Agenda Items

• Update on 14 parcels from 7-11 Committee (5 Minutes)
• Update on Polling Process and Discussion of Survey Questions (45 Minutes)
• Approved & Proposed Projects (15 Minutes)
  o Update on Remaining State Modernization Projects
• Project Delivering Methods (15 Minutes)
• Timeline to a Successful Bond Election – November 2018 (15 Minutes)
• Future Agenda Items (5 Minutes)
14 Parcels from 7-11 Committee

**Properties for Disposal**
1. Ascot
2. Bell Avenue
3. Former Harmon Johnson Elementary School
4. West 4th and Q Street (Thelma Clark Site)
5. West 4th and E Street (Dorus Ryan)
6. Chuckwagon Park
7. RAFT Building
8. Del Paso Shop

**Properties On Hold**
1. New Police Services – Listed as GMTI
2. Taft Site (Maintenance & Operations Yard
3. Aero Haven Elementary School (Play Field)
4. Grand Avenue Office Complex
5. Fred K. Robinson Center (Dixianne Site)
6. Rio Linda Elementary School (Former District Office and Multipurpose Room)
Polling Process & Survey Questions
Twin Rivers
Unified School District Polling

December 5, 2017

Miranda Everitt & John Fairbank
Fairbank, Maslin, Maullin, Metz & Associates
Presentation Overview

- Firm History
- 2016 Polling vs. Results
- Likely Voter Modeling
- Voter Survey Process
- 2016 Survey Review
- 2018 Survey Questions
Firm History
FM3’s Record

✓ With a 95% win rate, FM3 has passed 124 California K-12 bond measures generating more than $67 billion
✓ Integral in statewide school facilities financing efforts
✓ Strategic and independent
✓ FM3 combines the benefits of small and large firms
  • Partner John Fairbank assigned full-time to the project from beginning to end
  • Research Associate Miranda Everitt will assist with survey drafting, reporting and analysis of the results
  • In-house data analysis and graphics teams for quality control and quick turnaround
Statewide Education Funding Measures

✓ Prop. 51 (statewide $9 billion school bond – Nov. 2016)
✓ California School Boards Association
✓ Coalition for Adequate School Housing (C.A.S.H.)
✓ Prop. 55 (statewide $12.3 billion school bond)
✓ Prop. 39 (lowered school bond vote threshold to 55%)
✓ Prop. 1A (statewide $9.8 billion school bond)
✓ Prop. 155 (statewide $900 million school bond)
✓ Prop. 153 (statewide $900 million school bond)
✓ Prop 152 (statewide $1.9 billion school bond)
✓ Prop. 121 (statewide $450 million school bond)
✓ Prop. 98 (guarantees school funding in state budget)
Recent K-12 Clients in Your Region

- San Juan USD – Measure P ($750 million)
- Elk Grove USD – Measure A ($205 million)
- Natomas USD – Measure J ($129 million)
- Tahoe-Truckee USD – Measure U ($117 million)
- Tahoe-Truckee USD – Measure E ($62 million)
- Nevada JUHSD – Measure B ($47 million)
- Amador County USD – Current Client
- Placer USD – Current Client
All November 2016 School Bond Wins

- Alhambra Unified School District, $110 Million Bond
- Alhambra Unified School District, $149 Million Bond
- Bakersfield City School District, $110 Million Bond
- Barstow Unified School District, $39 Million Bond
- Caruthers Unified School District, $6 Million Bond
- Chino Valley Unified School District, $750 Million Bond
- Etiwanda School District, $137 Million Bond
- Firebaugh-Las Deltas Unified School District, $17 Million Bond
- Fresno Unified School District, $225 Million Bond
- Hacienda-La Puente Unified School District, $148 Million Bond
- Kern High School District, $280 Million Bond
- Lodi Unified School District, $281 Million Bond
- Long Beach Unified School District, $1500 Million Bond
- Mountain View Elementary School District, $57 Million Bond
- Nevada Joint Union High School District, $47 Million Bond
- Ontario-Montclair School District, $150 Million Bond
- Paramount Unified School District, $106 Million Bond
- Red Bluff Joint Union High School District, $26 Million Bond
- Sanger Unified School District, $60 Million Bond
- San Juan Unified School District, $750 Million Bond
- Santa Barbara Unified School District, $135 Million Bond
- Santa Barbara Unified School District, $58 Million Bond
2016 Polling vs. Results
The number, passage rate, and total amount raised by bonds have all been increasing.

<table>
<thead>
<tr>
<th>Election</th>
<th>Prop. 39 School Bond Measures Passed</th>
<th>Passage Rate</th>
<th>Total Bond Funds Raised</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 2016</td>
<td>167</td>
<td>97%</td>
<td>$23.4 billion</td>
</tr>
<tr>
<td>June 2016</td>
<td>41</td>
<td>91%</td>
<td>$5.7 billion</td>
</tr>
<tr>
<td>November 2014</td>
<td>91</td>
<td>81%</td>
<td>$9.8 billion</td>
</tr>
<tr>
<td>June 2014</td>
<td>32</td>
<td>74%</td>
<td>$2.4 billion</td>
</tr>
<tr>
<td>November 2012</td>
<td>90</td>
<td>81%</td>
<td>$13.3 billion</td>
</tr>
<tr>
<td>June 2012</td>
<td>25</td>
<td>74%</td>
<td>$2.0 billion</td>
</tr>
<tr>
<td>November 2010</td>
<td>47</td>
<td>75%</td>
<td>$3.6 billion</td>
</tr>
<tr>
<td>June 2010</td>
<td>15</td>
<td>75%</td>
<td>$1.4 billion</td>
</tr>
<tr>
<td>November 2008</td>
<td>87</td>
<td>92%</td>
<td>$22.2 billion</td>
</tr>
<tr>
<td>June/February 2008</td>
<td>56</td>
<td>79%</td>
<td>$5.9 billion</td>
</tr>
</tbody>
</table>
The current political environment is helpful for local school finance measures.

- Education is a very important priority for voters.
- November 2018 and November 2020 electorates have more favorable demographics than June and odd-year turnouts.
- Districts are starting their planning earlier and doing more and better public education.
- Voters continue to believe that schools have major funding needs, both statewide and locally.
- Terrorism, mass shootings and school shootings have made voters want to invest in local safety, especially at their schools.
- Voters are pessimistic about the federal (and to some degree, state) government’s ability to address their needs.
- Voters see local school measures as a positive vote they can make to improve the quality of life in their local community.
Polling for Long Beach USD’s $1.5 billion bond precisely matched the actual vote.

Long Beach Unified School District Repair and Safety Measure. $1.5 Billion Bond
Polling Margin of Error +/-4.9%

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>Undecided</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 2016 Poll</td>
<td>75%</td>
<td>4%</td>
<td>21%</td>
</tr>
<tr>
<td>Nov. 2016 Vote</td>
<td>75%</td>
<td></td>
<td>25%</td>
</tr>
</tbody>
</table>
In nearby San Juan USD, support was highest for the largest bond amount.

If the San Juan Unified School District bond measure that I just described to you was for $750 million, would you vote yes in favor of it, or no to oppose it?

- Total Yes: 72%
- Total No: 24%
- Undecided: 4%

If the bond measure was for $600 million, would you vote yes or no?

- Total Yes: 70%
- Total No: 23%
- Undecided: 7%

If the bond measure was for $500 million, would you vote yes or no?

- Total Yes: 67%
- Total No: 26%
- Undecided: 7%

If the bond measure was for $400 million, would you vote yes or no?

- Total Yes: 65%
- Total No: 27%
- Undecided: 8%
The measure polled consistently near 75%, which was reflected at the ballot box.

<table>
<thead>
<tr>
<th></th>
<th>Initial Vote</th>
<th>After Positive Messages</th>
<th>After Negative Messages</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Yes</strong></td>
<td>76%</td>
<td>76%</td>
<td>74%</td>
</tr>
<tr>
<td><strong>Total No</strong></td>
<td>20%</td>
<td>21%</td>
<td>23%</td>
</tr>
<tr>
<td><strong>Undecided</strong></td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Q3/Q10/Q12. If the election were held today, would you vote yes in favor of it or no to oppose this school bond measure?
Polling reflected actual results.

San Juan Unified School District Repair and Safety Measure. $750 Million Bond
Polling Margin of Error +/-4.0%

March 2016 Poll
- Yes: 72%
- Undecided: 4%
- No: 24%

Nov. 2016 Vote
- Yes: 69%
- Undecided: 31%
Likely Voter Modeling
FM3 provides the most accurate survey research available by successfully reaching respondents who other research firms sometimes miss.

FM3 is among the few public opinion research organizations to match the voter samples we pull for each unique research project against commercially-available consumer databases that include the most up-to-date contact information for registered voters, including email addresses and cellular phone numbers.

This additional step ensures that voters who may have changed their phone number or email address since registering to vote in the District are still able to participate in the survey, thereby expanding participation opportunities for more voters and providing a more representative sample than would otherwise be possible.
## Twin Rivers USD Voters

<table>
<thead>
<tr>
<th></th>
<th>All Registered</th>
<th>Likely June 2018</th>
<th>Likely Nov. 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>82,330</td>
<td>18,840</td>
<td>42,776</td>
</tr>
<tr>
<td>Men</td>
<td>42%</td>
<td>43%</td>
<td>42%</td>
</tr>
<tr>
<td>Women</td>
<td>50%</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>Democrats</td>
<td>44%</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Republicans</td>
<td>24%</td>
<td>32%</td>
<td>28%</td>
</tr>
<tr>
<td>NPP/Other</td>
<td>31%</td>
<td>17%</td>
<td>22%</td>
</tr>
<tr>
<td>18-49</td>
<td>55%</td>
<td>21%</td>
<td>39%</td>
</tr>
<tr>
<td>50-64</td>
<td>26%</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>65+</td>
<td>19%</td>
<td>45%</td>
<td>30%</td>
</tr>
<tr>
<td>Latino</td>
<td>19%</td>
<td>12%</td>
<td>17%</td>
</tr>
</tbody>
</table>
A November model allows us to examine June turnout as well.

Nov. 2018
42,776 Voters

June 2018
18,840 voters

Full Sample
N=600

June Sub-Sample
N=264
Voter Survey Process
Revenue Measure Planning

- Initial research
  - Assess needs and funding options
  - Assess voter attitudes (baseline survey)

- Build support
  - Communicate with public
  - Develop coalition

- Reassess voter attitudes (tracking survey)

- Refine measure and put it on the ballot

- Communicate with public

- Win!
Survey Goals

✓ Determine willingness to support local school facilities bond measure
✓ Identify the maximum bond authorization and tax rate voters will support
✓ Work with bond counsel to determine specific ballot language to maximize voter support
✓ Assess voters’ understanding of the District’s current financial status
✓ Evaluate perception of the District’s financial and facilities needs
✓ Identify voter priorities for school construction projects to be funded by potential bond measures
✓ Determine the most effective themes and messages for building and solidifying support for the bond measure
**Typical Research Timeline**

**Week 1**
- Kick-off meeting
- Finalize sample and survey methodology
- Circulate first survey draft for comment

**Week 2**
- Revise initial survey draft
- Finalize survey draft
- Acquire the survey sample
- Program survey

**Week 3**
- Begin conducting online survey interviews
- Complete online survey interviews
- Begin conducting telephone survey interviews

**Week 4**
- Complete telephone survey interviews
- Produce “topline” results
- Debrief
- Produce cross-tabulation report

**Week 5**
- Produce graphic presentation
- Present research findings

**Ongoing**
- FM3 remains available
- Provide input on ballot title and summary, ordinance and public outreach materials
2016 Survey Review
Two-thirds saw a need for additional local school funding.

Q2. Generally speaking, would you say that ______________ has a great need for additional funding, some need, a little need, or no real need for additional funding? (February 27 - March 6, 2016; N=600)

- Twin Rivers Unified School District: 44% Great Need, 20% Some Need, 23% DK/NA, 9% A Little Need, 6% No Real Need
  - 65% Overall need

- Your local elementary schools: 43% Great Need, 22% Some Need, 23% DK/NA, 8% A Little Need, 6% No Real Need
  - 65% Overall need

- Your local middle and high schools: 43% Great Need, 21% Some Need, 22% DK/NA, 6% A Little Need, 8% No Real Need
  - 65% Overall need
If the vote on this measure were held today, would you vote yes in favor, or no to oppose it? (N=600, October 24-November 5, 2015)

TWIN RIVERS UNIFIED SCHOOL DISTRICT CLASSROOM AND SCHOOL SAFETY/REPAIR MEASURE.

To upgrade classrooms to meet safety/academic/technology standards; improve school security/fire safety systems; repair faulty electrical systems/air conditioning/leaky roofs/plumbing/deteriorating restrooms; remove asbestos/lead paint; improve education for all students; refinance lease payments; and repair, construct, and acquire educational facilities/equipment, shall the Twin Rivers Unified School District issue $230 million in bonds at legal rates, with independent audits, citizens’ oversight, and no money for administrators’ salaries/pensions?
More than seven in ten backed a $230 million bond measure for the entire District.
Measure 1A
Twin Rivers Unified School District Middle School and High School Repair and Student Safety Measure. To improve education/safety for all middle and high school students; repair leaky roofs/deteriorating gas lines/faulty electrical systems; improve school security/fire safety systems; remove asbestos/lead paint; retain/attract quality teachers; refinance lease payments; and repair/construct/acquire educational facilities/equipment; shall the Twin Rivers Unified School District issue $148 million in bonds at legal rates, with independent audits, citizens’ oversight, and all funds used locally?
The pattern of support was very similar for a smaller measure focused on the high schools.

- **Definitely yes**: 45%
- **Probably yes**: 22%
- **Undecided, lean yes**: 6%
- **Undecided, lean no**: 2%
- **Probably no**: 5%
- **Definitely no**: 13%
- **Undecided**: 7%

**Total Yes**: 74%

**Total No**: 19%
### Feb./March 2016 Polling Vote Patterns

**Middle/High School Measure**

<table>
<thead>
<tr>
<th></th>
<th>Initial Vote</th>
<th>After Informational Messages</th>
<th>Final Vote</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Yes</strong></td>
<td>74%</td>
<td>72%</td>
<td>67%</td>
</tr>
<tr>
<td><strong>Total No</strong></td>
<td>19%</td>
<td>23%</td>
<td>27%</td>
</tr>
<tr>
<td><strong>Undecided</strong></td>
<td>7%</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Q3, Q13, Q16. If the vote on this measure were held today, would you vote yes in favor of it, or no to oppose it? (February 27 - March 6, 2016; N=600)
If the vote on this measure were held today, would you vote yes in favor of it, or no to oppose it? (N=600, June 14-20, 2016)

NEIGHBORHOOD MIDDLE SCHOOL AND HIGH SCHOOL REPAIR AND STUDENT SAFETY MEASURE.

To improve education/safety for all local middle and high school students; repair leaky roofs/deteriorating gas lines/faulty electrical systems; improve school security/fire safety systems; remove asbestos/lead paint; help retain/attract quality teachers; refinance leases; and repair/construct/acquire educational facilities/equipment; shall the Twin Rivers Unified School District issue $148 million in bonds at legal rates, with independent audits, citizens’ oversight, and all funds used locally?
Revisiting the $148 million middle and high school measure yielded the same three-quarters support.

Definitely yes 45%
Probably yes 25%
Undecided, lean yes 3%
Undecided, lean no 3%
Probably no 4%
Definitely no 15%
Undecided 5%

Total Yes 73%
Total No 22%

(N=600, June 14-20, 2016)
If the vote on this measure were held today, would you vote yes in favor of it, or no to oppose it? (N=600, June 14-20, 2016)
Elementary School Bond
Measure Tested Feb./March 2016

Measure 1B
The Twin Rivers Unified School District Elementary School Repair and Student Safety Measure. To improve classroom education and safety for all elementary school students; repair faulty electrical systems/leaky roofs/deteriorating gas lines; improve school security/fire safety systems; remove asbestos/lead paint; retain/attract high-quality teachers; refinance lease payments; and repair/construct/acquire educational facilities/equipment, shall the Twin Rivers Unified School District Elementary School Facilities Improvement District issue $140 million in bonds at legal rates, with independent audits, citizens’ oversight, and all funds used locally?
The elementary school measure also has significant and strong support.

(As asked in Potential SFID Only, N=520)

Q5. If the vote on this measure were held today, would you vote yes in favor of it, or no to oppose it? (February 27 - March 6, 2016; N=600)

- Definitely yes: 47%
- Probably yes: 18%
- Undecided, lean yes: 6%
- Undecided, lean no: 3%
- Probably no: 6%
- Definitely no: 14%
- Undecided: 6%

Total Yes: 72%
Total No: 23%
Q5, Q14, Q17. If the vote on this measure were held today, would you vote yes in favor of it, or no to oppose it?

Feb./March 2016 Polling Vote Patterns
Elementary School Measure

(Asked in Potential SFID Only, N=520)

<table>
<thead>
<tr>
<th></th>
<th>Initial Vote</th>
<th>After Informational Messages</th>
<th>Final Vote</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Yes</td>
<td>72%</td>
<td>73%</td>
<td>67%</td>
</tr>
<tr>
<td>Total No</td>
<td>23%</td>
<td>23%</td>
<td>28%</td>
</tr>
<tr>
<td>Undecided</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Elementary School Bond Measure Tested June 2016

NEIGHBORHOOD ELEMENTARY SCHOOL REPAIR AND STUDENT SAFETY MEASURE.

To improve classroom education and safety for all local elementary school students; repair leaky roofs/deteriorating gas lines/faulty electrical systems; improve school security/fire safety systems; remove asbestos/lead paint; help retain/attract quality teachers; refinance leases; and repair/construct/acquire educational facilities/equipment; shall the Twin Rivers Unified School District Elementary School Facilities Improvement District issue $140 million in bonds at legal rates, with independent audits, citizens’ oversight, and all funds used locally?
Again, more than seven in ten backed the elementary-school only measure.

Asked in SFID Only; N=513

- Definitely yes: 46%
- Probably yes: 23%
- Undecided, lean yes: 3%
- Undecided, lean no: 2%
- Probably no: 5%
- Definitely no: 17%
- Undecided: 4%

Total Yes: 72%
Total No: 24%
If the vote on this measure were held today, would you vote yes in favor of it, or no to oppose it? (N=600, June 14-20, 2016)
2018 Survey Questions
Voter Priorities for Local School Finance Measures

**Almost Always**
- Enough funding to meet your needs
- Fiscal accountability
- Retain/attract quality teachers
- Vocational/job/career education
- Classroom technology/science labs
- After school programs that help kids stay out of trouble
- Quality education for all students
- School/student safety
- Reducing overcrowding

**Sometimes**
- Sunset clauses
- Arts and music education
- Physical education
- Early childhood education
- Energy efficiency
- Replacing portable classrooms
- Accessibility for the disabled
- 21st century learning
- Maintaining/reducing class sizes

**Almost Never**
- Modernization
- Facilities
- Swimming pools
- Gyms/Athletic fields
- Tracks
- Stadiums
- “STEM”/“STEAM”
- Joint community use
- Administrative buildings
The survey results guided revisions to the 75-word ballot label summary for Fresno USD’s bond

April 2010 BENCHMARK SURVEY:

THE QUALITY NEIGHBORHOOD SCHOOLS, CLASSROOM REPAIR, STUDENT SAFETY AND EDUCATION IMPROVEMENT MEASURE

To offset state budget problems and improve schools in every neighborhood by: replacing deteriorating portables with new classrooms, science labs and vocational education classrooms; upgrading classroom technology/computers; Repairing restrooms; improving school security systems; upgrading art/music classrooms and school playgrounds; and acquiring, constructing, repairing school campuses/ facilities/ equipment; shall Fresno Unified School District issue $256 million in bonds, at legal rates, requiring citizen’s oversight, audits, and no money for administrators’ salaries?

Final Ballot Language - November 2010:

MEASURE Q: QUALITY NEIGHBORHOOD SCHOOLS, CLASSROOM REPAIR AND TEACHER RETENTION MEASURE. To offset state budget cuts, attract quality teachers, and repair classrooms by: Upgrading vocational education classrooms/science labs/ technology/ libraries; Improving security/ fire safety/ restrooms/ plumbing/ ventilation systems; increasing handicapped access; securing state matching funds; replacing deteriorating portables; preventing dropouts by improving alternative schools; acquiring, constructing, repairing campuses/ facilities/ equipment; shall Fresno Unified School District issue $280 million in bonds requiring audits, citizens’ oversight, no money for administrators’ salaries, no money for Sacramento, and no tax rate increase.
Questions?
For more information, contact:

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(310) 453-6562
John@FM3research.com

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1999 Harrison St., Suite 2020
Oakland, CA 94612
(510) 451-9521
Miranda@FM3research.com
Approved and Proposed Projects
## 2018 Facilities Projects

<table>
<thead>
<tr>
<th>NMR</th>
<th>Project Descriptions</th>
<th>Type of Project</th>
<th>Est. Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Foothill Ranch Middle School Roofing</td>
<td>Roofing</td>
<td>2,055,000</td>
</tr>
<tr>
<td>2</td>
<td>Hillsdale ES Paving</td>
<td>Paving</td>
<td>340,781</td>
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<tr>
<td>3</td>
<td>Foothill Oaks ES Paving</td>
<td>Paving</td>
<td>108,575</td>
</tr>
<tr>
<td>4</td>
<td>Dry Creek ES Paving</td>
<td>Paving</td>
<td>238,548</td>
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<tr>
<td>5</td>
<td>Babcock ES Paving</td>
<td>Paving</td>
<td>1,935,000</td>
</tr>
<tr>
<td>6</td>
<td>Babcock ES Painting</td>
<td>Painting</td>
<td>205,500</td>
</tr>
<tr>
<td>7</td>
<td>Dry Creek ES Painting</td>
<td>Painting</td>
<td>205,500</td>
</tr>
<tr>
<td>8</td>
<td>Ridgepoint ES Painting</td>
<td>Painting</td>
<td>205,500</td>
</tr>
<tr>
<td>9</td>
<td>Morey Ave Painting</td>
<td>Painting</td>
<td>135,630</td>
</tr>
<tr>
<td>10</td>
<td>Frontier ES Painting</td>
<td>Painting</td>
<td>194,540</td>
</tr>
<tr>
<td>11</td>
<td>Regency Park Portable Project</td>
<td>Other</td>
<td>2,200,000</td>
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<tr>
<td>12</td>
<td>Ridgepoint ES HVAC</td>
<td>HVAC</td>
<td>728,706</td>
</tr>
<tr>
<td>13</td>
<td>Del Paso ES HVAC (split funded w/QZAB pg 13)</td>
<td>HVAC</td>
<td>513,167</td>
</tr>
<tr>
<td>14</td>
<td>Fairbanks ES HVAC</td>
<td>HVAC</td>
<td>547,524</td>
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## 2018 Facilities Projects - Continued

<table>
<thead>
<tr>
<th>NMR</th>
<th>Project Descriptions</th>
<th>Type of Project</th>
<th>Est. Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>Grant HS Fireplace/Bleachers/Sunshade</td>
<td>Other</td>
<td>394,105</td>
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<tr>
<td>16</td>
<td>Greenhouses (amount over CTE Grant)</td>
<td>Other</td>
<td>300,000</td>
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<tr>
<td>17</td>
<td>Futures Roofing</td>
<td>Roofing</td>
<td>439,433</td>
</tr>
<tr>
<td>18</td>
<td>Energy Projects - District Wide</td>
<td>Prop 39</td>
<td>2,500,000</td>
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<tr>
<td>19</td>
<td>CCAA</td>
<td>Prop 39</td>
<td>55,318</td>
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<tr>
<td>20</td>
<td>Smythe</td>
<td>Prop 39</td>
<td>113,755</td>
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<tr>
<td>21</td>
<td>Westside</td>
<td>Prop 39</td>
<td>54,128</td>
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<tr>
<td>22</td>
<td>Castori ES</td>
<td>Mod</td>
<td>772,804</td>
</tr>
<tr>
<td>23</td>
<td>Frontier ES</td>
<td>Mod</td>
<td>1,058,164</td>
</tr>
<tr>
<td>24</td>
<td>Hillsdale ES</td>
<td>Mod</td>
<td>229,491</td>
</tr>
<tr>
<td>25</td>
<td>Johnson ES</td>
<td>Mod</td>
<td>4,976,142</td>
</tr>
<tr>
<td>26</td>
<td>Madison ES</td>
<td>Mod</td>
<td>1,584,137</td>
</tr>
<tr>
<td>27</td>
<td>Pacific HS</td>
<td>Mod</td>
<td>3,147,866</td>
</tr>
<tr>
<td>28</td>
<td>Rio Linda HS</td>
<td>Mod</td>
<td>2,120,882</td>
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<td>29</td>
<td>Woodridge ES</td>
<td>Mod</td>
<td>962,663</td>
</tr>
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<td><strong>Total</strong></td>
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<td><strong>28,322,859</strong></td>
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Subject to Available Local Funds.
## 2019 Facilities Projects

<table>
<thead>
<tr>
<th>NMR</th>
<th>Project Descriptions</th>
<th>Type of Project</th>
<th>Est. Total Cost</th>
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<tbody>
<tr>
<td>30</td>
<td>Norwood JHS Enclose &amp; Mod Outdoor Café/MP</td>
<td>Other</td>
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<td>31</td>
<td>Grant HS</td>
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<td>Noralto ES</td>
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<td>33</td>
<td>Oakdale ES</td>
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<td>34</td>
<td>Sierra View ES</td>
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<td>35</td>
<td>Village ES</td>
<td>Mod</td>
<td>2,278,418</td>
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<td>36</td>
<td>Vineland ES</td>
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<td>37</td>
<td>Westside ES</td>
<td>Mod</td>
<td>1,072,858</td>
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</table>
Project Delivering Methods
Bidding Methods

Kim Barnett
Executive Director
General Services
December 5, 2017
Twin Rivers Unified School District:
Inspiring each student to extraordinary achievement every day!

Agenda

• What is a Project?
• Preferred Contractors
• Processes
  ➢ Public Works
  ➢ CUPCCAA
  ➢ Formal Bidding Process
  ➢ Lease-lease Back
  ➢ Emergency Projects
WHAT IS A PROJECT?

- A project is defined as the construction, reconstruction, alteration, renovation, improvement, demolition and repair work involving any publicly owned, leased or operated facility. Painting or repainting of any publicly owned, leased or operated facility.
Twin Rivers Unified School District has contracted with Colbi Technologies to provide a web-based process for prequalification called “Quality Bidders”.

- California school districts may require contractors to submit a standardized questionnaire and financial statements to determine if they’re qualified to bid.
- Contractors must declare, under penalty of perjury, that submitted information is true.
- Submitted questionnaires and financial statements are not public records and shall not be open to the public.
- Assembly Bill 1565: AB 1565 is a law that went into effect January 1, 2014. It requires school districts with over 2,500 students to pre-qualify bidders (General and MEP subcontractors) for construction contracts if the total project value is $1,000,000 or more and if the project is funded, in whole or in part, with State bond funds. AB 1565, in part, added Section 20111.6 to the Public Contract Code.
- Public Contract Code 20111.6 requires certain districts to pre-qualify contractor, and mechanical, electrical and plumbing (MEP) subcontractors before bids can be accepted when certain projects are funded in part by State bonds. Pre-qualification applies to the following licenses:
  - General Contractors (A and B) Mechanical, Electrical, and Plumbing subcontractors (C-4, C-7, C-10, C-16, C-20, C-34, C-36, C-38, C-42, C-43, C-51, and C-46)
- Additionally, as a District requirement, Twin Rivers USD requires that C-39 Roofing Contractors be prequalified.
- Pre-qualification approval remains valid for one (1) calendar year from the date of notice of qualification except if noted in the pre-qualification documents.
Contractors Qualifications - CUPCCA

• CUPCCA is an acronym for California Uniform Public Construction Cost Accounting.

• Since 1983, school districts that adopt CUPCCA procedures may perform public project work up to $45,000 with their in-house work force, and informally bid construction projects up to $175,000 to contractors.

• During November each year TRUSD mails and publishes a written notice to all construction trade journals designated for that Agency under Section 22036, inviting all licensed contractors to register so that they can become a prequalified Contractor.

• Districts are encouraged to include contractors that have submitted a bid in the 12 months prior to the effective date of the list. Contractors may also be added on an ongoing basis.
Twin Rivers Unified School District:
Inspiring each student to extraordinary achievement every day!

PUBLIC WORKS BIDDING
PUBLIC WORKS

- A project over $15,000
- Labor code requirements must be met including but not limited to the requirement to call for prevailing wages, payment bond for projects in excess of $25,000, fingerprinting, etc.
- Change orders are only permitted to a maximum contract total of 10%.
- Best practices would include ensuring that you are getting the required scope of work for the best price; therefore, obtaining multiple quotes is desirable.
Project - HVAC Repair – Non Public Works

1. Obtain 3 Quotes pre-qualified Contractors
2. Award Contract
3. Site Assessment
4. Assessment Report(s)
5. Estimate Cost Under $15,000
6. Project Close Out
CUPCCA BIDDING PROCESS
INFORMAL BIDDING METHOD

• The CA. Uniform Public Construction Cost Accounting Act (CUPCCA), enacted in 1983 under Public Contract Code Section 22000 et seq., allows local agencies to perform public project work of up to $45,000 with their own workforces

And/or

• Public projects of forty-five thousand dollars ($45,000) or less may be performed by the employees of a public agency by force account, by negotiated contract, or by purchase order.
Project Back-flow Repairs - CUPCCA

- Obtain 3 Quotes pre-qualified Contractors
- Award Contract
- Site Assessment
- Assessment Report(s)
- Estimate Cost Under $45,000
- Project Close Out
Projects between $45,000 and $175,000 shall be let as follows:

- Public projects of one hundred seventy-five thousand dollars ($175,000) or less may be let to contract by informal procedures as set forth in this article (PCC22032 (b)).
- Contractors on our prequalified list for the category of work being bid or all contractors on the list for the category of work being bid and all construction trade journals specified in Section 22036, shall be notified of informal bids unless the product or service is proprietary.
- The notice shall be sent at least 10 days prior to bid opening.
Projects between $45,000 and $175,000 shall be let as follows:

- All standard public contract and labor code requirements must be met including but not limited to bid bond, prevailing wages, payment bond for projects in excess of $25,000, fingerprinting, escrow agreement, DVBE, labor compliance, etc.
- The authority to award informal contracts may be delegated.
- Contracts may be awarded up to $175,000. Effective January 1, 2012, if all bids received are in excess of $175,000, the governing body of the public agency may, by adoption of a resolution by a four-fifths vote, award the contract, at dollars $187,500 or less, to the lowest responsible bidder, if it determines the cost estimate of the public agency was reasonable.
Project – Carpet Replacement

- Site Assessment
- Estimate Cost
- Installation
- CUPPAA
- Project Close Out
What are some of the Benefits?

Some benefits of the CUPCCAA method include:

- Saves approximately $2,000 per legal advertisement
- Reduces bid lead time up to 8 weeks
- Earlier construction start date
- Probability of bid protest is minimized
- District General Conditions & Standards remain intact
- Maintains competitive pricing process
- Can perform Emergency Work under $175,000 without Resolution
- District contract requirements remain intact
- Continue relationships with local contractors
- Reduced staff time not bidding projects under $45,000
- Bid threshold appears to adjust with inflation
- Allows for quick response to unplanned projects
FORMAL BIDDING METHOD

• Public projects of more than one hundred seventy-five thousand dollars ($175,000) shall, except as otherwise provided in this article, be let to contract by formal bidding procedure.

• Standard bid process as outlined in Public Contract Code 20111

• Must be advertised for at least 14-days prior

• A 15-day notice shall be sent to all contractors on the qualified bidders list or the mandated trade journals, or both. (PCC 22037)

➤ Projects funded by State Facility Bond money valued over $1 million require all General Contractors, and Mechanical, Engineering, and Plumbing Sub-Contractors to be Pre-Qualified through a Pre-Qualification process. Assembly Bill (AB) 1565
Lease-Leaseback Method (LLB)

- The Lease-leaseback project delivery method was authorized by the state legislature to deliver school facilities on time, on budget and with a reduced level of public risk.
- California’s Ed Code section 17406 says (in plain language) that:
  - A District may lease any real property that belongs to the District to a “person or corporation,” (the Builder) for $1.00 per year. The agreement between the District and the Builder must provide for the construction of a building or improvement on the District’s property.
- In 2016, AB 2316 was passed, updating CA Ed Code Sec 17406, and the Lease Leaseback process. Districts are to consider “best value” proposals using a multi-step RFP process and evaluation criteria, pre-approved by the Board.
Notice of the RFP must be published in the manner of notice provided in Section 20112 of the Public Contract Code and in a trade paper of general circulation published in the county where the project is located, with the latest notice published at least 10 days before the date for receipt of the proposals. The notice of the RFP should be published as follows:

- At least once a week for two weeks in some newspaper of general circulation published in the District, or if there is no such paper, then in some newspaper of general circulation, circulated in the county.
- The District may also post the notice of the RFP on the District’s website or through an electronic portal.
- The notice of the RFP must also be published in a trade paper of general circulation published in the county where the project is located.
- The latest notice must be published at least 10 days before the date for receipt of the proposals.
What is the difference between lease-leaseback and traditional Public Works bid?

- Although the selection process is different from hard bid, Lease Leaseback projects are still subject to the requirements of DSA, DIR and prevailing wage.
- Under lease-leaseback, the district is allowed to select a general contractor based on factors in addition to cost, such as quality and performance, to determine the Best Value for the District.
- Contractors are invited to respond to a District Request for Proposals. The proposals are evaluated using criteria approved by the Board.
- The general contractor competitively bids the subcontractor work, and this cost is part of the general contractor’s proposal.
- Through negotiation between the district and the general contractor, a guaranteed maximum price for the project is established and recommended to the Board for approval.
  - This process provides additional flexibility and control for the district in ensuring quality projects at a competitive price. In the traditional hard bid environment, the district is required to award the project to the lowest responsive, responsible bidder, without regard to quality and performance.
What are some of the Benefits of LLB?

Some benefits of the LLB contracting method include:

• A level of control not available in the traditional hard bid method, to ensure the public dollar is maximized.

• General contractor selection is based on “Best Value” to the District, determined by the Contractor’s ability to meet or exceed the evaluation criteria approved by the Board and provided in the RFP.

• A Guaranteed Maximum Price (“GMP”) is provided by the contractor. The GMP means no surprises on cost.

• Project cost and timeline are negotiated, with costs of similar projects compared to ensure competitive pricing.

• Opportunity to create a design-build partnership for constructability review and value engineering saves money and avoids problems during construction.

• Ability to ensure local bond dollars stay local through participation by local trades.

• General contractors have incentive to perform well to be selected for future projects.
How is a general contractor selected?

- Under Lease Leaseback, contractors must be prequalified by the District to submit proposals.
- Responses to the Lease-Leaseback RFP are evaluated in a multi-step process. First, proposals are received and scored according to the rubric published in the RFP. After preliminary scoring of the proposals, finalists are invited to interview with the District panel and to bring their fee proposals in a sealed envelope.
- The fee proposal will be used to calculate the **Best Value Score**. The Best Value Score is determined by dividing the Firm’s *final evaluation score* (after interviews have been conducted) by the total fee proposal price to calculate a dollar per point score (Best Value Score = Total Fee Proposal/Final Score). *The Firm with the lowest dollar per point score will be the Best Value Score.*
- The following example, for illustration purposes only, demonstrates the calculation of the final score and the Best Value Score.
RFP SCORING - PART 1 (PRELIMINARY SCORE)

Fill in points for each category up to max indicated. Columns will auto-total at bottom.

<table>
<thead>
<tr>
<th>EVALUATION CATEGORY (from Sec X-B of RFP)</th>
<th>BOBO CONSTR</th>
<th>HARRIS CONSTR</th>
<th>LANDMARK CONSTR</th>
<th>SEWARD L. SCHREDER</th>
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<tr>
<td>Mandatory Requirements</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Firm Personnel, Capacity, and Methodology</td>
<td>Pass/Fail</td>
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<tr>
<td>Relevant Experience and Past Performance</td>
<td>20 points</td>
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<tr>
<td>Preconstruction Services</td>
<td></td>
<td>30 points</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Labor Compliance/Skilled and Trained Workforce</td>
<td>10 points</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Safety</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Business Outreach, Sub Experience</td>
<td>15 points</td>
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<tr>
<td>Exceptions to Preconstruction/LLB</td>
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<tr>
<td><strong>MAXIMUM PRELIMINARY SCORE</strong></td>
<td><strong>100 points</strong></td>
<td><strong>0</strong></td>
<td><strong>0</strong></td>
<td><strong>0</strong></td>
</tr>
</tbody>
</table>

The Contractor’s cost proposal, divided by their final score, provides their “Dollar-per-Point” score. Lowest Dollar-Per-Point score = “Best Value”
Emergencies

• In cases of emergency when repair or replacements are necessary, the governing board may proceed at once to replace or repair any public facility without adopting plans, specifications, strain sheets, or working details, or giving notice for bids to let contracts.

• By a four-fifths vote of the governing board, may repair or replace a public facility, take any directly related and immediate action required by that emergency, and procure the necessary equipment, services, and supplies for those purposes, without giving notice for bids to let contracts.

• By a four-fifths vote of the governing board, the authority to enter emergency contracts may be delegated as long as the designee takes the action to the governing board within 7 days or at its next regularly scheduled meeting which shall be no more than 14 days after the action was taken.
Project – Fire - Emergency

- Site Assessment Safety
- Insurance
- Clean-up
- Emergency Resolution
- Board of Trustee & SCOE Approval
- Restoration
QUESTIONS?
Timeline to a Successful Bond Election – November 2018
Timeline to a Successful Bond Election

1. Update Current Accessed Value, Tax Rates and Master Plan Projection
   - November 2017

2. Review Polling Process and Current Projects
   - December 2017

3. Finalize Timeline for Action Steps, Identify Priority Projects
   - January 2018

4. Conduct Voter Opinion Poll
   - February 2018

5. Development Final Language for Ballot Measure
   - March 2018
Timeline to a Successful Bond Election

- **April 2018**: 6th Board of Trustees pass Resolution to put Bond Election on the Ballot

- **July 2018**: 7th Establish an Election Committee

- **August 2018**: 8th Campaign on your own time

- **September 2018**: 9th Campaign on your own time

- **November 6, 2018**: Election Day
Future Agenda Items

• Establish a timeline to place a Measure on the November 2018 Ballot
• Complete a Voter Opinion Survey of Likely Voters in November Election
• Establish Priority Project List
• Establish a Proposed General Obligation Bond Amount and Tax Rate