



CSIS California School Information Services

Atascadero Unified School District

Housing/Facilities Review

September 7, 2011



Joel D. Montero
Chief Executive Officer







CSIS California School Information Services

September 7, 2011

Deborah Bowers, Superintendent
Atascadero Unified School District
5601 West Mall
Atascadero, CA 93422

Dear Superintendent Bowers:

In March 2011, the Atascadero Unified School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for management assistance. Specifically, the agreement stated that FCMAT would perform the following:

The Atascadero Unified School District has requested FCMAT to develop an Interim Student Housing and Facilities Plan for the proposed construction/modernization of facilities beginning in June of the 2011-12 fiscal year. The Interim Housing and Facilities Plan should be a model that can provide interim housing either on or off site during the thirty-six-week school year and proposed construction time frame. The Interim Student Housing and Facilities Plan should be scalable and provide a blueprint that can be replicated for future modernization projects that are included in the district's Facilities Master Plan.

The district has successfully passed a general obligation bond in the amount of \$117 million and anticipates eligibility and modernization funding from the Office of Public School Construction that will augment the district's bond funding.

The district's facilities and long range master plan have been significantly impacted by four major variables that will be considered in the development of an Interim Student Housing and Facilities Plan:

- The decline in student enrollment during the past decade, which is projected to continue to impact the district for the next five to ten years.
- The current excess capacity as determined by the amount of unfilled seats based on student enrollment compared to the capacity of each school site.
- The aging of buildings, which causes the need for renovations and infrastructure improvements.
- The changing nature of the educational programs, especially with the potential expansion of magnet/thematic schools.

The scope of work for this project in developing the Interim Student Housing and Facilities Plan will include guiding principles that will maximize academic achievement of all students; provide a safe and orderly environment for all students and employees; include efficient and effective support operations

FCMAT

Joel D. Montero, Chief Executive Officer

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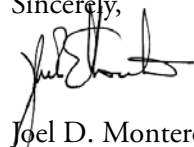
Administrative Agent: Christine L. Frazier - Office of Kern County Superintendent of Schools

for all students, families, teachers, and administrators; evaluate resources to address the needs of all students at the site; and maintain public confidence and strong parent/community engagement. This planning process and final recommendations should be data driven and allow for broad-based community input into the decision making process.

1. An evaluation of interim housing options available to the district will include an enrollment and capacity analysis for all elementary sites and include but not be limited to the following:
 - Option One: House all students at a single site designed for interim housing with a capacity of 450 students, and expandable to 550 students. Identify and analyze all district elementary sites with the potential to accommodate this option. The district's objective for this option is to house all students together during the site construction/modernization of facilities in an effort to maintain continuity in the student's academic environment and result in the least disruption to the students and parents of the school site.
 - Option Two: House students by grade level in existing vacant classrooms at other district elementary schools, if capacity allows. This option should discuss the pros and cons of relocating students on a temporary basis to other sites.
 - Option Three: House students in two grade level configurations such as K-3 and 4-6, at two modified existing school sites. This option should discuss the pros and cons of relocating students on a temporary basis to other sites while developing alternative grade level configurations.
 - Option Four: House students at a single existing school site through the use of the year-round school concept and split schedules.
 - Option Five: Review the priority of facility projects identified in the district's Facility Master Plan to determine if there are other interim housing options that could be made available by changing the sequence or order of all the district's projects or any other options not referenced above.
2. An evaluation of the cost of each option including impact on student academics, classroom instruction, special education, transportation, food service, extracurricular activities, maintenance, safety, administration, supervision, traffic flow, implementation time lines, etc. should be included with all recommendations provided by the FCMAT Team.

This final report contains the study team's findings and recommendations in the above areas of review. We appreciate the opportunity to serve the Atascadero Unified School District, and extend our thanks to all the staff for their assistance during fieldwork.

Sincerely,



Joel D. Montero
Chief Executive Officer

cc: Jackie Martin, Assistant Superintendent of Business Services
Stuart Stoddard, Director of Support Services

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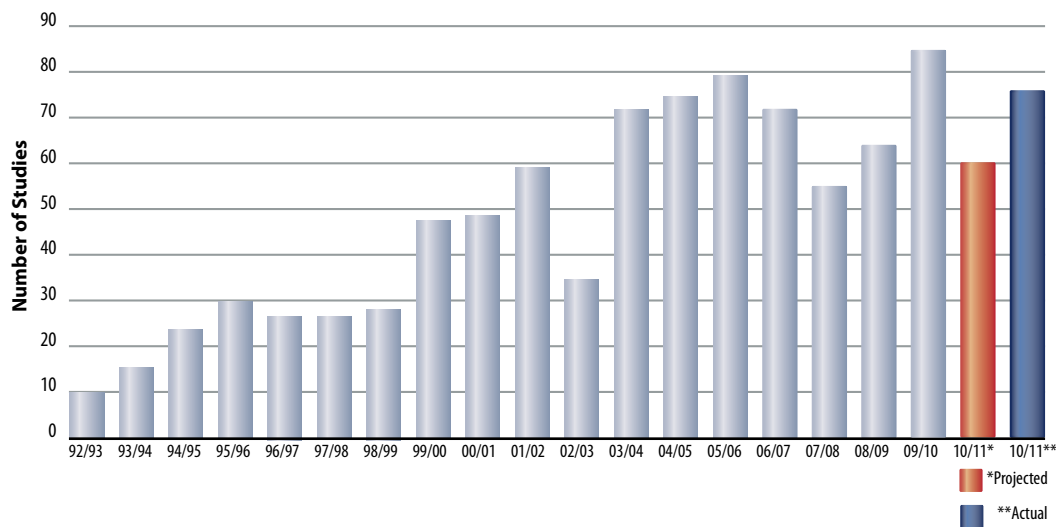
About FCMAT

FCMAT’s primary mission is to assist California’s local K-14 educational agencies to identify, prevent, and resolve financial and data management challenges. FCMAT provides fiscal and data management assistance, professional development training, product development and other related school business and data services. FCMAT’s fiscal and management assistance services are used not just to help avert fiscal crisis, but to promote sound financial practices and efficient operations. FCMAT’s data management services are used to help local educational agencies (LEAs) meet state reporting responsibilities, improve data quality, and share information.

FCMAT may be requested to provide fiscal crisis or management assistance by a school district, charter school, community college, county office of education, the state Superintendent of Public Instruction, or the Legislature.

When a request or assignment is received, FCMAT assembles a study team that works closely with the local education agency to define the scope of work, conduct on-site fieldwork and provide a written report with findings and recommendations to help resolve issues, overcome challenges and plan for the future.

Studies by Fiscal Year



FCMAT also develops and provides numerous publications, software tools, workshops and professional development opportunities to help local educational agencies operate more effectively and fulfill their fiscal oversight and data management responsibilities. The California School Information Services (CSIS) arm of FCMAT assists the California Department of Education with the implementation of the California Longitudinal Pupil Achievement Data System (CALPADS) and also maintains DataGate, the FCMAT/CSIS software LEAs use for CSIS services. FCMAT was created by Assembly Bill 1200 in 1992 to assist LEAs to meet and sustain their financial obligations. Assembly Bill 107 in 1997 charged FCMAT with responsibility for CSIS and its statewide data management work. Assembly Bill 1115 in 1999 codified CSIS’ mission.

AB 1200 is also a statewide plan for county office of education and school districts to work together locally to improve fiscal procedures and accountability standards. Assembly Bill 2756 (2004) provides specific responsibilities to FCMAT with regard to districts that have received emergency state loans.

In January 2006, SB 430 (charter schools) and AB 1366 (community colleges) became law and expanded FCMAT's services to those types of LEAs.

Since 1992, FCMAT has been engaged to perform nearly 850 reviews for LEAs, including school districts, county offices of education, charter schools and community colleges. The Kern County Superintendent of Schools is the administrative agent for FCMAT. The team is led by Joel D. Montero, Chief Executive Officer, with funding derived through appropriations in the state budget and a modest fee schedule for charges to requesting agencies.

Introduction

Background

Located in San Luis Obispo County, the Atascadero Unified School District has a seven-member elected governing board and serves approximately 4,898 students in kindergarten through 12th grade. The district has seven elementary schools, a fine arts academy, one junior high school, one comprehensive high school, and two alternative schools. Student enrollment reached a peak of 6,143 students in 1996-97 but has declined each fiscal year through 2009-10. The October 2010 enrollment data indicates that district enrollment is relatively stagnant, with an increase of 24 students from 2009-10.

The district passed a \$117 million general obligation bond measure in 2010 to help provide funding to acquire, construct, modernize, and improve school facilities.

In March 2011, the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement with the district for management assistance. The study agreement specifies the scope and objectives of FCMAT's work as follows:

The Atascadero Unified School District has requested FCMAT to develop an Interim Student Housing and Facilities Plan for the proposed construction/modernization of facilities beginning in June of the 2011-12 fiscal year. The Interim Housing and Facilities Plan should be a model that can provide interim housing either on or off site during the thirty-six-week school year and proposed construction time frame. The Interim Student Housing and Facilities Plan should be scalable and provide a blueprint that can be replicated for future modernization projects that are included in the district's Facilities Master Plan.

The district has successfully passed a general obligation bond in the amount of \$117 million and anticipates eligibility and modernization funding from the Office of Public School Construction that will augment the district's bond funding.

The district's facilities and long range master plan have been significantly impacted by four major variables that will be considered in the development of an Interim Student Housing and Facilities Plan:

- The decline in student enrollment during the past decade, which is projected to continue to impact the district for the next five to ten years.
- The current excess capacity as determined by the amount of unfilled seats based on student enrollment compared to the capacity of each school site.
- The aging of buildings, which causes the need for renovations and infrastructure improvements.
- The changing nature of the educational programs, especially with the potential expansion of magnet/thematic schools.

The scope of work for this project in developing the Interim Student Housing and Facilities Plan will include guiding principles that will maximize academic achievement of all students; provide a safe and orderly environment for all students and employees; include efficient and effective support operations for all students, families, teachers, and administrators; evaluate resources to address the needs of all students at the site; and maintain public confidence and strong parent/

community engagement. This planning process and final recommendations should be data driven and allow for broad-based community input into the decision making process.

1. An evaluation of interim housing options available to the district will include an enrollment and capacity analysis for all elementary sites and include but not be limited to the following:
 - Option One: House all students at a single site designed for interim housing with a capacity of 450 students, and expandable to 550 students. Identify and analyze all district elementary sites with the potential to accommodate this option. The district's objective for this option is to house all students together during the site construction/modernization of facilities in an effort to maintain continuity in the student's academic environment and result in the least disruption to the students and parents of the school site.
 - Option Two: House students by grade level in existing vacant classrooms at other district elementary schools, if capacity allows. This option should discuss the pros and cons of relocating students on a temporary basis to other sites.
 - Option Three: House students in two grade level configurations such as K-3 and 4-6, at two modified existing school sites. This option should discuss the pros and cons of relocating students on a temporary basis to other sites while developing alternative grade level configurations.
 - Option Four: House students at a single existing school site through the use of the year-round school concept and split schedules.
 - Option Five: Review the priority of facility projects identified in the district's Facility Master Plan to determine if there are other interim housing options that could be made available by changing the sequence or order of all the district's projects or any other options not referenced above.
2. An evaluation of the cost of each option including impact on student academics, classroom instruction, special education, transportation, food service, extracurricular activities, maintenance, safety, administration, supervision, traffic flow, implementation time lines, etc. should be included with all recommendations provided by the FCMAT Team.

Study Guidelines

FCMAT visited the district on June 2 and 3, 2011 to conduct interviews, collect data and perform site visits. This report is the result of those activities and is divided into the following sections:

- Executive Summary
- Interim Student Housing Options
- Appendices

Study Team

The study team was composed of the following members:

Diane Branham

FCMAT Fiscal Intervention Specialist
Bakersfield, California

Mark Rosson, Vice President

CPM (Capital Program Management)
Sacramento, California

Laura Haywood

FCMAT Public Information Specialist
Bakersfield, California

Executive Summary

FCMAT completed evaluations of several interim student housing options as necessitated by the district's facility implementation plan for modernizing five of its elementary schools. Current enrollment evaluations and a facilities capacity analysis by site were conducted.

Options one, two and three presented by the district in the study agreement would house students at other existing schools utilizing vacant space and/or grade level reconfigurations. These options, particularly options two and three, would significantly affect families by separating siblings, and would also separate the Parent Teacher Association (PTA), parent volunteers, and staff, thus minimizing the school site identity. During FCMAT's site visits, administrators and staff expressed their desire to keep their school on its current site during modernization, if possible.

A year-round school concept with split schedules, as outlined in option four, would likely result in significant logistical and operational impacts. Examples include scheduling challenges for families with children attending more than one district school; increased utilities costs; the need to negotiate numerous changes to the collective bargaining agreements for employees working on a year-round schedule including the number of annual work days, instructional minutes, and changes to the monthly payday schedules; and difficulty in completing customary summer cleaning and maintenance projects.

While option five suggests delaying the start of the elementary modernization projects until a new junior high school can be built, construction costs likely would escalate during the five years needed to design and build the new junior high school. The Escalation Cost Analysis in Appendix A of this report indicates an estimated cost increase of \$4.5 million if just the first two modernization projects, Monterey Road and Santa Rosa Road, are delayed.

The district also has considered using its vacant 13-acre site located adjacent to the San Benito Elementary School to build a temporary campus for interim student housing. While using portable buildings could yield some design and construction savings and could be completed six to 12 months sooner than a school constructed of permanent buildings, the cost to build even a temporary campus could be as much as \$14.5 million based on historical cost data.

Housing students on campus during the modernization projects could reduce interim housing costs by over \$1 million while providing for a safe environment for students and staff. This approach capitalizes on each site's unused classroom space to house students, and compresses the proposed construction schedule enough to complete the work during a single summer for the San Gabriel and San Benito Elementary School modernization projects. This also accommodates the request by some site staff members for each school's culture and identity to remain intact.

The district's proposed construction list contains numerous projects, the first being modernization of the Monterey Road Elementary School that is scheduled to begin in summer 2012. During FCMAT's fieldwork, staff indicated that the district would sell its first series of bonds in June 2011. The district should be mindful of the arbitrage issues surrounding bond funds that are not expended within 36 months of issuance, and continue discussions with its financial advisors to ensure bonds are issued timely. All implementation schedule options should be accompanied by a cash flow analysis to ensure sufficient funds are in place so that construction does not outpace the district's ability to issue bonds and to avoid any potential arbitrage issues if the schedule is delayed for any reason.

Findings and Recommendations

Interim Student Housing Options

As outlined in the study agreement, the district requested that FCMAT review five interim housing options, and provide any additional options to be considered for implementation during the upcoming modernization of five of the district's elementary school sites: Monterey Road, Santa Rosa Road, Santa Margarita, San Benito, and San Gabriel elementary schools. Following is FCMAT's assessment of each of those options. FCMAT did not review interim housing options for the upcoming modernization of the two outlying elementary school sites, Carrisa Plains and Creston, as the district has already determined the option that will be used for these sites.

Option One – “House all students at a single site designed for interim housing with a capacity of 450 students, and expandable to 550 students. Identify and analyze all district elementary sites with the potential to accommodate this option.”

The district does not have an existing elementary school site that could house all students from any one of the five elementary school sites scheduled for modernization. However, the Fine Arts Academy may be a viable option if additional temporary portable classrooms were obtained.

The academy is adjacent to the district office and Atascadero Junior High School, and is centrally located among four of the five elementary schools to be modernized, with the exception of Santa Margarita Elementary School. While the Fine Arts Academy lacks core facilities such as a cafeteria/multipurpose room, facilities to serve these needs are available at Atascadero Junior High School and are used now by academy students. However, extended scheduling options for these core facilities would need to be considered if an additional 450-550 students were housed at the academy.

Approximately 40-50% of the classrooms at the Fine Arts Academy are unused and could house additional students and staff. However, fairly significant costs would be incurred if this site were used to house all students from each of the other elementary school sites during their respective modernization projects.

This option would require design work, Division of the State Architect (DSA) approval, and installation of temporary portable buildings and utility infrastructure improvements necessary for the additional students, plus office space for staff. The approximate cost to make these improvements is projected to range from \$211,000 to \$240,000 and is based on historical costs to provide interim student housing classrooms for a campus similar to Monterey Road or Santa Rosa Road for 15 months. The cost for temporary portable buildings may be reduced incrementally depending on the number of empty classrooms available at the Fine Arts Academy during the modernization of each elementary school site.

The interim student housing planning and implementation activities should begin at least nine months before the actual student and staff relocation. Major activities include the development of detailed architectural site plans that include Americans with Disability Act (ADA) access compliance, fire/life safety compliance, and portable manufacturer information; local fire marshal approval for ingress/egress and fire hydrant location; plan submission to and approval by DSA; procurement of the temporary portable units, allowing for sufficient time to review and obtain the best lease terms; site preparation including utilities and communications connections; and DSA project inspection requirements. Planning and implementation would need to begin imme-

diately to be ready to house the students and staff from the Monterey Road Elementary School, as construction is scheduled to start at the beginning of the 2012 summer break.

The 2010-11 Accountability Progress Report indicates that each school affected by modernization has a base academic performance index (API) score of between 781 and 852. However, the 2010 Adequate Yearly Progress (AYP) Report indicates that the following schools receiving federal Title I funds are in program improvement (PI): Santa Rosa Road Academic Academy – PI year two; San Benito Elementary – PI year one. Schools and local educational agencies that do not meet AYP criteria for two consecutive years are identified for PI under the federal Elementary and Secondary Education Act (ESEA). The ESEA requires all states to implement accountability systems based on state standards in English-language arts and mathematics, annual testing for students, and annual statewide progress objectives, with the goal that all students achieve proficiency by 2013-14. Schools and districts that fail to make AYP proficiency goals are subject to improvement and corrective action measures. Therefore, prior to determining if option one should be chosen for interim student housing, the district's Educational Services Department would need to determine how moving students from one school site to an existing school would affect each site's Title I funding eligibility, test scores and PI status.

If the district chose option one for interim student housing, an analysis would need to be completed to determine the effects on transportation routes and their related costs for those students temporarily displaced by each of the modernization projects. Staff indicated that many parents transport their elementary students to school each day. Therefore, increasing the number of students housed at the Fine Arts Academy may also significantly affect traffic patterns.

Option Two – “House students by grade level in existing vacant classrooms at other district elementary schools, if capacity allows.”

This option would require grade levels to be housed at several other campuses, at least two or three depending on the size of the site being modernized, and would likely cause logistical challenges for the receiving campuses. For example, if insufficient vacant kindergarten classrooms were available, students would be housed in standard size/configuration classrooms, which would not comply with California Department of Education (CDE) planning standards. Staff indicated that the following approximate number of classrooms may be available to house additional students on each campus if future enrollment remains at the 2010-11 levels:

Fine Arts Academy	8
Santa Rosa Road	6
San Benito	4
San Gabriel	2
Santa Margarita	6 (approximately 12 miles from the Monterey Road site)
Monterey Road	8

District enrollment estimates for 2011-12 indicate that approximately 17 classrooms will be needed to house the Monterey Road students. Thus, housing the Monterey Road students on other elementary campuses would require sending students to at least three separate locations based on the number of classrooms that could be made available at each of the other school sites.

This option would significantly impact families by separating siblings, and would minimize the site identity by separating the PTA, parent volunteers and staff. Site administrators also expressed significant concerns regarding the effects that relocation to other campuses would have on

students in severe special education programs. Additionally, the transportation and educational effects discussed in option one would need to be considered prior to implementing option two.

Option Three – “House students in two grade level configurations such as K-3 and 4-6, at two modified existing school sites.”

Unless the district plans to implement a long-term grade-level configuration change, this option would significantly affect parents, students, and staff, similar to option one and two. It would also necessitate additional costs for design work, portable interim housing costs and approvals as outlined in option one. The transportation and educational effects discussed in option one would also need to be considered prior to implementing option three.

Option Four – “House students at a single existing school site through the use of the year-round school concept and split schedules.”

This option has similar logistical impacts to options two and three. While a multi-track year-round schedule expands the seating capacity at a school site, it is not designed as a short-term solution to house students during a modernization project. It has most often been used in districts that experienced rapid growth and overcrowding.

Implementing a multi-track year-round schedule on a short-term basis may create significant scheduling difficulties for families with children attending more than one district school. It would increase utilities costs due to full-school operations spanning the summer months; would make completing the necessary deep cleaning and maintenance projects that typically occur during the summer more difficult; and would necessitate negotiating significant changes to the collective bargaining agreements for each employee group prior to implementation for such terms and conditions as the number of annual work days, daily instructional minutes, and changes to monthly payday schedules.

Option Five – “Review the priority of facility projects identified in the district’s Facility Master Plan to determine if there are other interim housing options that could be made available by changing the sequence or order of all the district’s projects.”

The district owns a vacant 13-acre property adjacent to the San Benito Elementary School that is being considered for use as a junior high school site. Interviews indicated that if the vacant property were used to build a new junior high school, the current Atascadero Junior High School site could be used to house students during all of the elementary modernization projects.

While in concept this may appear to be a valid solution, it effectively delays the start of construction for all modernization projects until the new school can be designed, built, and occupied. Time and due diligence challenges are also involved in developing a new school site. Examples include local entitlement reviews; site hazardous material, geological/geo-hazard and soil investigations; the California Environmental Quality Act (CEQA) process; and the CDE site evaluation and educational specifications approval.

This option would result in increased costs for hard construction and the associated soft costs as a result of delays in the modernization projects. A reasonable time frame for a new school to be built and ready to occupy is five years. Thus, for example, the estimated resulting escalation cost is \$1.8 million for the Monterey Road modernization project and \$2.6 million for the Santa Rosa Road Academic Academy project. An estimated time and cost analysis for this option is included in Appendix A - Escalation Analysis Scenario.

The district has also discussed developing a temporary campus on its 13-acre vacant property. Although all of the same planning steps would have to be taken as listed above, the time frame

for the campus to be made ready to occupy could be reduced by approximately six to 12 months. This could be accomplished by the architect specifying the use of portable classrooms that have been pre-approved by DSA, thus reducing construction time and the time needed for DSA reviews and approvals.

However, based on historical cost data, the projected cost to implement a temporary interim housing campus on the vacant site could range from approximately \$11.5 to \$14.5 million, depending on site conditions and the level of design quality. This estimate includes costs for site planning and design, site improvements, interim housing set up, and portable lease payments for five years. The portable leases include a total of 42,000 square feet that provides classroom space for 500 students, student/staff restrooms, office/staff space, and a cafeteria building (no kitchen). Also included are basic site improvements such as parking, and limited hard court surfaces and turf play areas. The estimated cost does not include off-site utilities and potential roadway realignment. In addition, unless the district enhances the design of the portables to be used on a more permanent/long-term basis, this solution would include many sunk costs (costs that have been incurred and cannot be recovered) for the lease of temporary portable buildings.

Suggested Alternative

Another alternative is to house students on their current campus during the modernization efforts. While this departs from the scenario of moving students away from each campus during modernization, it has the potential to decrease the overall interim housing costs from as much as \$1.1 million to \$0 as reflected in Appendix B – Interim Housing Cost Analysis.

Both Monterey Road and Santa Margarita Elementary schools could utilize unused classrooms while construction takes place. This could be accomplished over a 15-month period for each site, with the classrooms being modernized wing-by-wing using a construction phasing schedule throughout the school year as reflected in Appendix C – Proposed Project Schedule. The modernization work would begin the first summer with utility upgrades and site work activities and then be completed during the second summer with the core facilities, including the office and multipurpose/cafeteria buildings.

The Santa Rosa Road Academic Academy site is constrained due to the number of individual buildings and their close proximity to one another; therefore, it would be very difficult for construction activities to take place with staff and students present. Santa Rosa students and staff could be temporarily moved to the Fine Arts Academy campus. This could be accomplished by completing the Monterey Road modernization project first, then moving the Fine Arts Academy students into the unused classrooms at Monterey Road temporarily.

Because the facilities are newer, the proposed scope of work for the San Gabriel and San Benito school sites is not as extensive as the other elementary schools. These two sites are candidates for the modernization activities to be completed in the summer months. The district should also consider performing the two projects concurrently, which will likely result in construction economies because the schools have the same design and could be bid as a package. Savings would be achieved by finishing the projects at the same time, rather than waiting another year to complete one of the projects. A short-term interim housing contingency plan should be considered for these two sites in the event of an unforeseen circumstance that prevents the modernization work from being completed before staff and students return at the start of the school year.

Consideration of safety for the students, staff and the public is paramount when making a decision about whether or not to modernize a school while it is in session. Fingerprinting requirements and site worker procedural options for contractors should be evaluated by the district and

stipulated in the bidding documents. It is important to properly fence contractor work zones and to establish construction staging and parking areas. Summer school programs should be relocated to a nearby school site so that the contractor has full access to perform campus-wide activities such as utility upgrades and core facility construction.

Hazardous material construction activities, such as lead and asbestos removal, can be safely accomplished on an occupied campus. Educational forums should be conducted for staff members to help assure everyone that all Division of Occupational Safety and Health (Cal/OSHA) and Air Quality Management District guidelines and regulations will be followed. The bid documents should also contain all safety and code of conduct procedural expectations.

Appendix C of this report includes a proposed modernization phasing schedule for all of the projects that articulates the flow and pace of work necessary to optimize program-wide cost savings versus time. This approach appears to be the most cost effective interim housing solution and provides for the least disruption to students, parents and staff. This option would also retain the affected school site's identity by avoiding a move off site.

Recommendations

The district should:

1. Consider implementing the suggested alternative for interim student housing and the Proposed Project Schedule presented in Appendix C of this report.
2. Ensure that site safety considerations are evaluated and stipulated in the bid documents.
3. Conduct educational forums for staff members regarding Cal/OSHA and Air Quality Management District guidelines and regulations and include safety and code of conduct procedural expectations in the bid documents.
4. If the suggested alternative for interim student housing is selected, relocate summer school programs for the site being modernized to a nearby school site.
5. If the suggested alternative is not selected, consult with its Educational Services Department to determine how the movement of students between school sites would affect each site's Title I funding eligibility, test scores and PI status prior to moving forward with option one, two or three.
6. If the suggested alternative is not selected, complete an analysis of the transportation needs for students that are relocated to other school sites to evaluate the related costs and effects on traffic patterns prior to moving forward with option one, two or three.

Appendices

Appendix A – Escalation Cost Analysis

Appendix B – Interim Housing Cost Analysis

Appendix C – Proposed Project Schedule

Appendix D – Study Agreement

Atascadero Unified School District
Escalation Cost Analysis

Estimated Project and Escalation Costs					
School	Estimated Total Project Costs, Including: 2010 District Data + 35% Soft Costs	Estimated Total Project Costs, Including: 2010 District Data + 35% Soft Costs + Interim Housing Cost Estimate (MR/SR only)	Option 1		Option 5
			All Projects Completed in Sequence, Using Interim Housing Units	Suggested Alternative	Creates one Interim Housing Site and delays Monterey Road and Santa Rosa projects
			Escalation Costs		
Monterey Road	\$ 4,841,000	\$ 5,053,000	\$ 256,000	\$ 245,000	\$ 1,846,000
Santa Rosa	\$ 4,797,000	\$ 5,008,000	\$ 613,000	\$ 587,000	\$ 2,648,000
Santa Margarita	\$ 5,566,000	\$ 5,566,000	\$ 1,258,000	\$ 1,258,000	\$ 1,258,000
San Benito	\$ 5,101,000	\$ 5,101,000	\$ 1,389,000	\$ 1,389,000	\$ 1,389,000
San Gabriel	\$ 5,163,000	\$ 5,163,000	\$ 1,405,000	\$ 1,405,000	\$ 1,405,000
Project Subtotal	\$ 25,468,000	\$ 25,891,000	\$ 4,921,000	\$ 4,884,000	\$ 8,546,000
Interim Housing Site (13 Acre Site)		\$25,468,000 also used in Option 5			
Estimated Project Costs					\$ 14,449,000.00
Grand Total Including Escalation			\$ 30,812,000	\$ 30,352,000	\$ 48,463,000

Assumptions:

- 1 - Project Costs are based on 2010 Construction Costs as listed on Report: 'AUSD Improvement Measure Expenditures Extrapolated Over Time' (5/11/11)
- 2 - Monterey Road and Santa Rosa will experience Interim Housing Costs in Option 1; Santa Margarita was excluded due to the distance from Interim housing sites (such as Fine Arts Academy)
- 3 - Grand Total is based on Estimated Project Costs plus Subtotal of each Escalation Option
- 4 - Grand Total of Option 5 includes the estimated project cost to establish an Interim Housing site on the 13 Acre Parcel
- 5 - San Gabriel, San Benito and Santa Margarita are not anticipated to incur Interim Housing costs
- 6 - Escalation rates used for the options are:

Year	Escalation Rate
2012	2%
2013	5%
2014	8%
2015	10%
2016 *	12%
2017 *	12%

* 2016-2017 rates were only used for Option 5, for Monterey Road and Santa Rosa

Appendix A



Appendix B

Atascadero Unified School District
Interim Housing Cost Analysis

School	Total Sq Ft / School	Estimated Interim Housing Set-Up Costs	Estimated Interim Housing Lease Costs	Total Estimated Interim Housing Costs
<i>Historical Average Data</i>		\$ 3.20	\$ 1.84	
		<i>cost per sf</i>	<i>cost per sf</i>	
Monterey Road	42,185	\$ 135,000	\$ 77,000	\$ 212,000
Santa Rosa	41,803	\$ 134,000	\$ 77,000	\$ 211,000
Santa Margarita	48,505	\$ 155,000	\$ 89,000	\$ 244,000
San Benito	44,451	\$ 142,000	\$ 82,000	\$ 224,000
San Gabriel	44,991	\$ 144,000	\$ 83,000	\$ 227,000
Totals		\$ 710,000	\$ 408,000	\$ 1,118,000

Analysis Information

Assumptions:

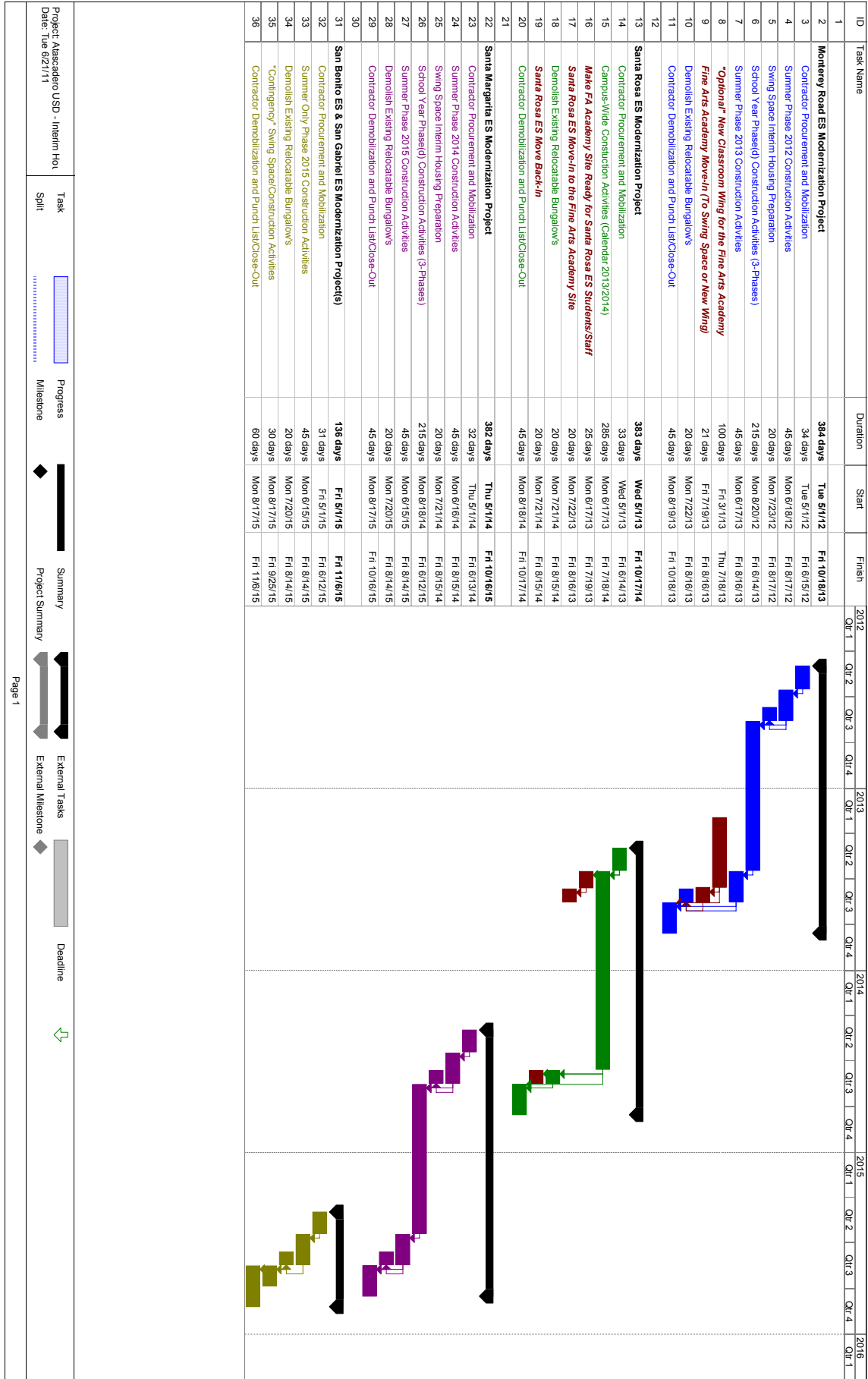
- Historical Average Data is based on project cost history from CPM client files
- Set-Up costs include site prep, set-up of portable units, and tear-down/removal
- Interim Housing cost estimates are shown in 2011 dollars
- Interim Housing cost estimates only reflect Student spaces

Recommendations:

- Employ on-site Swing Space solutions, when available
- Relocate students to unoccupied campus, in lieu of Interim Housing units
- Execute projects during Summer break

School	On-Site Option (Swing Space)	Off-Site Option (Fine Arts)	No Interim Housing if Summer Project only
Monterey Road	X		
Santa Rosa		X	
Santa Margarita	X		
San Benito			X
San Gabriel			X

Appendix C



Project: Atascadero USD - Interim Ho
Date: Tue 6/21/11

Task Split

Progress Milestone

Summary Project Summary

External Tasks External Milestone

Deadline

Appendix D

FCMAT

FISCAL CRISIS & MANAGEMENT
ASSISTANCE TEAM

CSIS California School Information Services

FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM STUDY AGREEMENT

February 24, 2011

The FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM (FCMAT), hereinafter referred to as the Team, and the Atascadero Unified School District, hereinafter referred to as the District, mutually agree as follows:

1. BASIS OF AGREEMENT

The Team provides a variety of services to school districts and county offices of education upon request. The District has requested that the Team provide for the assignment of professionals to study specific aspects of the Atascadero Unified School District operations. These professionals may include staff of the Team, County Offices of Education, the California State Department of Education, school districts, or private contractors. All work shall be performed in accordance with the terms and conditions of this Agreement.

In keeping with the provisions of AB1200, the County Superintendent will be notified of this agreement between the District and FCMAT and will receive a copy of the final report. The final report will be published on the FCMAT website.

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

The scope and objectives of this study are to:

The Atascadero Unified School District has requested FCMAT to develop an Interim Student Housing and Facilities Plan for the proposed construction/modernization of facilities beginning in June of the 2011-12 fiscal year. The Interim Housing and Facilities Plan should be a model that can provide interim housing either on or off site during the thirty six week school year and proposed construction time frame. The Interim Student Housing and Facilities Plan should be scalable and provide a blueprint that can be replicated for future modernization projects that are included in the District's Facilities Master Plan.

The District has successfully passed a General Obligation Bond in the amount of \$117 million dollars and anticipates eligibility and modernization funding from the Office of Public School Construction that will augment the districts bond funding.

The District's facilities and long range master plan have been significantly impacted by four major variables that will be considered in the development of an Interim Student Housing and Facilities Plan:

- The decline in student enrollment during the past decade which is projected to continue to impact the District for the next five to ten years.
- The current excess capacity as determined by the amount of unfilled seats based on student enrollment compared to the capacity of each school site.
- The aging of buildings which causes the need for renovations and infrastructure improvements.
- The changing nature of the educational programs, especially with the potential expansion of magnet/thematic schools.

The scope of work for this project in developing the Interim Student Housing and Facilities Plan will be include guiding principles that will maximize academic achievement of all students; provide a safe and orderly environment for all students and employees; include efficient and effective support operations for all students, families, teachers, and administrators; evaluate resources to address the needs of all students at the site; and maintain public confidence and strong parent/community engagement. This planning process and final recommendations should be data driven and allow for broad-based community input into the decision making process.

- 1) An evaluation of interim housing options available to the District will include an enrollment and capacity analysis for all elementary sites and include but not be limited to the following:
 - Option One: House all students at a single site designed for interim housing with a capacity of 450 students, and expandable to 550 students. Identify and analyze all district elementary sites with the potential to accommodate this option. The District's objective for this option is to house all students together during the site construction/modernization of facilities in an effort to maintain continuity in the student's academic environment and result in the least disruption to the students and parents of the school site.

- Option Two: House students by grade level in existing vacant classrooms at other district elementary schools, if capacity allows. This option should discuss the pros and cons of relocating students on a temporary basis to other sites.
 - Option Three: House students in two grade level configurations such as K-3 and 4-6, at two modified existing school sites. This option should discuss the pros and cons of relocating students on a temporary basis to other sites while developing alternative grade level configurations.
 - Option Four: House students at a single existing school site through the use of the year around school concept and split schedules.
 - Option Five: Review the priority of facility projects identified in the District's Facility Master Plan to determine if there are other interim housing options that could be made available by changing the sequence or order of all the district's projects or any other options not referenced above.
- 2) An evaluation of the cost of each option including impact on student academics, classroom instruction, special education, transportation, food service, extra-curricular activities, maintenance, safety, administration, supervision, traffic flow, implementation time lines, etc; should be included with all recommendations provided by the FCMAT Team.

B. Services and Products to be Provided

- 1) Orientation Meeting - The Team will conduct an orientation session at the School District to brief District management and supervisory personnel on the procedures of the Team and on the purpose and schedule of the study.
- 2) On-site Review - The Team will conduct an on-site review at the District office and at school sites if necessary.
- 3) Exit Report - The Team will hold an exit meeting at the conclusion of the on-site review to inform the District of significant findings and recommendations to that point.
- 4) Exit Letter - The Team will issue an exit letter approximately 10 days after the exit meeting detailing significant findings and recommendations to date and memorializing the topics discussed in the exit meeting.

- 5) Draft Reports - Sufficient copies of a preliminary draft report will be delivered to the District administration for review and comment.
- 6) Final Report - Sufficient copies of the final study report will be delivered to the District administration following completion of the review.
- 7) Follow-Up Support – Six months after the completion of the study, FCMAT will return to the District, if requested, to confirm the District’s progress in implementing the recommendations included in the report, at no cost. Status of the recommendations will be documented to the District in a FCMAT Management Letter.

3. PROJECT PERSONNEL

The study team will be supervised by Anthony L. Bridges, CFE, Deputy Executive Officer, Fiscal Crisis and Management Assistance Team, Kern County Superintendent of Schools Office. The study team may also include:

<i>A. Diane Branham</i>	<i>FCMAT Fiscal Intervention Specialist</i>
<i>B. Eric D. Smith</i>	<i>FCMAT Consultant</i>
<i>C. Leigh Coop</i>	<i>FCMAT Consultant</i>
<i>D. To be determined</i>	<i>FCMAT Consultant</i>

Other equally qualified consultants will be substituted in the event one of the above noted individuals is unable to participate in the study.

4. PROJECT COSTS

The cost for studies requested pursuant to E.C. 42127.8(d) (1) shall be:

- A. \$500.00 per day for each Team Member while on site, conducting fieldwork at other locations, preparing and presenting reports, or participating in meetings.
- B. All out-of-pocket expenses, including travel, meals, lodging, etc. The District will be invoiced at actual costs, with 50% of the estimated cost due following the completion of the on-site review and the remaining amount due upon acceptance of the final report by the District.

Based on the elements noted in section 2 A, the total cost of the study is estimated at \$15,000.

- C. Any change to the scope will affect the estimate of total cost.

Payments for FCMAT services are payable to Kern County Superintendent of Schools - Administrative Agent.

5. **RESPONSIBILITIES OF THE DISTRICT**

- A. The District will provide office and conference room space while on-site reviews are in progress.
- B. The District will provide the following (if requested):
- 1) A map of the local area
 - 2) Existing policies, regulations and prior reports addressing the study request
 - 3) Current or proposed organizational charts
 - 4) Current and two (2) prior years' audit reports
 - 5) Any documents requested on a supplemental listing
 - 6) Any documents requested on the supplemental listing should be provided to FCMAT in electronic format when possible.
 - 7) Documents that are only available in hard copy should be scanned by the district and sent to FCMAT in an electronic format.
 - 8) All documents should be provided in advance of field work and any delay in the receipt of the requested documentation may affect the start date of the project.
- C. The District Administration will review a preliminary draft copy of the study. Any comments regarding the accuracy of the data presented in the report or the practicability of the recommendations will be reviewed with the Team prior to completion of the final report.

Pursuant to EC 45125.1(c), representatives of FCMAT will have limited contact with pupils. The District shall take appropriate steps to comply with EC 45125.1(c).

6. **PROJECT SCHEDULE**

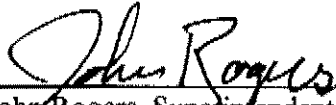
The following schedule outlines the planned completion dates for key study milestones:

<i>Orientation:</i>	<i>to be determined</i>
<i>Staff Interviews:</i>	<i>to be determined</i>
<i>Exit Interviews:</i>	<i>to be determined</i>
<i>Preliminary Report Submitted:</i>	<i>to be determined</i>
<i>Final Report Submitted:</i>	<i>to be determined</i>
<i>Board Presentation:</i>	<i>to be determined</i>
<i>Follow-Up Support:</i>	<i>If requested</i>

Name of contact person: Stuart Stoddard, Director of Support Services

Telephone: (805) 462-4243 FAX: (805) 462-4295


E-Mail: sstoddard@atas.k12.ca.us



John Rogers, Superintendent
Atascadero School District

~~2-24-2011~~ 3-7-2011

Date



Anthony L. Bridges, CFE
Deputy Executive Officer
Fiscal Crisis and Management Assistance Team

February 24, 2011

Date