

BOARD CORRESPONDENCE, 08-17-09

**San Dieguito Union High School District**  
**INFORMATION REGARDING BOARD AGENDA ITEM**

**TO:** BOARD OF TRUSTEES

**DATE OF REPORT:** August 17, 2009

**BOARD MEETING DATE:** August 20, 2009

**PREPARED AND  
SUBMITTED BY:** STEVE MA, ASSOCIATE SUPERINTENDENT  
BUSINESS

**SUBJECT:** FACILITIES UPDATE / DOLINKA GROUP

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**EXECUTIVE SUMMARY**

The Dolinka Group will be presenting the attached information which summarizes the task force work to date, as well as some conceptual financing plans.

**RECOMMENDATION:**

This item is being submitted for review by the Board.

**FUNDING SOURCE:**

N/A

KN/bb

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**San Dieguito Union High School District**

**Board Workshop  
August 20, 2009**

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# Long Range Facilities Task Force

## Timeline and Session Content

December  
2, 2008

- Overview of Facilities Action Plan
- Purposes and Philosophy
- Timeline of Board Sessions

January  
21, 2009

- Enrollment vs. Capacity
- Enrollment Projections
- New Capacity Guidelines
- Trends

March 26,  
2009

- Parity Level of Existing Core Facilities
- Modernization Needs

April 30,  
2009

- Site Evaluation
- Surplus Seats
- Site Utilization Options
- Central Administrative Support Facilities
- Current Facilities
- Guidance

May 19,  
2009

- Housing Needs
- Expansions/Enhancements
- New Construction
- Programmatic Changes

June 3,  
2009

- Alternative Education
- Support Services
- Middle School/High School Scenarios

September  
2009

- Funding Sources
- State Funding
- Local Funding Uses
- Project Prioritization
- Cash Flow
- Asset Management

October  
2009

- Preliminary Action Plan
- Solution Discussion

November  
2009

- Final Action Plan

As  
Needed

- Flex meeting will be scheduled if necessary

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# Long Range Facilities Task Force

## Discussion Points

### ▪ **Middle School Facilities**

- » Enrollment growth in the South
- » Core facilities comparison
- » Smaller campuses with specialized curriculum (North and South)
- » New middle school facilities (North and South)

### ▪ **High School Facilities**

- » Size of Academy programs
- » Size of comprehensive high schools
- » Core facilities comparison
- » Sunset/North Coast facilities needs

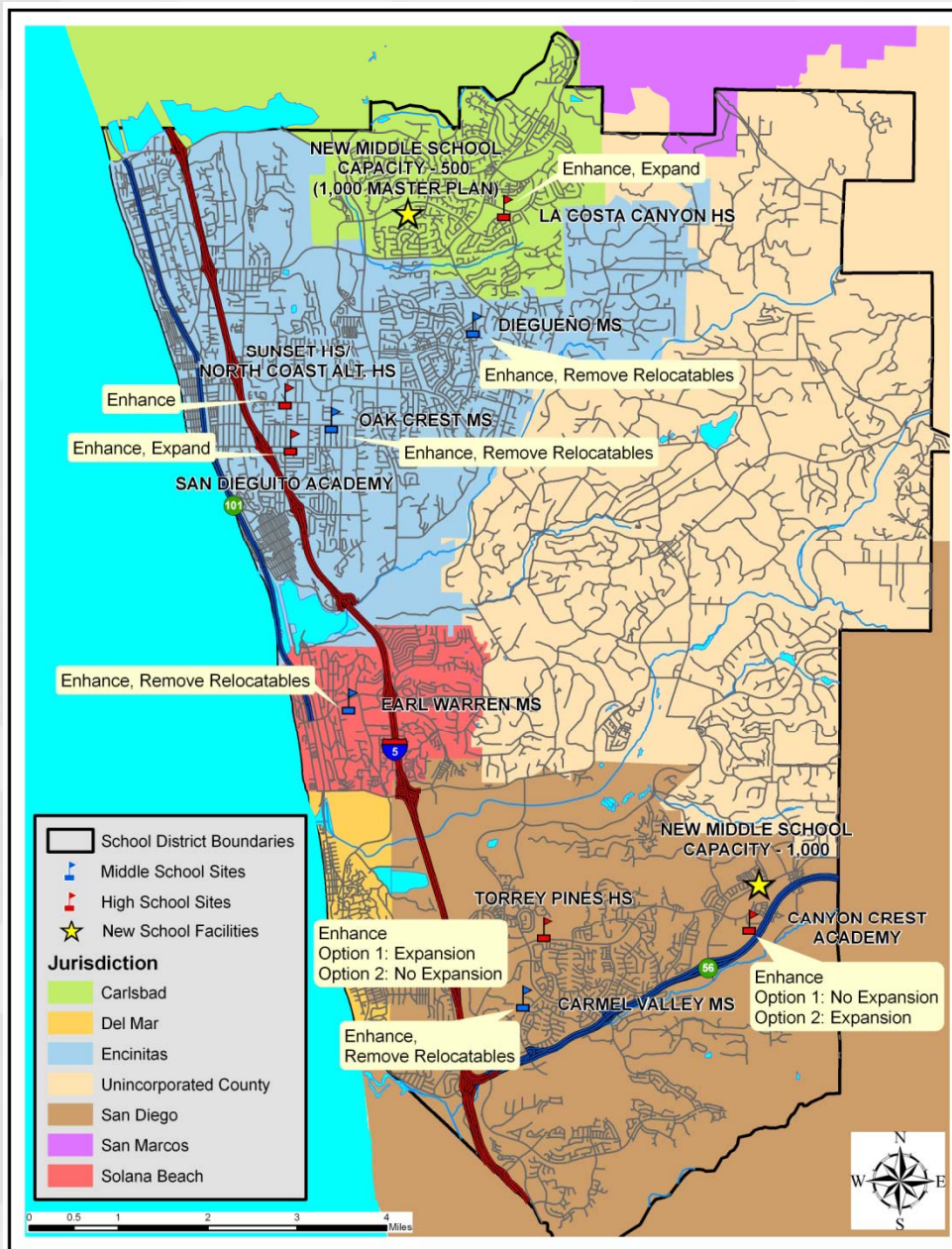
### ▪ **District-wide Issues**

- » 21<sup>st</sup> Century learning environments
- » Use of renewable energy sources
- » Low, moderate, and high modernization needs
- » Schools of choice
- » Articulated programs

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# Long Range Facilities Task Force

## Preliminary Recommendations



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# Long Range Facilities Task Force

## Middle School Level Preliminary Recommendations

School Facility	Description	Existing Capacity	Proposed Capacity	Estimated Cost
Carmel Valley MS	Enhance, Remove Relocatables	1,331	1,127	\$5,241,509
Diegueño MS	Enhance, Remove Relocatables	1,153	783	\$18,867,680
Earl Warren MS	Enhance, Remove Relocatables	872	515	\$32,168,370
Oak Crest MS	Enhance, Remove Relocatables	987	821	\$18,949,515
New Middle School (North) [1]	Construct	NA	500 (1,000 MP)	\$37,368,370
New Middle School (South) [1]	Construct	NA	1,000	\$55,289,520
<b>Total</b>	<b>NA</b>	<b>4,343</b>	<b>4,746</b>	<b>\$167,884,964</b>

[1] New middle schools are recommended for construction at School District-owned site in La Costa Valley (North) and on property adjacent to Canyon Crest Academy (South).

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## High School Level Preliminary Recommendations - Option 1

### Option 1 – Expand Torrey Pines HS to Accommodate Growth in South

School Facility	Description	Existing Capacity	Proposed Capacity	Estimated Cost
Canyon Crest Academy	Enhance	1,812	1,812	\$20,605,000
Torrey Pines HS	Enhance, Expand	3,011	3,353	\$82,027,563
La Costa Canyon HS	Enhance, Expand	2,717	2,921	\$25,516,296
San Dieguito HS Academy	Enhance, Expand	1,476	1,500	\$50,248,946
Sunset /North Coast	Enhance	140	140	\$6,339,775
<b>Total</b>	<b>NA</b>	<b>9,156</b>	<b>9,726</b>	<b>\$184,737,580</b>



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## High School Level Preliminary Recommendations - Option 2

### Option 2 – Expand Canyon Crest Academy to Accommodate Growth in South

School Facility	Description	Existing Capacity	Proposed Capacity	Estimated Cost
Canyon Crest Academy	Enhance, Expand	1,812	2,256	\$36,153,000
Torrey Pines HS	Enhance, Remove Relocatables	3,011	2,832	\$73,027,663
La Costa Canyon HS	Enhance, Expand	2,717	2,921	\$25,516,296
San Dieguito HS Academy	Enhance, Expand	1,476	1,500	\$50,248,946
Sunset /North Coast	Enhance	140	140	\$6,339,775
<b>Total</b>	<b>NA</b>	<b>9,156</b>	<b>9,649</b>	<b>\$191,285,680</b>



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# Long Range Facilities Task Force

Total Estimated Costs

## Option 1

Facility	Cost Estimate
Middle School Level	\$167,884,964
High School Level	\$184,737,579
District-wide Tech. Improvements	\$7,000,000
Escalation	TBD
Contingency	TBD
<b>Total</b>	<b>\$359,622,543</b>

## Option 2

Facility	Cost Estimate
Middle School Level	\$167,884,964
High School Level	\$191,285,680
District-wide Tech. Improvements	\$7,000,000
Escalation	TBD
Contingency	TBD
<b>Total</b>	<b>\$366,170,644</b>

# Funding Options

## Funding Mechanisms

- **State Funding**
- **Certificate of Participation ("COP")**
- **Community Facilities District ("CFD")**
- **Revenue Bonds**
- **Asset Management**
- **Recreation Improvement Maintenance District ("RIMD")**
- **General Obligation Bonds ("GO Bond")**

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# Funding Options

## General Obligation Bonds

- There are two different types of GO Bonds; Proposition 46 GO Bonds and Proposition 39 GO Bonds
- Proposition 39 was passed in November 2000 allowing for a lower voter approval threshold, which has greatly increased the number of school districts able to pass GO Bonds

Description	Proposition 46 General Obligation Bonds	Proposition 39 General Obligation Bonds
Level of Voter Approval Required	Two-thirds of votes cast	55% of votes cast
Maximum Annual Tax	Not limited	High School District: \$30 per \$100,000 of assessed value
Ballot Measure	Level of detail at direction of Board; specific facilities list not required	Must list specific school facilities projects; must be certified by the Board after evaluation for safety, class size reduction, and information technology needs
Accountability Requirement	Preparation of an annual report regarding the amount of funds collected and expended, and the status of any authorized projects	Annual report plus annual, independent financial audits and establishment of citizens oversight committee with authority to audit the bond program
Election Date	Any Tuesday	Must coincide with regularly scheduled local election <ul style="list-style-type: none"> <li>▪ June 2010</li> <li>▪ November 2010</li> </ul>

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# Funding Options

## Financing Strategy A – District-wide GO Bond

- In a District-wide GO Bond the School District would levy a GO Bond tax on all property within the School District
- The School District would seek approval from all voters within the School District, including voters residing within existing CFDs
- There are approximately 75,000 parcels within the School District including 17,680 parcels within existing CFDs
- Financing Strategy A could generate approximately \$525 million of proceeds for school facility projects

### Examples of High School Districts with District-wide GO Bonds

School District	Bond Authorization	Number of CFDs	Number of CFD Parcels	Number of Taxed Parcels
Murrieta Valley Unified School District	\$120,000,000 (June 2006)	26	6,423	39,002
William S. Hart Union High School District	\$300,000,000 (November 2008)	8	4,896	82,265
Sweetwater Union High School District	\$644,000,000 (November 2006)	17	30,566	100,578

\*Financing numbers are based on preliminary analysis

[1] The 11 CFDs include nine (9) CFDs for San Dieguito Public Facilities Authority and two (2) CFDs for North City West School Facilities Financing Authority.

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## Funding Options

### Financing Strategy B - School Facilities Improvement District ("SFID")

- SFIDs allow school districts to tax only a portion of the area it serves
- SFID would allow the School District to tax only parcels outside of existing CFDs
- San Dieguito UHSD is the lead agency on 11 CFDs[1] encompassing 17,680 parcels throughout the School District
- Financing Strategy B could generate approximately \$400 million of proceeds for school facility projects

### Examples of School Districts with SFIDs

School District	Bond Authorization	Number of CFDs	Number of CFD Parcels	Number of Taxed Parcels
Poway Unified School District	\$179,000,000 (February 2008)	28	23,816	TBD
Capistrano Unified School District	\$65,000,000 (November 1999)	9	32,720	92,076

\*Financing numbers are based on preliminary analysis

[1] The 11 CFDs include nine (9) CFDs for San Dieguito Public Facilities Authority and two (2) CFDs for North City West School Facilities Financing Authority.

# Hypothetical Timetable

