



# 2023 FACILITIES MASTER PLAN



SCHOOLWORKS, INC.



# Facilities Master Plan Goals

The goal of a successful Facilities Master Plan provides administration and stakeholders with the appropriate information to assist in creating a realistic and equitable plan, that is flexible and adaptable to uncertainties.

Our team focuses on developing a plan that not only identifies, defines and prioritizes key maintenance, modernization and new construction projects, but also puts a strong emphasis on timing and availability of future funding at both the State and local level.







# Why should you invest in a Facilities Master Plan

- Engages stakeholders
- Provides a visual representation of the district's goals & objectives
- Outlines both short-term & long-term projects including major modernization, deferred maintenance and new construction
- Plan for future General Obligation Bonds
- Maximize State funding resources & other grants
- Assists design teams such as architects & engineers
- Prepare for future enrollment trends





## The Process

# Questions a Facilities Master Plan should address

1

What are the District's needs?

2

How much will the scope of work cost?

3

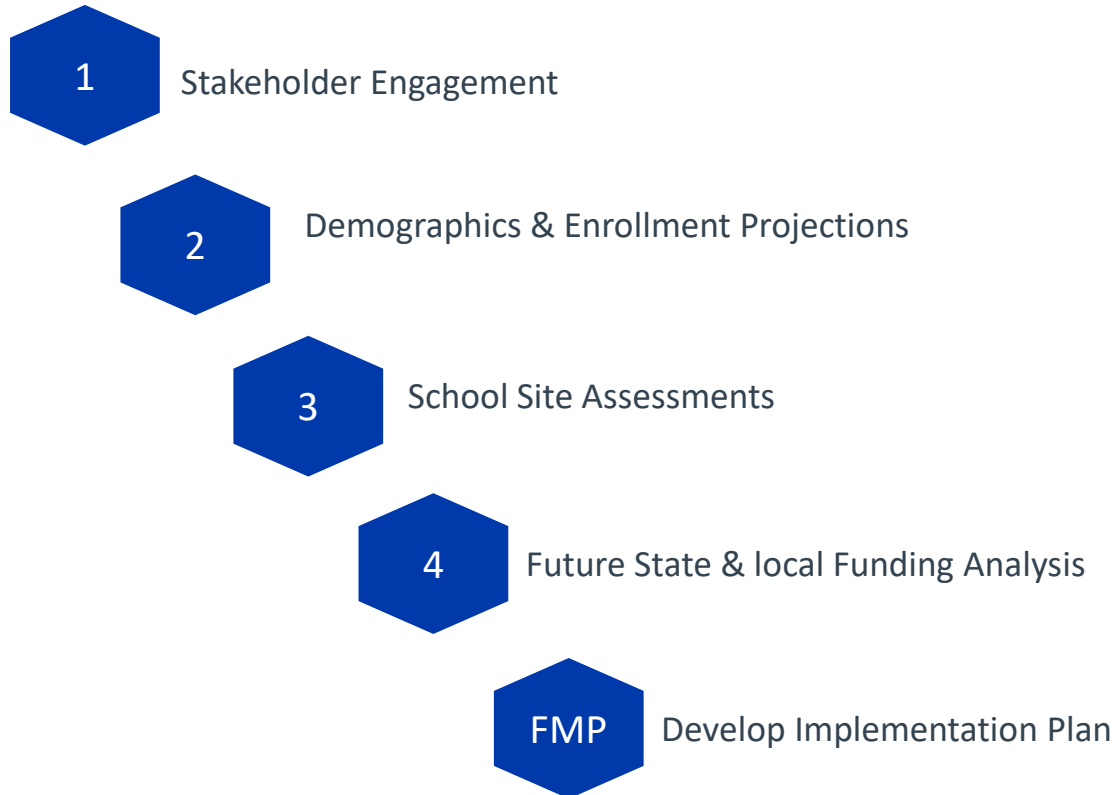
What funding resources are available?

4

When will funding be available?



# The Foundational Cornerstones for Success





## Foundational Cornerstone #1

# Standard Stakeholder Engagement

The Facilities Master Plan process is successful only if the stakeholders understand the planning process and have input into both the district's needs and proposed solution to address those needs

1

Stakeholder introduction Meetings

2

Teacher & staff surveys

3

Staff meeting during site assessment

4

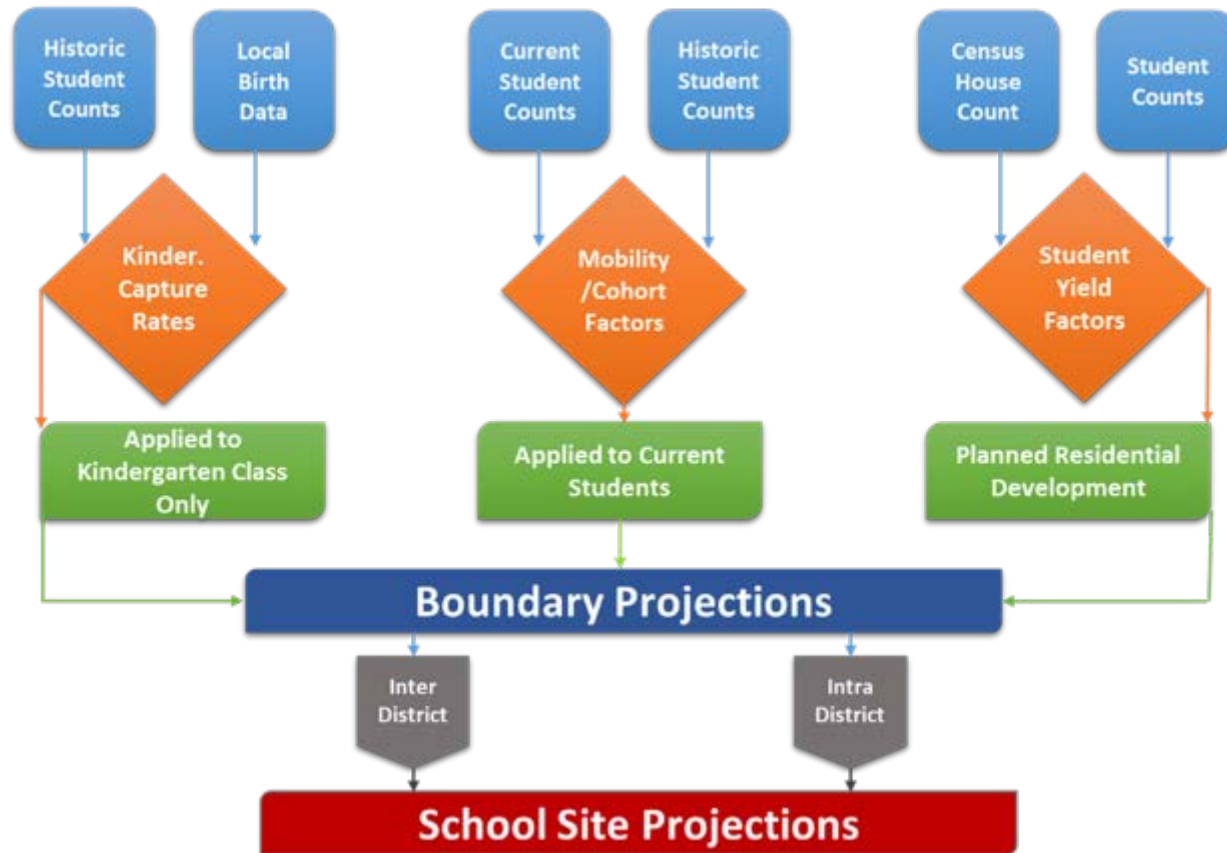
Board workshop





## Foundational Cornerstone #2

# Enrollment Projection





## Foundational Cornerstone #3

# School Site Assessments

1

Analyze crucial infrastructure such as HVAC, utilities, roofing, health, safety & security

2

Evaluate the district's current deferred maintenance procedures

3

Assess how facilities accommodate current educational and support programs

4

Do facilities create any negative impacts on students & teachers?

5

Equity of facilities across the district

6

Address future large scale new construction projects

7

Scope of work cost estimates







## Foundational Cornerstone #4

# Future Funding Analysis



### State Funding Options

Modernization Eligibility

New Construction Eligibility

Future Early Learning Grants



### Local Funding Options

Developer Fees

Certificates of Participation (COP)

General Obligation Bonds (G.O.)

Mello-Roos/Community Facilities District (CFD)



### Other funding Options

Deferred Maintenance

RRMA/RMA (Restricted Maintenance Accounts)

Federal Grants



# Green Valley Elementary



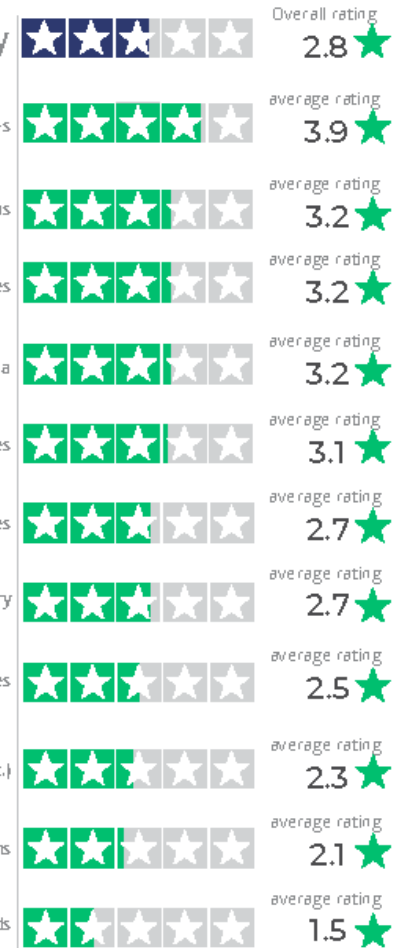




# Stakeholder Engagement



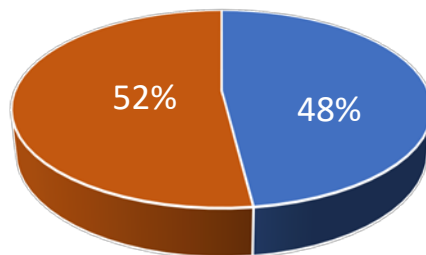
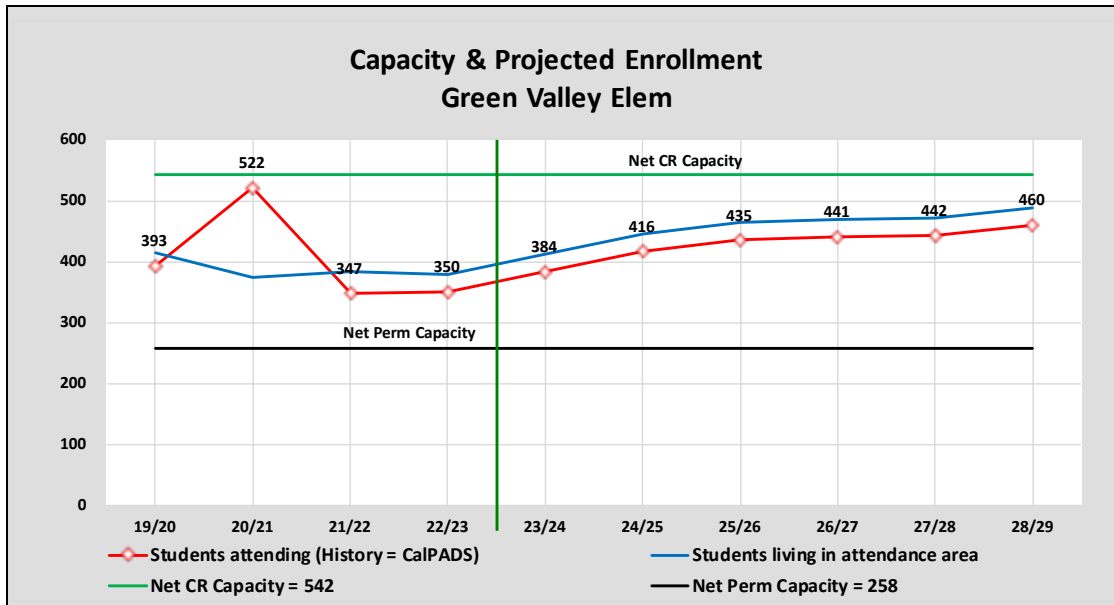
## Green Valley Elementary







# Green Valley Elementary



- Permanent Classrooms
- Portable Classrooms





# Green Valley Elementary



Playfields



Kindergarten Classrooms



D Wing Portables



Portable Buildings

## Future Modernization Projects

Roofing

Utilities

Rehabilitate Playfields

Safety & Security

Flatwork (paving)

Upgrade Technology

Remodel Restrooms

Upgrade Classroom Interior Spaces

## Future New Construction Projects

Shade Structure

Replace Portables with Permanent  
Modular/Permanent New Construction

Master Plan	Cost Estimate
Modernization	\$1,326,520
New Construction	\$8,060,520
Total Cost	\$9,387,040





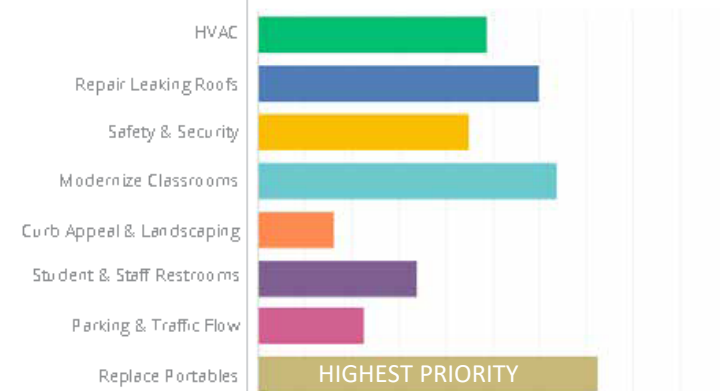
# Jackson Elementary



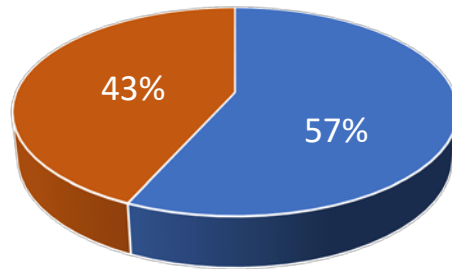
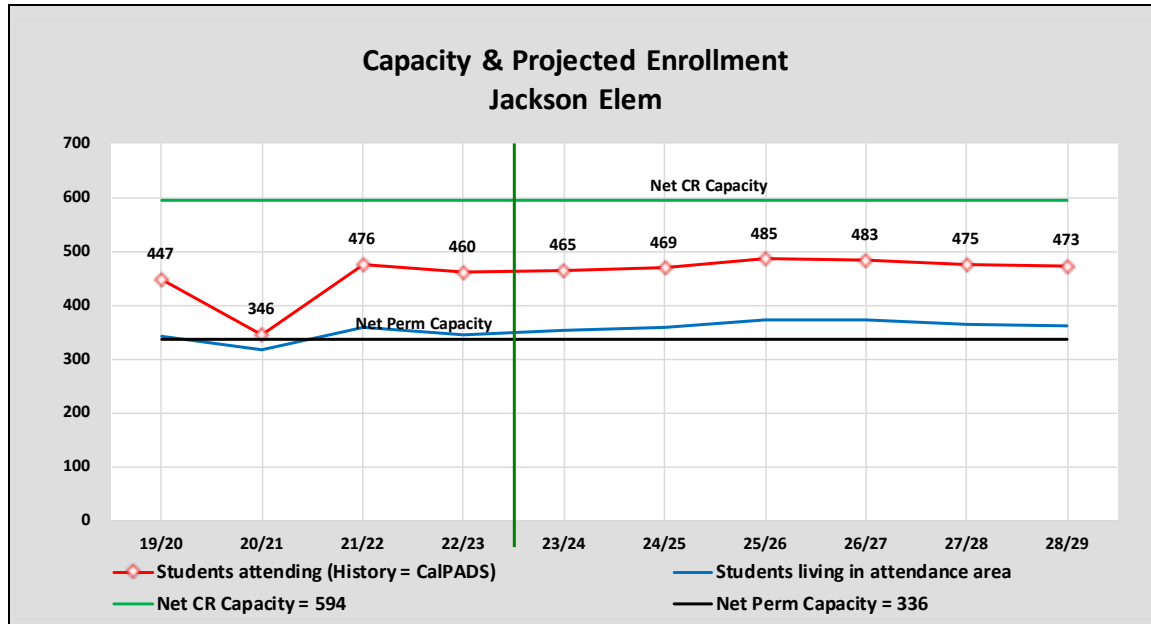




# Stakeholder Engagement



# Jackson Elementary



- Permanent Classrooms
- Portable Classrooms





# Jackson Elementary



Classroom



Water Damage Repair

## Future Modernization Projects

Roofing

HVAC

Utilities

Safety & Security

Flatwork (paving)

Upgrade Technology

Remodel Restrooms

Upgrade Classroom Interior Spaces

Exterior Paint & Repairs

## Future New Construction Projects

Shade Structure

Replace Portables with Permanent  
Modular/Permanent New Construction



Portables



Portable

Master Plan	Cost Estimate
Modernization	\$1,960,166
New Construction	\$11,414,000
Total Cost	\$13,374,166





# Lake Forest Elementary





# Stakeholder Engagement



## Lake Forest Elementary

Overall rating  
2.9 ★

Multipurpose/Cafeteria

average rating  
3.5 ★

Library

average rating  
3.5 ★

Kitchen/Food Services

average rating  
3.3 ★

Staff and Administrative Spaces

average rating  
3.2 ★

General Education Classroom Spaces

average rating  
2.7 ★

Specialized Classrooms (Science, Music, Labs, Etc.)

average rating  
2.7 ★

Student Counseling Spaces

average rating  
2.7 ★

Outdoor Play Equipment, Hardcourts, Playfields

average rating  
2.7 ★

Special Education Classrooms

average rating  
2.5 ★

Restrooms

average rating  
2.5 ★

Physical Education/Indoor Athletic Spaces

average rating  
2.4 ★

HVAC

Repair Leaking Roofs

Safety & Security

Modernize Classrooms

Curb Appeal & Landscaping

Student & Staff Restrooms

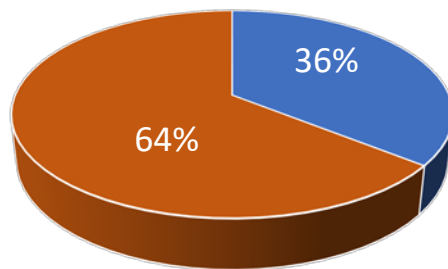
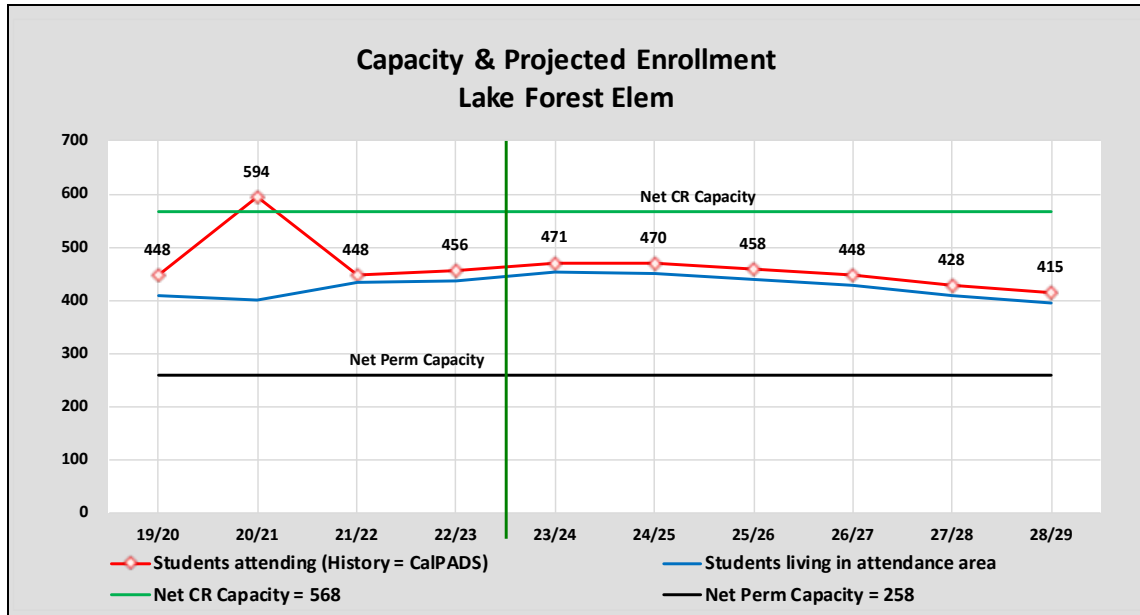
Parking & Traffic Flow

Replace Portables





# Lake Forest Elementary



- Permanent Classrooms
- Portable Classrooms



Permanent/Modular      Portable





# Lake Forest Elementary



Portables



Portables



ADA Path of Travel



Paint Exterior

## Future Modernization Projects

Roofing

Utilities

Safety & Security

Flatwork (paving)

Upgrade Technology

Remodel Restrooms

Upgrade Classroom Interior Spaces

Exterior Paint & Repairs

## Future New Construction Projects

Shade Structure

Replace Portables with Permanent  
Modular/Permanent New Construction

Master Plan	Cost Estimate
Modernization	\$1,789,606
New Construction	\$14,664,000
Total Cost	\$16,453,606





# Lakeview Elementary







# Stakeholder Engagement



## Lakeview Elementary

Overall rating 4.0 ★

Staff and Administrative Spaces

average rating 4.8 ★

Kitchen/Food Services

average rating 4.8 ★

Library

average rating 4.8 ★

Special Education Classrooms

average rating 4.5 ★

General Education Classroom Spaces

average rating 4.3 ★

Student Counseling Spaces

average rating 4.0 ★

Restrooms

average rating 4.0 ★

Multipurpose/Cafeteria

average rating 3.8 ★

Specialized Classrooms (Science, Music, Labs, Etc.)

average rating 3.5 ★

Physical Education/Indoor Athletic Spaces

average rating 3.0 ★

Outdoor Play Equipment, Hardcourts, Playfields

average rating 2.5 ★

HVAC



Repair Leaking Roofs



Safety & Security



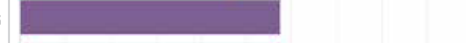
Modernize Classrooms



Curb Appeal & Landscaping



Student & Staff Restrooms



Parking & Traffic Flow



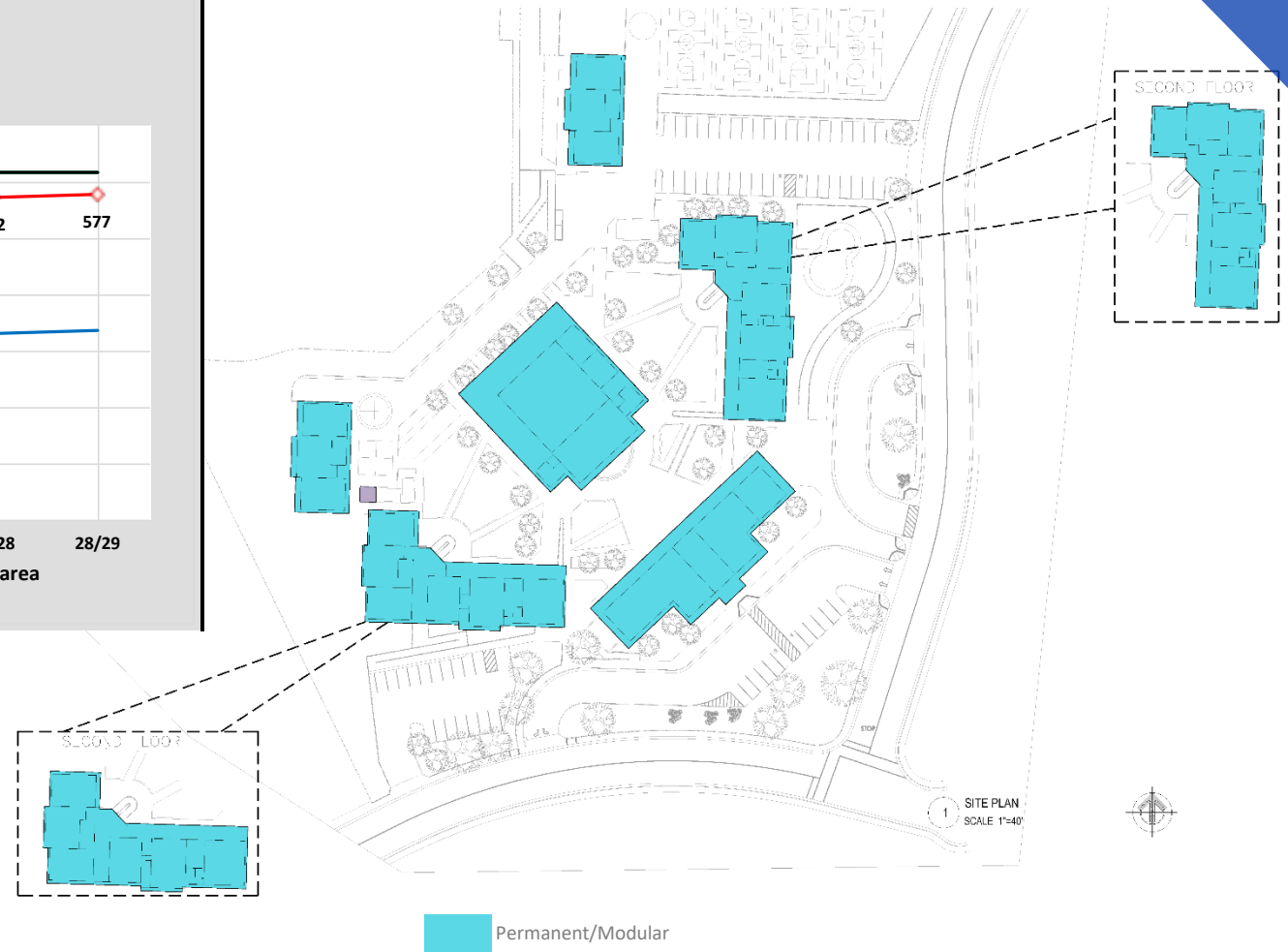
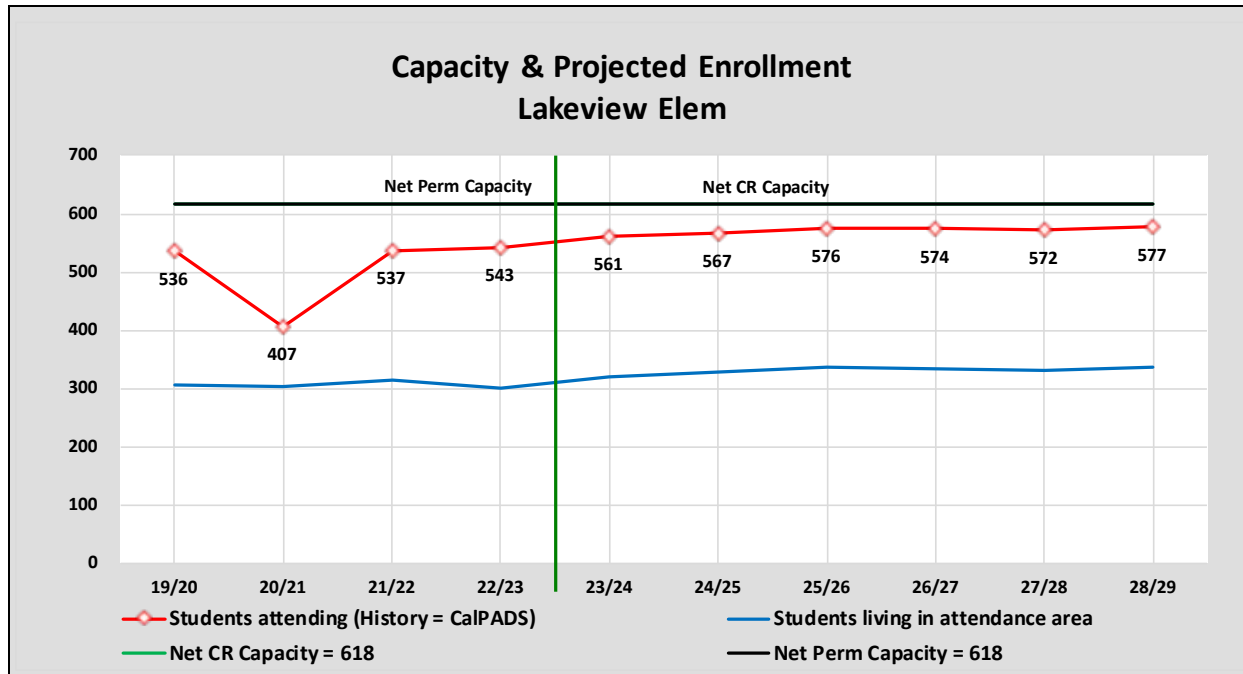
Replace Portables







# Lakeview Elementary





# Lakeview Elementary



Playground



Multipurpose/Cafeteria



## Future Modernization Projects

Utilities

Safety & Security

Upgrade Technology

General Deferred Maintenance Projects

## Future New Construction Projects

Shade Structure

DG (decomposed granite) track around field

## Master Plan

## Cost Estimate

Modernization

\$383,500

New Construction

\$1,495,000

Total Cost

\$1,878,500





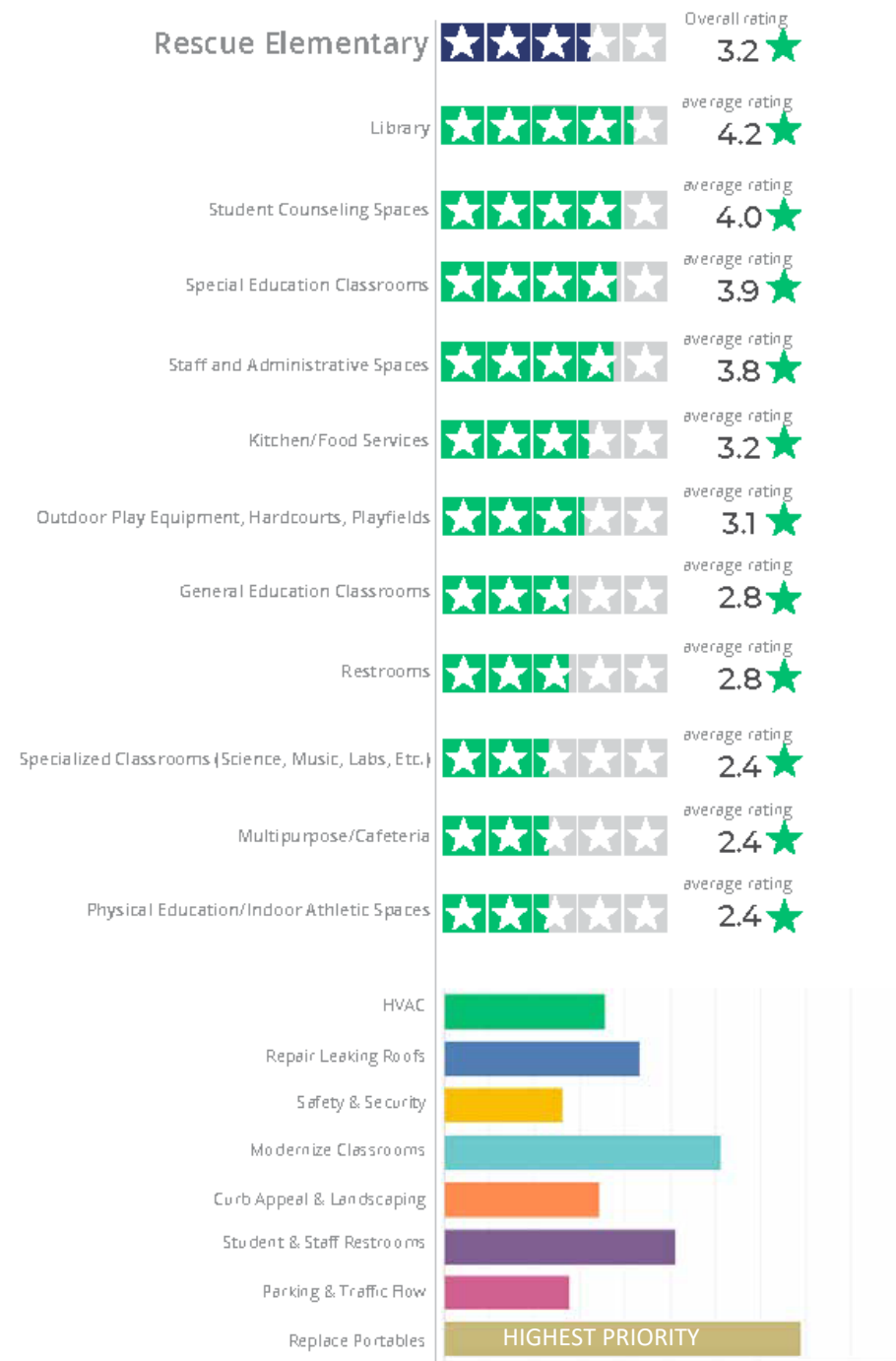
# Rescue Elementary







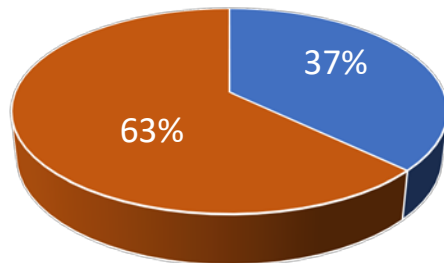
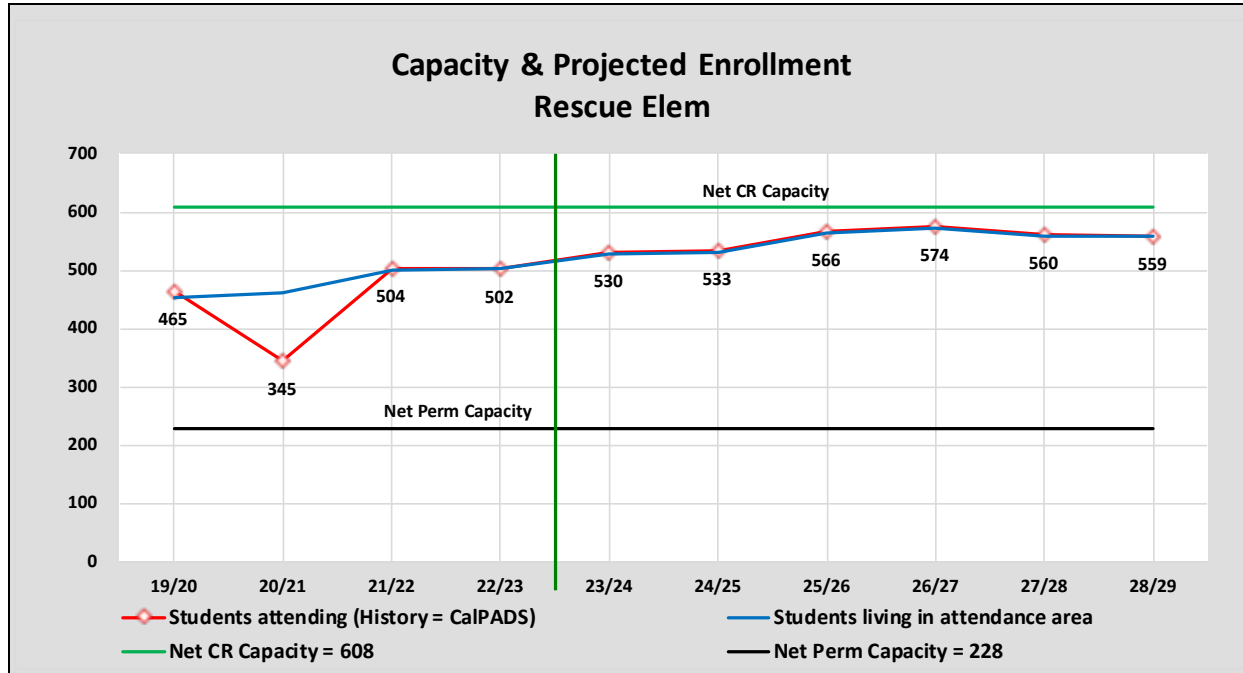
# Stakeholder Engagement







# Rescue Elementary



- Permanent Classrooms
- Portable Classrooms





# Rescue Elementary



Portables



Portables

## Future Modernization Projects

Roofing

Rehabilitate Playfields

Utilities

Safety & Security

Upgrade Technology

Remodel Restrooms

Upgrade Classroom Interior Spaces

Exterior Paint & Repairs

Replace Original Windows

## Future New Construction Projects

Replace Portables with Permanent  
Modular/Permanent New Construction



Restrooms



Original Windows

Master Plan	Cost Estimate
Modernization	\$3,486,956
New Construction	\$18,018,000
Total Cost	\$21,504,956





# Marina Village Middle







# Stakeholder Engagement

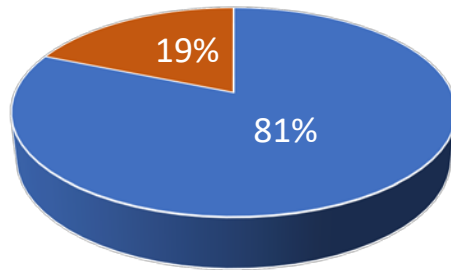
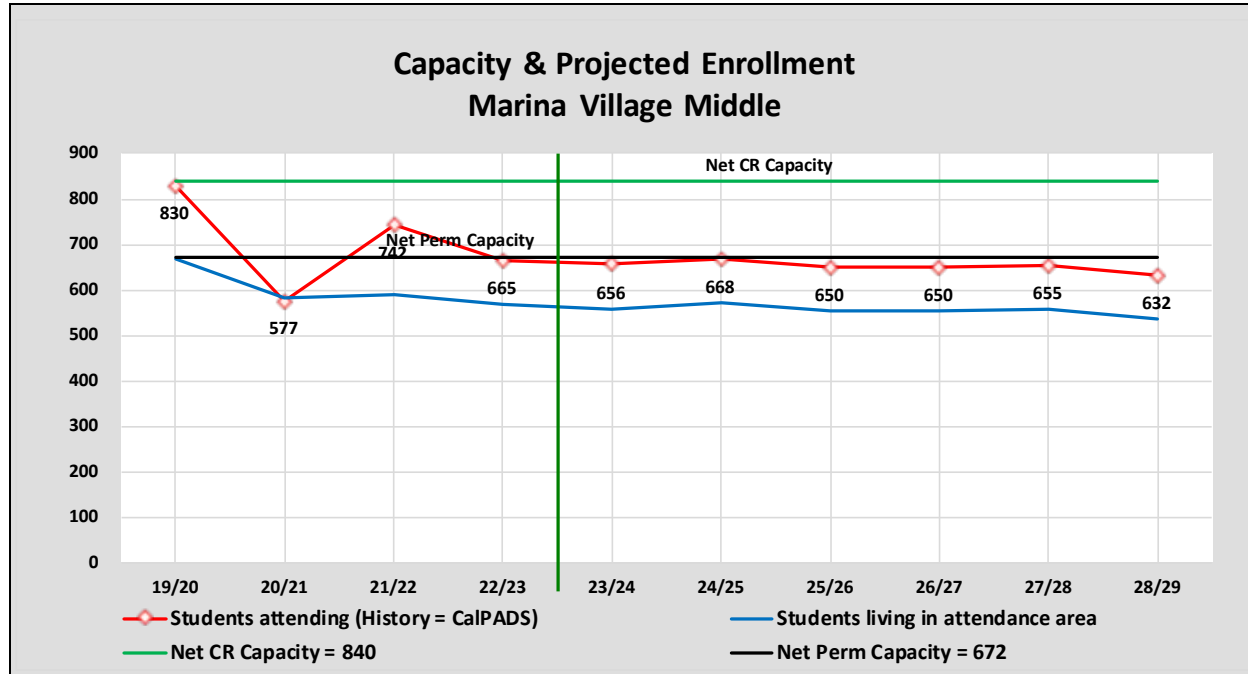


Marina Village Middle	★★★★★	Overall rating 3.9 ★
Library	★★★★★	average rating 4.7 ★
Staff and Administrative Spaces	★★★★★	average rating 4.2 ★
Special Education Classrooms	★★★★★	average rating 4.0 ★
Physical Education/Indoor Athletic Spaces	★★★★★	average rating 3.9 ★
Specialized Classrooms (Science, Music, Labs, Etc.)	★★★★★	average rating 3.8 ★
Student Counseling Spaces	★★★★★	average rating 3.8 ★
Kitchen/Food Services	★★★★★	average rating 3.8 ★
Multipurpose/Cafeteria	★★★★★	average rating 3.7 ★
Outdoor Play Equipment, Hardcourts, Playfields	★★★★★	average rating 3.7 ★
General Education Classroom Spaces	★★★★★	average rating 3.6 ★
Restrooms	★★★★★	average rating 3.5 ★





# Marina Village Middle



- Permanent Classrooms
- Portable Classrooms





# Marina Village Middle



Portables



Classroom



Path of Travel



Multipurpose

## Future Modernization Projects

- Roofing
- Utilities
- Safety & Security
- Flatwork (paving)
- Upgrade Technology
- HVAC
- Upgrade Classroom Interior Spaces
- Exterior Paint & Repairs

## Future New Construction Projects

- Shade Structure
- Replace Portables with Permanent Modular/Permanent New Construction

Master Plan	Cost Estimate
Modernization	\$2,609,521
New Construction	\$5,648,500
Total Cost	\$8,258,021





# Pleasant Grove Middle

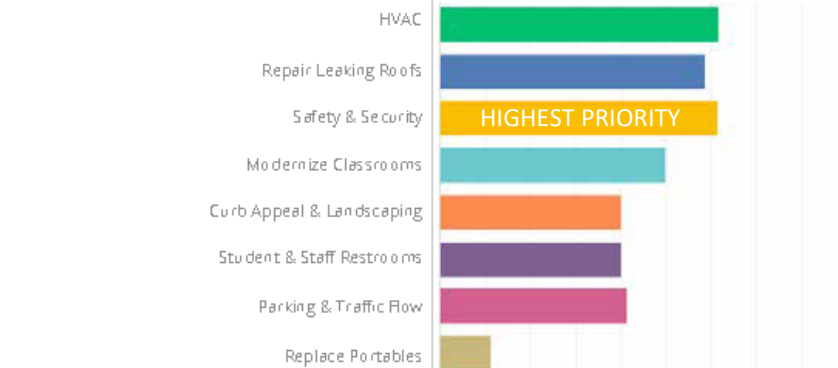
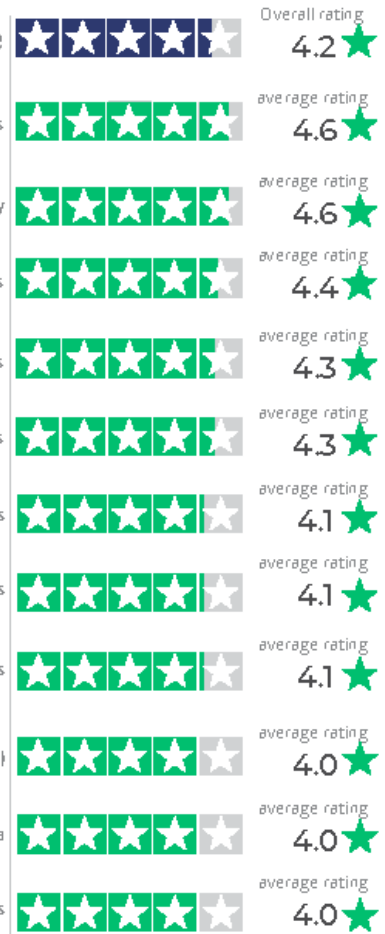




# Stakeholder Engagement

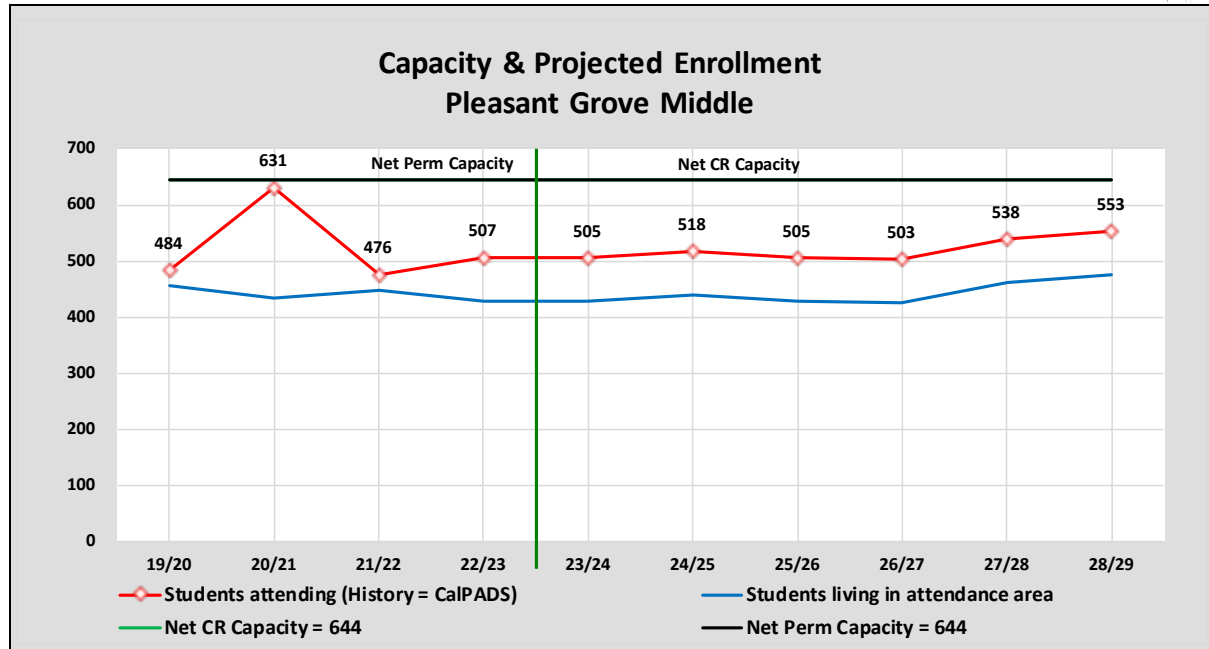


## Pleasant Grove Middle





# Pleasant Grove Middle



Permanent/Modular



# Pleasant Grove Middle

## Future Modernization Projects

Roofing

Utilities

Safety & Security

Flatwork (paving)

Upgrade Technology

Landscaping

Upgrade Classroom Interior Spaces

Exterior Paint & Repairs

## Master Plan

## Cost Estimate

Modernization

\$2,750,670

New Construction

\$0

Total Cost

\$2,750,670



Correct Driveway Grade



Repurpose Planters



Exterior Sports Courts



Paint Exterior





# District Facilities







# District Facilities



Facilities, Maintenance & Operations/Transportation

The Facilities, Maintenance, Operations and Transportation departments are housed on the southern end of Rescue Elementary School. During the assessment it was noted that the District needs a new bay shop with interior offices and storage. Transportation would also like to remodel the existing shop interior and add a new in-ground hydraulic lift.

## Future New Projects

MOT Upgrades

Future District Office & Technology

Master Plan	Cost Estimate
MOT Upgrades	\$3,393,000
Future District Office	\$2,496,000
Total Cost	\$5,889,000

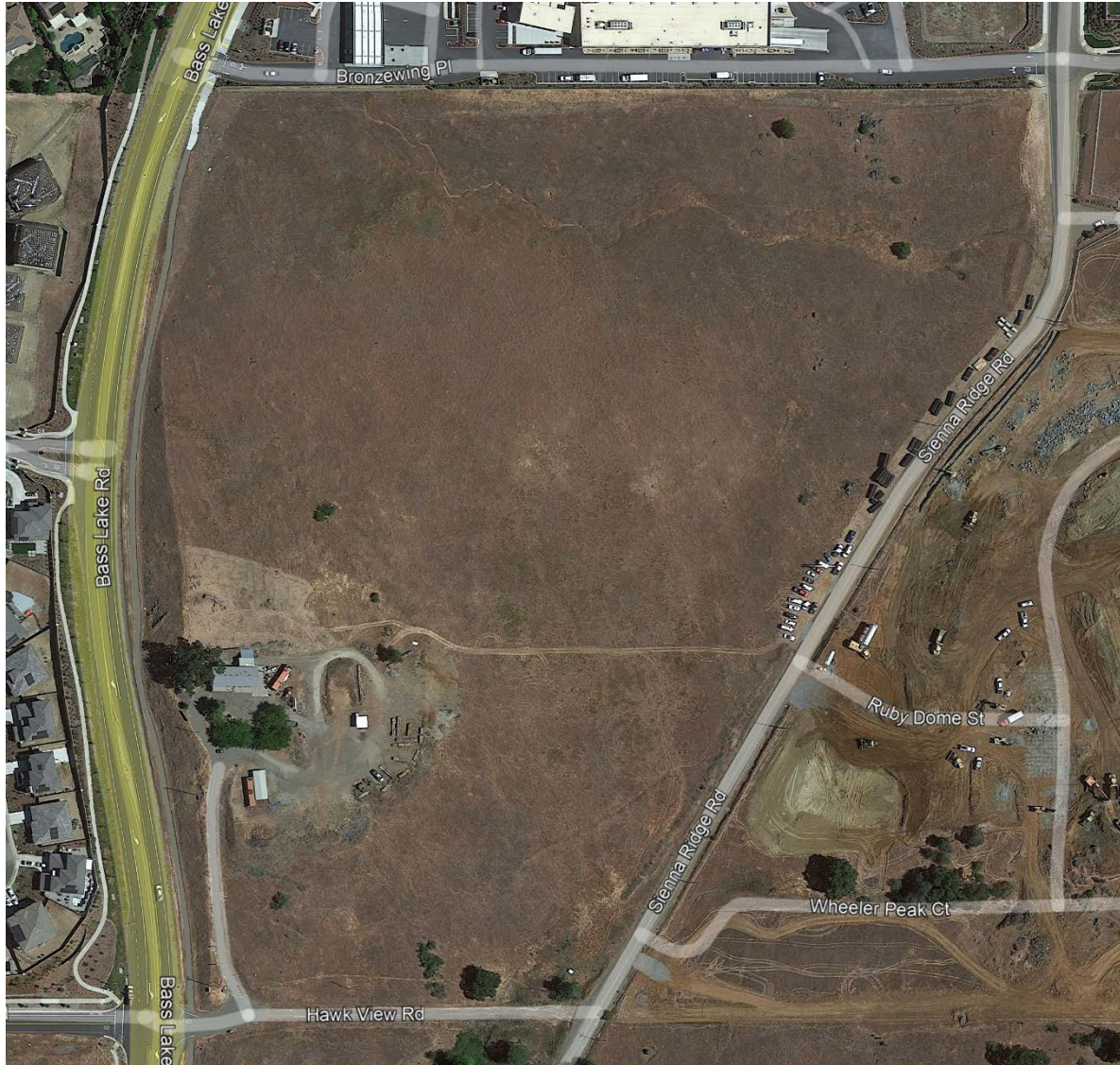


District Office & Technology

The District Office and Technology offices are currently housed in portable buildings on the Green Valley Elementary campus. While not a focal point of the Master Plan scope of work, the District may need to eventually address these aging facilities and infrastructure.



# District Facilities



The District owns 21 acres of property of future expansion near the corner of Bass Lake Road and Serrano Parkway.

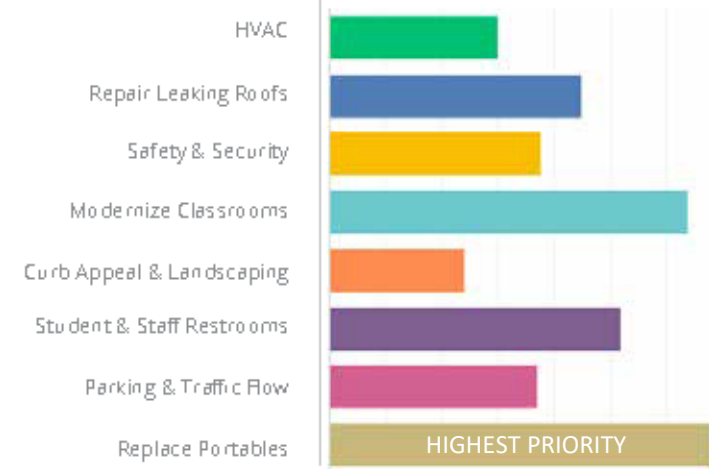
Sienna Ridge Property

# MASTER PLAN SUMMARY





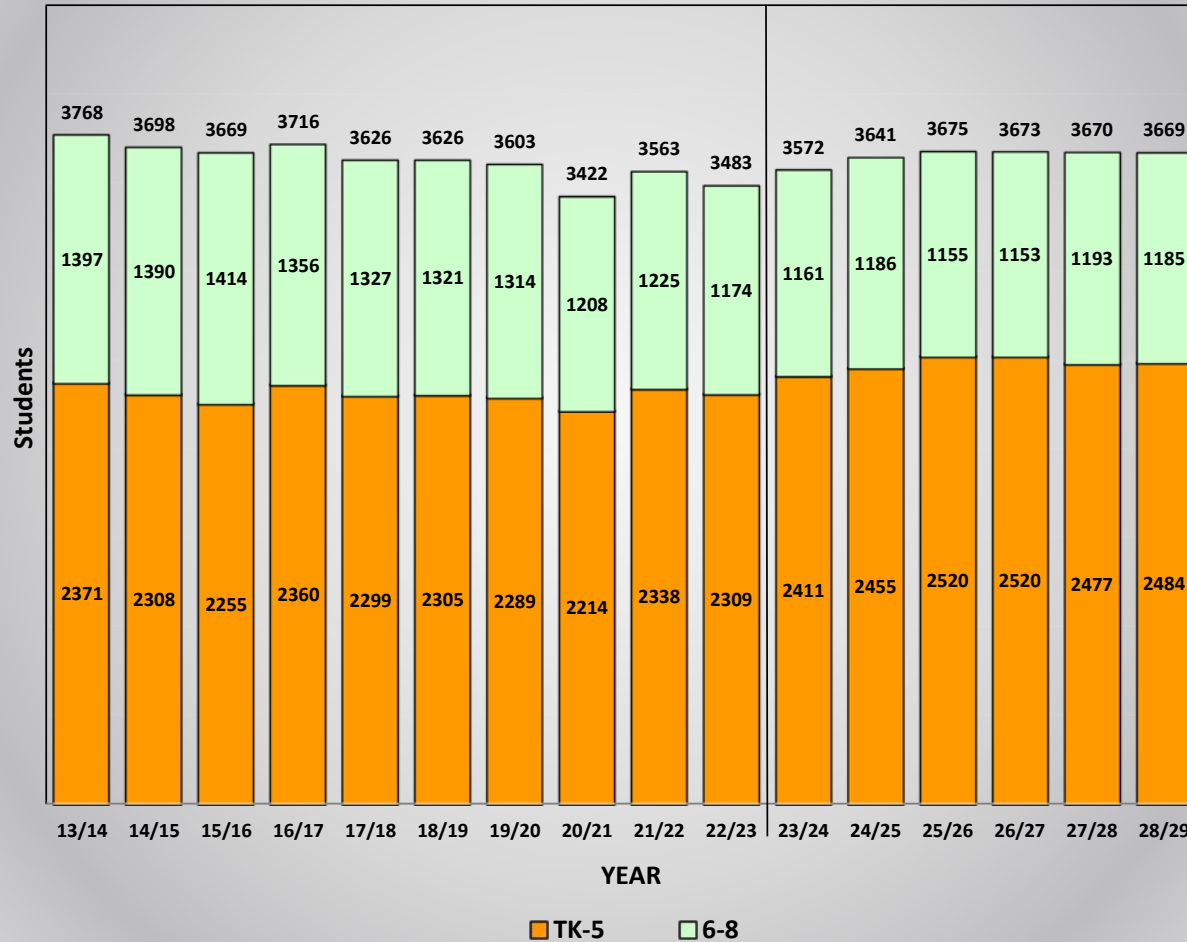
# Stakeholder Engagement





# Enrollment Projection

10 Year Enrollment History &  
6 Year Enrollment Projection







# School Site Assessments

- Cost Estimates
- Total Master Plan Projects: **\$73,606,959\***
- Modernization Projects: **\$14,306,939**
- New Construction Projects: **\$59,300,020**

\*Cost Estimates are based on 2023 rates and do not take into account future inflation adjustments.

## Classroom Statistics

- Gross Classroom Count: 211
- 34% of classrooms are portables
  - Lake Forest 64% portable classrooms
  - Rescue 64% portable classrooms
  - Green Valley 52% portable classrooms
  - Jackson 43% portable classrooms
- Average age of Portables is 30 years old





# Historic Funding

HISTORIC FUNDING 2000-2022 (STATE AND GENERAL OBLIGATION BONDS)							
Date	Site	Project Number	Description	State Modernization	State New Construction	Local General Obligation Bond	Total Funds
4/1/1998	GO Bond		Facilities; Technology, repairs, new classrooms	\$0	\$0	\$27,000,000	\$27,000,000
7/25/2000	Rescue Elementary	57/61978-00-001		\$352,502	\$0	\$0	\$352,502
9/15/2000	Green Valley Elementary	50/61978-00-001	Office/Library, Gym & 6 classrooms	\$0	\$3,103,876	\$0	\$3,103,876
2/19/2003	New Middle School	50/61978-00-002	Pleasant Grove Middle Construction	\$0	\$8,289,072	\$0	\$8,289,072
4/28/2003	New Elementary School	50/61978-00-003	Lakeview Elementary Construction	\$0	\$7,285,882	\$0	\$7,285,882
9/20/2005	Jackson Elementary	57/61978-00-002		\$1,339,431	\$0	\$0	\$1,339,431
2/6/2008	Rescue Elementary	57/61978-00-003		\$622,052	\$0	\$0	\$622,052
4/1/2008	Rescue Elementary	50/61978-00-004	Kindergarten Building	\$0	\$974,659	\$0	\$974,659
7/29/2002	Marina Village	57/61978-00-005		\$4,446,896	\$0	\$0	\$4,446,896
Totals				\$6,760,881	\$19,653,489	\$27,000,000	\$53,414,370

PENDING SUBMITTED STATE PROJECTS							
Date	Site	Project Number	Description	State Modernization	State New Construction	Local General Obligation Bond	Total Funds
SAB APPROVED	Green Valley Elementary	57/61978-00-006	Administration/Kindergarten Modernization	\$3,401,723	\$0	\$0	\$3,401,723
SAB APPROVED	Rescue Elementary	57/61978-00-007	Multipurpose Modernization	\$1,522,341	\$0	\$0	\$1,522,341
Totals				\$4,924,064	\$0	\$0	\$4,924,064





Rescue Union School District  
Modernization Eligibility Analysis

# Future State Funding

State Match (60%)	2022	2023	2024	2025	2026	2027	2028	2029
Green Valley Elem	\$59,257	\$59,257	\$59,257	\$59,257	\$59,257	\$59,257	\$59,257	\$59,257
Jackson Elem	\$920,814	\$920,814	\$920,814	\$920,814	\$920,814	\$920,814	\$920,814	\$920,814
Lake Forest Elem	\$2,674,050	\$2,674,050	\$2,674,050	\$2,674,050	\$2,674,050	\$2,674,050	\$2,674,050	\$2,674,050
Lakeview Elem	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3,230,158
Rescue Elem	\$190,942	\$190,942	\$190,942	\$1,098,838	\$1,098,838	\$1,098,838	\$1,098,838	\$1,098,838
Marina Village Middle	\$215,518	\$215,518	\$215,518	\$215,518	\$215,518	\$215,518	\$215,518	\$215,518
Pleasant Grove Middle	\$0	\$0	\$0	\$0	\$0	\$2,997,907	\$2,997,907	\$2,997,907
<b>Totals</b>	<b>\$4,060,581</b>	<b>\$4,060,581</b>	<b>\$4,060,581</b>	<b>\$4,968,478</b>	<b>\$4,968,478</b>	<b>\$7,966,385</b>	<b>\$7,966,385</b>	<b>\$11,196,543</b>

Local Match (40%)	2022	2023	2024	2025	2026	2027	2028	2029
Green Valley Elem	\$39,505	\$39,505	\$39,505	\$39,505	\$39,505	\$39,505	\$39,505	\$39,505
Jackson Elem	\$613,876	\$613,876	\$613,876	\$613,876	\$613,876	\$613,876	\$613,876	\$613,876
Lake Forest Elem	\$1,782,700	\$1,782,700	\$1,782,700	\$1,782,700	\$1,782,700	\$1,782,700	\$1,782,700	\$1,782,700
Lakeview Elem	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,153,439
Rescue Elem	\$127,294	\$127,294	\$127,294	\$732,559	\$732,559	\$732,559	\$732,559	\$732,559
Marina Village Middle	\$143,679	\$143,679	\$143,679	\$143,679	\$143,679	\$143,679	\$143,679	\$143,679
Pleasant Grove Middle	\$0	\$0	\$0	\$0	\$0	\$1,998,605	\$1,998,605	\$1,998,605
<b>Totals</b>	<b>\$2,707,054</b>	<b>\$2,707,054</b>	<b>\$2,707,054</b>	<b>\$3,312,318</b>	<b>\$3,312,318</b>	<b>\$5,310,923</b>	<b>\$5,310,923</b>	<b>\$7,464,362</b>

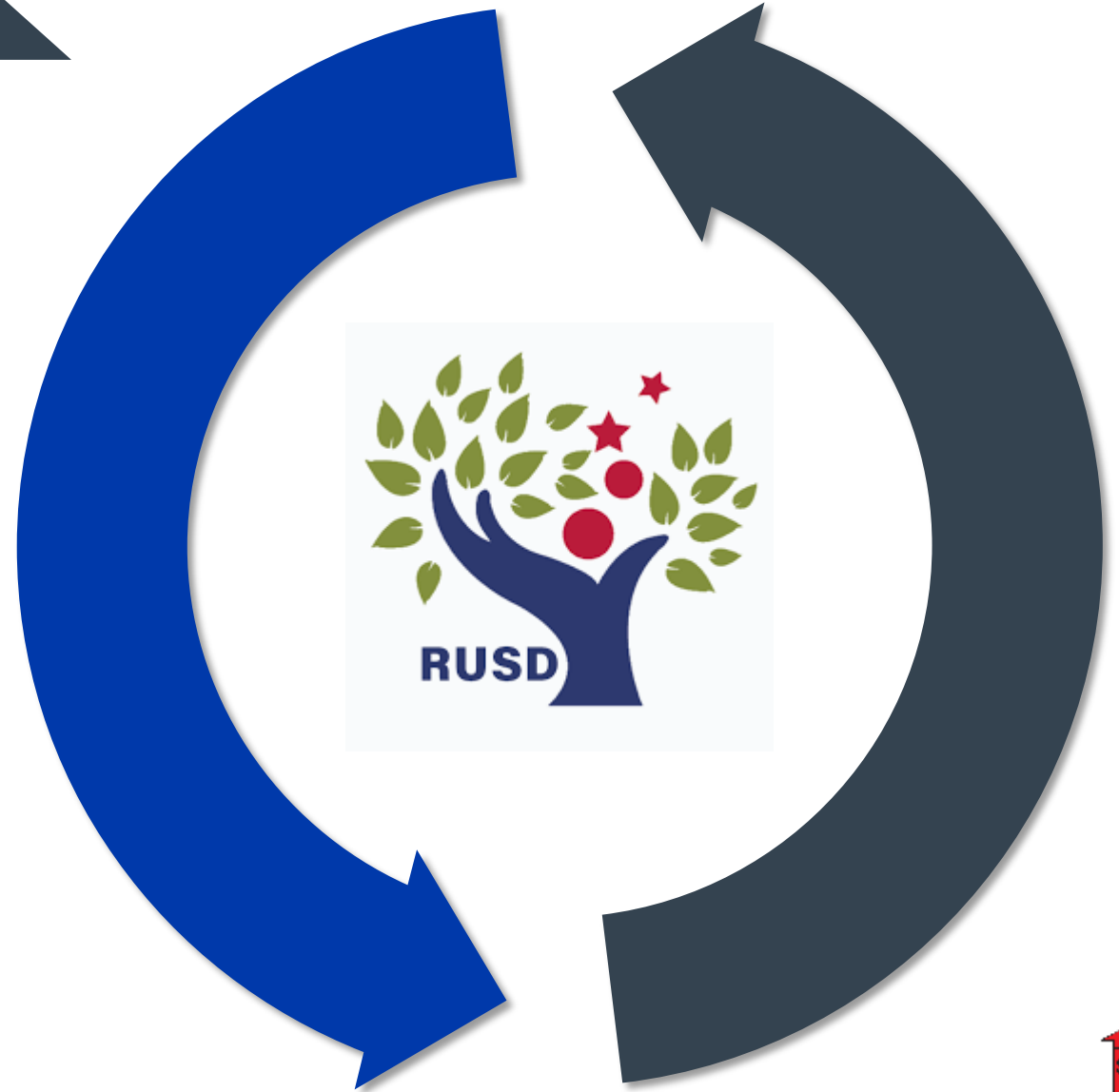
Project Totals	2022	2023	2024	2025	2026	2027	2028	2029
Green Valley Elem	\$98,762	\$98,762	\$98,762	\$98,762	\$98,762	\$98,762	\$98,762	\$98,762
Jackson Elem	\$1,534,690	\$1,534,690	\$1,534,690	\$1,534,690	\$1,534,690	\$1,534,690	\$1,534,690	\$1,534,690
Lake Forest Elem	\$4,456,750	\$4,456,750	\$4,456,750	\$4,456,750	\$4,456,750	\$4,456,750	\$4,456,750	\$4,456,750
Lakeview Elem	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$5,383,597
Rescue Elem	\$318,236	\$318,236	\$318,236	\$1,831,396	\$1,831,396	\$1,831,396	\$1,831,396	\$1,831,396
Marina Village Middle	\$359,197	\$359,197	\$359,197	\$359,197	\$359,197	\$359,197	\$359,197	\$359,197
Pleasant Grove Middle	\$0	\$0	\$0	\$0	\$0	\$4,996,512	\$4,996,512	\$4,996,512
<b>Totals</b>	<b>\$6,767,636</b>	<b>\$6,767,636</b>	<b>\$6,767,636</b>	<b>\$8,280,796</b>	<b>\$8,280,796</b>	<b>\$13,277,308</b>	<b>\$13,277,308</b>	<b>\$18,660,904</b>



## Next Step: Implementation Plan

- 1 Adhere to the 4 Facilities Master Plan questions
- 2 Analyze each foundational cornerstone results
- 3 Review District goals & objectives
- 4 Rank projects based on priority & future available funding

The Facilities Master Plan is a living document that will require periodic updates. The Foundational Cornerstones should be review and re-evaluated on an annual basis by District's guidance council.





Contact Us

## Contact us for further information



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The background is a detailed architectural floor plan of a school building, rendered in a light blue, semi-transparent style. The plan includes various rooms such as a Gymnasium, Music Room, Multi Purpose room, and several classrooms. A large, bold, white 'THANK YOU' text is centered over the plan. A diagonal blue band runs across the bottom right corner of the image. 

# THANK YOU