SOCCCD Master Plan Advisory Council

Gary Poertner, Deputy Chancellor/Chair
David B. Lang, President, Board of Trustees
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Richard McCullough, President, Saddleback College
Tom Anderson, Vice Chancellor, Educational Services
Beth Mueller, IVC-Director of Fiscal Services
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Glenn Roquemore, President, Irvine Valley College
Wendy Gabriella, IVC-Academic Senate President
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Mary Williams, SC-Classified Senate/Designee
Lewis Long, CTA/Faculty Association President
Connie Zucker, CSEA President
Visitor: James R. Wright, SC-Dean, Math/Science/Engineering, SC

SOCCCD Master Plan Advisory Council established by
Dr. Raghu P. Mathur, Chancellor

Planning Team:

Facilities Planning

- gkkworks
  - David Hunt, AIA, Principal
  - Kris Kay, AIA, Principal-in-Charge
  - Edmund Einy, AIA, Design Director and Planner
  - Ann Cash, Project Designer and Planner

Architectural and Planning

- Newport Beach, CA

Educational Planning

- MAAS Companies
  - Michael Maas, Ph.D., Principal-in-Charge
  - Joyce Black, Project Manager
  - Ken Cereghino, Senior Associate
  - Jim Rogers, Project Manager

Facilities Master Plan

- Saddleback College
- Irvine Valley College
- Advanced Technology & Education Park (ATEP)
# South Orange County Community College District Master Plan

## Advanced Technology and Education Park

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**Letter from the Chancellor**

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**Letter from the President**

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It is with great pride that I present the Educational and Facilities Master Plan which reflects the shared vision of hundreds of students, faculty, staff, administrators, trustees and members of the community. The South Orange County Community College District now has a thoughtfully prepared roadmap to guide the development of instructional programs, student services and facilities.

Since 1968, we have been fulfilling an educational promise made to the community with nationally-recognized instruction at two beautiful campuses, first at Saddleback College in Mission Viejo and then at Irvine Valley College in Irvine. This proud tradition continues at our newest campus, the innovative Advanced Technology & Education Park in Tustin.

The Master Plan was brought to fruition by an advisory council of all collegial consultation groups of the colleges and district. The final version reflects more than 80 interviews and group meetings conducted in 2005-2006, an online survey of all employees, a survey of more than 200 business and industry representatives, environmental scans, workforce analyses, estimates of population growth and trends, consideration of technology developments and needs in education, a review of economic data, and analysis of enrollment trends.

As good stewards of taxpayer investment, our district must conscientiously plan for the future of our students and the future of our regional economy. A recently commissioned study found that our district accounts for $1.7 billion of all earnings in the region, based on students in the workforce and district expenditures. Every dollar of state and local taxes invested in our district brings a return of 14.3 percent to state and local governments. Students who attend our programs have higher earnings, pay more in taxes and use fewer social services. We are making a significant difference in the lives of our students as well as in the vibrant economy of the region.

The driving force behind this Master Plan was to document the vision of our district looking ahead to the year 2020. Together, with the guidance and leadership of the South Orange County Community College District Board of Trustees, we envision great things in our quest to provide academic opportunities, cultural enrichment and social experiences to foster student success and contribute to the community.

Raghu P. Mathur, Ed.D.
Chancellor

The vision of the South Orange County Community College District is to create an environment of excellence that best serves the students and community.
South Orange County Community College District Master Plan

Introduction

The South Orange County Community College District (SOCCCD) is located in Southern California in the County of Orange. Currently the District has two campuses: Saddleback College (SC), and Irvine Valley College (IVC) as well as its new 68-acre Advanced Technology & Education Park (ATEP), at the Tustin Legacy site in Tustin, California. The Colleges also offer various off-campus programs at locations throughout the community.

Purpose of the Master Plan

The purpose of the South Orange County Community College District Educational and Facilities Master Plan is to provide a working Vision for the future growth of the District’s three campuses through the year 2020. The Educational and Facilities plans are comprised of two separate documents that together, create the overall Facilities and Educational Master Plan. The Educational Master Plan was prepared by MAAS Companies. The Facilities Master Plan was prepared by gkkworks. The growth of the District is driven by the projected growth for each campus. The Educational and Facilities Master Plan delineates broad solutions for areas of educational growth but details of specific projects will evolve as they are designed in the future. We recommend that this document be utilized as a living document that is used for its vision and guidelines with the stipulation that it would incorporate midcourse corrections as necessary.

The Master Planning Process

The planning process has been a very participatory process involving the District, Colleges, and ATEP. The Planning team included gkkworks Campus Planners and Architects as well as The MAAS Companies Educational Planners. The planning team worked with the Master Plan Advisory Council, comprised of faculty, staff, and administrators, as well as College committees, which also comprised of faculty, staff, students and administrators. The planning process included:

- Division Interviews (for SC and IVC)
- A Questionnaire
- Discussions
- Reviews
- A Local Business Community Breakfast (for ATEP)
- Presentations

The committees reviewed existing site and environmental scans, qualitative and quantitative issues and made recommendations about project priorities.

The Educational and Facilities Master Plans

The Educational and Facilities Master Plan document herein describes the local external scan for Orange County.

The Educational Master Plan:
Saddleback and Irvine Valley Colleges

Scope Overview

The 2006 Saddleback College and Irvine Valley College Educational Resource Plans (“Educational Resource Plans” or “Plans”) are space needs plans that update the previous assessment for space identified in the South Orange County Community College 2001 Educational and Facility Master Plan. It provides the foundation document upon which the Facilities Master Plan is predicated. The Educational Master Plan was prepared by the MAAS Companies, Inc. The Facilities Master Plan was prepared by gkkworks.

The Educational Resource Plans have their roots in both qualitative input and quantitative data obtained from the Colleges. These two sources of information were the primary components used to determine changes that might have occurred over the past five-years and to forecast future needs. The goal of the Educational Master Plan was to determine the amount of space that would be required to accommodate the academic program of instruction and support services through the year 2020. Required space needs will guide the Facility Master Plan objectives.

The Resource Educational Plans developed by the MAAS Companies were based upon the following tasks:

1. Conducting an overview and assessment of the Colleges and the areas served:
   a) Conducting data research that focused on the history of growth for both student enrollment and weekly student contact hours (WSCH).
   b) Completing a physical capacity analysis – determining the viability of the physical space to support the current program of instruction and support services.
   c) Assessing the internal environment of the Colleges relative to the current profile of the students served.
   d) Evaluating the current level of facility utilization, for example, comparing available space versus weekly student hours of use.
   e) Conducting an external environmental scan, for example, viewing the Colleges in relationship to its service area and external environment.

2. Creating a platform to support forecasting the future needs and directions of the Colleges:
   a) Surveying of faculty, staff, administrators and students relative to needs of the Colleges.
   b) Securing input from deans and directors to assess current and future needs relative to the program of instruction and/or support services.
   c) Conducting on-campus interviews and meetings with deans and directors, administrators and managers and students to determine the future campus vision.
   d) Conducting a section level analysis of the current program of instruction.
   e) Creating a baseline curriculum that is reflective of current WSCH values by discipline/program, by instructional division/school and by the Colleges overall.
   f) Melding the qualitative input from Colleges with quantitative data obtained in the research process.
   g) Comparing the data obtained with the previous educational master plan completed in 2000.
3. Defining the capacities for WSCH generation in the future and determining the needs for space through year 2020:
   a) Creating a WSCH generation forecast by discipline/program and instructional division/school relative to the program of instruction for the future.
   b) Quantifying the capacity of academic space needs (in assignable square feet/ASF) for the future.
   c) Quantifying the capacity of the Colleges' total space needs (in assignable square feet/ASF) for the future.
   d) Translating space needs to be consistent with the Title V standards of the state.
   e) Producing a surplus/deficit analysis for the space requirement of the future.

Objectives

- To coalesce educational components such as the physical, programmatic and human resource components of the Colleges into a long-range plan that will support facility future development and decision-making.
- To identify and allocate academic and support services space through the year 2020.
- To provide the facility master planners with appropriate space categories that meet state educational codes and Title V standards.
- To position the Colleges for taking the next step in the physical building process. This entails determination of physical building requirements from projected space needs that meet state criteria and then, identifying a finance plan and strategy to meet all the facilities needs of the Colleges.

The Educational Master Plan: ATEP Campus

Process/Methodology
The work performed for creating the Plan was directed to 1) identifying potential opportunities for the ATEP site and 2) formulating a recommended program of implementation. Particular emphasis was placed on technology-based uses for the site. A long-range vision for ATEP, incorporating both programmatic and site/use options, was generated as part of the goal of this process. This included determining the space needs required to support the programmatic and site/use options, articulating a sequencing schedule for development, and projecting the costs for implementation.

Tasks to be completed:

Task I: Conduct an Overview and Assessment of ATEP’s Capacity
- Conduct a physical capacity analysis of both existing facilities and proposed new construction.
- Conduct an internal and external environmental review to determine the opportunities and challenges of the service area.
- Identify the internal and external factors that could have an influence or impact on the development and programmatic direction of the ATEP site.
- Assess current and projected educational programs for the ATEP site.
- Secure input from faculty/staff, deans/directors and administrators/managers of Saddleback and Irvine Valley Colleges relative to the use and purpose of the ATEP site.
- Secure input from the constituency/user groups relative to ATEP’s potential for serving the needs of the area.

Task II: Develop Program of Instruction for ATEP’s Start-up Period
- Define start-up educational benchmarks.
- Recommend programs and services for ATEP’s initial start-up period.

Task III: Define The Future Capacity of ATEP and Determine Future Programs, Uses, and Space Needs
- Recommend programmatic and site/use options for the future.
- Determine the highest and best use of the ATEP site for the future.
- Quantify space needs for the future.
- Assess and determine appropriate future benchmarks for implementation.
- Determine raw square footage tolerance levels via the state educational codes and Title V standards, as appropriate.

Task IV: Capture the Elements Into A Working Model
- Recommend a sequencing schedule for development.
- Identify costs for development.
- Present the findings in a formal document.

Plan Objectives
- Identify programmatic and site/use targets for ATEP via data gathered in the quantitative and qualitative review processes.
- Identify start-up educational programs.
- Recommend a long range program of development and use for the ATEP site.
- Provide facility planners with appropriate space allocations.
- Provide a sequencing schedule for development.
- Provide a cost estimate for the Plan’s implementation.
- Position ATEP for taking the next step in the process.
ATEP Campus Building Objectives - Civic/Site Support Building Profile

This will be the site’s premiere building. It may also serve as a hub for District distance education programs and staff development. Its function will be as a multiuse facility, supporting civic and business and industry uses. Additionally, this facility could house a state-of-the-art Language Lab that will support English and Foreign Language learning or another “Education/Business Partner.” This multi-faceted building could have the following space and use profile:

### Conference Center and Partner Facility

<table>
<thead>
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<tr>
<td></td>
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<tr>
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<tr>
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<tr>
<td>Meeting</td>
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<td>Café</td>
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### The Financial Plan & Funding Sources

#### Introduction

The District’s Facility Master Plan has been built around the concept of matching the space needs of the colleges and ATEP with the tolerance thresholds of time and money. The goal has been to produce a viable building/facilities program. Thus, the Plan was developed to identify all projected facilities needs and, at the same time, understanding that it would have to be phased in over a number of years depending on the availability of funding from a variety of sources. We anticipate 20 years has been anticipated as a possible time frame. However, the time frame may need adjustment depending on available funding. The priorities and the identified projects do not change. The variables are time and funding.

The proposed building/facilities program that follows defines projects by site and location. The cost estimates for the projects are primarily based on current construction costs as established by the State of California pursuant to California Construction Cost Index (CCI-4421). This index projects costs for projects that will be under construction during the 2007-08 fiscal year.

gkkworks has provided specific cost summary estimates which are located at the end of each campus section. The Maas Companies has further analyzed such costs per the following breakdown. For renovation projects, it is estimated that approximately $125/ASF should be budgeted for renovation and remodel of existing buildings.

All existing spaces will also need to be upgraded for technology and equipment. $55/ASF has been budgeted for this category.

Much of the infrastructure and utility systems at the Saddleback College campus are 30-40 years old, at Irvine Valley College they are 20 years old and there is no infrastructure at ATEP. The estimated cost for these improvements is $106/ASF of building area.

Site improvements including parking lots, lighting ADA access, fields and landscaping are also needed. The cost to construct these improvements is $20/ASF of building area.

#### Proposed Facilities by Site

As discussed in this facilities master plan, the significant proposed projects, by site, are as follows:

1. **Irvine Valley College**
   - **New Facilities**
     - Business Science & Advanced Technology Innovation Center
     - Life Science Building
     - Fine Arts Building
     - Central Plant
   - **Renovations/Additions**
     - Library/LRC/Administration Annex
     - Student Services Annex
     - B 200 Laboratory Sciences Annex
   - **Site Improvements**
     - Reconfigure Entry Road
     - Relocate Bus Drop-off
     - New Barranca Parkway Entrance
     - New Soccer Stadium
     - Complete Baseball Stadium

Source: Maas Companies projections.
B. Saddleback College

1. New Facilities
   • Science Building
   • Fine Arts Building
   • Student Services (Admission/Records/Matriculation)
   • Classroom Building
   • Transportation Building

2. Renovations/Additions
   • BGS Building
   • Performing Arts Restrooms
   • TAS Building
   • Library/LRC
   • Math/Science Building
   • PE 100 & 300 Buildings
   • McKinney Theater

3. Site Improvements
   • New Loop Road
   • P.E., Soccer and Practice Fields
   • Widen Marguerite Parkway Entrance
   • Parking & Parking Structure

C. ATEP

1. New Buildings
   • Classroom/Administrative Support Services Modular Buildings

   • Conference Center
     - Conference/Exhibit
     - Conference Support
     - Food Service
     - Classrooms (Partnerships)

2. Renovations/Additions
   • Chapel
   • Hangar
   • MCX

3. Site Improvements
   • Demolition of Existing Buildings
   • Central Plant and Utility Infrastructure
   • Parking and On-site Roads
   • Landscaping

Projected Costs for the Facilities Master Plan

The District will be facing some very difficult decisions with respect to prioritizing the aforementioned projects and establishing a financing plan for the identified projects. To assist in this process, a preliminary cost estimate has been developed that identifies the costs of the Plan by the following major categories:

- New Construction
- Renovations and Modernizations
- Site Improvements
- Project “Soft Costs” (architecture, engineering, inspection, management, etc.)

By site, the cost’s to fully implement the proposed facilities plan breaks down roughly as follows:

A. Irvine Valley College
   • New Construction $75,000,000
   • Site Improvements $11,000,000
   • Renovations and Modernizations $53,000,000
   • Project Soft Costs $20,000,000
   TOTAL $159,000,000

B. Saddleback College
   • New Construction $76,000,000
   • Site Improvements $32,000,000
   • Renovations and Modernizations $84,000,000
   • Project Soft Costs $29,000,000
   TOTAL $221,000,000

C. ATEP
   • New Construction (Phase I) $44,000,000
   • Site Improvements (Phase I) $9,000,000
   • Renovations and Modernizations (Phase I) $13,000,000
   • Project Soft Costs (Phase I) $13,000,000
   SUB-TOTAL $79,000,000
   • ATEP Phase II and III $270,000,000
   TOTAL $349,000,000

   GRAND TOTAL (Including ATEP Phase I Only) $459,000,000
   GRAND TOTAL (Including ATEP Phases I-II) $729,000,000

Financing Options

Given the magnitude of the financing required to implement the proposed facilities master plan, a financing plan involving a number of funding options has been developed for consideration by the District. Specifically, the options are as follows:

- General Operating Fund of the District
- State of California Capital Outlay Funding
- Certificates of Participation (COP)
- Scheduled Maintenance Funds from the State*
- Special Assessment District Funding
- Federal and State Grants
- Joint Venture programs with Business and Industry
- Joint Venture programs with other Educational Institutions
- Leasing of Land/Buildings
- Fee Based Instructional Programs
- Student Fees
- Private Donations
- Local Bond Issue

* These funds may be distributed by the State as a “Block Grant” that also includes funding for instructional equipment. The District would need to designate these funds for augmentation of the capital construction program.
A. General Operating Fund of the District

The South Orange County Community College District is one of three community college districts in California that are considered a “Basic Aid” district. The Basic Aid process survived the Proposition 13 Tax Reform Initiative in 1978. The Board of Trustees has latitude to collect additional local property tax dollars based on this process. These dollars are above and beyond those that the State of California distributes to local districts according to student attendance based on Weekly Student Contact Hours (WSCCH). This is a revenue option for the District but it is a very sensitive political issue that the Board of Trustees must carefully consider before requesting such funding. However, this source of funding, along with a portion of the general operating revenue received from the State, is an option the District might consider as local funding to match the state capital construction program discussed in item B.

B. State of California Capital Outlay Funding

Funding through the California Community College Chancellor’s Office is a long-standing source for funding capital construction projects. This process requires submittals of an Initial Project Proposal (IPP) and a Final Project Proposal (FPP). Approvals through the State Chancellor’s Office and ultimately the Department of Finance and the legislature typically takes three years from application to receive initial funding of a project, and five years before the project is completed and ready for occupancy. The process is driven by a competitive point system with all community colleges competing for the same funding that the State has provided via a state-wide bond program. This process generally requires the District to provide a percentage of its own funds as a “match” while the State provides the balance. In the past, 10% – 20% District funding was a norm. Recently, the percentage of local contribution has risen to 30% – 50% in matching funds as Districts who have passed local bonds are using those funds to gain additional “points” for their projects. Pursuant to State guidelines, the State will fund a maximum of one project per college per year. In reality, the pattern of funding has been less than the maximum due to the time it takes to plan and construct a project via this procedure. If the District can achieve the necessary “points” for a project to be funded, a reasonable expectation would be to have 4-5 projects funded by the State per campus over the next 20 years.

C. Certificates of Participation (COP)

The Board of Trustees has the statutory right to issues Certificates of Participation (COP) to fund capital or leasehold improvements. In simple terms, a COP is a loan the District secures to finance an obligation it wishes to undertake. Typically, this obligation is a capital outlay project (buildings and/or equipment, land acquisition, etc.) Issuance of COP’s does not require voter approval. However, the concern for issuing COP’s is the source of repayment. Generally, the source of repayment is the general operating fund or another identified fund such as a bookstore fund or lease revenue fund maintained by the District. The District must demonstrate to the lender that it has the financial capability to repay the COP in a timely manner prior to issuance. There are financial limits and necessary approvals the District must achieve to use this program.

D. Scheduled Maintenance Funds from the State

As noted above, the State of California has historically funded local districts to assist in scheduled maintenance of facilities. Until 2002, funding occurred on a project-by-project basis. Since 2002, scheduled maintenance funding is included in an annually funded block grant program that also includes funds for instructional and library equipment. There is a local match required for the use of these funds. It is not typically a large amount of funding ($300,000-$600,000/district/year) but it is an option to solve minor building renovation or maintenance issues.

E. Special Assessment District Funding

The creation of a special assessment district is an option the District may wish to consider as part of the funding strategy for the ATEP site. In cooperation with the City and/or County an assessment district could be created to provide infrastructure financing for the ATEP site. As is always the case, this is again a loan that must be repaid. The source of repayment is typically the property tax revenue or special assessment levied against the property owners within the described assessment district. This would be an obligation the College/District would need to carefully consider because, as the property owner, they are basically obligating themselves and/or their partners. Special Assessment Districts are often an integral part of a redevelopment project wherein the project will generate additional property tax revenue that can be used to re-pay the bonds that are issued for the capital improvement.

F. Federal and State Grants

Federal and State grants are generally obtained through a competitive application process. These occur on an on-going basis. For community colleges, most Federal and State Grants come in the form of funds for equipment, furniture, program development costs, operational staffing, etc. Often they are “seed money” that require the District to assume the financial responsibility at some point in the future. Such funding is rarely available for capital construction. An exception to this statement is the Federal Title III Grant for equipment funding. This grant is a one time source of funding for new instructional programs awarded annually on a competitive basis.

G. Joint Venture programs with Business and Industry

Joint venture options with business and industry have been identified as a primary source of funding for the ATEP site. The District has the statutory right to enter into a joint-venture agreement with business or industry. The District would contribute the capital and repay the construction loan for the building would be part of the joint-use agreement between the parties and ultimately in lieu of land lease payments and rent until such time that the building cost is paid.

H. Joint Venture programs with other Educational Institutions

Joint venture options with other educational institutions would be similar in format to the joint venture program discussed in item G. However, rather than having a joint venture partner from business or industry, the District would have another educational institution as its partner. The education partner, via the joint venture agreement would assume responsibility for the repayment of the construction loan in lieu of land lease payments and rent until the building cost is paid.

I. Leasing of Land/Buildings

The Leasing of Land/Buildings The District has participated in this form of alternate funding for a number of years. The golf facility at the Saddleback campus is an example. The District has the statutory right to lease property that is not needed for instructional purposes. Rather than entering into a joint-venture agreement, this may be a funding option the district can consider for a building that would be used by a private party or an educational institution. If so, the revenue generated from such activities can be used to fund capital construction projects for the District.

J. Fee Based Instructional Programs

Fee based instructional programs The District has the option to develop a fee-based curriculum and compete with other public and private institutions for students who would not typically attend the traditional, state-funded, public instructional program of a community college. Any excess revenue generated from such activities could be used to fund future capital construction projects.

K. Student Fees

Student fees The District has the option to develop a fee-based curriculum and compete with other public and private institutions for students who would not typically attend the traditional, state-funded, public instructional program of a community college. Any excess revenue generated from such activities could be used to fund future capital construction projects.

L. Private Donations

Private colleges and universities have historically created capital campaigns to fund facilities. Unfortunately, the community colleges have had limited success in such alternate funding efforts. However, the proposed development of ATEP may provide an opportunity for this type of funding. Private businesses or educational institutions may wish to “partner” with the District. Typically, such donations are for the development of technology. In recent years, it has
become very popular to develop business incubators with the University of California campuses. This partnership approach seems very appropriate for the future development of the ATEP site. Using this concept, businesses or educational institutions could partner (by providing capital) with the District to develop advanced technology programs and educational facilities at the site.

M. Local Bond Issue
The option of requesting voter approval of a local bond issue to fund future capital construction projects is also an option utilized by many community colleges in California. Currently, 56 community colleges have included this funding option in their financing plan. It is recognized that this is an option that must be carefully assessed and evaluated prior to committing to such an election. Pursuant to Proposition 39 guidelines, 55% of the voters must approve the issuance of bonds. There is a maximum limit of $25/$100,000 of assessed valuation that can be levied. Typically, the length of repayment of the obligation is 20-30 years. Elections to request voter approval of a Proposition 39 Bond must be held in conjunction with a general election such as the state-wide primary or general elections. Very specific guidelines and procedures must be followed by the District if they elect to pursue this option. Finally, a comprehensive, detailed plan of public information and justification for all projects that will be funded via the bond program must be shared with all constituencies.

Suggested Financing Parameters
The following general guidelines are suggested as the District considers the funding options for the Facilities Master Plan:

1. The Board of Trustees, in concert with the District staff, should carefully review and assess all funding options. A series of Board of Trustees workshops specifically designated for this purpose may be necessary.
2. The District must prioritize the projects included in the Facilities Master Plan. This prioritization should be based on the specific needs as well as the source of potential funding.
3. The District must maximize state funding. This should be a primary criterion for the prioritization of projects.
4. Carefully assess the time line for implementing the plan. Adjustment in the time line may provide additional funding options.
5. Respect the Plan. Any modifications must be carefully considered as there will likely be secondary effects that may not be anticipated. However, make the Plan a “living” document that is used as a guide to decision-making. Update as agreed upon as a result of thoughtful planning and discussion with all parties.
South Orange County Community College District Master Plan

How to use this Master Plan

The campus projects in this master plan are phased at five year intervals, 2005 (current plan), 2010 (five year plan), 2015 (ten year plan) and 2020 (final phased plan for fifteen years). The graphics and documentation in this plan are colored according to these phases to aid in the reader’s understanding of campus phased development.

The following represents the phasing process:

- Existing Campus: Gray
- Phase One (2006 - 2010): Yellow
- Phase Two (2011 - 2015): Teal Blue
- Phase Three (2016- 2020): Cobalt Blue