

2018 Facility Master Plan Proposed Phase 1 Plan of Action

Carlsbad Unified School District Board of Trustees
November 14, 2018
Agenda Item 8.5

Tonight's Agenda

1. Fiscal Plan
2. Implementation Overview
3. Design and Stakeholder Input Process
4. Implementation Criteria
5. Projects and Timelines
6. Next Steps



Fiscal Plan



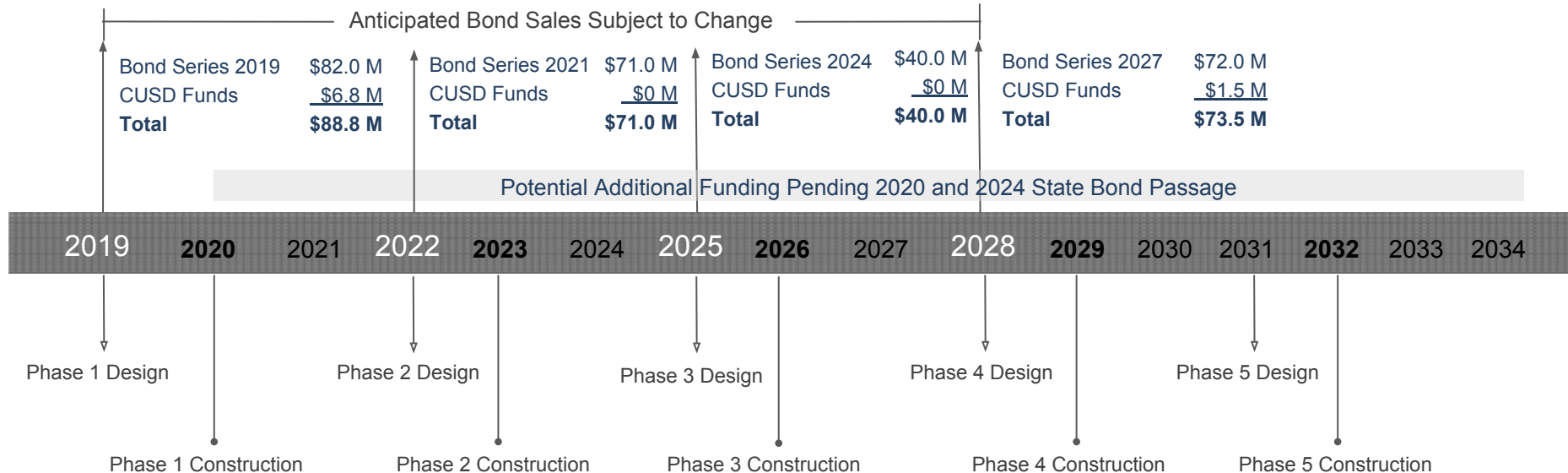
- Issue four series of bonds totalling \$265 million
 - \$82 million 2019 (spring)
 - \$71 million 2021
 - \$40 million 2024
 - \$72 million 2027
- Program start up costs
 - Leverage CUSD funds (CFD, Developer Fees) in the beginning of the Bond Program to pay for design related soft costs until bonds are sold
- Aggressively pursue state matching funds for eligible projects
 - CASH is proposing statewide facility bonds in 2020 and 2024
- Apply for available grants (CTE) and incentives (SDG&E)
- Restore Phase 5 work as funds become available

Fiscal Plan

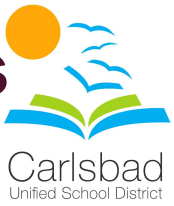
- Bond assumptions
 - No Capital Appreciation Bonds (CABs)
 - Each bond series is up to 30 years in duration
 - Lifespan of the item matches the term of the bond
 - Tax Rate \$34 per \$100,000 Assessed Value
- Variables impacting implementation
 - Bond proceeds dependent on assessed values and market rates
 - Availability of state matching funds
 - Availability of CUSD funds
 - Construction market saturation
 - Escalation rates
 - Tariffs
 - Prevailing wage rate increases

Implementation Overview

Proposed 15 Year Construction Program



Phase 1 Design and Stakeholder Input Process



Step 1

Architects begin with project scope and design per 2018 FMP

Step 2

Architects create initial design with rendering

Step 3

Site, community, Board:
Opportunities to provide feedback and input

Step 4

Architects adjust design and rendering

Step 5

Final design and rendering presented to
the Board

Build

Construction begins

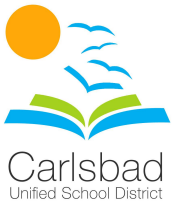


Post DSA approved plans
and renderings to web
pages; include QR/VR
viewing capability

Implementation Criteria

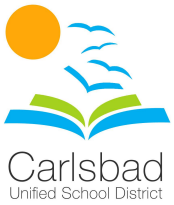
- Address older school facilities and aging portables and infrastructure
 - Magnolia, Hope, Kelly for modernization
 - CHS science building and chiller plant
 - Buena Vista, Pac Rim, Poinsettia for portable removal/replacement
- Address safety and security
 - Install wrought iron perimeter fencing, keyless entry locks, security cameras, visitor sign-in system, emergency lockdown system, first responder knox boxes
- Address energy efficiency and sustainability
 - Install battery storage and solar panel systems
 - Districtwide implementation
- Address need for STEAM Labs
 - Flexible learning spaces with ubiquitous technology
 - Magnolia, Hope, Kelly, Pacific Rim, Poinsettia, Buena Vista
- Criteria are from the 2018 FMP

Magnolia Project



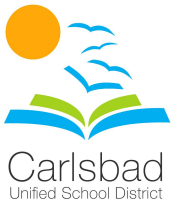
- Full campus renovation
 - Interior renovation, HVAC, restrooms, painting, natural light
 - Expanded parking, parking lot solar structures and battery storage
 - STEAM lab
 - Expansion of core facilities
 - Improved entryway, flow and security
 - Shaded/solar outdoor learning spaces, play structures and lunch shelters
 - Removal of Sanderling relocatables
 - Turf fields and running track
 - Removal and replacement of portables
 - Increased enrollment
- Total budget \$20,448,419
- Ruhnau Clarke assigned as the architect
- Interim housing on joint use field

Hope Project



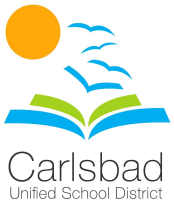
- Full campus renovation
 - New classroom buildings
 - Expansion of library and core facilities
 - New MPR and kitchen
 - Interior renovation, HVAC, restrooms, painting, natural light
 - STEAM lab
 - Rooftop solar, parking lot solar structures and battery storage
 - Improved entryway and security
 - Shaded/solar outdoor learning spaces, play structures and lunch shelters
 - Removal and partial replacement of portables
 - Increased enrollment
- Total budget \$27,749,781
- Rachlin Partners assigned as the architect
- Interim housing on field

Kelly Project



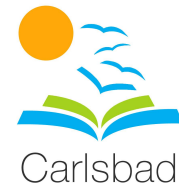
- Full campus renovation
 - New classroom building
 - New library, MPR and kitchen
 - Interior renovation, HVAC, restrooms, painting, natural light
 - STEAM lab
 - Expanded parking and parking lot solar structures
 - Rooftop solar and battery storage
 - Improved entryway and security
 - Shaded/solar outdoor learning spaces, play structures and lunch shelters
 - Removal and replacement of portables
 - Turf fields and running track
 - Increased enrollment
- Total budget \$12,687,075
- LPA assigned as the architect
- Interim housing on field

CHS Science Building & Chiller Project



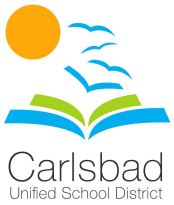
- Science building renovation
 - Complete interior renovation and exterior painting
 - HVAC
 - Restrooms
 - Natural daylight
 - Cabinetry replacement
 - Technology infrastructure
 - Roof garden
 - Interim housing
- Chiller Plant
 - Systemwide improvements
 - Construct system redundancies
 - Replace heat pumps and fan coils
- Total budget \$8,000,000
- Lionakis assigned as the architect

Lease-Leaseback (LLB) Project Timeline



Target Date	Milestone	Design & Input Step
November 15, 2018	Publish RFQ/P for LLB (Magnolia, Hope, Kelly, CHS Science/Chiller)	Step 1 & 2: Architects begin with project scope & design per 2018 FMP; initial design with rendering
January 2019	Board approval for preconstruction services	
January 2019	LLB contractor, HazMat testing firm, CEQA and environmental consultant joins team meetings	
February 2019	Stakeholder meetings: Site & parents	Step 3: Site, community, Board: feedback and input
	Board feedback	
March 2019	Re-draw site plan	Step 4: Architects adjust design and rendering
May 2019	Final schematics	
	Bridging documents complete, Board approval of PGMP	
	Present to Board	Step 5: Final design & rendering presented to the Board
June 2019	Final drawings - DSA submittal	
February 2020	DSA approval	
March 2020	Board approval of Final Guaranteed Maximum Price (FGMP) and construction phase scheduling	Build
June 2020	Start construction	
July 2022	Construction complete, NOC filed, DSA certification	
May 2023	Warranty PL walk	
July 2023	Warranty period complete	

Security Projects

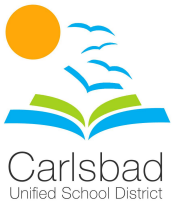


- Quickstart projects
- Install fencing
 - 8 foot wrought iron and/or concrete perimeter and interior fencing
 - Magnolia, Kelly, BV, Valley perimeter fencing currently in bidding process
 - Pac Rim, Poinsettia, Calavera Hills & Carlsbad HS
- Visitor sign-in system
 - Committee recommendations made
 - Pilot Lobby Guard system at Magnolia
 - Implement a standard system districtwide pending pilot
- Security cameras
 - Committee to review and recommend a standard scope for CUSD
- First responder knox boxes
- Keyless entry locks and emergency lockdown system - installed during site modernization
- Total Budget \$2,608,673

Security Timeline

Target Date	Milestone	Design & Input Step
January 2019	HazMat testing firm, CEQA and environmental consultant joins team meetings if needed	Step 1 & 2: Architect design
January 7, 2019	Stakeholder meetings: Site & parents	Step 3: Site, community, Board: feedback and input
	Board feedback	
February 2019	Re-draw site plan	Step 4: Architects adjust design and rendering
March 2019	Final schematics	
	Present to Board	Step 5: Final design & rendering presented to the Board
April 2019	Final drawings - DSA submittal	
August 2019	DSA Approval, Publish RFB	
September 2019	Start construction	Build
September 2020	Construction complete, NOC filed, DSA Certification	
May 2021	Warranty PL walk	
September 2021	Warranty period complete	

Sustainability Projects

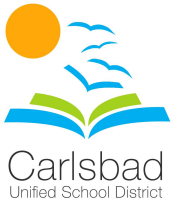


- Quickstart project
- Schneider Electric to perform Investment Grade Audit
 - CA Governing Contract Code 4217
 - Feasibility Study
 - Scope for rooftop solar, parking lot solar, battery storage districtwide
 - Identify supporting work required (concrete, asphalt, etc.)
 - Review recent utility bills to determine current demand
 - Quantify costs and potential savings
 - Energy Analysis
 - How much energy we use and where we use it
 - Identify areas to decrease/maximize energy usage to right size scope
 - Final construction contract
 - Sizing of battery storage and solar
 - Final construction scope, price, savings, incentives, schedule, delivery method
 - Construction sequencing aligned with bond program planning
- Total Budget \$6,504,132

Sustainability Timeline

Target Date	Milestone	Design & Input Step
January 2019	Board approval for Investment Grade Audit services and kickoff meeting with construction staff	Step 1 & 2: Architects begin with project scope & design per 2018 FMP; initial design with rendering
January 2019	HazMat testing firm, CEQA and environmental consultant joins team meetings, if needed	
March 2019	Present feasibility-level site options	
	Stakeholder meetings: Site & parents	Step 3: Site, community, Board: feedback and input
	Board feedback	
April 2019	Re-draw site plans	Step 4: Architects adjust design and rendering
May 2019	Present to Board final schematics: construction scope, price, savings, schedule	Step 5: Final design & rendering presented to the Board
	Board approval	
June 2019	Final drawings - DSA submittal	
December 2019	DSA approval	
January 2020	Start construction	Build
January 2021	Construction complete, NOC filed, DSA certification	
August 2021	Warranty PL walk	
January 2022	Warranty period complete	

Quickstart Portable & STEAM Lab Project



Buena Vista

- Remove and replace 5 portables
- Add two portables for STEAM Lab

Pacific Rim

- Add two portables for STEAM Lab

Poinsettia

- Add three portables
- Add two portables for STEAM Lab

Portable project summary

- Budget \$2,250,000
- Alpha Design assigned as architect

STEAM Lab project summary

- Budget \$1,000,000
- LPA assigned as architect

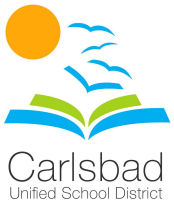
Portable Timeline, Phase 1

Target Date	Milestone	Design & Input Step
January 2019	HazMat testing firm, CEQA and environmental consultant joins team meetings if needed	Step 1 & 2: Architect design
January 2019	Stakeholder meetings: Site & parents	Step 3: Site, community, Board: feedback and input
	Board feedback	
February 2019	Re-draw site plan	Step 4: Architects adjust design and rendering
March 2019	Final schematics	
	Present to Board	Step 5: Final design & rendering presented to the Board
April 2019	Final drawings - DSA submittal	
August 2019	DSA approval, publish RFB	Build
September 2019	Start construction	
August 2020	Construction complete, NOC filed, DSA certification	
April 2021	Warranty PL walk	
August 2021	Warranty period complete	

STEAM Lab Timeline, Phase 1

Target Date	Milestone	Design & Input Step
February 2019	Preliminary design	Step 1 & 2: Architect design
March 2019	Stakeholder meetings: Site & parents	Step 3: Site, community, Board: feedback and input
	Board feedback	
May 2019	Re-draw site plan	Step 4: Architects adjust design and rendering
July 2019	Final schematics	
	Present to Board	Step 5: Final design & rendering presented to the Board
August 2019	Final drawings - DSA submittal	
February 2020	DSA approval, publish RFB	Build
June 2020	Start construction	
January 2021	Construction complete, NOC filed, DSA certification	
April 2021	Warranty PL walk	
June 2021	Warranty period complete	

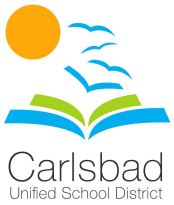
Next Steps



RFQ/RFP/RFB Timelines

Projects/Services	Bid Opening Date	Bid Closing Date	Board Approval Date
FAC1819-07, LLB Magnolia ES Modernization	November 15, 2018	December 3, 2018	January 2019
FAC1819-09, LLB Kelly ES Modernization	November 15, 2018	December 3, 2018	January 2019
FAC1819-10, LLB Hope ES Modernization	November 15, 2018	December 3, 2018	January 2019
FAC1819-17, LLB CHS Chiller & Science Building Modernization	November 15, 2018	December 3, 2018	January 2019
Pre-Qualification for California Environmental Quality Act (CEQA) Services	November 15, 2018	December 3, 2018	January 2019
Pre-Qualification for Hazardous Material Testing, Monitoring and Inspection Services	November 15, 2018	December 3, 2018	January 2019
Pre-Qualification for Environmental Consulting Services	November 15, 2018	December 3, 2018	January 2019
FAC1819-18, Districtwide Energy Efficiency and Sustainability	NA	NA	January 2019

Next Steps



RFQ/RFP/RFB Timelines

Projects/Services	Bid Opening Date	Bid Closing Date	Board Approval Date
Pre-Qualification for On-call Project Support Services	February 1, 2019	Late February 2019	March 2019
Pre-Qualification for Division of the State Architect Project Inspection Services	February 1, 2019	Late February 2019	March 2019
Pre-Qualification for Material Testing & Inspection Laboratory of Record Services	February 1, 2019	Late February 2019	March 2019
RFB/RFP for Districtwide Safety & Security Modernization	August 1, 2019	Mid - Late August 2019	September 1, 2019
RFB Portable Classroom Removal & Replacements at Various School Sites	August 1, 2019	Late August 2019	September 2019
RFB STEAM Labs at Various School Sites	February 1, 2020	Late February 2020	March 2020

Next Steps



- Oversight Committee

- Board to adopt resolution establishing the Measure HH Oversight Committee and approve bylaws
- Board to adopt resolution entering the election results into the minutes of the Board
 - Triggers 60 day window to form and populate the HHOC
 - Can merge PPOC and HHOC

- Bond website update

- Bond Program staffing supports

- Bond Accountant/Analyst (AP, Budget, data)
- Administrative Assistant
- Project/construction managers as needed (contract)

Questions and Discussion

