

Developing and Planning for a 2016 School Facilities Bond



Board Workshop

Prepared by District Staff and Bond Team

September 3, 2015

Workshop Objectives

- ❑ Provide clarity on roles and responsibilities
- ❑ Identify future decision points and related issues
- ❑ Specify deliverables and necessary data
- ❑ Initiate development of timeline and decision making process



Discussion Points

- Overview and background
- Roles and responsibilities
- Community and stakeholder engagement
- Decision points and deliverables
- Timelines, planning, decision making process



The District's Bond Planning Team

- Superintendent, Assistant Supt., Director M/O/T
- Election Planning - TBWB (Jared Boigon/Amanda Sintes)
- Pollster – Goodwin/Simon (Paul Goodwin)
- Architect / PM – Bartos Architectures, Inc. (Mark Bartos)
- Municipal Advisor – NHA Advisors (Craig Hill)
- Bond Counsel – Jones Hall (Chick Adams)

Board of Trustees
Community
School sites
Teachers and staff
Cabinet staff
Program directors

Overview of District's Facility Program

- Measure C 1998 - \$95 million

- Measure G 2006 - \$ 90 million

- State grants 1999-2006
 - Facility modernization
 - \$35 million

- State funding approved 1999-2006
 - Approx. \$25 million
 - For modernization and CTE
 - Three CTE projects will be launched in Spring/Summer 2016
 - Requires district match - 50%

Summary of facility program:

**Robust
Comprehensive
Sustained
Strategic
Strong community support**



District's Current Bonding Capacity

□	Outstanding Balance of General Obligation Bonds	\$147 million
□	Legal Bonding Capacity	\$497 million
□	Available Legal Bonding Capacity	\$350 million
□	Bonding Capacity Given Prop 39 Limitation	\$200-\$250 million



Status of Initial Planning

- ❑ Secured contracts with community engagement firm (TBWB) and pollster (Goodwin)
- ❑ Board workshop and site meetings held in the spring 2015
- ❑ Work / analysis initiated on Need Assessment and Facility Master Plan
- ❑ Necessary financial analysis initiated
- ❑ District and Bartos have begun initial site analysis
- ❑ Developing integrated and multi-disciplinary staff team



Roles and Responsibilities

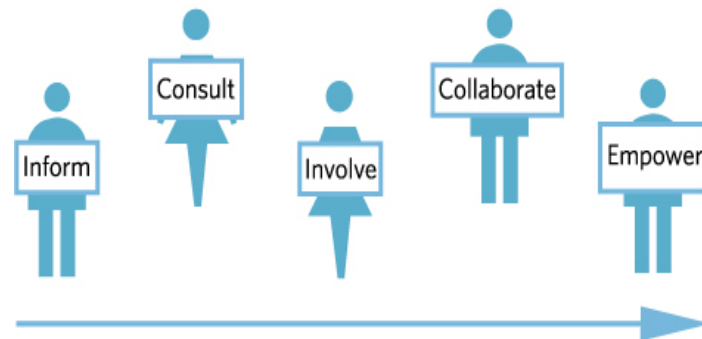
Involvement of all parties is key to success

- The Board of Trustees
- Superintendent, Assistant Superintendent, District Staff
- Consultants
- School sites and programs – administrators, teachers, staff
- Students, community, parents, and taxpayers

Community and Stakeholder Engagement

Comprehensive public engagement plan is critical to success

- ❑ Public engagement mail
- ❑ Online engagement email
- ❑ Site meetings with Teachers / staff
- ❑ PTSA's
- ❑ Boosters
- ❑ Voter survey / poll
- ❑ Community meetings
- ❑ Meetings with feeder districts
- ❑ Workshops and updates to Board of Trustees
- ❑ Incorporating input and feedback into bond language





Decision Points and Deliverables

- Capturing community, stakeholder, and voter survey input
- Draft and final Facility Master Plan and Needs Assessment
- Financial data
- Bond language and project list
- Determining scope, theme, objectives of the bond

Resolution Calling the Election

- Board must adopt a resolution calling the election
- 75-Word Ballot Measure specified
- Accountability Requirements, including Oversight Committee
- Bond Project List
 - ◆ Specifies projects and facilities which are eligible for bond expenditure
 - ◆ Should not be overly specific and detailed
 - ◆ Should provide flexibility for unforeseen future needs
 - ◆ Should not indicate priority
 - ◆ If subject to State funding, must so provide



Facility Assessment and Master Plan

- **Spring Semester 2015**
 - Initial site review and preliminary project lists
 - Initial Site Stakeholder Meetings. Faculty and Parent Groups
 - May Board Presentation

- **Summer 2015**
 - Detailed on site review by Architects and Consultants
 - Master Plan Continued Development
 - State Eligibility Study. Enrollment Study.(Dolinka)

- **Fall Semester 2015**
 - Second Site Stakeholder Meetings. Faculty/Parent Groups
 - Site “open house” workshops
 - October Board Workshop / Draft Master Plan

- **Winter 2015**
 - Master Plan Adoption (anticipated)

June 2016 Bond Timeline



- Poll
- Election timing
- Tax rate
- Projects
- Political landscape
- Competing issues
- Potential controversy

- Write resolution
- Ballot question
- Non-advocacy communication
- Consensus building
- Board vote

- Private fundraising
- Direct mail
- Website
- Endorsements
- Phone banks
- Lawn signs
- GOTV

Telephone Survey Purposes

- ❑ Track changes over time in attitudes about the District and its need for additional funding
- ❑ Assess support for bond at different expenditure and tax levels
- ❑ Prepare optimal ballot title and summary
- ❑ Identify voter priorities for use of bond funds
- ❑ Ascertain potential concerns about the bond
- ❑ Inform optimal communications strategy





Next steps

- Visit sites; meet with staff
- Scientific survey of voters
- Initiate broader stakeholder engagement, including online feedback
- October: Board update
 - Survey results
 - Review draft Master Plan



Thank you

For More Information:

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