olivos TK-6th grade  
Program Assumptions: N/A  
Current School Capacity: 908

#### Oak Creek Elementary School

<table>
<thead>
<tr>
<th>School</th>
<th>2021 (1 Year Projection)</th>
<th>2025 (5 Year Projection)</th>
<th>2030 (10 Year Projection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oak Creek ES</td>
<td>904</td>
<td>906</td>
<td>904</td>
</tr>
</tbody>
</table>

Capacity Assumptions: N/A  
Draw Assumptions: Closed K enrollment to Oak Creek attendance area  
Program Assumptions: Special Education Program  
Current School Capacity: 1,001

Source: IUSD21Mod Recent Development Projections
CAPACITY VERSUS PROJECTIONS
TK-12 ENROLLMENT
PROJECTIONS STUDY SCENARIOS

Aggressive School Projections (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
• Used for timing of new school openings (within mitigation agreements)

Conservative School Projections (Recent Development Gen Rates)
• Illustrative of less aggressive growth in District (30% lag in development)
• Used for District staffing
• Used for General Fund budgeting

Geographic Projections
• Illustrative of projected students within a geographic boundary
• Used for analysis of various planning scenarios
**Elementary School Capacity vs Geo Enrollment**

<table>
<thead>
<tr>
<th></th>
<th>North of the Interstate 5</th>
<th>South of the Interstate 5</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2020</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ES Capacity</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>ES Enrollment</td>
<td>8,985</td>
<td>9,928</td>
</tr>
<tr>
<td>Open Seats</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>2021</strong></td>
<td>10,486</td>
<td>12,162</td>
</tr>
<tr>
<td>ES Capacity</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>ES Enrollment</td>
<td>9,227</td>
<td>10,095</td>
</tr>
<tr>
<td>Open Seats</td>
<td>1,259</td>
<td>2,067</td>
</tr>
<tr>
<td><strong>2025</strong></td>
<td>11,186</td>
<td>12,162</td>
</tr>
<tr>
<td>ES Capacity</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>ES Enrollment</td>
<td>10,171</td>
<td>9,800</td>
</tr>
<tr>
<td>Open Seats</td>
<td>1,015</td>
<td>2,362</td>
</tr>
</tbody>
</table>

**Schools North of I-5**
- Existing ES: 10
- Existing K-8: 2
- Planned K-8: 1
- Total: 13

**Schools South of I-5**
- Existing ES: 14
- Existing K-8: 2
- Total: 16

Source: IUSD21Mod (Aggressive) Geographic Enrollment Projections, includes SDC
### MIDDLE SCHOOL CAPACITY VS GEO ENROLLMENT

#### North of the Interstate 5

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2021</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>MS Capacity</td>
<td>N/A</td>
<td>2,800</td>
<td>3,000</td>
</tr>
<tr>
<td>MS Enrollment</td>
<td>2,514</td>
<td>2,688</td>
<td>3,052</td>
</tr>
<tr>
<td>Open Seats</td>
<td>N/A</td>
<td>112</td>
<td>-52</td>
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</table>

#### South of the Interstate 5

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2021</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>MS Capacity</td>
<td>N/A</td>
<td>4,247</td>
<td>4,247</td>
</tr>
<tr>
<td>MS Enrollment</td>
<td>3,026</td>
<td>3,026</td>
<td>3,082</td>
</tr>
<tr>
<td>Open Seats</td>
<td>N/A</td>
<td>1,221</td>
<td>1,165</td>
</tr>
</tbody>
</table>

#### Schools

**North of I-5**
- Existing MS: 2
- Existing K-8: 2
- Planned K-8: 1
- Total: 5

**South of I-5**
- Existing MS: 4
- Existing K-8: 2
- Total: 6

*Source: IUSD21Mod (Aggressive) Geographic Enrollment Projections, includes SDC*
### HIGH SCHOOL CAPACITY VS GEO ENROLLMENT

<table>
<thead>
<tr>
<th></th>
<th>North of the Interstate 5</th>
<th>South of the Interstate 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2020</td>
<td>2021</td>
</tr>
<tr>
<td>HS Capacity</td>
<td>N/A</td>
<td>4,733</td>
</tr>
<tr>
<td>HS Enrollment</td>
<td>4,240</td>
<td>4,534</td>
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<tr>
<td>Open Seats</td>
<td>N/A</td>
<td>199</td>
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</table>

#### Schools

<table>
<thead>
<tr>
<th>Schools North of I-5</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing HS</td>
<td>2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Schools South of I-5</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing HS</td>
<td>4</td>
</tr>
</tbody>
</table>

*Northwood HS and Portola HS can be expanded to 2,600 capacity per Board Policy.

Source: IUSD21Mod (Aggressive) Geographic Enrollment Projections, includes SDC.
DISTRICTWIDE UPDATE (NON MEASURE E)
DISTRICTWIDE UPDATE (NON MEASURE E)

- Preparing Facilities for a Return to In-Person Learning
- Irvine Virtual Academy
- District Office Expansion
- Cadence Park School Relos
- Solis Park School
PREPARING FACILITIES FOR A RETURN TO IN-PERSON LEARNING

Analyzing the Need for Additional Portables
• Joint effort with Education Services
• Modeled multiple classroom configurations at various class sizes with social distancing
• Modeled multiple capacity utilization calculations at actual class sizes with social distancing
• Conducted site visits with multiple principals

Ultimately, Facilities and Education Services staff determined that additional portables related to current social distancing guidelines were not required

Analyzing the Need for Augmented Furniture
• A few school sites will require an augmentation to their furniture in order to appropriately socially distance students and staff
DISTRICT OFFICE EXPANSION

Proposed Building Location
CADENCE PARK SCHOOL RELOCATABLES

Three (3) relocatable classroom buildings
SOLIS PARK SCHOOL

Main Entrance to Campus

Parking Lot and Drop-Off to Campus
(Portola High School at far right)
OVERVIEW

- Solar Overview
- Trane – Energy Savings Projects
- SCE Electric Vehicle (EV) Pilot Program
- Sustainability Initiatives
IUSD’s Current Solar Portfolio:

42 Solar Arrays at 32 Sites
- 21 Rooftop Installations
- 21 Solar Vehicle Shade Structure Installations

First System Activated in August 2010

10 Megawatts of Generating Capacity

As of June 30, 2020, cumulative energy savings have been estimated at $2.62 Million

IUSD continues to explore additional solar at existing sites and any new school sites.
Summer 2020 Solar Vehicle Shade Structure Installations

Loma Ridge Elementary School

Canyon View Elementary School
Summer and Fall 2020 Solar Vehicle Shade Structure Installations

Sierra Vista Middle School

El Camino Elementary School
Summer 2021 Solar Vehicle Shade Structure Installations
• Culverdale Elementary School
• Westpark Elementary School
• Deerfield Elementary School / Venado Middle School

Three New 2021 Solar Systems
• Adds 1.3 megawatts (MW) of production capacity
• 11.1-MW Solar Portfolio at 35 Sites
• Puts IUSD at 73% of our Net-Zero Goal (clean energy)

IUSD on a path toward Net-Zero emissions by 2024

Potential next future sites include Creekside HS and Solis Park School with Board approval
Summer 2021 Solar Vehicle Shade Structure Installations

Westpark Elementary School
System size 337.5 kWDC
Site Energy Usage Offset: 540 MWh per year

Culverdale Elementary School
System size 472.5 kWDC
Site Energy Usage Offset: 474 MWh per year
Summer 2021 Solar Vehicle Shade Structure Installations

Deerfield Elementary School and Venado Middle School

System size 403.1 kWDC
Site Energy Usage Offset: 506 MWh per year

Proposed Deerfield Elementary School

Proposed 38 to 42 New Parking Spaces
System size proposed is currently 379.6 kWDC
SELF FUNDED ENERGY SAVINGS PROJECTS BY TRANE

• **Purpose:** Replace old inefficient equipment, save energy use and costs at 11 targeted sites

• **Scope of Work:** LED lighting upgrades and replacement of HVAC, Controls, and Transformers. Scope was assessed, prioritized and reviewed by IUSD staff.

• **Self Funded Project Cost Estimate:** $7.2 Million

• **Timeline:** Summer 2021 through Summer 2022

• Ability to turn one-time facility funds into ongoing general fund savings
SELF FUNDED ENERGY SAVINGS PROJECTS PHASE I

11 Targeted Sites with Energy Savings Opportunities

- Alderwood ES
- Bonita Canyon ES
- College Park ES
- Culverdale ES
- ECLC
- Irvine HS
- Northwood ES
- Northwood HS
- Sierra Vista MS
- Turtle Rock ES
- Woodbridge HS

[Image of building with people]
IUSD was awarded two (2) school sites: Irvine HS and Portola HS

Selection was based on meeting certain criteria

Each site must have six (6) EV charging ports for light-duty vehicles

No upfront capital costs for installation of electrical infrastructure and charging stations

SCE will own, operate, and maintain the equipment as well as collect and remit station user fees to the District for eight (8) years

After year eight, the District will have the option of assuming ownership, operation, and maintenance of the stations or can choose to have them removed at no cost to the District
SCE CHARGE READY SCHOOL PILOT PROGRAM

- ChargePoint software was selected by SCE to support the projects
- SCE monthly customer charge of $158.61 per site
- The monthly customer charge and electricity bills will be offset by anticipated income from user fees
- IUSD will determine the pricing, fees, and access to use the chargers and other ChargePoint system parameters
- The Charge Ready Schools Pilot Program aligns with IUSD’s Renewable Clean Energy Solar Program
- Next Steps: Request Board Approval to enter into an agreement to participate in the SCE Charge Ready School Pilot
IUSD SUSTAINABILITY INITIATIVES

IUSD Textile Recycling
Since inception 25 schools have textile recycling bins. Sites have recycled a total of approximately 502,481 lbs. of textiles which equates to:

- 742,591,200 gallons of water saved
- 1,256 trees planted
- 728 cars off the road
- 2,872 cubic yards of landfill space avoided
- Over $10,000 have been raised that goes directly to school sites

M&O continues efforts to install textile bins at every site

IUSD Bottle Filling Stations
Since inception 128 water bottle filling stations have been installed

- IUSD eliminated single-use plastic water bottles districtwide and encourages reusable water bottles
IUSD SUSTAINABILITY INITIATIVES

Annual Earth Day Poster Contest
• 2021 Theme: Restore our Earth
• Over 600 students participated!

Sustainable Landscaping and Garden Program
• Water is saved by using drought-tolerant plants, drip irrigation, automatic irrigation controls, flow sensors, and master valves
• Currently 30 school sites have gardens, which M&O continues to support and expand districtwide
The State Grants funds are through the State School Facility Program currently under Proposition 51.

### State Grants Received for Non-Measure E

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

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Amount Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cypress Village ES (New School)</td>
<td>$25,660,246</td>
</tr>
<tr>
<td>Northwood HS (Expansion)</td>
<td>$4,785,541</td>
</tr>
<tr>
<td>Irvine HS (Expansion)</td>
<td>$5,834,348</td>
</tr>
<tr>
<td>Portola Springs ES (New School)</td>
<td>$30,701,042</td>
</tr>
<tr>
<td>Beacon Park School (New School)</td>
<td>$39,693,767</td>
</tr>
<tr>
<td>Northwood HS (Culinary Arts)</td>
<td>$497,281</td>
</tr>
<tr>
<td>Creekside HS (Culinary Arts)</td>
<td>$545,953</td>
</tr>
<tr>
<td>Jeffrey Trail MS (2015 Villas)</td>
<td>$1,267,906</td>
</tr>
<tr>
<td>Cypress Village ES (2015 Villas)</td>
<td>$1,140,512</td>
</tr>
<tr>
<td>Portola High School (New School)</td>
<td>$122,916,550</td>
</tr>
<tr>
<td>Portola Springs ES (2016 Villas)</td>
<td>$1,236,192</td>
</tr>
<tr>
<td>Cypress Village ES (2016 Villas)</td>
<td>$1,073,146</td>
</tr>
<tr>
<td>Eastwood ES (New School)</td>
<td>$30,195,387</td>
</tr>
<tr>
<td>Portola Springs ES (2017 Villas)</td>
<td>$1,153,523</td>
</tr>
<tr>
<td>Rancho San Joaquin MS (Music CR)</td>
<td>$398,771</td>
</tr>
<tr>
<td>Cadence Park School (New School)</td>
<td>$42,947,948</td>
</tr>
</tbody>
</table>

**Total State Funded Applications (Non-Measure E)**

$310,048,113
**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 1b: “Workload” List**  
*When State Funding is available*

- Project applications submitted to OPSC, waiting for staff review
- *Anticipate funding under Proposition 51*

**STEP 1A: OPSC ACKNOWLEDGED LIST**

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Estimated Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solis Park School (New School)</td>
<td>$47,744,919</td>
</tr>
<tr>
<td>Total State Funding Acknowledged (Non-Measure E)</td>
<td>$47,744,919</td>
</tr>
</tbody>
</table>

**STEP 1B: OPSC WORKLOAD LIST**

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Estimated Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loma Ridge ES (New School)</td>
<td>$33,872,655</td>
</tr>
<tr>
<td>Cypress Village ES (2018 Relos)</td>
<td>$1,394,110</td>
</tr>
<tr>
<td>Canyon View ES (2018 Villas)</td>
<td>$932,595</td>
</tr>
<tr>
<td>Canyon View ES (2018 Villas)</td>
<td>$1,671,074</td>
</tr>
<tr>
<td>Total State Funding Applications (Non-Measure E)</td>
<td>$37,870,434</td>
</tr>
</tbody>
</table>
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 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
State Grants Received for Measure E

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

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

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Amount Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creekside High School (Series 1 CTEFP: CTE)</td>
<td>$439,400</td>
</tr>
<tr>
<td>Woodbridge High School (Series 1 CTEFP: Performing Arts)</td>
<td>$3,000,000</td>
</tr>
<tr>
<td>College Park ES (Series 1: MOD)</td>
<td>$527,914</td>
</tr>
<tr>
<td>Culverdale ES (Series 1: MOD)</td>
<td>$784,679</td>
</tr>
<tr>
<td>Santiago Hills ES (Series 1: MOD)</td>
<td>$625,105</td>
</tr>
</tbody>
</table>

Total State Funds Received $5,377,098
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 2022)

Step 1b: “Workload” List

When State Funding is available

- Project applications submitted to OPSC, waiting for staff review
- Anticipate funding under Proposition 51 (by 2023 or sooner)

### STEP 1A: ACKNOWLEDGED LIST

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Estimated Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bonita Canyon ES (Series I: MOD)</td>
<td>$152,700</td>
</tr>
<tr>
<td>Greentree ES (Series I: MOD)</td>
<td>$249,000</td>
</tr>
<tr>
<td>Lakeside MS (Series I: MOD)</td>
<td>$435,300</td>
</tr>
<tr>
<td>Total State Funding Acknowledged</td>
<td>$837,000</td>
</tr>
</tbody>
</table>

### STEP 1B: OPSC WORKLOAD LIST

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Estimated Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stone Creek ES (Series 1: MOD)</td>
<td>$896,500</td>
</tr>
<tr>
<td>Stone Creek ES (Series 1: NC)</td>
<td>$727,600</td>
</tr>
<tr>
<td>Irvine HS (Series 1: MOD)</td>
<td>$4,256,100</td>
</tr>
<tr>
<td>University HS (Series 1: MOD)</td>
<td>$735,200</td>
</tr>
<tr>
<td>Creekside HS (Series 1: NC)</td>
<td>$1,166,900</td>
</tr>
<tr>
<td>Sierra Vista MS (Series 1: NC)</td>
<td>$1,671,600</td>
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<tr>
<td>South Lake MS (Series 1: NC)</td>
<td>$919,000</td>
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<tr>
<td>Eastshore ES (Series 1: MOD)</td>
<td>$757,900</td>
</tr>
<tr>
<td>Eastshore ES (Series 1: NC)</td>
<td>$833,100</td>
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<tr>
<td>Venado MS (Series 1: NC)</td>
<td>$2,249,000</td>
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<tr>
<td>Rancho San Joaquin MS (Series 1: MOD)</td>
<td>$571,800</td>
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<tr>
<td>Rancho San Joaquin MS (Series 1: NC)</td>
<td>$1,105,400</td>
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<tr>
<td>Springbrook ES (Series 1: NC)</td>
<td>$3,059,800</td>
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<tr>
<td>Westpark ES (Series 1: MOD)</td>
<td>$3,729,000</td>
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<tr>
<td>Brywood ES (Series 1: MOD)</td>
<td>$3,133,900</td>
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<tr>
<td>Brywood ES (Series 1: NC)</td>
<td>$458,900</td>
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<tr>
<td>Meadow Park ES (Series 1: MOD)</td>
<td>$2,757,800</td>
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<tr>
<td>Meadow Park ES (Series 1: NC)</td>
<td>$513,900</td>
</tr>
<tr>
<td>Total State Funding Anticipated</td>
<td>$29,543,400</td>
</tr>
</tbody>
</table>
Step 2: “Unfunded (Lack of AB 55)” List

- Project applications have been fully reviewed by OPSC staff
- Subject to bi-annual 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 funding under Proposition 51
Kindergarten – Community College Public Education Facilities Bond Act of 2022

Highlights

• Replacement of school buildings at least 75 years old
• Specified assistance for small school districts
• Testing and remediation of lead levels in water fountains and sinks, drinking and food prep
• Financial Hardship eligibility raised to $15.0 Million in bond authority capacity (with annual inflation beginning 2023-2024)
• Specified assistance to districts and county offices impacted by natural disaster (requires Governor to declare state of emergency)
• Additional funding for energy efficient projects
• Requires OPSC staff to process applications within 120 days of receipt
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 of $281.0 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

<table>
<thead>
<tr>
<th>ORIGINAL</th>
<th>ISSUED/PROPOSED</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016 (Series 1) $ 95.0M</td>
<td>2016 (Series 1) $ 95.0M</td>
</tr>
<tr>
<td>2021 (Series 2) $ 51.9M</td>
<td>2018 (Series 2) $ 41.0M</td>
</tr>
<tr>
<td>2025 (Series 3) $ 49.4M</td>
<td>2021 (Series 3) $ 45.0M</td>
</tr>
<tr>
<td>2029 (Series 4) $ 54.5M</td>
<td>2024 (Series 4) $ 45.0M</td>
</tr>
<tr>
<td>TOTAL $ 250.8M</td>
<td>2028 (Series 5) $ 55.0M</td>
</tr>
<tr>
<td></td>
<td>TOTAL $281.0M*</td>
</tr>
</tbody>
</table>

*Maximum Bond Capacity is $319.0M
MEASURE E
BUDGET PROCESS

1. Master Plan
2a. Concept Design
2b. Schematic Design
3. Design Devel.
5. Bid / Award
6. Construction
7. Close Out

PRELIMINARY
- Master Plan (2015)
- Broad Scope (unit costs times sq. ft.)
- Soft Cost general percentage
- Schedules not defined

INITIAL
- Concept Design Completion
- Refined Soft Costs based on project scope
- Escalation, project schedules defined

"REVISED" INITIAL
- Design Development Completion
- Architect / CM Cost Estimates

POST-BID
- Award of Construction Bids

FINAL
- Project Completion
- Contractor’s Notice of Completion Filing and Final Payment of Purchase Orders

If cost estimate exceeds budget, identify Bid Alternates and potential work to defer until funding is available.

If bid(s) exceeds budget, identify work to defer until funding is available or identify additional funds.
Implementation Plan Update: Series 1 Projects

Bond Sale 2016A

PROJECT TYPES

a. Modernize facilities over 25 yrs of age
b. Enclose open classrooms
c. Construct Music Classrooms
d. Construct Multipurpose Room
e. Construct/Upgrade Food Service
f. Construct Career Tech and Innovation/Design Labs
g. Construct Visual and Performing Arts, Media Arts Elective Labs and New/Upgrade Theaters
h. Construct/upgrade science labs and Elective Spaces
i. Construct/Upgrade Kinder Classroom
j. Construct all weather track and field
k. Construct Classrooms to replace portables
l. Construct Practice Gym
m. Construct/Upgrade Site Specific Support Facilities

NOTE: Schools organized by region, not by feeder schools

Series 1 Funds $154.9M
Series 1 Costs $151.3M
Surplus $3.6M
Implementation Plan Update: Series 2 Projects

NOTE: Schools organized by region, not by feeder schools

PROJECT TYPES

a. Modernize facilities over 25 yrs of age
b. Enclose open classrooms
c. Construct Music Classrooms
d. Construct Multipurpose Room
e. Construct/Upgrade Food Service
f. Construct Career Tech and Innovation/Design Labs
g. Construct Visual and Performing Arts, Media Arts Elective Labs and New/Upgrade Theaters
h. Construct/upgrade science labs and Elective Spaces
i. Construct/Upgrade Kinder Classroom
j. Construct all weather track and field
k. Construct Classrooms to replace portables
l. Construct Practice Gym
m. Construct/Upgrade Site Specific Support Facilities

- Under construction
- In design
- Waiting for Bond sale

Series 2 Funds $30.9M
Series 2 Costs $32.3M

Deficit <$1.4M>
Surplus (Series 1) $3.6M
Surplus $2.2M

Bond Sale 2018B
PROJECT TYPES

a. Modernize facilities over 25 yrs of age
b. Enclose open classrooms
c. Construct Music Classrooms
d. Construct Multipurpose Room
e. Construct/upgrade Food Service
f. Construct Career Tech and Innovation/Design Labs
g. Construct Visual and Performing Arts, Media Arts Elective Labs and New/Upgrade Theaters
h. Construct/upgrade science labs and Elective Spaces
i. Construct/Upgrade Kinder Classroom
j. Construct all weather track and field
k. Construct Classrooms to replace portables
l. Construct Practice Gym
m. Construct/Upgrade Site Specific Support Facilities

$4.9M + $14.4M + $0 + $0.3M = $30.0M

AFAP Funds AFAP Costs Surplus
$30.0M $23.4M $6.6M

NOTE: Schools organized by region, not by feeder schools

Implementation Plan Update: AFAP (Projects from Series 3, 4 & 5)

Funds Made Available in 2019
Implementation Plan Update: Series 3 Projects

Bond Sale 2021C

**Series 3 Funds** $65.5M

**Series 3 Costs** $45.8M

**Surplus** $19.7M

**PROJECT TYPES**

a. Modernize facilities over 25 yrs of age
b. Enclose open classrooms
c. Construct Music Classrooms
d. Construct Multipurpose Room
e. Construct/Upgrade Food Service
f. Construct Career Tech and Innovation/Design Labs
g. Construct Visual and Performing Arts, Media Arts Elective Labs and New/Upgrade Theaters
h. Construct/upgrade science labs and Elective Spaces
i. Construct/Upgrade Kinder Classroom
j. Construct all weather track and field
k. Construct Classrooms to replace portables
l. Construct Practice Gym
m. Construct/Upgrade Site Specific Support Facilities

**NOTE:** Schools organized by region, not by feeder schools
Implementation Plan Update: Series 4 Projects

Pending Bond Sale Projected 2024
Implementation Plan Update: Series 5 Projects
Pending Bond Sale Projected 2028
## MEASURE E
## FINAL CHANGE ORDERS

<table>
<thead>
<tr>
<th>School</th>
<th>Original Contract</th>
<th>Final Contract</th>
<th>Change Orders</th>
<th>Change Order %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Bonita Canyon ES</td>
<td>$687,833</td>
<td>$661,920</td>
<td>($25,913)</td>
<td>-3.77%</td>
</tr>
<tr>
<td>2 College Park ES</td>
<td>$1,947,472</td>
<td>$1,997,707</td>
<td>$50,235</td>
<td>2.58%</td>
</tr>
<tr>
<td>3 Culverdale ES</td>
<td>$1,004,045</td>
<td>$1,020,602</td>
<td>$16,557</td>
<td>1.65%</td>
</tr>
<tr>
<td>4 Greentree ES</td>
<td>$1,263,711</td>
<td>$1,240,335</td>
<td>($23,376)</td>
<td>-1.85%</td>
</tr>
<tr>
<td>5 Santiago Hills ES</td>
<td>$1,053,407</td>
<td>$1,050,915</td>
<td>($2,492)</td>
<td>-0.24%</td>
</tr>
<tr>
<td>6 Stone Creek ES</td>
<td>$3,155,560</td>
<td>$3,113,229</td>
<td>($42,331)</td>
<td>-1.34%</td>
</tr>
<tr>
<td>7 Northwood HS</td>
<td>$2,946,419</td>
<td>$3,055,203</td>
<td>$108,784</td>
<td>3.69%</td>
</tr>
<tr>
<td>8 Irvine HS</td>
<td>$4,704,255</td>
<td>$4,843,227</td>
<td>$138,972</td>
<td>2.95%</td>
</tr>
<tr>
<td>9 University HS</td>
<td>$3,533,004</td>
<td>$3,519,126</td>
<td>($13,878)</td>
<td>-0.39%</td>
</tr>
<tr>
<td>10 Sierra Vista MS</td>
<td>$3,643,560</td>
<td>$3,526,896</td>
<td>($116,664)</td>
<td>-3.20%</td>
</tr>
<tr>
<td>11 South Lake MS</td>
<td>$2,753,376</td>
<td>$2,688,937</td>
<td>($64,439)</td>
<td>-2.34%</td>
</tr>
<tr>
<td>12 Lakeside MS</td>
<td>$2,279,702</td>
<td>$2,214,866</td>
<td>($64,836)</td>
<td>-2.84%</td>
</tr>
<tr>
<td>13 Rancho San Joaquin MS</td>
<td>$4,201,968</td>
<td>$4,102,266</td>
<td>($99,702)</td>
<td>-2.37%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>School</th>
<th>Original Contract</th>
<th>Final Contract</th>
<th>Change Orders</th>
<th>Change Order %</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 Westpark ES</td>
<td>$7,535,025</td>
<td>$7,612,852</td>
<td>$77,827</td>
<td>1.03%</td>
</tr>
<tr>
<td>15 Brywood ES - Mod</td>
<td>$8,022,047</td>
<td>$8,634,679</td>
<td>$612,632</td>
<td>7.64%</td>
</tr>
<tr>
<td>16 Brywood ES - Music</td>
<td>$2,842,214</td>
<td>$2,773,341</td>
<td>($68,873)</td>
<td>-2.42%</td>
</tr>
<tr>
<td>17 Meadow Park ES - Mod</td>
<td>$9,640,387</td>
<td>$9,856,858</td>
<td>$216,471</td>
<td>2.25%</td>
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<tr>
<td>18 Meadow Park ES - Music</td>
<td>$2,889,679</td>
<td>$2,838,289</td>
<td>($51,390)</td>
<td>-1.78%</td>
</tr>
<tr>
<td>19 Eastshore ES</td>
<td>$4,522,529</td>
<td>$4,597,990</td>
<td>$75,461</td>
<td>1.67%</td>
</tr>
<tr>
<td>20 Venado MS</td>
<td>$3,798,615</td>
<td>$3,813,274</td>
<td>$14,659</td>
<td>0.39%</td>
</tr>
<tr>
<td>21 Creekside HS</td>
<td>$3,681,144</td>
<td>$3,598,072</td>
<td>($83,072)</td>
<td>-2.26%</td>
</tr>
<tr>
<td>22 Springbrook ES- Mod</td>
<td>$8,110,543</td>
<td>$8,413,410</td>
<td>$302,876</td>
<td>3.73%</td>
</tr>
<tr>
<td>23 Springbrook ES- Music</td>
<td>$3,387,188</td>
<td>$3,245,008</td>
<td>($142,180)</td>
<td>-4.20%</td>
</tr>
<tr>
<td>24 Woodbridge HS-Field Imp</td>
<td>$2,568,204</td>
<td>$2,651,706</td>
<td>$83,502</td>
<td>3.25%</td>
</tr>
<tr>
<td>25 Woodbridge HS-PAC</td>
<td>$23,435,033</td>
<td>$22,782,163</td>
<td>($652,870)</td>
<td>-2.79%</td>
</tr>
</tbody>
</table>

**TOTALS** $113,606,920 $113,852,871 $245,951 0.22%
MEASURE E
PROGRAM FUNDS

2016A 2018B 2021C

Series 1
Series 2
IUSD Funds
IUSD Fund (WHS)
IT Funds
CTE Grant (CHS)
CTE Grant (WHS)
IRWD Rebate (NHS)
TDP Grant (WHS)
Adj. Funds

$95.0 M
$13.12 M
$41.50 M
$1.00 M
$0.64 M
$0.44 M
$3.00 M
$0.17 M
$0.06 M
$154.93 M

Series 2
IUSD Funds
To Series 1
Adj. Funds

$41.0 M
$3.0 M
($13.1 M)
$30.9 M

Series 3
IUSD Funds
Funds

$45.0 M
$20.5 M
$65.5 M

Series 4
IUSD Funds
Funds

$45.0 M
$0.0 M
$45.0 M

Series 5
IUSD Funds
Funds

$55.0 M
$0.0 M
$55.0 M


Future Bond Sale Years Subject to Change

Series 1 State Funding from Prop 51, anticipated by 2023: $29.57 M

Augmented Funds to Accelerate Projects (AFAP)

AFAP Funds

$30.0 M
$30.0 M

BOND FUNDS: $281.0 M
IUSD FUNDS: $65.0 M
IUSD FUNDS (WHS): $1.0 M
OTHER FUNDS: $4.3 M
AFAP FUNDS: $30.0 M
TOTAL FUNDS: $381.3 M

The above figures exclude future State Grant funds.
Potential for Surplus Funds

- **Series 1 Surplus**
  - Projects are all complete

- **Series 2 Deficit**
  - Projects are under construction

- **Series 3 Surplus**
  - South Lake MS bids received, construction June 2021
  - Irvine HS PAC & Woodbridge HS J&K HVAC, construction early 2022

- **AFAP Surplus**
  - Projects will start construction June 2021

How did the surplus occur?

- Series 3 Bond sale $45.0 Million (increase of $14.2 Million from 2020 Fall Study Session)
- Recent bids were under cost estimates
- Ongoing projects staying within Post-Bid Budgets
MEASURE E
DISCUSSION

Bring Forward Projects ($25.2 Million available)

• **Greentree ES** - New Multipurpose Building ($7.7 Million preliminary project budget)
• **Santiago ES** - New Multipurpose Building ($6.8 Million preliminary project budget)
  - Both school sites were included in Series 1 (2017)
  - Project would be modeled after recently completed Bonita Canyon ES
  - Existing multipurpose spaces are inadequate

Options for remaining surplus funds ($10.7 Million remaining surplus)

• **Option 1** - Bring forward Culverdale ES – New Multipurpose Building / Nutrition Services ($9.5 Million anticipated)
  - School site was included in Series 1 (2017)
  - Project would be modeled after recently completed Bonita Canyon ES

• **Option 2** - Increase parking stalls at Irvine HS parking lot replacement project ($4.0 Million anticipated)
To accommodate the new PAC, the site will lose 112 parking spaces and a replacement parking lot is required

- An onsite parking lot replacement has been designed and funding identified
- To provide adequate parking during PAC construction the parking lot replacement is preferred to be constructed prior to the start of PAC construction

### Walnut Parking Lot Replacement Stall Count

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>229</td>
</tr>
<tr>
<td>Loss due to PAC</td>
<td>-112</td>
</tr>
<tr>
<td>Replacement Parking Lot</td>
<td>143</td>
</tr>
<tr>
<td>Total Parking Lot</td>
<td>260</td>
</tr>
</tbody>
</table>

ROM Project Cost: $2 million
Facilities and City staff met regarding an expanded parking lot at Irvine High that would increase overall stall count

- A conceptual parking lot has been designed with a net gain of 213 stalls
- Fund source to be identified
- Site would potentially lose 139 stalls until completion of PAC

<table>
<thead>
<tr>
<th>Walnut Parking Lot Expansion Stall Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
</tr>
<tr>
<td>Loss due to PAC</td>
</tr>
<tr>
<td>Parking Lot Expansion</td>
</tr>
<tr>
<td>Total Parking Lot</td>
</tr>
</tbody>
</table>

ROM Project Cost: $6.0 million
CURRENT SCHEDULE (Series 2, AFAP, Series 3)

**SERIES 2**
- **Bonita Canyon ES and Turtle Rock ES**
  - Construction: Late Spring 2021
- **Northwood ES and University Park ES**
  - Construction: Summer 2022
- **Canyon View ES, Deerfield ES, Oak Creek ES and Plaza Vista School**
  - Construction: Summer 2022

**AFAP**
- **Canyon View ES, Deerfield ES, Oak Creek ES and Plaza Vista School**
  - Procurement: Summer 2022
  - Construction: Summer 2022

**SERIES 3**
- **South Lake MS**
  - Bid: Summer 2022
  - Procurement: Summer 2022
  - Construction: Summer 2022
- **Woodbridge HS**
  - Scoping: Summer 2022
  - Bid: Summer 2022
  - Procurement: Summer 2022
  - Construction: Summer 2022
- **Irvine HS**
  - Design / DSA (AFAP): Summer 2023
  - Bid: Summer 2023
  - Construction: Summer 2024
- **Greentree ES and Santiago Hills ES**
  - Design / DSA: Summer 2023
  - Bid: Summer 2023
  - Construction: Summer 2023
UNIVERSITY PARK ES (New Classroom Building and Renovations)

Classroom Building

Classroom Building Interior
NORTHWOOD ES (New Classroom Building and Food Services Renov.)

*Construction to begin June 2021
CANYON VIEW ES (Music Expansion / Innovation & Design Labs)

*Construction to begin June 2021

Expanded Music Classroom*

New Innovation Lab*
OAK CREEK ES (New Classroom Building and Lunch Shelter)

Classroom Building (right)*

Classroom Building Interior*

*Construction to begin June 2021
DEERFIELD ES (New Classroom Building and Food Services Renov.)

*Construction to begin June 2021

Classroom Building*
*Construction to begin June 2021
SOUTH LAKE MS (Modernization/Expansion)

*Construction to begin June 2021

Music Classroom Expansion*

*Construction to begin June 2021
WOODBRIDGE HS (HVAC Upgrades)

- **Phase 1 of Building J and Building K Modernization (HVAC only)**
  - Phase 1 will focus on replacing HVAC system installed with original construction over 30 years ago
  - Phase 2 will focus on modernizing the interior of buildings in Series 5

- **Building J and Building K (two-story buildings)**
  - New heat pumps in classrooms and on roof (40)
  - New exhaust fans (11)
  - New cooling tower (1), new boiler (1), and suction pumps (2)
  - New plumbing for units and equipment
  - New ductwork and ductwork replacement in select areas
  - Construction scheduled for summer 2022 and complete by start of 2022/2023 school year

- **New HVAC system**
  - Update the HVAC system with controls to current code
  - Make HVAC system more energy efficiency
  - Improve classroom environment
Design Parameters

- Placement of new Performing Arts Complex
- Single story building
- 650 seats
- Black Box theater
- Realignment of drive aisles
- Modification to parking lot
IRVINE HS (New Performing Arts Complex)

New Performing Arts Complex (aerial view)

New Performing Arts Complex (street view)
QUESTIONS