



CALIFORNIA'S  
COALITION  
*for* ADEQUATE  
SCHOOL HOUSING<sup>SM</sup>

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*A* SUMMARY **2017**  
*of the* ORGANIZATION'S WORK

**DON ULRICH, CHAIR**  
**JANUARY 9, 2018**

# LEADERSHIP

The Board of Directors oversees the overall operation of the CASH organization and approves all positions on legislative and regulatory issues. It is a working Board, to which its members dedicate a tremendous amount of time and effort.

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Joe Dixon (2013-2015)  
Cathy Allen (2011-2013)  
William Savidge (2009-2011)  
Ted Rozzi (2007-2009)  
Pamela Johnson (2005-2007)  
Eric Hall (2003-2005)  
Kathleen Moore (2001-2003)  
Dave Doomey (1999-2001)  
Terry Bradley (1997-1999)  
Mamie Starr (1995-1997)  
Kelvin Lee (1993-1995)  
Mike Vail (1991-1993)  
*William Cornelison\** (1989-1991)  
Tom Duffy (1987-1989)  
Dave Christensen (1985-1987)  
Constantine Baranoff (1983-1985)  
*Dave King\** (1981-1983)  
Gene Hartline (1978-1980)  
*\*deceased*

## HISTORY AND PURPOSE

The Coalition for Adequate School Housing (CASH) was founded in 1978 to advocate for K-12 facilities funding and improve school facilities in California. CASH began as a coalition of existing statewide organizations and a few dozen school districts. Over the years, CASH evolved into a single organization that has grown to more than one thousand public and private sector members, making it the largest premier statewide organization focused exclusively on school facilities issues.

CASH pursues an extensive agenda each legislative session. CASH monitors and engages on hundreds of bills in pursuit of the organization's goals and to protect the gains achieved over the years. CASH also pursues an extensive regulatory agenda in furtherance of these same goals.

CASH takes great pride in the relationships with government agencies that are integral to K-12 school facilities, including:

- California Air Resources Board
- California Building Standards Commission
- California Debt & Investment Advisory Commission
- California Department of Education
- California Department of Finance
- California Energy Commission
- California Public Utilities Commission
- California State Legislature
- California Seismic Safety Commission
- Department of Industrial Relations
- Department of Toxic Substances Control
- Division of the State Architect
- Governor's Office
- Legislative Analyst's Office
- Office of Public School Construction
- State Allocation Board
- State Board of Education
- State Controller's Office
- State Fire Marshal
- State Treasurer's Office
- State Water Resources Control Board
- U.S. Congress

Murdoch, Walrath and Holmes has represented CASH since 1981. James L. Murdoch, founder of the firm, was the first lobbyist to represent CASH and continued to work on behalf of the organization until his death in October 2002. He is credited with shaping CASH into the influential statewide organization it is today.

While CASH has experienced considerable success with its legislative goals, the most significant achievement of the organization is its efforts in support of the passage of statewide school facilities bonds. Under CASH leadership, 16 statewide bond issues have been placed on the ballot since 1982. All but one of these issues was approved by the voters of California, for a total of more than \$61 billion in school facilities funding.

This document summarizes the following areas:

- Legislative and Regulatory Focus
- Operations
- Committees

**CASH Vision:** Work with the State Legislature and agencies to provide resources for school facilities that serve every child in California.

## LEGISLATIVE AND REGULATORY FOCUS

### Overview

In 2017, the U.S. and California economies continued to perform well, sustaining one of the longest economic expansions in modern history. In California, economic indicators such as job growth began to slow, however, revenues from Personal Income Tax remained strong. In preparation for the next economic downturn, the Governor and Legislature have focused on building reserves and tempering new spending commitments.

CASH focused on one major goal in 2017: smooth implementation of Proposition 51. CASH spent the first half of the year working through various policy issues and laying groundwork for a successful bond sale in the fall of 2017.

### Proposition 51 State School Bond Implementation

After the successful passage of Proposition 51 in November 2016, CASH immediately pivoted toward navigating the decisions and challenges of implementation. CASH's initial efforts focused on getting the mechanics of the School Facility Program (SFP) back up and running, with two main priorities: processing the backlog of applications for funding, and the sale of state bonds to apportion funds. CASH achieved success on both of these policy issues in 2017. Improvements included the State Allocation Board's (SAB) adoption of new Financial Hardship regulations to allow for concurrent review of Financial Hardship status and the application for funding, which CASH supported. CASH also participated in discussions about updating the three-year eligibility lock for small school districts; this issue is still pending.

### Grant Agreement and Local Audit Requirements for State-Funded Projects

When the Governor issued his January 2017-18 budget proposal, he requested two policy changes before supporting the sale of state bond funds for school facility projects:

- Establish a grant agreement between the state and school districts to set forth basic terms and conditions.
- Shift audit requirements for state-funded school facility projects from the state level to the local level.

CASH worked with the Administration, the Office of Public School Construction (OPSC), and other stakeholders in the education community to achieve swift passage of both requests while ensuring the solutions would be fair and attainable. CASH successfully negotiated amendments to the grant agreement, including changes to the eligible expenditures list and inclusion of the option for project-specific guidance letters incorporated by reference into individual grant agreements. CASH opposed the significant policy change to classify educational technology expenditures, including computers and printers, as ineligible. The grant agreement was approved via regulation by the SAB on June 5, 2017.

In June, the Legislature approved and the Governor signed education budget trailer bill AB 99, which adds state-funded school facility project scope to the local annual K-12 audit. CASH successfully negotiated changes to the language, including the ability for schools to repay audit exceptions with capital or operational funds.

## LEGISLATIVE AND REGULATORY FOCUS

### SFP Application Processing and the Project Backlog

When Proposition 51 was passed by voters in November 2016, districts had submitted just over \$2 billion in new construction and modernization applications to OPSC, which CASH urged should be processed as soon as possible. On June 5, 2017, the SAB approved an action directing OPSC to begin processing applications using the regulations in place at the time of submittal, with one major exception. The Board acted to radically alter the SFP by requiring new construction projects to submit eligibility updates for the enrollment year in which OPSC processes the application, rather than using the eligibility in place at the time of application submittal. CASH opposed this drastic change and filed an underground regulation challenge with the Office of Administrative Law (OAL), stating that the action violates the statutory language approved by voters in Proposition 51, and that the SAB did not correctly abide by the Administrative Procedures Act (APA) and regulatory process. OAL declined to take up CASH's petition but did not opine on the petition's merits.

### Sell School Bonds Press Efforts

CASH engaged in sustained efforts to raise awareness about the inadequacy of the state's bond sales, which in 2017 were both too infrequent and small to meet the need of schools. Efforts included coordinating letters to the editor and op-eds in various newspapers across the state, and encouraging school boards to pass resolutions in support of larger, more frequent bond sales. CASH hosted a press conference at the State Capitol Building on August 23, 2017, where CASH leadership and representatives from other education organizations urged the Legislature and Administration to enact the will of the people.

In 2018, CASH will continue to advocate for larger and more frequent bond sales to meet the urgent needs of our students, teachers, and school districts across California.

### **Division of the State Architect Initiatives**

The Division of the State Architect (DSA) made progress on a number of significant initiatives, and CASH worked with DSA to provide valuable feedback on these priorities. Over the summer, DSA instituted a new appointments system to eliminate bin time and reduce costs by heading off escalation. Additionally, DSA committed to electronic plan review by signing a contract for Bluebeam, a program that will increase efficiency and better serve the needs of both DSA and schools by streamlining the plan review process and improving communication between all parties. CASH will continue to support DSA in this transition as they begin to train over 200 staff on real projects using Bluebeam.

### **Proposition 39**

CASH supported language to extend the Proposition 39 encumbrance date in the State Budget. In June, the Governor signed the 2017-18 State Budget Agreement that contained language to remove the sunset on the current Proposition 39 program *and* extend the final encumbrance date to June 30, 2019. The budget trailer bill language swept remaining Proposition 39 funds to be used by schools as follows:

- \$75 million for Clean Energy Buses (first); then

## LEGISLATIVE AND REGULATORY FOCUS

- \$100 million for Energy Conservation Assistants Act (ECAA) low- and no-interest loans California Energy Commission program (CEC); Remainder for K-12 energy projects per application in per-Americans With Disabilities Act (ADA) tier groups.

### **Maintenance and Operations**

To assist maintenance departments in ensuring that their priorities are included in their district's Local Control Accountability Plan (LCAP) discussion, the CASH Maintenance Network updated the *CASH Facility Inspection Tool (FIT) Guidebook* as a resource to help school maintenance and facility departments meet the *Williams* and LCAP's "Good Repair" standard. The updated *Guidebook* retains the basic architecture of the first version which was a decade old, but was updated to reflect the significant changes in State maintenance funding and programs as a result of the LCAP. The new version of the Guidebook also includes additional resources to assist districts in meeting new Federal and State requirements that did not exist a decade ago. The *Guidebook* is now available electronically to CASH Maintenance Network and CASH members at no cost. In addition, the CASH Maintenance Network held two CASH FIT Guidebook Workshop Trainings, and will schedule more across the state in 2018 to ensure we cover all regions of California.

### **Environmental Issues**

Water issues continued to be a hot topic for schools and school facilities in 2017, and we expect this to continue in 2018, with drinking water quality and storm water quality leading the way. In addition, school toxic issues continue to be hot topics, and we expect this trend to continue in 2018 as well.

#### Drinking Water Quality – Lead Testing/School Water Systems

Over ten bills on lead testing of school water systems were introduced in 2017, and CASH worked to mitigate the more onerous bills and components of these bills. In the end, the last bill standing was AB 746 (Gonzalez-Fletcher) which was signed by the Governor. This bill requires community water systems that serve a school or preschool with a building constructed before January 1, 2010 to test for lead in the potable water system of the school site before January 1, 2019, as well as schools to notify parents if lead levels exceed specified levels and other specified provisions.

#### Storm Water Quality – Water Board Permit and Legislation

The State Water Resource Control Board (Water Board) is in the process of updating its Municipal Storm Water Permit, which for the first time will include schools, and will go into effect in 2018. In 2017, CASH closely monitored this issue and represented the school perspective in meetings with the Water Board and other stakeholders. When the State Water Board proposed to include schools in their reissuance of the Municipal Storm Water Permit (MS4) 2008, CASH led an effort to exempt schools based on lack of funding (occurred in the middle of the financial crisis) and expertise in storm water management. The result was that schools were given a "non-designation" status and were not fully subject to the MS4's requirements – with the idea that schools would use the five-year permit period to build capacity and expertise while they utilized Best Management Practices (BMPs). This exemption for schools will end with the reauthorization of the MS4. In addition, the Governor signed SB 541 which promotes the development of storm water BMPs for schools by key state agencies such as

## LEGISLATIVE AND REGULATORY FOCUS

the State Water Resources Control Board (Water Board), the Division of the State Architect (DSA), and the California Department of Education (CDE).

### School Toxic Issues

School facility and maintenance departments continued to comply with new Healthy Schools Act training and reporting requirements as a result of legislation, and the presence of PCBs in building materials and light ballasts in older building materials continued to be a risk management challenge. The most significant development in school toxic issues this year was the Department of Pesticide Regulation's (DPR) new state policy for agricultural pesticide use near K-12 schools and daycare centers. CASH engaged with DPR on the development of the new regulation.

The regulations establish minimum distance standards for certain agricultural pesticide applications near schools and annual notifications to schools. The goal is to reduce the chances of unintended pesticide exposure to children by increasing communication between growers, County Agricultural Commissioners, and schools. The new regulations take effect on January 1, 2018.

### **REGULATORY HIGHLIGHTS**

CASH legislative staff worked on numerous regulatory issues this year. The following is a summary of regulatory activity CASH was engaged in during 2017:

California Department of Education (CDE)/State Board of Education

- Proposition 51 Implementation
- Local Control Funding Formula and Local Control Accountability Plan
- Proposition 39
- Title 5 Review
- School Maintenance
- Career Technical Education Facilities Program (CTEFP)
- Small Schools Initiative

California Energy Commission (CEC)

- Proposition 39

California Environmental Protection Agency

- PCBs (polychlorinated biphenyls)
- Trash; Food Waste

Department of Industrial Relations (DIR)

- Prevailing Wage Monitoring Program
- School Action for Safety and Health (SASH)
- Skilled Workforce Information

Air Resources Board

- Cap and Trade

Division of the State Architect (DSA)

- Water Conservation Regulations

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- Green Building Code
- Inspector Evaluation Card and DSA Box
- Electronic Plan Review
- Appointment System
- Proposition 39
- Zero Net Energy (ZNE)
- Plan Review Fee

### State Allocation Board (SAB)/Office of Public School Construction (OPSC)

- Application Processing
- Charter School Facilities Program (CTEFP)
- Financial Hardship
- Priority Funding Process
- Grant Agreement
- Local Audits for State Funded Projects
- Level III Developer Fees Trigger
- Developer Fee Amounts
- Level II and Level III Background/History
- Staffing

### Education Audit Appeals Panel

- Local Audits for State Funded Projects

### Public Utilities Commission (PUC)

- Solar Time of Use (TOU) Rates

### State and Consumer Services Agency/Building Standards Commission (BSC)

- Green Building Code
- Zero Net Energy (ZNE)

### State Treasurer's Office/California Debt and Investment Advisory Commission (CDIAC)

- State Bond Sales
- Local Audits for State Funded Projects
- Local Bond Reporting Requirements
- Use of Local Bond Funds
- Local Bonds and Other Local Financing Options

### State Water Resources Control Board (SWRCB)

- Municipal Permit
- Safe Drinking Water
- Lead Water Grant Program

### Department of Pesticide Regulation (DPR)

- SB 1405 Implementation
- New Pesticide Regulations
- Pesticide Application and Noticing Requirements

## LEGISLATIVE AND REGULATORY FOCUS

### LEGISLATIVE HIGHLIGHTS

In 2017, CASH tracked 197 facilities-related bills and took formal positions on 19 of these bills. Highlights are detailed in this section.

#### Local Bond Issues

In 2017, there were multiple attempts to limit the authority of school districts to pass and administer local bonds. CASH successfully defeated or amended most of these measures.

- SB 7 (Moorlach) required greater specificity for the project list for Proposition 39 (2000) bonds, plus a master plan with cost estimates prior to placing a local bond on the ballot. SB 7 would unnecessarily limit the ability of school districts to respond to changing needs and priorities in their community, and CASH opposed the bill and successfully blocked it in its first committee.
- AB 1196 (Harper) required schools to match the term of their bonds with the anticipated economic life of the item purchased, which is already required by Federal tax code. CASH opposed AB 1196 because it would provide a new tool to slow issuance of voter-approved bonds and stall projects. We successfully stopped the bill in its second committee in the Senate.
- AB 776 (Harper) and AB 1194 (Dababneh), required additional information about tax rate increases on the ballot label. CASH opposed both, and was able to block AB 776 in the Senate and negotiated amendments on AB 1194 allowing CASH to remove opposition.

#### Other Legislation

AB 203 (O'Donnell) was intended to address the Governor's concerns about the complexity of the School Facility Program (SFP). The bill requires CDE and OPSC to develop regulations to provide schools with flexibility in the design of instructional facilities. CDE must develop strategies to provide small school districts with technical assistance on school construction and funding, and CDE, OPSC, and DSA must report to the Legislature by July 1, 2018 regarding the feasibility of one application or a common application number, as well as common software for project submittals. CASH supported this bill and the intent to streamline the SFP, and it was signed into law by the Governor.

AB 746 (Gonzalez-Fletcher) requires community water systems that serve a school or preschool with a building constructed before January 1, 2010 to test for lead in the potable water system of the school site before January 1, 2019. It also requires the community water system to report its findings to the school site, and if lead levels exceed a certain level, to test a water sample from the point in which the school site connects to the community water system's supply network. If lead levels exceed the specified level at a school site, schools are required to notify parents and guardians of the pupils who attend the school site, and to take immediate steps to make inoperable and shut down all fountains and faucets where the excess lead levels may exist. Finally, the community water system must prepare a sampling plan for each school site where lead sampling is required. To assist school districts, the State Water Resource Control Board (SWRCB) in collaboration with the CDE has established the Drinking Water for Schools Grant Program which provides \$9.5 million in funding to improve access to, and quality of, drinking

## LEGISLATIVE AND REGULATORY FOCUS

water in public schools. CASH worked with the author and stakeholders to make AB 746 more workable for schools, and the bill was signed into law by the Governor.

SB 418 (Hernandez) updates the skilled workforce requirements for projects using Lease-Leaseback and Design-Build. It exempts a number of trades from achieving the phased-in percentage increases for apprenticeship graduation requirements. Most notably, the exemption does not apply to laborers or Mechanical, Electrical, and Plumbing (MEP) contractors. The exempted trades are required to maintain a 30% apprenticeship graduation requirement. The bill was sponsored by Building Trades in recognition of labor shortages and challenges that schools face in meeting the requirements. CASH supported SB 418, which was signed into law by the Governor.

SB 96, a budget trailer bill, made significant updates to the Department of Industrial Relations (DIR) prevailing wage monitoring program. The bill provides some relief, including a small project exemption that raises the threshold for reporting and contractor registration from \$1,000 per project to \$15,000 for maintenance projects and \$25,000 for construction projects. SB 96 extends the timeframe for providing notice to DIR of contract award (filing the PWC-100 form) from five to 30 days. The bill creates new compliance mechanisms, including a penalty for awarding bodies of \$100 per day up to \$10,000 per project. Public agencies deemed “willful violators” with two violations in 12 months would lose state facility funding for one year. The bill increases the annual contractor registration fee from \$300 to \$400. CASH worked with stakeholders, including Building Trades and DIR, to provide feedback on this proposal. SB 96 was signed into law by the Governor and key provisions took effect July 1, 2017.

## LEGISLATIVE AND REGULATORY FOCUS

### **Bills for which CASH took a formal position in 2017**

**AB 68 (Mathis) – School facilities: school site acquisition**

Position: Oppose

Status: Failed passage in Assembly Education Committee

**AB 161 (Levine) – Department of Finance: infrastructure investment**

Position: Support

Status: Failed passage in Senate Appropriations Committee

**AB 203 (O'Donnell) – School facilities: design and construction: report: regulations**

Position: Support

Status: Signed by the Governor

**AB 304 (Eggman) – Public Utilities Commission: proceedings: intervenor compensation**

Position: Support

Status: Failed passage in Assembly Utilities and Energy Committee

**AB 448 (Daly) – Local governments: parcel taxes: notice**

Position: Oppose

Status: Failed passage in Senate Governance and Finance Committee

**AB 581 (McCarty) – Apprenticeships on public works projects**

Position: Support

Status: Signed by the Governor

**AB 776 (Harper) – School district elections: school bond measures**

Position: Oppose

Status: Failed passage in Senate Elections and Constitutional Amendments Committee

**AB 885 (Rubio) – Pupil health: drinking water: lead**

Position: Oppose

Status: Held on Suspense in Assembly Appropriations Committee

**AB 1082 (Burke) – Electric Vehicle Infrastructure Program on School Sites**

Position: Support

Status: Signed by the Governor

**AB 1194 (Dababneh) – Elections: local bond measures: tax rate statement**

Position: Withdraw Opposition

Status: Signed by the Governor

**AB 1196 (Harper) – School bonds: term of bonds: furnishing and equipping classrooms**

Position: Oppose Unless Amended

Status: Failed passage in Senate Governance and Finance Committee

## LEGISLATIVE AND REGULATORY FOCUS

**AB 1253 (Cooley) – Education finance: school bonds: citizens’ oversight committees**

Position: Oppose

Status: Held on Suspense in Assembly Appropriations Committee

**SB 7 (Moorlach) – School district and community college district bonds: project information**

Position: Oppose

Status: Failed passage in Senate Education Committee

**SB 110 (Committee on Budget and Fiscal Review) – Clean Energy Job Creation Program and citizen oversight board**

Position: Support

Status: Signed by the Governor

**SB 348 (Leyva) – County voter information guide: taxpayer notice**

Position: Oppose

Status: Failed passage in Assembly Local Government Committee

**SB 418 (Hernandez) – Public contracts: skilled and trained workforce**

Position: Support

Status: Signed by the Governor

**SB 423 (Cannella) – Indemnity: design professionals**

Position: Oppose

Status: Failed passage in Senate Judiciary Committee

**SB 496 (Cannella) – Indemnity: design professionals**

Position: Oppose

Status: Signed by the Governor

**SB 541 (Allen) – Water: school facility water capture practices**

Position: Support

Status: Signed by the Governor

# LEGISLATIVE AND REGULATORY FOCUS

## Legislative and Regulatory Issues Addressed in 2017

- 7x7x7 Initiative
- Beneficial Occupancy Provisions
- Best Value Requirements
- Bonding Capacity Limits
- Building Standards Commission
- CALGreen Code
- California Building Codes
- California Department of Education Issues
- California Energy Commission Funding Opportunities
- Cap and Trade
- Career Technical Education Facilities Program
- CEQA Issues
- Charter School Facilities Program/Regulations
- Collaborative for High-Performance Schools
- Community Facilities Districts/School Facilities Improvement Districts
- Competitive Selection
- CPUC Intervenor Compensation Program
- DIR Prevailing Wage Monitoring Program
- Design-Build
- Development Mitigation and Developer Fees
- Drought Response
- DSA Construction Oversight Process
- DSA Plan Review Fees
- Electronic Plan Review
- Energy Efficiency Standards and Funding
- Facility Hardship Program
- Facility Inspection Tool
- Federal Energy Efficiency Funding
- Federal Support of School Facilities
- Financial Hardship Program
- Fire Code Requirements and State Funding
- Good Repair and School Maintenance
- Green Schools
- Hazardous Substances and School Siting
- High Performance Schools Grant
- Indemnification Agreements with Design Professionals
- Indoor Air Quality
- Irrigation Efficiency Regulations
- Job Order Contracting
- Lease-Leaseback
- Local Bonds and Financing
- Local Control Funding Formula and Local Control and Accountability Plan
- Minimum Essential Facilities
- New Construction Eligibility
- Net Energy Metering
- NextGen Facilities
- Office of Public School Construction Issues
- Offsite Prevailing Wage Monitoring
- Overcrowding Relief Grants
- Parcel Tax Litigation
- Pesticide Application and Noticing
- Project Labor Agreements
- Polychlorinated Biphenyls (PCBs)
- Portable Classrooms
- Prequalification of Bidders
- Project Information Worksheet
- Proposition 39 Energy Efficiency Program
- Public Works Contracting
- Qualified Zone Academy Bonds (QZAB)
- Routine Restricted Maintenance Account
- Sale of Surplus Property
- School Facility Needs Assessment Program
- School Facility Program Reform
- School Safety and Disaster Preparedness
- School Siting and Local Zoning Ordinances
- Seismic Safety Retrofit/Replacement Program
- Skilled Workforce Requirements and Contracting
- Small School District Eligibility
- Special Education Integration
- State Budget
- Statewide School Bond/Proposition 51
- Storm Water
- Title 5 Updates
- UC Berkeley Center for Cities and Schools Reports
- Underground Storage Tank Clean-Up Program
- Unfunded List and Acknowledged List Regulations
- Use of Local Bond Funds and Related Legal Issues
- Water Funding Programs
- Zero Net Energy Programs

## OPERATIONS

### OPERATIONS

The primary focus for CASH in 2017 was to have a smooth implementation of Proposition 51. The 38<sup>th</sup> Annual Conference in February started with a major initiative to get the Proposition 51 funds out to schools. CASH urged members to “know your number” – meaning know what you are eligible for from the state and to communicate your school facility needs to your legislators.

In addition to focusing on Proposition 51 implementation, the CASH Leadership formed the CASH School Facilities Research Institute (CSFRI); a charitable 501(c)(3) organization. The purpose of this organization is to educate the public on the benefits of quality educational facilities for students and citizens of California. CSFRI will initiate and inform statewide discourse on the funding, design, construction, and operations of facilities as a means to enhance student academic and community success.

Under the leadership of Don Ulrich, Chair of the Annual Conference Planning Committee, the conference had an overall attendance increase of 9.1 percent, and 4.0 percent for public sector attendance over 2016. There was a high level of energy at this conference as we were coming off the victory of passing Proposition 51. Attendees were eager to hear about implementation and when state bond funds would be getting out to school districts. Highlights included the expanded NextGen Experience on the Trade Show floor, top-notch education, the Tuesday Networking Dinner, and exceptional networking opportunities.

The graduation of the second cohort of the CASH Maintenance Management Certification Program (CMMCP) was held during the conference. Participants presented their planned maintenance programs, followed by a graduation ceremony where instructors presented the graduates with their certificates of completion in front of colleagues and family. The CMMCP is a rigorous one-year educational program designed to develop current and future maintenance staff into leading experts in the maintenance arena.

In March, the seventh cohort of the CASH School Facilities Leadership Academy (CSFLA) kicked off with a three-day Institute for the participants. The program was oversubscribed, leading CASH to implement another Academy during the 2018-19 year.

In May, CASH continued efforts to provide educational opportunities focused on NextGen learning with a Spring Symposium titled: *Reshaping the Physical School Environment to Accelerate Student Learning and Engagement*. The first day of the event was dedicated to *Changing the Way We Do Schools* which was held at the STEAM Academy, Washington Elementary School Campus in the Sacramento City Unified School District. The Symposium brought together teachers, principals and other instructional leaders with facility planners, architects, engineers, design professionals, and designers of school furnishings, to share how changes in instruction and learning are transforming classrooms into modern school facilities.

In August of 2017, in place of our regularly scheduled monthly update meeting in Sacramento, CASH held a “Sell State School Bonds” press conference on the West steps of the State Capitol. In addition to a large turnout of CASH members to support our efforts, there was also a huge turnout of the education coalition and several news media outlets.

## OPERATIONS

In September and October, CASH held workshops in Sacramento, Ontario, Fresno and San Diego titled: *The Challenge of Navigating the Newly Added Complexities to the School Facility Program*. These workshops, among other topics, provided a forum for CASH members to provide feedback on the new local audit requirement for state-funded projects.

In October, CASH held a successful Fall Conference in Newport Beach, which included a Pre-Conference workshop.

With the Proposition 51 implementation efforts and a continued steadied economy, the organization experienced an exceptional year of increased membership and attendance at conferences. CASH also experienced another strong fiscal year due to the commitment of the membership.

CASH continued to provide the high level of education and services our members are accustomed to and expanded educational offerings in 2017. With the influx of school facility projects on the horizon, CASH held a three-part Regional Training Course Series in Kern County. Over 50 participants, including superintendents, chief business officials, and school facilities and maintenance directors were immersed in school facilities planning, finance and construction during these courses.

CASH also continued to hold in-person and live-streamed Monthly Update Meetings, which are recorded and open to the school facilities community at-large. These meetings provide up-to-the-moment industry updates, including legislative and regulatory matters, state agency speakers, CASH committees and other organizations related to school facilities.

In 2017, CASH continued to receive support from associate members through online advertising in the *CASH Register* ([www.cashfacilitiesnews.org](http://www.cashfacilitiesnews.org)) and website sponsors, conferences, workshops, the Annual Conference Trade Show/NextGen Experience and other opportunities throughout the year.

Throughout the State, we continued our outreach to county office of education facility planner meetings. We also continued to provide educational outreach workshops at:

- California School Boards Association Annual Education Conference
- Green California Schools and Community College Summit and Exposition

### **2017 Operations Highlights**

#### **38<sup>th</sup> Annual Conference**

The 38<sup>th</sup> Annual Conference was very successful, with positive feedback from attendees, such as:

- “Clearly the best conference available for public school facilities professionals.”
- “Excellent conference with perfect topic choices, I needed one additional day!”
- “The workshop topics were current and relevant to the business of school facilities. Excitement, energy and an overall positive vibe resonated through the halls. Best conference so far!”
- “Really excellent trade show this year. I found a lot of good products and new consultants. This is definitely the highlight.”

# OPERATIONS

## NextGen Experience

Due to the popularity of the NextGen Experience on the Trade Show floor, we expanded the space in 2017. LPA Architects, and in particular Lindsay Hayward, Jim Kisel and Kate Mraw did an excellent job designing and implementing the space this year. Thanks to the following companies for contributing to the success of the NextGen Experience:

- AFE Sports/Astro Turf
- Balfour Beatty Construction
- Buzzi Space
- Campbell Keller
- Cisco
- LPA
- MeTEOR
- Mondo
- Office Depot
- Paragon
- Shaw Contract
- VS America

## **CASH School Facilities Leadership Academy (CSFLA)**

In March, the seventh cohort of the CSFLA kicked off with a three-day Institute in Sacramento. The 42 enrolled students were immersed in the class by the core instructors and guest speakers.

We give special thanks to the core instructors who have helped make this program a huge success:

- Cathy Allen, Sacramento City USD
- Janet Dixon, Temecula USD
- Joe Dixon, Dixon SmartSchoolHouse LLC
- Ed Mierau, Neff Construction

## Participants:

- John Atherton, Balfour Beatty Construction
- Gilbert Baez, PBK Architects
- Tony Barrios, Glendale USD
- Julie Boesch, Maple School District
- William Brandle, Darden Architects
- Dietrick Brown, Monterey Peninsula USD
- Maria Campos, Chico USD
- Lydia Cano, Balwin Park USD
- Graham Clark, Fremont Union High SD
- Daniel Clem, TELACU Construction Management
- Kyle Ellis, Clovis USD
- Jim Evans, Centralia SD
- Christina Frankel, Derivi Castellanos Architects
- Jennifer Gibb, Napa Valley USD
- Hector Gonzalez, Perris Union High SD
- Darren Grisham, Norris School District
- Patricia McCaughey, Orange County DOE
- Paul Melloni, Liberty Union High SD
- Gregory Morales, AFE Sports
- Brooke Murray, Long Beach USD
- Rick Navarro, Evergreen Elementary SD
- Jeremey Nielsen, Calxico USD
- Doug Orr, Natomas USD
- Steven Prince, Ruhnau Ruhnau Clarke Architects Planners
- Janea Quirk, Sweetwater Union High SD
- Matthew Riley, Erickson-Hall Construction Co.
- Lalanya Rothenberger, Chico USD
- Warren Sun, Lodi USD
- Andrew Thompson, HMC Architects
- Hans Twardowski, Hemet USD
- Debra Vaughn Cleff, Webb Cleff Architecture & Engineering

## OPERATIONS

- Ruben Hernandez, Whittier City SD
- Leonard Hernandez, Inglewood USD
- Danny Hillman, San Ramon Valley USD
- Philip Jones, Rescue Union SD
- Jessica Landon, Cordoba Corporation/Inglewood USD
- Joseph Martinez, Central Unified SD
- Louis Velez, Hawthorne SD
- Ted Walstrom, Merced Union High SD
- Daniel Zaich, San Rafael City Schools

### **Fall Conference and Pre-Conference Workshop**

The pre-conference workshop focused on demystifying new obligations, including changes that will allow schools and their private industry partners to successfully navigate the state approval process to access funding. The workshop covered changes in indemnity defense obligations for design professionals, new requirements for bidding and contracting under recent Department of Industrial Relations (DIR) legislation, changes to skilled workforce requirements, new school bond audit requirements, and other significant new state requirements.

The Fall Conference included presentations about CASH advocacy efforts to ensure state bonds are sold in a timely manner, the new School Facility Program (SFP) Front-End Grant Agreement and local audit requirements for state-funded projects, a summary of new legislation and regulations, and updates from our state agency partners, including the Office of Public School Construction (OPSC), the Division of the State Architect (DSA) and the California Department of Education (CDE). Mark Schniepp with the California Economic Forecast was the keynote speaker and was well-received. The Conference included information for school maintenance departments, including CASH's effort to update the *CASH Facilities Inspection Tool (FIT) Guidebook*, as well as a presentation by the CASH School Facilities Leadership Academy.

### **Association Outreach**

#### Green California Schools and Community Colleges Summit and Exposition

For the 11<sup>th</sup> year in a row (since the event's inception), CASH had a presence at the Green California Schools and Community Colleges Summit and Exposition held at the end of November in Pasadena. In conjunction with the School Energy Coalition, speakers from CASH presented at two workshops titled: *What's Next for Proposition 39: Beyond the Fifth Year!* and *Getting Real: Zero Net Energy Schools in California*.

#### EDspaces Conference

In early November, leadership and staff attended the EDspaces Conference in Kansas City. EDspaces is the gathering place for architects, facility planners, designers, administrators and dealers to learn about trends and experience the latest products and services that enhance student learning. We attended to engage and meet with product and service providers to debut at the CASH Annual Conference, especially the Trade Show and NextGen Experience; as well as to educate them about the implementation of Proposition 51, local school bonds and the potential for school facilities funding in California.

## OPERATIONS

### California School Boards Association (CSBA) Annual Education Conference (AEC)

Under the leadership and guidance of CASH Board Member Alex Parslow, and with the assistance of Nancy Chaires Espinoza, Elk Grove USD Board Member and CSBA Legislative Advocate, we presented a workshop titled: *Show Me the Money - What's Next for the School Facility Program* at the CSBA AEC in early December. In preparation for the session, we surveyed school board members to determine the most relevant topics to address during the workshop. The agenda was as follows:

- History of CASH and State School Bonds, Don Ulrich, CASH Chair, Clovis USD
- Overview of the School Facility Program, Don Ulrich, CASH Chair, Clovis USD
- Governing School Board Survey/Questions & Answers, All Panelists
- Closing Remarks and Resources, Julie Arthur, CASH Vice Chair, Palm Springs USD

This workshop had the highest audience engagement level that CASH has presented at the CSBA AEC in recent history. The strategically planned interactive format allowed panelists to be on the floor with attendees to respond to questions.

### County Offices of Education – Facility Planner Meetings

CASH continued its member outreach efforts through county offices of education. CASH leadership, staff and members gave periodic updates at facility planner meetings throughout the State and provided monthly update materials for the meetings.

### **Outreach Committee**

In 2017, the Outreach Committee continued to demonstrate its dedication to raising awareness of CASH by facilitating successful Networking Mixers and growing the Student School Design Awards and Scholarship Program.

This year, complimentary networking mixers open to all school facilities industry professionals were held across the state in the following areas:

- Fremont
- Fresno
- Huntington Beach
- Long Beach
- Menifee
- Oceanside
- Ontario
- Palm Springs
- Sacramento
- San Jose
- Whittier

Under the leadership of Mike Vail, Past Chair, Outreach Committee Chair, and NAC Architecture, and Laura Knauss, Board Member and Lionakis, the Student School Design Awards and Scholarship program remained strong and received 31 submissions from four schools of architecture. CASH continued to grant monetary scholarships to the winners at the Annual Conference, thanks to the generosity of CASH member architect firms. We also thank the subcommittee members for their assistance connecting CASH with schools of architecture and outreach to students about the program.

# OPERATIONS

CASH operates very smoothly on a day-to-day basis, due in part to the highly effective association management team that works closely with CASH leadership and members. Operations for CASH encompass conferences, workshops, webinars, educational programs, leadership training, operations and maintenance training, meetings, communications, committees, membership marketing and retention, sponsor and exhibit sales, outreach, budgeting, and accounting.

## Conferences

| <u>Annual Conference</u>    | <u>Spring NextGen Symposium</u> | <u>Fall Conference</u> | <u>Workshops and Webinars</u> |
|-----------------------------|---------------------------------|------------------------|-------------------------------|
| 1,985 attendees             | 77 attendees                    | 280 attendees          | 23 total                      |
| 67 sponsors                 | 0 sponsors                      | 27 sponsors            | 954 attendees                 |
| 220 exhibitors              | 22 presenters                   | 22 presenters          | 174 presenters                |
| 168 presenters              |                                 |                        |                               |
| 82 golfers                  |                                 |                        |                               |
| 20 golf tournament sponsors |                                 |                        |                               |

## Topics Included

- New Year, New Governor’s Budget, New Construction Delivery Legislation, New DSA IRs and Newly Proposed CDE Title 5 Changes
- Planning & Executing Successful Summer Projects
- The Path to Zero Net Energy (ZNE): Going Beyond Lighting and HVAC on School Sites
- Proposition 51 Implementation: Understanding the Upfront Agreements, Project Processing Impacts and the New Audit Process
- Ensuring Safe K-12 Schools: The Continuing Evolution of DSA
- The Challenge of Navigating the Newly Added Complexities to the School Facility Program
- Significant Changes Affecting School Facility Projects
- Preparing for 2018
- Maintenance Network Workshop Series “Getting Your Share of Your District’s LCAP Funding”
- Webinar: “State’s School Facility Program 101”
- Pre-Conference Workshop at the Fall Conference: “Challenges and Opportunities: Implementing New Legislation”

## Membership

545 Public sector  
608 Private sector  
23 Affiliated organizations  
134 New members

## Communications

### CASH Register Online

- 1 Advertiser
- 64 News articles posted
- Over 15,000 visits, averaging more than 1,000 visits per month

### Membership Directory

- 2 Advertisers
- More than 1,300 distributed

### CASH Website

- Conference and workshop information
- Facility Resource Center
- Links to State Agencies
- Professional Opportunities

### Broadcast Emails

- More than 230 campaigns

### Surveys

- CASH State School Bond Sales Survey
- New Construction Eligibility Justification for Acknowledged List
- CASH/CASBO Questionnaire – State Bond Audit and Grant Agreement/New Requirements for State Bond Funds

## COMMITTEES

As part of the organization's structure, CASH uses standing and ad hoc committees to work on many important issues that are of the utmost interest to our members. These committees are advisory in nature and convey information to the Board of Directors and staff on important issues. In 2017, there were 11 Standing Committees and four Ad Hoc Committees with participation of more than 500 members.

### Standing Committees

Annual Conference Planning Committee, *Julie Arthur*  
Architects Committee, *Laura Knauss*  
Budget Committee, *Dwayne Mears*  
Environmental Committee, *David Miranda*  
Legal Advisory Committee, *Julie Arthur*  
Legislative Advisory Committee, *Robert Pierce*  
Maintenance Network, *Joe Dixon and Alex Parslow*  
Membership Committee, *Noemi Avila-Zamudio*  
Nominating Committee, *Jenny Hannah*  
School Bond Finance Committee, *Don Ulrich, Julie Arthur and Jenny Hannah*  
Urban School Districts Committee, *Tova Corman*

### Ad Hoc Committees

AB 566 Working Group, *Ed Mierau*  
County Offices of Education Working Group, *Jeff Becker*  
Outreach Committee, *Mike Vail*  
Small School Districts Committee, *William Draa*

## STAFF

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