

CAPISTRANO UNIFIED SCHOOL DISTRICT
BOARD REPORT

To: Board of Trustees

From: Clark Hampton, Deputy Superintendent, Business and Support Services

Prepared by: John Forney, Chief Facilities Officer, Facilities Planning

Date: December 16, 2020

Board Item: Second Reading – Board Policy 7100, *Determining Needs*

HISTORY

The *Determining Needs* Board Policy is an essential resource that aligns with the Facilities Master Plan to ensure proposed District facilities meet the educational needs of the students and conform to all planning requirements imposed by state and local governmental agencies.

BACKGROUND INFORMATION

Board Policy 7100, *Determining Needs* was last revised on January 8, 1996 and is in need of alignment with updated federal and state requirements regarding new school planning and design.

CURRENT CONSIDERATIONS

Facilities Planning staff researched Board policies from other districts as well as from California School Boards Association (CSBA) and aligned the revised *Determining Needs* Board Policy with updates to comply with current federal, state and local government agencies. CSBA has recommended that our current Board Policies 7120 *Participation in Planning*, and 7140 *Relations with the Public* be eliminated as separate policies and the language added to the *Determining Needs* Policy to better align with how needs are determined. The Board policy number and the 7000 Board policy series title is being updated. Staff incorporated recommended changes from Trustees from the first reading on October 21, 2020.

FINANCIAL IMPLICATIONS

There is no financial impact.

STAFF RECOMMENDATION

District staff recommends the Board of Trustees approve the Second reading of Board Policy 7100, *Determining Needs*.

PREPARED BY: John Forney, Chief Facilities Officer, Facilities Planning

APPROVED BY: Clark Hampton, Deputy Superintendent, Business and Support Services

~~New Construction~~ Facilities

BP 71400(a)

DETERMINING NEEDS

The Superintendent or designee ~~shall~~may maintain planning procedures for school facilities. These procedures ~~shall~~may serve as the basis for determining facility needs that will enhance the District educational program. Accordingly, criteria for determining these needs ~~shall~~may reflect the goals and objectives of the District Facilities Master Plan.

The Superintendent or designee ~~shall~~may draw upon all necessary resources to assure that proposed District facilities meet the educational needs of the students and conform to all planning requirements imposed by state and local governmental agencies. These resources ~~shall~~may include District staff, educational consultants, architectural and engineering firms, utility companies, local governmental and planning agencies, the County Department of Education, the California Department of Education, the Division of the State Architect, and the Office of Public School Construction.

To assure a comprehensive approach to projecting and planning needs, the following elements ~~shall~~may be considered in planning school facilities and are not in priority order:

1. The expanding and changing educational program of the District including the number of children to be served and their specific educational needs

2. The District's Guiding Goals and Principles

2.3. The impact of proposed facilities on the community and considerations regarding community use of the facilities

3.4. Safety and welfare of students

4.5. The relationship between existing and new facilities

5.6. Community planning and zoning requirements

6.7. Other site specific information which provides guidance in the planning of facilities

7.8. Optimum number of schools opening, modernizing, re-purposing, changing grade level configuration, refurbishing or closing

Optimum Number of Schools, Opening, Modernizing, Re-Purposing, Changing Grade Level Re-Configuration, Refurbishing or Closing

~~The goal of the District shall is~~ be to operate an optimum number of schools at each level: elementary, middle and high. The optimum number of schools for a given level is defined as the number of schools necessary to theoretically serve all students at a school of the targeted average enrollment. For example:- the (total enrollment for a given level divided by the targeted average school enrollment at that level). This goal shall may receive primary consideration in determining the need to open, refurbish or close a school modify an existing school.

DETERMINING NEEDS ~~(NEEDS~~ (continued)

BP 7100(b)

The annual review of the District's Facilities Master Plan ~~shall~~ may include uploaded information regarding the number of schools operated at each level compared to the optimum number of schools, and ~~shall~~ may address the need to open, modernize, re-purposesize, grade level configuration changes~~refurbish~~ or close schools. Objective criteria ~~shall~~ may be established to determine the conditions under which a school ~~shall~~ may be considered for such ~~opening, refurbishing, or closing~~ modifications.

The families of students attending an aging school that is determined by the Board to no longer be a candidate for ~~refurbishment~~ modernization, ~~shall~~ may be given notice of such determination within a reasonable time.

The families of students attending a school that is a candidate for closure, ~~shall~~ may~~shall~~ be informed of such consideration at least 12-months prior to the start of the ~~following~~one school year~~prior to the school closure~~ in which the schools' prospective closure is to take place. Does not apply to emergency situations that affect health and safety students and staff.

Objective criteria are established to determine the conditions under which a school ~~shall~~ may be considered a candidate for opening, (re-opening), modernization, re-purpose, grade level configuration changes ~~refurbishing, or closing~~.

Opening ~~an Elementary, or Middle School or High a~~ School

Consideration may be given to opening (or re-opening) a school, when one or more of the following conditions is met:

1. The actual number of schools at a given level is fewer~~less~~ than the optimum number of schools at that level;
2. The residential community to be served is not located within the ~~maximum radius~~suggested routes or close proximity of existing school(s), and the anticipated peak enrollment exceeds the targeted average enrollment for the school under consideration;
3. The residential community to be served is located within ~~the maximum radius~~close proximity of existing school(s); however, the existing school(s) is/are unable to accommodate the anticipated peak enrollment, or the anticipated peak enrollment from the residential community to be served exceeds the targeted school average enrollment;
4. The proposed school site is located within ~~the maximum radius~~close proximity of an existing school or schools, but those existing site(s) are determined to need substantial maintenance within the next 3 to 5 years and are not candidates for further investment;
5. The proposed school is capable of supporting larger, more flexible facilities with more cost-effective class enrollments and can be located on a site that has sufficient acreage and is easily accessible.

DETERMINING NEEDS (NEEDS (continued))

BP 7100(c)

Refurbishing Modernization of a School

Modernizations are infrastructure improvements that extend the useful life of, or enhance the physical environment of, the school which may include but not limited to roof replacement, HVAC replacement, utility infrastructure replacement, space reconfigurations, structural, fire life safety and accessibility improvements.

Consideration may be given to refurbishing-modernization or re-purposing of (or reconstructing) a school, when one or more of the following conditions is met:

1. The actual number of schools at a given level is fewerless than the optimum number of schools at that level;
2. The school facility serves a residential community that is beyond the maximum radiusclose proximity of another school and has an anticipated projected or actual enrollment that exceeds the targeted average school enrollment;
3. The school facility sits within the maximum radiusclose proximity of a residential area that is already served by other schools, but those schools do not each enroll the targeted average number of students, and the facility to be refurbished has sufficient acreage and a satisfactory location with which to consolidate students from the nearby under-utilized schools that may be candidates for closure;
4. The school facility serves a residential area that could also be served by a new school in a new development within the same residential area; however,
 - The existing site has been classified as a candidate for refurbishment-modernization because of its location, acreage, funding, access, transportation routes, or other key quality and functionality criteria that make it a better choice for the community than the new site; and
 - A workable refurbishment-modernization plan can be created and implemented, and the plan addresses student housing needs during construction;
5. The school facility provides the opportunity for serving alternative programs and optimum school choice within the overall mix of District school options.

Closing an Elementary, or Middle or High a School

The Superintendent or designee is authorized to close any of the District's educational facilities when, in the opinion of the Superintendent or designee, the physical welfare of the students and/or staff on that site can no longer be reasonably assured.

Prior to Board consideration of a recommendation to close a school, a comprehensive analysis of identified impacts must be conducted. Prime consideration is given when all early warning indicators, 1-5, are met:

DETERMINING NEEDS ~~(NEEDS~~ (continued)

BP 7100(d)

1. The actual number of schools at a given level exceeds the optimum number of schools at that level;
2. The projected or actual enrollment from the assigned attendance area of a given school is fewerless than half the targeted school average enrollment, or the overall enrollment is fewerless than 75% of the targeted school average enrollment;
3. The projected or actual enrollment from the assigned attendance area of a given school can be accommodated at nearby schools while observing District policies on school size and reasonable proximity.
4. The necessary capacity to serve students from the assigned attendance area of a given school can be created at schools within ~~the maximum radius~~close proximity of the residential area (or the assigned attendance area), if necessary, by some combination of factors such as, but not limited to:
 - Changing attendance boundaries
 - Returning students from outside the attendance boundaries to assigned attendance area school
 - Adding additional seating capacity
 - Relocating special district programs.
5. The projected benefit to the general fund is significant either through reduced expenditure or increased revenue.

An additional prime consideration is also given when the following condition is met:

The school has been classified as a site in need of substantial maintenance within the next 3 to 5 years and is not a candidate for ~~refurbishment~~-modernization or re-purpose~~construction~~ based on restrictive location, limited acreage, excessive funding requirements, limited access, undesirable transportation routes or other key quality or functionality criteria.

Participation in Planning

Procedures ~~shall~~may be maintained that ensure members of the school community including staff, parents/guardians, students, and business and community representatives are given the opportunity to provide input into the planning process.

DETERMINING ~~NEEDS~~-(NEEDS (continued)

BP 7100(e)

Consultants and other appropriate resource personnel from state and local agencies ~~may shall~~ be initiated into the planning process in accordance with state law, and in those instances where such consultation will benefit an effective planning process.

Assistance from colleges and universities, planning laboratories, and private consulting firms ~~shall may~~ be authorized when necessary to augment District staff resources.

Relations ~~Withwith~~ The Public

The Board of Trustees acknowledges its responsibility to keep the public informed as to the need for new facilities, or renovating, remodeling and modernizing existing facilities. The Board also pledges to keep the public informed as to the use of any and all funds for school facilities.

The Superintendent or designee will provide information to the public through such means as the Board deems necessary and desirable.

Legal Reference: (See next page)

DETERMINING NEEDS—(NEEDS (continued))

BP 7100(f)

*Legal Reference:*EDUCATION CODE35160 Authority of Governing Boards, commencing January 1, 1976*35275 New school planning and design (re cooperative relations with recreation and park authorities)*39101 Powers concerning building and building sites*39110-39116 Plans of schoolhouses*39140-39159 Approval of plans and supervision of construction*39148 Persons qualified for the preparation of plans, specifications, and estimates and the supervision of construction**39150 Approval in writing from Department of General Services (construction or alteration of school facilities)**39158 Requirement for SD approval**39159 Contract provision required making plans etc. property of District**39210-39230 Fitness for occupancy*CODE OF REGULATIONS, TITLE 5*14030(c) Prepare educational specifications**14031 Submission to bureau of school facilities planning**14032 Plan approval**14033 Planning guides "The Guide for Planning Educational Facilities"*

Policy

Adopted: January 8, 1996

Revised: XXXXXXXXX

CAPISTRANO UNIFIED SCHOOL DISTRICT

San Juan Capistrano, California