



# REGISTER

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THE NEWSLETTER OF THE COALITION FOR ADEQUATE SCHOOL HOUSING

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## *Asset Management – Theme of the Pre-Conference Workshop and Spring Conference*

This year's C.A.S.H. Spring Conference and Pre-Conference Workshop focused on Asset Management and Shifting Enrollment.

On Tuesday, May 10, over 80 school districts, county offices of education and associate members turned out for the Pre-Conference workshop. The half-day workshop agenda covered the following topics:

- *Master Planning and Enrollment Projections* presented by Kathy Tanner and Katy Wright, Sweetwater Un. HSD
- *Managing Your Assets* presented by Dan Santo, California Financial Services
- *Legal Issues* presented by Doug Yeoman, Parker and Covert LLP
- *Surplus Real Property Issues* presented by Wendy Wiles, Bowie Arneson Wiles & Giannone
- *A Case Study on Public Relations* presented by Leigh Coop, Vacaville USD

This workshop was very well-received by attendees. Many evaluations stated that the information was valuable and that it could be used by their district.

Thank you to all of the presenters for making this workshop a success. For

copies of the handouts from this workshop, please visit the C.A.S.H. web site at [www.cashnet.org](http://www.cashnet.org).

On Wednesday, May 11 the Spring Conference was kicked off with a warm welcome by C.A.S.H. Chair, Pamela T. Johnson. Bill Savidge, West Contra Costa USD, moderated the day's General Session. The morning session encompassed the following topics:

- *Overview of the Pre-Conference Workshop* presented by Jim Bush, School Site Solutions
- *State Agencies' Case Studies on Asset Management/Shifting Enrollment Issues* presented by:
  - o Kathleen Moore, CDE/School Facilities Planning Division
  - o Lori Morgan, Office of Public School Construction
  - o Dennis Bellet, Division of the State Architect
- *CDE/School Facilities Planning Division Update* presented by Kathleen Moore, CDE/School Facilities Planning Division
- *Office of Public School Construction Update* presented by Luisa Park, Office of Public School Construction and Mavonne Garrity, State Allocation Board

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# Message From The Chair



Pamela T. Johnson, C.A.S.H. Chair

## C.A.S.H. Board Makes Grant Adequacy a Priority

placed the LPP with the SFP. Funding for school facilities under the SFP is based on a per-pupil grant for specified categories, plus additional costs. Funding for the LPP was provided on a project apportionment basis based on square footage per student.

At the time the SFP was developed, the legislative intent was to have the per-pupil grants under the SFP provide an amount to school districts equivalent to the new construction project allocations they received to construct new schools under the LPP. Since establishment of the SFP per-pupil grant, however, school districts have contended that the total of the per-pupil grants under the SFP is less than the project apportionment under the LPP.

To address this challenge, the C.A.S.H. Board of Directors created the C.A.S.H. Grant Adequacy Task Force, which worked with state agency staff,

local educational agency representatives, architects, construction industry representatives and others to conduct a comprehensive data-driven analysis comparing the SFP new construction per-pupil grants with the project apportionments for like projects under the LPP. The Department of Finance and legislative staff were asked to participate to provide an opportunity for their review and comment on the work of the C.A.S.H. Task Force. OPSC provided the data utilized in the study, reviewed and commented on technical information regarding the provisions regulating both the LPP and SFP, and collaborated on the appropriate data analysis methodology.

Based on the data, the Task Force concluded that at the time of the conversion from the LPP to the SFP in 1998, the per-pupil grants for all grade levels were deficient by the percentages indicated below to meet the legislative intent of providing per-pupil grants under the SFP that equate to the per-pupil project allocations school districts received to construct new schools under the LPP:

- Elementary (K-6)  
per-pupil grant ..... 7.6% deficient
- Middle (7-8)  
per-pupil grant ..... 27.1% deficient
- High School (9-12)  
per-pupil grant ..... 13.6% deficient

In response to the information developed by the C.A.S.H. Task Force, C.A.S.H. is sponsoring AB 670 (Goldberg) which would do the following:

*Continued on page 10*

When the Lease Purchase Program (LPP) was converted to the School Facility Program (SFP) in 1998, the SFP per-pupil grants were deficient and did not meet the legislative intent of providing per-pupil grants under the SFP that equated to the per-pupil project allocations under the LPP.

With the enactment of Senate Bill 50 in August 1998, the Legislature re-



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The CASH Register is published eleven times a year (January through November) by the Coalition for Adequate School Housing (C.A.S.H.) and distributed to C.A.S.H. members. Over 1,000 rapidly growing school districts, county offices of education, architects, attorneys, bond counsel, financial institutions, developers, contractors, consultants, inspectors, licensed professionals, manufacturers of portable classrooms, maintenance suppliers and others who are concerned about school construction issues hold C.A.S.H. memberships.

The CASH Register solicits articles on school facility-related topics from the membership. If you are interested in submitting an article, please send it or a letter of inquiry to: Editor, CASH Register editorial office, 1130 K Street - Suite 210, Sacramento, CA 95814. Sorry, we are unable to return or acknowledge unpublished manuscripts. The views expressed herein are those of the authors and not necessarily those of the Coalition for Adequate School Housing, its board, staff or general membership.

**Asset Management – Theme of the Pre-Conference Workshop and Spring Conference**

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During the lunch session Eric J. Hall, Immediate Past Chair, presented an award to former Senator Dede Alpert for her years of dedication and commitment to K-12 school facilities and education. He touted her as one of the best Senators to come out of the San Diego region.

The lunch session also provided attendees with a presentation by Nancy Sidhu of the Los Angeles Economic Development Department. Nancy shared her outlook on California's economic status.

The afternoon session was moderated by Nina Young, Orange County Department of Education. This session covered the following topics:

- *The Sacramento Political Scene* presented by Paul Holmes and Dave Walrath, Murdoch, Walrath & Holmes
- *Legislative Platform Overview* presented by Nina Young, Orange County Department of Education and Tom Duffy, Murdoch, Walrath & Holmes
- *AB 491 (Goldberg): Cohort Survival Methodology* presented by Lyle Smoot, Los Angeles USD
- *AB 670 (Goldberg): Grant Adequacy* presented by Dennis Dunston, HMC Architects
- *Legislative Wrap-Up* presented by Tom Duffy, Murdoch, Walrath & Holmes which encompassed the following bills:
  - o AB 539 (Daucher): Construction Cost Index, Grant Adjustments
  - o SB 327 (Lowenthal): Piggyback Contracts
  - o SB 1035 (Hollingsworth): Routine Restricted Maintenance Account

That evening, attendees were able to enjoy the great San Diego weather at an outdoor reception sponsored by several C.A.S.H. associate members. (For a list of sponsors, see page 14)



*C.A.S.H. Board Member Lettie Boggs, Nancy Sidhu, Los Angeles Economic Development Corporation and C.A.S.H. Chair Pamela T. Johnson*

Thursday morning's session was moderated by Janet Dixon, Riverside USD. This session focused on topics surrounding Williams issues and state agency updates:

- *Williams Issues: The COE/LEA Perspective* presented by the following:
  - o Cathy Allen, Placer COE
  - o Bob Nicholson, San Diego COE
  - o Gerald Yarbrough, Los Angeles COE
- *ACLU Perspective on Williams* presented by Brooks Allen, ACLU
- *Division of the State Architect*

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*C.A.S.H. Immediate Past Chair Eric J. Hall and former Senator Dede Alpert*



*Lori Morgan, Office of Public School Construction and Dennis Bellet, Division of the State Architect*

# Legislative Update

## **C.A.S.H.-Sponsored Legislation**

### **AB 670 (Goldberg) – State Grant Amounts**

AB 670, which would increase the state grant amounts, was heard by the Assembly Appropriations Committee on May 25. The grant amounts that C.A.S.H. proposed for new construction and modernization are:

#### **NEW CONSTRUCTION**

Elementary: ..... \$7,283  
Middle: ..... \$9,099  
High: ..... \$10,647

#### **MODERNIZATION**

Elementary: ..... \$3,146  
Middle: ..... \$3,930  
High: ..... \$4,598

The grant amounts that C.A.S.H. currently is proposing for modernization are 43.19% of the proposed new construction grant amounts, which maintains the current statutory ratio between the modernization and new construction grants.

**Status: Two-year bill**  
**Position: Support**

### **AB 491 (Goldberg) – Cohort Survival Methodology**

AB 491 would allow a district to use one of three enrollment projection methodologies, including the current available methodology for determining eligibility to participate in the School Facility Program (SFP). A district may opt to use current enrollment data or countywide birthrates for its kindergarten cohort factor. AB 491 passed out of the Assembly.

**Status: Senate**  
**Position: Support**

## **Key Facilities Legislation (in house and bill number order)**

### **AB 58 (Nuñez) – Statewide School Facilities Bond**

AB 58 would enact the Kindergarten - University Public Education Facilities Bond Act of 2006 and authorizes, upon approval of the California electorate on November 7, 2006, the issuance of state general obligation bonds. We believe that this legislative vehicle will be significantly amended next year to include many of the unfunded school facilities issues commonly discussed by our membership.

**Status: Two-year bill**  
**Position: Watch**

### **AB 315 (Hancock) – CHPS Standards**

As amended on May 26, 2005, AB 315 would require new construction projects built with state funds from a voter-approved bond measure after January 1, 2006 to meet specific design and construction criteria, including those developed by the Collaborative for High Performance Schools (CHPS). The bill requires the State Allocation Board to develop regulations to adopt criteria and fund 50 percent, or 100 percent for districts that qualify for hardship assistance, of any increased costs resulting from meeting the criteria. The bill passed out of the Assembly.

**Status: Senate**  
**Position: Support**

### **AB 539 (Daucher) – Construction Cost Index, Grant Adjustments**

AB 539 directs the State Allocation Board (SAB) to adjust a district's state-apportioned grant for both modernization and new construction at the time of the bid opening. This provision leaves intact the "full and final" statu-

tory provision while meeting the needs of districts to have timely construction cost indices applied. Assembly Member Daucher has been concerned about any negative impact more frequent grant adjustments would have on developer fees. The amendments for AB 539 preserve fee levels as it does not impact the annual adjustments of the base grants. Under the current version of AB 539 projects with full and final apportionments will receive construction cost adjustments only if the bid opening occurred after the initial apportionment, the adjustments result in an increase to the initial apportionment, and fund release requests have been made to the SAB. The bill passed out of the Assembly.

**Status: Senate**  
**Position: Support**

### **AB 701 (Nava) – LEED Platinum Standards**

AB 701 requires that by January 1, 2006, all public buildings on which construction or renovation has begun must attain a LEED Platinum rating by January 1, 2015. The bill was not scheduled to be heard by the Assembly Education Committee because of the apparent oversight that the bill would impact school districts. C.A.S.H. contacted Assembly Member Nava's office to inform her of our concern that AB 701 applies to school districts, and it appeared that the staff was unaware that the bill had such an impact. Aware of C.A.S.H.'s concern, the author's staff contacted us and informed us that they would like the bill to encourage school districts to seek a LEED Platinum rating. C.A.S.H. does not support the idea and if necessary will oppose the measure.

**Status: Two-year bill**  
**Position: Watch**

### **AB 952 (Coto) – Use of Proceeds from Surplus Property**

AB 952 would permit the East Side Union High School District, the Oak

Grove Elementary School District, and the Walnut Valley Unified School District to deposit the proceeds from the sale of surplus property that occurred before January 1, 2006 into the general fund of the district or county office of education to be used for any one-time general fund purpose. C.A.S.H. opposes this bill because it would erode the traditional firewall between capital funds and operations funds.

**Status: Assembly**  
**Position: Oppose**

**AB 970 (Yee) –  
Seismic Safety**

AB 970 would require the Department of General Services (DGS) to provide upon request written information regarding the seismic safety of specific schools, included in the DGS report as required by AB 300 (Chapter 622, Statutes 1999), to the school district. C.A.S.H. requested an amendment to the bill as introduced to extend the immunity provision in the bill from four years to eight years to allow districts sufficient time to rectify, if necessary, the conditions of identified buildings. The bill was heard by the Assembly Judiciary Committee where the immunity provision was removed from the bill. As the bill moves through the Senate, C.A.S.H. will rescind its previous support for the bill based on communication by Assembly Member Yee that he accepted our proposed amendment. C.A.S.H. will work on the bill with the Seismic Safety Commission, who is sponsoring AB 970.

**Status: Senate**  
**Position: Watch**

**AB 1162 (Mullin) –  
Lease Leaseback**

AB 1162 (Mullin) is a revival of AB 1486 (Dutra) from last session regarding lease leaseback, which was vetoed by the Governor. The bill would repeal the provision that allows for lease leaseback and would require districts to

use a special competitive bid process until January 1, 2010. The bill was heard by the Assembly Education Committee on April 27 and passed out with eight AYE votes and three NO votes and out of the Assembly Appropriations Committee with 13 AYE votes and five NO votes. C.A.S.H. abstained from taking a position on the bill and will continue to monitor it.

**Status: Senate**  
**Position: Watch**

**AB 1292 (Evans) –  
Indoor Air Quality**

AB 1292 passed out of the Assembly Education Committee on April 27, 2005 by an 8-3 vote and was heard in the Assembly Appropriations Committee on May 25, 2005. AB 1292 requires a school district to ensure that facilities have heating and ventilation and air-conditioning (HVAC) systems that meet the minimum requirements of indoor air quality as specified in Labor Code Section 142.3. The bill would also require these systems to be maintained by contractors that have been certified by a “nationally recognized organization.”

The original version of the bill would have prevented districts from participating in the SFP unless they certified that they are in compliance. C.A.S.H. took an Oppose Unless Amended position on the bill in Committee. C.A.S.H. worked with the sponsor (Sheet Metal Workers Union) to remove this provision of the bill before Committee. The bill was amended in Committee to remove the reference to Labor Code Section 142.3. C.A.S.H. expressed concern that this provision could unnecessarily open districts up to increased liability. C.A.S.H. is now working with the sponsors to make the provision requiring the use of nationally-certified contractors more flexible for school districts by allowing the option to use qualified district staff. The bill failed passage out of the Assembly Appropriations Committee and is now a two-year bill.

**Status: Two-year bill**  
**Position: Oppose Unless Amended**

**AB 1300 (Arambula) –  
Modernization Grants**

AB 1300 would allow the State Allocation Board to permit a school district to use a portion of its modernization grant for an alternate school site and would require the governing board to find that the funds are not necessary for the site for which the apportionment was granted. AB 1300 was heard in the Assembly Education Committee on April 20, 2005, but was held over to the Committee’s next meeting on April 27 as a result of concerns expressed by Chairwoman Goldberg. Specifically, Assembly Member Goldberg stated that the bill is too undefined and lacked precision. She pointed out that the terms “high priority” and “orphaned” were ambiguous. Goldberg argued that the bill in its current form would, “...create mini-SABs in each district”. Goldberg stated that modernization needs reform, but that the provisions of AB 1300 do not offer the proper reform needed in its current form. Goldberg, Assembly Member Arambula, and the sponsor (Fresno Unified School District) agreed to work on the bill to address these deficiencies. The bill was held by the Assembly Appropriations Committee.

**Status: Two-year bill**  
**Position: Watch**

**AB 1416 (Goldberg) –  
Critically Overcrowded Schools (COS)**

AB 1416 would change the types of schools that would be eligible to receive funding from the Critically Overcrowded Schools Program to include Concept 6 schools. The bill specifies that Concept 6 schools would only be eligible for COS funding if COS funds remain after the State Allocation Board accepts applications for preliminary apportionments from districts that meet the site density criteria. C.A.S.H. has suggested to Assembly Member

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# School Demonstration Project to Highlight Displacement Ventilation

**The following article appeared in *Upblast* – a San Diego Gas & Electric publication generally distributed to ASHRAE members. There will be a workshop at the 2006 C.A.S.H. Annual Conference discussing the results of the following demonstration project.**

If you've never designed a displacement ventilation system, the subject may seem purely academic. A school demonstration project, however, will soon provide real-time data that shows how displacement ventilation compares with conventional mixing ventilation.

Starting in May at Kinoshita Elementary School in San Juan Capistrano, two adjacent first-grade classrooms – one retrofitted with a displacement ventilation system – will be monitored for temperature, relative humidity, carbon dioxide, electricity use and noise levels. Students and teachers also will be interviewed to assess their comfort. Testing will cover the six months that school is in session through January 2006.

"If testing in the field corroborates the computer models, displacement ventilation will solve three major challenges in school classrooms: indoor air quality, energy efficiency and noise," says Chip Fox, San Diego Gas & Electric commercial new construction supervisor.

SDG&E's "Savings By Design" program and mechanical equipment manufacturers are helping support the Capistrano demonstration project. The project administrator, Architectural Energy Corp. (AEC), is currently processing the monitoring results completed in March 2005 on two classrooms at Coyote Ridge Elementary

School in the Dry Creek Joint Elementary School District in Roseville, near Sacramento. Both Northern and Southern California demonstrations are part of a larger thermal displacement ventilation project under the auspices of a California Energy Commission Public Interest Energy Research (PIER) program to improve indoor environmental quality and energy performance in K-12 schools (see [www.archenergy.com/ieq-k12](http://www.archenergy.com/ieq-k12)).

## **"Has the potential to help kids do better"**

Capistrano Unified School District agreed to provide a test site because displacement ventilation "has the potential to help kids do better by making the classroom healthier and quieter, as well as save energy," according to Joe Dixon, Executive Director, CUSD Maintenance & Operations. "We believe that academic performance will be enhanced by improved attendance and a better learning environment."

Though relatively new in the U.S., displacement ventilation has been used successfully in northern Europe since the 1970s, typically in buildings with large open spaces and high ceilings. A thermal displacement air-conditioning system delivers up to 100% outside air at or near the floor, heated or cooled to a temperature of about 65°F. Large diffusers allow the supply air to enter the space at a whisper-quiet low speed. The supply air gently spreads by gravity throughout the lower occupied level, displacing the warmer, more buoyant room air. Heat and contaminants rise to the upper unoccupied level to be exhausted. Each occupant's body heat causes the cooler supply air at the floor to warm and move straight up in a

thermal plume, making it less likely that germs spread.

By contrast, with a standard air-conditioning system, the supply air enters the room at the ceiling, at a temperature of about 55°F and at a relatively high velocity. The cooler supply air mixes with the room air, providing a fairly uniform temperature throughout the space. This churning, however, also recirculates any dust, pollen, germs or other impurities throughout the room air before the stale air is returned at the ceiling level. In classrooms, the whistling, whooshing sound of high-speed air overhead can make it harder for students to hear the teacher.

A final report on the Capistrano demonstration project will be prepared after monitoring ends, notes AEC's John Arent, Project Manager, and Charles Eley, FAIA, PE, Principal.

## **Register for free seminar on displacement ventilation**

In the meantime, you can learn more about ventilation alternatives at SDG&E's free Savings By Design seminar on "Thermal Displacement Ventilation and Underfloor Air Distribution." Simon Turner of Healthy Buildings International Inc. will conduct the seminar from 8:30 a.m. to 12:00 p.m., Wednesday, Sept. 14, at National University in San Diego. Space is limited, so register today by contacting Virginia (Ginny) Vaplon at 858-636-5726 or [VVaplon@semprautilities.com](mailto:VVaplon@semprautilities.com). 

*The Savings By Design program is part of SDG&E's commitment to providing energy solutions to help our regional economy. For more information, visit [www.sdge.com/savingsbydesign](http://www.sdge.com/savingsbydesign).*

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# Constructability Review: An Effective Tool for Construction Cost Containment

By Ali A. Kiafar, Ph.D.

One of the challenges school districts face in practically every capital improvement project is change orders during the construction phase. Change orders almost always translate into extra costs to the project, extension of the completion date, and disagreement between the parties involved. The problem is especially the case in the traditional design-bid-build delivery method. With the cost of construction escalating and the project budgets increasingly becoming less than sufficient to cover all needs, reducing the number and costs of change orders has become critical in today's school construction environment.

Not all change orders are avoidable: Some may be in response to the owner's (school district) wishes; others may be due to specific project conditions. Many times the school district and/or school sites need additional items to be included in the scope of work after the project has been bid and construction contract(s) awarded. Other times, particularly in modernization projects, some change orders are inevitable due to unforeseen conditions such as when extra work is required after concealed areas are exposed. However, many, if not most of the, times a significant percentage of change orders is the result of construction documents not reflecting accurately all of the existing conditions or not having been properly coordinated. If, for example, the existing conditions are not addressed accurately on the plans, or solutions for the specific conditions are not properly provided, most likely requests for change orders will be initiated during construction. This in turn will result in additional costs or conflicts between different parties. If, due to discrepancies between construction documents

and job site conditions, bidders are not able to include the respective costs of the required work, or the work as identified in the plans and specifications can not be performed properly, the successful bidder, who is awarded the contract and is now the project contractor, would request additional time and money to address the conflicting situations. This usually creates problems with the project budget, duration of construction and timely occupancy of buildings, among other challenges.

At times, requests for change orders by general or prime contractors on the job are rejected by the project architect and/or district representatives (staff, project managers or construction managers) if they believe the cost of the required work should have been included in the bid amount. In many cases the disagreement with the change order request results in conflicts and tension in relationships between the opposing sides, many hours of valuable time wasted in trying to justify each side's position, and even claims filed and/or litigation pursued, requiring additional costs to resolve the dispute. In such cases, even if it is proven that the contractor should have known about the existing conditions or the cost of the required work should have been included in the bid amount (a situation which does not happen frequently), the district one way or the other ends up paying for additional cost resulting from the work to be done. Adding to the problem is the fact that the cost of change orders during construction is normally higher than if the work had originally been included in the bid package, as the competitive conditions would no longer exist. Normally, the contractor on the job is the sole bidder

for the extra work during construction, thus being able to request prices higher than if there were others who would bid on the same work.

Another reality in today's construction environment leading to change orders is the lack of proper coordination between documents related to different disciplines. For instance, many times there is a discrepancy between what the mechanical drawings show vis-à-vis electrical drawings, or architectural drawings vs. structural. Even with notes and references in the plans and specifications, if such discrepancies are discovered during construction, change orders are requested, normally leading to extra cost to the owner and extension of completion date, the letter itself also meaning loss of both time and money.

An effective tool to reduce the problems causing change orders is to conduct a constructability review (CR) before the project is bid. If performed by professionals with in-depth knowledge of the entire construction process, a quality CR can ensure that, to the maximum extent possible, the existing conditions are properly reflected in the plans and specifications and that there is adequate coordination between various disciplines in the construction documents. The CR would also identify the details and construction components that are difficult, if not impossible, to build or are not proper for the specific conditions of the project at hand. A well-prepared CR should also make recommendations for modification or deletion from construction documents the details and work that are problematic or costly. It could also be a tool for real value engineering.

Constructability review is most efficient when it is prepared during the

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# PLANNING 101

*Following is part 2 of a 2 part series of articles from C.A.S.H. Board Member Lettie Boggs of Colbi Technologies, Inc. This series was her presentation during the C.A.S.H. 26th Annual Conference in March 2005. Part 1 appeared in the April issue.*

## **Assemble the Team**

### **STRATEGIZE THE PROCESS**

Strong effective teams are no accident. They require leadership. The leader of the team has the opportunity to bring the right people to the task. Deciding what expertise will be needed and determining the capability of the various players to communicate their expertise is a key element in compiling a great team.

One of the first decisions is often how much of the team will be in-house personnel and which components need to come from outside expertise.

### **DISTRICT STAFF**

When you have the luxury of building a facilities staff, you can look for individuals with complementary areas of expertise. Or when you have intelligent staff with good attitudes, you can train them in the various areas so that you have a demographic expert, a person versed in land acquisition, and a logistical planner. Typically when the staff is small, there is more need for consultants to assist with specific expertise.

In addition to the facilities staff, the planning team will need the expertise of someone from Maintenance & Operations. The current condition of facilities, the problems with various building systems, and a current knowledge of materials standardization are all important to the planning process.

A good rule for every planner is never to surprise the superintendent! The plan will eventually become the superintendent's plan, so the process needs representation at the cabinet

level. If the facility department head does not attend cabinet meetings, there needs to be very close communication with the assistant superintendent and superintendent.

### **COMMITTEES**

As projects are discussed and planned, and eventually as project components are identified, prioritized, and cost estimated, the planners will need contact with district staff at the school sites.

It is much easier to plan without input, but the plan won't be real. The challenge is to include input at the appropriate time and in ways that won't raise unrealistic expectations. Rather than establish

an additional set of committees for facilities planning, there are often standing committees that can be of assistance. Grade level curriculum committees can work on grade level furniture and equipment standards. Site level parent committees are great for discussing parking lot plans and neighborhood traffic issues. For larger scope planning, committees of principals can assist without the danger of only one principal's input. It is much more efficient to work with existing committees as their meetings are already on calendar; you just need to get on the agenda. Using standing committees also removes a layer of complaint regarding who was selected to contribute to the planning effort.

#### **Strategize the process**

- District staff
- Committees
- State players
- Consultants

#### **Direct the Process**

- The facilities team
  - Who makes what move and how
  - Delegation

### **STATE PLAYERS**

During early planning the state is not directly involved, but the representatives from the various state agencies can be a resource for information that will apply later. Knowing the eventual requirements and constraints will allow you to build a realistic and workable plan.

If you don't know what OPSC, DTSC, CDE-SFPD, and DSA are, you need to do some studying as they will all be involved in funding projects, approving school sites, and/or approving the plans for the projects.

- <http://www.opsc.dgs.ca.gov/>
- <http://www.dtsc.ca.gov/>
- <http://www.cde.ca.gov/ls/fa/sf/fieldstaff.asp>
- <http://www.dsa.dgs.ca.gov/>

### **CONSULTANTS**

The facilities planning team is a combination of players from within the district and supporting consulting firms. My father used to say that a consultant was someone who borrowed your watch to tell you what time it was. Well that analogy is often true. But a smart leader knows which areas have become so complex that a second set of eyes are needed to tell the time, and those areas should be targeted for some assistance.

### **DIRECT THE PROCESS**

The team leader compiles the team, gives clearly defined direction, facilitates effective communication, manages the timelines, and holds people accountable for their contributions to the effort. The leader is also the one who makes decisions. Someone needs to decide when there is

enough information gathered for an informed decision so that the team can move forward.

### **WHO MAKES WHAT MOVE AND HOW**

It is important that the team members each have clearly defined roles.

They need to know what you expect them to do – what the work product should be. And they need to know how and when you will expect them to communicate with the team.

Many planners find it useful to use a Gant chart, listing each task and assigning a team member to be responsible for that task. The timeframe for that task can be entered in the timeline. This will allow the leader to look at a particular time and see which components are being worked. It also provides a format for analyzing the order in which the tasks need to be managed, particularly with land acquisition and funding components, some tasks cannot precede others.

Action plans are familiar in many districts and can also be used to make sure everyone on the team knows their assignments and reporting dates.

### **DELEGATION ALLOWS MOVEMENT**

When a team does not seem to be making progress, there are several things the leader needs to analyze. Has the work been adequately delegated? If all the work is centered on very few individuals, they quickly become over-tasked and create a bottleneck that slows the process down. The bottleneck is often the leader, so include the leader in this assessment – especially if you are the leader.

If there is sufficient delegation and still the process is not moving forward, then one needs to analyze whether the team members are being held accountable for completing their tasks and reporting back to the team.

If they are and yet the timeline is not being met, there may be a need to add more members to the team or create a more realistic timeline.

### **REFINE THE PLAN**

Plans should change! As the team is assembled and more information becomes available, the plan can be filled in with more detailed information,

better ideas may arise, or plan assumptions may not prove true. The plan should be reviewed and revised on a regular basis. Radical shifts should be kept to a minimum, but refinement should be expected.

### **IDEA SHARING**

The leader of the team has the opportunity to foster a team climate that encourages the sharing of ideas. If people feel shot-down whenever they speak up – they quit speaking up. Hearing folks out, valuing their opinions, and encouraging collaboration brings all the best ideas to the

table. Often the primary role of the district person is to make sure the right minds are at the table, and that they all stay there until a good solution is reached.

### **RESEARCH**

Keeping up with new ideas, products, and information can be a daunting task. However, paying attention to new information can keep the flow of ideas fresh and effective. Without them designs and solutions can become stale and less than optimum. But always following the newest trend can lead to chaos and some non-sustainable innovations. Finding balance between the two extremes can be a challenge.

Watch for ideas that meet a need. Then watch them awhile. Run your own tests and monitor performance before buying into something new in a big way. Standardization saves money on the maintenance side, so be cautious about varying a standard unless there is a good reason.

### **WHAT HAVE OTHERS DONE?**

Listen to your peers. Participate in C.A.S.H. and CASBO and learn how others are addressing the challenges. Go on field trips to other districts and see what they are doing. One great advantage to being in a business that is not profit driven is the open sharing of

ideas. Go for it – learn from the people who are doing a great job.

## ***Communicate the Plan***

### **MEDIA MATERIALS**

Prior to communicating your plan, you need to prepare materials that will assist you in conveying the plan. Consider the cost and keep it reasonable. If the presentation materials are costly or too commercial that can add a layer of criticism that taxpayer funds are being wasted. But the materials need to be classy enough to engender some confidence in your ability and in the plan.

### **CONCISE & READABLE**

If the plan can't be summarized in two pages, you probably can't communicate it. Which sites are affected, what will happen at those sites, and the budget are the three main components that need to be communicated.

Since it is impossible to know at the planning stage exactly how far the money will go, give yourself some flexibility. For the site level back up detail, a list format can be helpful with an indication of how far down the list the money is estimated to go. Any additional funds that come in will be applied to the list. Assure them that every possible funding source is being actively pursued. This communicates that you heard their requests and noted them and also conveys which components are highest priority.

### **THE REPORT**

A printed report with the two-page maximum executive summary is important for the district leadership team and the board. It is also helpful for addressing the more detail-oriented questioners. But most people want the short version – with pictures.

### **POWER POINT**

Prepare a presentation that incorporates the executive summary material. Include aerials of the sites so that they

*Continued on page 12*


#### ***Refine the plan***

- Idea sharing
- Research
  - What have others done?

## Message From The Chair

Continued from page 2

1. Statutorily adjust the SFP new construction per-pupil grants based on the above data to provide the level of funding intended by the Legislature when the LPP was replaced with the SFP.
2. Amend the modernization grant to reflect an appropriate, corresponding adjustment.

AB 670 was heard in the Assembly Education Committee on Wednesday April 27, and was approved on consent by the Committee. The Assembly Appropriations Committee heard the bill on May 25 and held it in Committee; therefore, the bill is now a two-year bill. C.A.S.H. will continue to work to ensure that SFP Grants are adequate to build outstanding school facilities. 

### Asset Management – Theme of the Pre-Conference Workshop and Spring Conference

Continued from page 3

Update presented by State Architect David Thorman

- Department of Toxic Substances




Brooks Alan, ACLU, Gerald Yarbrough, Los Angeles County Office of Education, Janet Dixon, Riverside Unified School District, Cathy Allen, Placer County Office of Education, and Bob Nicholson, San Diego County Office of Education

Control Update presented by Hamid Saebfar, Department of Toxic Substances Control

Many attendees commented that the information presented at the Spring Conference was valuable.

Thank you to all of the presenters and sponsors who helped to make the Spring Conference a success.

For copies of the handouts from the Spring Conference, please visit the C.A.S.H. web site at [www.cashnet.org](http://www.cashnet.org).

 – C.A.S.H. Staff

### Legislative Update

Continued from page 5

Goldberg and her staff to provide language in the bill that will make other severely overcrowded schools eligible for funding, including Concept 6 schools, which would be consistent with the original objectives of the program as conceptualized in AB 16 (Chapter 33, Statutes 2002). The bill passed out of the Assembly.

**Status: Senate**

**Position: Watch**

### AB 1451 (Montañez) – MTYRE, 6% “Hits”

AB 1451 repeals the “hit” on MTYRE districts that receive operational grants, as well as the 6% “hit” for all districts participating in the School Facility Program. Assembly Member Montañez accepted as author’s amendments the repeal of the 6% “hit” at C.A.S.H.’s request, which we previously had included as a provision in AB 670, but have since removed from the bill as a result of the AB 1451 amendments.

**Status: Assembly**

**Position: Support**

### SB 327 (Lowenthal) – Piggyback Contracts, Modular Facilities

SB 327 (Lowenthal) was heard by the Senate Education Committee on April 27. C.A.S.H. was the only entity



Hamid Saebfar, Department of Toxic Substance Control, Janet Dixon, C.A.S.H. Board Member and David Thorman, State Architect, Division of the State Architect

to testify in opposition to the bill, contending that the bill seeks to further restrict the ability of districts to provide safe and adequate facilities for students. SB 327 would prohibit school districts from using piggyback contracts for certain modular facilities, specifically facilities that cannot be transported without the roof and floor attached. The bill is sponsored by the Building Trades Council, who along with Lowenthal's staff, informed us that the intent of the legislation is to prohibit entire modular schools from being built via piggyback contracts and to forestall future "Santa Maria-like" crises vis-à-vis the TurnKey demise. SB 327 was amended at the request of modular leasing companies to allow for the continued use of piggyback contracts for modulars that can be transported with the roof and the floor attached. These new provisions do not deny entire modular schools nor do they protect districts from future failures as occurred in the Santa Maria Unified School District, which has occurred due to failure of districts to require performance bonds from their modular contractors.

C.A.S.H. testified in Committee that the definition of a relocatable that is exempt from SB 327 is too restrictive and impedes districts' current abilities to provide facilities with cost and time efficiency. Through the help of Senator Scott, Senator Lowenthal agreed to continue to work with Tom Duffy on behalf of C.A.S.H. to mitigate the negative impact the bill will have on districts. The bill passed out of the policy committee with a 7-to-1 party-line vote. The California Building Industry Association (CBIA) is opposing the measure, and along with C.A.S.H., has submitted a letter of opposition to Senator Lowenthal. Tom Duffy continues to insist the need to maintain flexibility for districts is critical at this time when construction costs are rising and districts are facing a high bid environment.

**Status: Assembly**  
**Position: Oppose**

**SB 362 (Torlakson) – Existing and Ongoing Building Capacity**


SB 362 was intended to deal with issues relating to leased and owned portables and district chargeability under the School Facility Program. The bill would have increased the eligibility for most districts that have used large numbers of portables on school campuses. The bill was held in the Appropriations Committee.

**Status: Two-year bill**  
**Position: Support With Amendments**

**SB 1035 (Hollingsworth) – Deferred Maintenance, Custodial Services**

SB 1035 would allow school districts to use up to one-third of their Routine Restricted Maintenance Account, which is calculated as 3% of their general fund, for custodial services. C.A.S.H. is strongly opposed to SB 1035 because it would reduce funds available for school building maintenance projects. This bill is directly related to SB 409 from last year, which reduced the 3% requirement to 2% for the current fiscal year (2004-2005). The restoration of the 3% requirement will be impacted by this bill as it further erodes the reserve of funds for maintenance. When the bill was heard by the Senate Education Committee on May 4, C.A.S.H. and the ACLU testified in opposition to it stressing concerns that in light of the Williams settlement, SB 1035 would impact districts' responsibilities to maintain their facilities. After a lengthy discussion in Committee, Committee Chair Jack Scott stated his ambivalence to the bill because it would in effect make a permanent statutory change to reduce the 3% district contribution to the Routine Restricted Maintenance Account. Senator Scott noted that he supported last year's budget measure to reduce the contribution temporarily to 2% in light of the state's – and thus local agencies' – fiscal crisis, but cautioned that the long-term effect of a reduction in the requirement is not known. Other legislators expressed

concern for the bill in that it lacked a requirement that the funds identified in the bill be used for cleaning and that there exists in it no accountability provision. Senator Hollingsworth, in an effort to mollify the opposition, agreed to accept as author's amendments a 2-year sunset provision and a provision to evaluate the bill's impact. With the adopted amendments, the bill passed out of the Senate Education Committee by a 7-to-0 vote. The Senate Appropriations Committee heard the bill on May 26 and the bill passed out of the Committee with a unanimous vote.

**Status: Senate**  
**Position: Oppose** 

**Constructability Review: An Effective Tool for Construction Cost Containment**

*Continued from page 7*

design development and before construction document phase of the project is completed. By working with the district staff, conducting on-site visits, detailed observation of existing conditions, and comprehensive review of the plans and specifications, the professionals performing the CR would have the opportunity to identify early on the problems with the constructability of the project documents, make recommendations for revisions and corrections, and prevent the circumstances which would result in disputes, additional costs and delays during the construction phase. A good and early CR could also assist in quicker and smoother agency approvals.

It may be argued that the CR should be part of the project architect's professional services, and thus, should be performed by the design professionals involved in the A/E services (i.e. it should not be performed by others and paid for separately). While there is merit in this argument, it is up to the owner/district to decide if they feel comfortable with the CR being performed as part of the standard architect-

*Continued on page 12*


**Constructability Review:  
An Effective Tool for  
Construction Cost Containment**

*Continued from page 11*

tural services or as a separate professional service. The reality in the profession today is that many construction documents, even if reviewed in-house by the project design team for quality control, may still require a third party's careful and detailed CR. Among the factors contributing to this situation are the large volume of school modernization and new construction projects after the passage of many bond measures. Another factor is the funding mechanism, at both local and state levels. Project funds are usually available only after passage of bonds and the ensuing timelines for start and completion of projects are frequently short due to the urgency of the needs or in response to the political pressure from the district's governing body or the community, which may result in insufficient time for design and engineering teams to provide high quality work in every step of the process.

In recent years, some school districts increasingly have employed construction managers to deliver their construction projects. Usually, CR is included in the scope of the construction management firm's professional services. In such cases, school districts can benefit from the collaboration of the design and construction teams to prepare a high quality CR by the professionals in both groups who specialize and have in-house expertise in this particular field.

In summary, a good quality constructability review should be considered for any modernization and new construction project. Benefits of a quality constructability review are many, including, but not limited to: clearly identifying the existing conditions, addressing the conflicts between the construction documents and existing conditions, correcting the problems in construction documents prior to start of the bidding process,

conducting a true value engineering, assisting bidders by properly defining the project requirements and their associated costs, lowering the bid amounts as a result of fewer unknowns and less guess work by bidders, fewer change orders during construction, and overall, reduction in construction cost, work delays and potential conflict between various parties involved in the construction process. 

*Ali A. Kiafar, Ph.D. is Senior Executive Director of Education for URS Corporation*

**Planning 101**

*Continued from page 9*

can be discussed; site maps that convey which buildings are involved or phasing are also helpful. A picture of the façade changes or building elevations can convey more than a discussion of them can. Keep it short and concise. Use the bullets in the Power Point as your outline for presentation and practice it without using notes other than the presentation itself. This helps you do a better presentation and assures that everything is contained in the Power Point that should be there.

Though it is typically prepared for the board, it can be used again and again at site level meetings, community meetings, city council, etc. If you can get a projector and laptop to use, it is always best to bring your own equipment and be familiar with it. If that level of technology is not available to you, then have your presentation printed onto overhead projector sheets as that technology is more readily available in the school community.

If you have architectural boards showing the plans for new schools or modernizations, take them with you to presentations. Set them up around the room beforehand and make them available after the presentation as you talk with people. If you are running a bond campaign and will be using them a lot, invest in a carrying case so that they stay in good shape. Be sure they will fit in your vehicle.

**Take it on the Road**

**TELL THE STORY**

Now you are ready for the road. The plan will affect many people, and they will want to know the plan. Rumors proliferate in a vacuum of information. It is to your advantage to control the message, and that requires a plan for telling the story.


**PUBLIC RELATIONS**

This is the meat of public relations for your district. All of your materials and your presentations are for public relations. If you are fortunate enough to have a Public Relations Officer, make yourself available to be coached. There are effective, and less effective, ways to answer the press, the foremost rule being to stay on topic and not answer leading no-win questions. How often have you heard a reporter ask a leading question and then heard a politician avoid the trap by staying on the same topic yet answering with their own message? You may need to become a bit of a politician if you have a sophisticated media market.

**BOND CAMPAIGN**

How you present yourself and the plan reflect on the district. Remember, people don't vote to give their money to people they don't think are competent. Work with your consultant to craft your presentation, but nothing sells it like the district folks getting out into the community with pictures, good information, and enthusiasm.

**LEGISLATIVE ADVOCACY**

Once the plan is ready and the district knows its mission, that knowledge can assist the people who help you in Sacramento and Washington DC to do a better job for you. The road blocks to progress, the insufficiencies in programs, those are the areas for a legislative agenda. Participate in the process and you can have an effect. Real world examples are the most effective communication. 

# Taking Our Cue from Research: The Next Level of Design

By Ronald H. Fanning, AIA, PE, REFP

Over the past 15 to 20 years, school districts – working closely with their planners and architects – have transformed the process of creating and modernizing school buildings. What was once a relatively “closed” practice, in which a small team of administrators worked quietly with designers to produce a facility that would be serviceable and cost-efficient (but not necessarily much more), has evolved into a highly interactive approach to facility planning that involves broad-based participation from educators, students, and the community.

Many district administrators today would tend to agree that this far-reaching, inclusive approach has revolutionized and improved school design. New schools built today, or those transformed through comprehensive modernization, are likely to be much more supportive of the instructional program and more responsive to the priorities of the overall educational mission within a district.

School districts have seen the benefit in a myriad of ways: better student attendance, fewer disciplinary problems, better faculty retention, improved faculty collaboration, increased volunteer support, and more opportunities for broader course offerings. Some schools point to higher test scores and improved student performance. Many also cite far better school-community relations, with expanded, ongoing support from local residents and businesses that were able to contribute to planning efforts, thus feeling an ownership in the resultant facility.

In order to optimize this increasingly interactive planning and design process, architects recognized the need to improve the framework for discussion and decision-making. What works best to draw out public charrettes, small-group committees, open forums,

surveys, tours, town meetings, on-site design and interactive websites have all now become standard tools in the planning toolbox.

## Embracing Research

Now that we have raised the bar on the planning process, what’s next? How can we take the practice of school design to the next level? How can we continue to create and evolve the best learning environment for students?


Clearly, we’ve benefited by listening to a broad range of voices over the past several years, and designing buildings that reflect the collective wisdom and experience of teachers, students, and community members. Now, we need to advance our efforts by listening to another important source: research. Fortunately, the profession has begun to recognize the value of research-based design initiatives for educational facilities, and the imperative of continuing to sponsor and support high-quality research within our industry.

In 1999, when Heschong Mahone published its findings on the impact of daylighting on the quality of learning, the results challenged every architect and school district in the nation to recognize and address this vital aspect of the educational environment. Similarly, other important studies have since examined the critical importance of acoustics, air conditioning, and air quality. Several analyses of the overall impact of the school building environment on learning have also been completed or are now underway.

Once the results of new research is available, design professionals must look closely at the translation – how does the “bricks and mortar” need to respond in order to capitalize on our latest knowledge? For example, once we were given concrete evidence that documented the importance of daylighting in the

classroom, we began to explore the design opportunities – and challenges – carefully in order to bring light into buildings more effectively. We analyzed glare and heat gain, assessed security and maintenance, reviewed costs, and devised innovative solutions. Today, architects and manufacturers are still engaged in addressing the daylighting issue creatively and cost-effectively, with breakthrough concepts emerging at new schools around the country.

The Council of Educational Facility Planners, International (CEFPI) and other industry associations have ramped up sponsorship of many important research studies. As a result, designers will need to respond to the tremendous challenge of blending today’s broad-based community input with the best new research results available, while also incorporating the latest in technological breakthroughs in materials and systems.

This will be a formidable task, perhaps especially so in California, where we will see districts aggressively pursuing renovations in order to meet the requirements of last year’s Williams settlement and ongoing state School Facility Program district-wide modernization program. Despite the pressure of immediate challenges resulting from *Williams*, the design profession should readily embrace the vital importance of responding to research. We’ve listened to our peers, we’ve listened to educators and community members, and now we need to listen to – and champion – advanced research as another important guide for the future. 

*Current sources of research relating to educational facilities design included the Council of Educational Facility Planners, International ([www.cefpi.org](http://www.cefpi.org)); the National Clearinghouse for Educational Facilities ([www.edfacilities.org](http://www.edfacilities.org)); DesignShare ([www.designshare.com](http://www.designshare.com)); and the School Design Research Studio ([www.schoolstudio.engr.wisc.edu](http://www.schoolstudio.engr.wisc.edu))*

*Ronald H. Fanning, AIA, PE, REFP is the Immediate Past President, CEFPI and Chairman, Fanning/Howey Associates, Inc.*

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**Correction** In the April issue of the *CASH Register*, it was noted in the school profile on the Lovonya DeJean Middle School that Turner Construction Management had been a part of the project. Turner was not part of the project. The only construction manager on the project was The Seville Group.

## FRC Update

### A Healthy, Safe And Secure School Environment

The following presentations on a **healthy, safe and secure school environment** can be found on the Facility Resource Center at <http://www.cashnet.org>.

- 1.1.23 "Do School Facilities Really Impact a Child's Education?" John B. Lyons, CEFPI, November 2001.  
This is a collection of studies that demonstrate how a school condition can affect student health and achievement.
- 2.1.16 "Designing Schools For Security," Tom Delapp, March 2001.  
A vital component to a District's overall security program is the approach to site and building design of the physical environment on school campuses. The physical layout of buildings and the spaces surrounding them are integral to the success or failure of the overall security program.
- 5.2.4 "Where Children Learn: Facilities, Conditions and Student Test Performance," Dr. Morgan Lewis, Council of Educational Facilities Planners International, Published Quarterly, December 2000.  
This new study supports previous studies that suggest that the condition of school facilities directly relates to student achievement.
- 5.2.18 "The *Williams* Lawsuit: A Practitioner's Perspective," Tom Rayburn, Capistrano Unified School District, February 2005.  
Board Policy is defined here along with the assignment of responsibilities, the role of human resources and of maintenance and operations.
- 5.4.17 "Planning and Operating Safe and Secure Environments," Deputy Matt Cosgrove, CPTED Program Coordinator, Riverside County Sheriff, February 2002.  
Crime Prevention through Environmental Design (CPTED) is a program that includes passive design concepts and active design concepts to improve security. Components include vehicular and pedestrian traffic, playgrounds, landscaping and lighting, building design and setting.

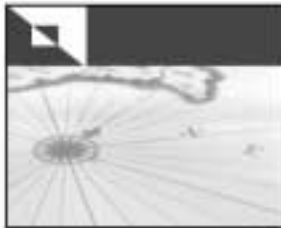


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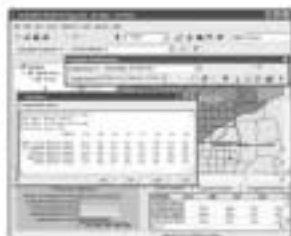
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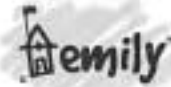
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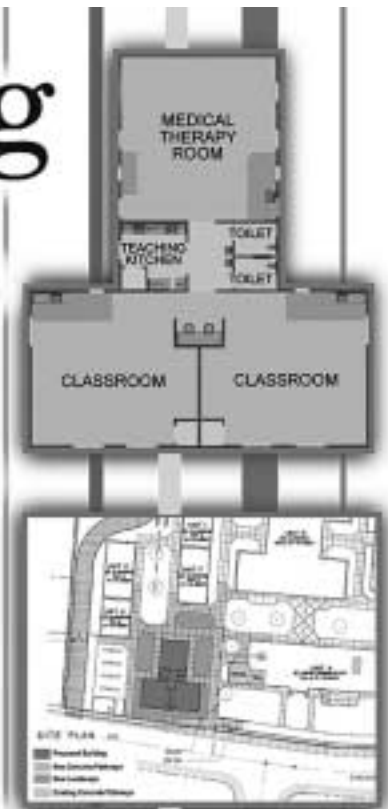
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# C.A.S.H. Meetings, Conferences & Workshops

**June 21, 2005**  
Tuesday  
9:00 a.m. – 3:30 p.m. **So What Is Happening with Piggyback Contracts Workshops**  
Doubletree Hotel  
2001 Point West Way, Sacramento, CA

**June 22, 2005**  
Wednesday  
**General Membership Meeting**  
1215 K Street, 14<sup>th</sup> Floor, Sacramento, CA

**June 24, 2005**  
Friday  
9:00 a.m. – 3:30 p.m. **So What Is Happening with Piggyback Contracts Workshops**  
Ontario Airport Marriott  
2200 E. Holt Blvd., Ontario, CA

**July 26, 2005**  
Tuesday  
**Environmental Challenges Facing School Districts (a.m.), Designing Schools to meet CHPS and LEED Standards (p.m.) Workshops**  
Doubletree Hotel, 2001 Point West Way, Sacramento, CA

**July 27, 2005**  
Wednesday  
**C.A.S.H. General Membership Meeting**  
1215 K Street, 14<sup>th</sup> Floor, Sacramento, CA

**July 29, 2005**  
Friday  
**Environmental Challenges Facing School Districts (a.m.), Designing Schools to meet CHPS and LEED Standards (p.m.) Workshops**  
Ontario Airport Marriott, 2200 E. Holt Blvd. , Ontario, CA

**August 2, 2005**  
Tuesday  
**Environmental Challenges Facing School Districts (a.m.), Designing Schools to meet CHPS and LEED Standards (p.m.) Workshops**  
Waterfront Plaza Hotel, Jack London Square, Oakland, CA

***Monthly C.A.S.H. meetings are held from 11:00 a.m. to Noon in Sacramento. The monthly meetings are always scheduled to coincide with the monthly meetings of the State Allocation Board on the fourth Wednesday of the month, except in November and December, to enable C.A.S.H. members to attend the SAB's afternoon session. Both SAB meetings and General membership meetings are subject to change.***



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