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A STUDY OF THE UTILIZATION OF PUBLIC SCHOOL FACILITIES (GRADES K THROUGH 12)

STATE OF CALIFORNIA

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BY THE

COMMISSION ON CALIFORNIA STATE GOVERNMENT ORGANIZATION AND ECONOMY

JULY 1978

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July 5, 1978

Honorable Edmund G. Brown Jr.
Governor, State of California

Honorable James R. Mills
President pro Tempore, and to Members of the Senate

Honorable Leo T. McCarthy
Speaker, and to Members of the Assembly

On June 6, 1978, California voters delivered a strong mandate to their state and local governments. Their message was clear; they want the cost of government reduced.

The public believes they have been overcharged for the service they have received from their governments. They feel this overtaxation stems from governmental inefficiency and the operation of "unnecessary" programs. Through Proposition 13 they have said they will no longer fund current governmental operating modes.

To comply with this act of the people, school districts will have to significantly increase their efforts to eliminate fiscal slack. Districts will now have to strive for the absolute optimum in cost-effective administrative operations if they are to provide a quality educational program at a reduced cost. One area of those operations in which important cost reductions can be realized is school facility utilization.

In 1973, while studying the State School Building Aid Program, this Commission discovered that declining enrollment in the elementary grades was beginning to reduce the efficiency of school facility utilization. During the ensuing years, as enrollment continued to drop, many schools became seriously underutilized, often housing fewer than one half the number of students they were designed to handle. By 1977 it appeared clear to the Commission that this adverse effect was not being effectively countered, and was contributing to increased per-pupil costs for education. Since the state at that time provided elementary and secondary school districts with more than $2.3 billion annually--nearly 40% of their total budgets--the Commission viewed this problem as a serious concern for state government as well as for school districts.

In August of that year I, as chairman of the Commission, formed a subcommittee to analyze the causes of inefficient school facilities utilization, investigate methods of improving efficiency and develop recommendations for achieving such improvement. Appointed to that subcommittee were Commissioner Edward M. Fryer, Assemblyman Jack R. Fenton and Commissioner Maurice Rene Chez, who chaired the subcommittee. Subsequently, I appointed Commissioner Nancie B. Knapp to that subcommittee. These Commission members provided policy guidance for the staff work which was performed by Don Anderson, former Executive Officer of the State Allocation Board, and Fred Klass under the direction of the Commission's Executive Director, L. H. Halcomb.

From this study the Commission has learned that the elementary and secondary educational facilities in California are overbuilt compared to what the state will need through at least the 1980's. The Commission has also discovered that a massive amount of the state's public school facilities are in very poor maintenance condition, seriously threatening a multi-billion dollar taxpayer investment.

The issues of maintenance condition and utilization efficiency are interrelated, each potentially affecting the other. Consequently, the accompanying report delineates the Commission's findings and recommendations with respect to both issues.

Although this report focuses specifically on the poor maintenance condition and inefficient use of school facilities, it also reveals that these conditions are reflections of more fundamental weaknesses in the ability of our state's educational system to economically deliver educational services. Perhaps the greatest weakness of all lies in the tremendous administrative inefficiency resulting from the redundancy and decentralization of 1,043 school districts. This overabundance of districts needlessly replicates administrative staff, facilities and governing board expenses. The excessiveness of this number of districts is readily apparent in the City of San Jose which contains a total of thirteen separate school districts within its corporate limits. Located in the center of the city are two one-school school districts, each with an enrollment of only about 300 students.

This Commission is concerned about the burden placed on California's taxpayers because of these economic weaknesses in the state's education system. Our interest in the efficient organization and operation of this system will not be limited to this report.

It is the intention of this Commission to pursue actively the implementation of this report's recommendations. To that end, this Commission will conduct an "implementation meeting" shortly after the report is issued. The purpose will be to bring together, and establish a coordinated effort among, representatives of organizations and individuals whose participation will be important to the successful implementation of this report's recommendations. Additionally, this Commission will review periodically the efforts of pertinent bodies to determine how effectively they have implemented this report's recommendations.

Attention to efficiency and economy in school facility utilization is long overdue. State leadership in the dissemination of methodology and promotion of managerial skills is essential. The study's recommendations address these imperatives.

MAURICE RENE CHEZ, Subcommittee Chairman
Members: Assemblyman Jack R. Fenton
Edward M. Fryer
Nancie B. Knapp

NATHAN SHAPELL, Chairman
Donald G. Livingston, Vice-Chairman
Senator Alfred E. Alquist
David P. Dawson
Assemblyman Richard D. Hayden
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Manning J. Post
Lloyd Rigler
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UTILIZATION OF PUBLIC SCHOOL FACILITIES
(GRADES K THROUGH 12)

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PART I

SUMMARY OF FINDINGS

Significant Decline in Student Enrollment. Between 1970 and 1977, enrollment through the twelfth grade in California public schools dropped by 300,853 students. School facilities constructed to accommodate peak enrollment levels of earlier years now provide a capacity significantly in excess of what the state will need through at least the 1980's. Many school buildings are occupied by far fewer students than they were designed to accommodate. Such serious underutilization of facilities raises per-student operating cost and decreases fiscal efficiency.

This study was conducted to ascertain the effectiveness with which school districts are meeting the challenge of maintaining efficient facility utilization as enrollment declines. This study's findings and recommendations have been developed from a review of pertinent literature, an on-site survey of selected school districts, many consultations with a broad range of individuals knowledgeable about one or more aspects of facility use and two public hearings. (See appendices.)

Even though some professional journals and school administrator organizations projected decreased enrollment and warned of its potential effects on school operations as early as the mid 1960's, school districts generally have not acted to preserve efficiency in response to the decline. What actions have been taken have not been commensurate with the size and impact of the decline.

Four Factors Responsible for Inefficient Utilization. Four factors are primarily responsible for this failure to effect efficient facility utilization:

1) Many school district administrators lack the knowledge and managerial skills essential to effecting the economic use of facilities. State laws and the education profession have ensured that a background in education is a virtual prerequisite for becoming a district administrator. However, they have not also ensured that administrators obtain managerial training and experience of sufficient quality to enable them to perform their administrative role competently.

2) The State Department of Education has generally failed to provide leadership in promoting the economic administration of education. In particular, the Department has failed to provide leadership in the collection, dissemination and promotion of information regarding the methods and benefits of attaining efficient facility use in the face of declining enrollment.

3) Various state and federal legislative and court mandates require school districts to undertake programs or operating modes which are counter to optimum facility utilization.

4) Intense community opposition to the closure and reorganization of schools frequently results in district administrators and governing boards abandoning fiscal efficiency to mollify local political pressures.

These four factors are also basic components of an overall environment of education administration which inhibits minimization of the cost of providing a quality education.

Greater Utilization Economies Can Be Achieved. Facility utilization efficiency can be increased by several means. First, most seriously underutilized schools can be consolidated. Surplus schools can then be leased or sold, possibly returning to the property tax rolls. The marketability of surplus schools appears to be sorely underestimated. Their convertability to alternate uses can be very financially viable, but school districts generally have not explored this option.

Achieving increased utilization efficiency is not limited to entire surplus schools. Excess space within schools which are not to be completely closed can be consolidated. The consolidated space might then be closed off to reduce overhead costs such as utilities and custodial care. It is also feasible to lease surplus space within actively operating schools.

Proper use of year-round scheduling offers perhaps the greatest opportunity for reducing the cost of education through more efficient facility usage. Year-round can increase facility capacity by up to one third, reducing space needs commensurately. The currently limited use of year-round to achieve this end appears primarily to be a result of overly skeptical attitudes and a general reluctance to change, rather than any significant defects in the concept or its implementation.

School district reorganization and consolidation offer important potential for increasing facility utilization efficiency. Reorganization can provide more flexibility in setting school attendance boundaries which distribute students proportionately among existing facilities. In addition, consolidating districts could significantly reduce the unnecessary redundancy of administrative and support facilities perpetuated by the state's excessive number (1,043) of school districts.

Poor Maintenance Jeopardizes Multi-billion Dollar Investment. A disturbingly large proportion of the state's school facilities are in serious need of major maintenance work. As wage demands, mandated programs, inflation, and revenue controls pressure school district budgets, districts, more often than not, sacrifice attention to major maintenance expenditures to meet other budgetary demands.

Compounded by the poor management of district maintenance programs, and the relatively short time span during which more than half of the state's school facilities were constructed, this inattention has given rise to a statewide need for maintenance having an estimated cost in excess of $740 million. Although some districts have done an exemplary job of keeping up their physical plant, the California Association of School Business Officials estimates that less than 5% of the state's school districts have adequately maintained the condition of their facilities. This situation jeopardizes an investment of billions of dollars in state, federal and local tax money.

The size alone of the statewide maintenance need poses a difficult problem for which no viable complete solution is readily apparent. However, at least a part of the solution for rectifying the maintenance problem may be found in improved facility utilization. By consolidating surplus facility space and either selling it or leasing it for a charge which covers its ongoing maintenance costs, a district can concentrate its maintenance funds on fewer facilities and more adequately meet its maintenance needs.

PART II

RECOMMENDATIONS

1. The State Department of Education should exercise a leadership role and promote the efficient utilization of school facilities. Specifically, the Department should:

   A. Improve coordination between its Program and Administrative branches so that educational programs designed or administered by the Department will be analyzed and evaluated for their impact on facility use and need. (pp. 17-18)

   B. Improve coordination within the Administrative branch by, for instance, consolidating the functions of the Bureau of School Facilities Planning within the Bureau of Management Services to ensure the inclusion of a facility element in the product of the management assistance teams. (pp. 15-16)

2. To identify the full administrative costs of implementation, the State Department of Education should be required to analyze all bills before the Legislature and all proposed Departmental administrative regulations which deal with the establishment or modification of programs administered by school districts. The analysis should seek to identify the costs of providing ancillary services and facilities for the program as well as the costs of the program's primary activity. This analysis should be required whether the program would be optional or mandatory. The analysis should be provided to the respective decision-making authorities before action is taken on the proposal. This analysis should be developed through close consultation with the relevant Departmental program and administrative units. (pp. 17-18)

3. In concert with the Association of California School Administrators and The California Association of School Business Officials, the State Department of Education should:

   A. Explore the potential market for surplus school facilities and sites. (p. 23)

   B. Review all legal opportunities and constraints concerning the use and disposition of school facilities and sites, and seek to clarify any uncertainties or ambiguities in the law. (pp. 23-24)

   C. Produce and widely disseminate a comprehensive facility utilization manual which would include thorough information regarding:

      i) How to prepare a facilities utilization plan based upon enrollment projections and regular assessments of the district's needs which will serve an ongoing function as a management tool. (pp. 11-13)

ii) The fundamental role of enrollment projections in facility use planning and the techniques for developing comprehensive projections in an environment of declining as well as increasing enrollment. (pp. 11-13)

iii) Methods of achieving greater operating efficiency in underutilized schools which are not to be closed. (p. 24)

iv) The viability of the year-round school concept as a means of achieving greater efficiency. (pp. 24-27)

v) The factors to consider when selecting a school for closure. (p. 14)

vi) Alternate uses for surplus school facilities. (pp. 23-24)

vii) Opportunities and constraints established in law regarding use of school facilities and sites, especially their lease or sale. (pp. 23-24)

4. The State Department of Education should develop and sponsor in-service administrator training workshops based upon proven training programs. These workshops should seek to improve general managerial skills as well as provide training in specific areas of district administration (e.g. facility utilization practices.) In designing and conducting these workshops, thorough use should be made of the talents of practicing administrators who have demonstrated unusual managerial ability or who have expertise in a particular facet of district operation. (pp. 12-14)

5. A joint legislative committee composed of the Senate Education Committee and the Assembly Education Committee should be formed to review the Education Code for statutes which limit the ability of school districts to realize the goal of providing an economical system of quality education. Such statutes should be critically reevaluated and appropriately amended or deleted when found to inhibit the attainment of that goal. In particular, Code sanctions designed to indiscriminately limit class sizes to thirty pupils, and Code disincentives to school district reorganization and consolidation should be reevaluated. (pp. 17-19 and pp. 30-32)

6. A joint ad hoc legislative committee composed from the Senate Education and Assembly Education committees should be formed to undertake a thorough reassessment of the economic, educational and social viability of the year-round school concept as a means of achieving greater efficiency and reducing the cost of education. (pp. 24-27)

7. The State Department of Finance should be directed to research the school facilities maintenance problem and report its findings and recommendations by no later than June 30, 1980. The Department's report should:

   A. Identify the extent and immediacy of maintenance needs throughout the state.

   B. Identify sources of funds and funding mechanisms for meeting those needs.

   C. Recommend specific action at the state and/or local level to bring about timely elimination of the maintenance backlog and prevent future backlogs. (pp. 29-33)

8. Section 39363 of the Education Code should be amended to require that if the funds received by a district from the sale or long-term lease of property are not needed for capital outlay as determined by the State Allocation Board, then those funds must be used to reduce major maintenance backlogs or deficiencies. If the State Allocation Board determines that no major maintenance backlog or deficiencies exist which cannot adequately be taken care of through current district maintenance programs, then those funds should be made available to the district for other general fund expenditures. (pp. 32-33)

9. School districts should install cost-beneficial energy-saving materials and devices when the maintenance, rehabilitation or remodeling of facilities is performed.

PART III: FINDINGS: SCHOOL FACILITY UTILIZATION
A. EXCESS FACILITY CAPACITY

Enrollment Trends
1950-1987

As a consequence of the postwar baby boom and in-migration, enrollment in California's public schools experienced very rapid growth in kindergarten through twelfth grade (K-12) from the late 1940's well into the 1960's. Between 1950 and 1960, K-12 enrollment statewide jumped 99% from 1,661,051 to 3,304,485. During the ensuing 10 years that enrollment grew an additional 35% to 4,457,325 in 1970.

To accommodate this tremendous growth, a massive construction effort was undertaken to provide necessary educational facilities. From fiscal year 1948-49 through 1975-76, $7.02 billion in local bond monies, state and federal grants and state loans to school districts were expended for elementary and secondary school sites and facilities.[1] As of June 30, 1976, outstanding school district indebtedness of those bonds and loans was in excess of $4.38 billion. Currently, the state's 1,043 school districts maintain 42,460 buildings covering more than 370 million square feet.[2]

Although rapid growth was a predominant feature of school districts for 20 years, statewide enrollment has been dropping steadily since 1970. In 1977, K-12 enrollment was 300,853 lower than 1970. The State Department of Finance (DOF) projects a further K-12 drop of 180,525 by 1982.

This decline is a consequence of several factors, but primarily the birthrate decrease which began several years ago. As postwar baby boom children have been passing through the K-12 system, the lower birthrate has not provided an equal number of replacement students. However, now that these same postwar babies are having children themselves, they are contributing to an eventual upturn in total enrollment which is expected to begin in 1983. The upturn will primarily result from the larger total number of childbearing women among the postwar boom group, rather than any change in the birthrate.

Net migration for California (the difference between in- and out-migration in the state) is also contributing to this ultimate enrollment upturn. Throughout the fifties and into the mid sixties, net migration increased the state's population by 232,000 to 388,000 persons annually. During the late sixties and early seventies, however, net migration fell off substantially, hitting a low of 10,000 in 1971-72. In the last few years, net migration has begun to increase again, reaching 204,000 in 1976-77.

The enrollment upturn forecast is highly reliable because it is based upon a count of actual births. The number of California births generally declined from 1968 through 1973. However, for the past four years births have been increasing. According to DOF enrollment projections, primary (K-8)

enrollment will continue to decline through 1980, but begin to rise again in 1981. Secondary (9-12) enrollment--which only began to decline in 1977--is projected generally to decline through 1987, the most future date forecast by DOF. Secondary enrollment will, however, eventually turn upward again as the larger numbers of primary grade students reach the secondary grades.

In spite of the eventual K-12 upturn, no current projections foresee enrollment levels comparable to the 1970 peak through at least the mid 1980's. Even though the K-12 trend is expected to turn around in 1983, the 1986 enrollment level is not expected to have even recovered to the 1977 level.

School facilities constructed to accommodate peak enrollment of earlier years now provide a student capacity significantly in excess of the state's current K-12 needs. There are no reliable data on the amount of excess capacity statewide and not every school district has a capacity excess. But few would deny that excess capacity is a widespread phenomenon of substantial statewide proportion. Furthermore, the excess will most likely increase as enrollment continues to drop over the next few years. According to State Department of Education (SDE) district-by-district enrollment projections, 82 districts representing 52% of the K-12 population will experience enrollment declines of 1,000 or more students between the 1977-78 and 1982-83 school years. Only five districts, representing 2% of the K-12 population, are projected to gain more than 1,000 students in that period.

Extreme cases of excess capacity are seen in two of the districts visited by the Commission staff. One of those, Oakland Unified, has an enrollment of about 50,000 but an estimated capacity of 60,000. The majority of this excess is located within the elementary grades. Using an average elementary school capacity of 600 pupils, Oakland's 10,000 excess is theoretically equivalent to 16 schools.

Another district, Garden Grove Unified, has an enrollment of approximately 44,000 but a capacity for over 52,000. Again, applying an average elementary school capacity of 600, Garden Grove's 8,000 excess capacity represents the equivalent of 13 schools.

For several practical reasons discussed below, this theoretical capacity figure of 600 cannot necessarily be used as an accurate standard to determine the actual number of unnecessary schools in a particular district. Nevertheless, it does provide a sense of the magnitude of the excess capacity situation.

Underutilization/Consolidation

As enrollment declines, the cost of operating and maintaining the schools does not automatically decline at the same rate. The need for maintenance, custodial and grounds work, insurance and debt servicing tends to remain

substantially unchanged. As a result, per-pupil costs rise and fiscal efficiency drops off. The optimum loading of school facilities, therefore, is a necessary element of efficient district management.

Perhaps the most obvious and effective way to achieve optimum loading in the face of declining enrollment is through the closure of schools. While there may be some additional costs, such as those of increased pupil transportation, these costs are typically outweighed by the savings achieved through closure. And when there is no reasonable expectation that a closed school will need to be reopened to accommodate a future enrollment upturn, the closed school could be sold and the proceeds used to help finance other district expenses as prescribed by law. If sold to a private concern--as opposed to another governmental agency or tax-exempt organization--the school site would be returned to the tax rolls, thus benefiting property taxpayers of the area. (See "Procedures of Sale" page 22 for legal prescriptions governing the sale of school district property and constraints on the use of resulting revenue.)

Other techniques for countering the effects of declining enrollment on efficient utilization of school facilities can also be employed. Some of these are discussed in this report.

Ensuring Efficient Utilization: State Occupancy Standards and District Responsibility

Originally, a central function of this study was to "promote the establishment and implementation of school building occupancy standards in order to achieve maximum efficiency and economy in the operation of existing school facilities." It was hoped that specific numerical criteria could be formulated and uniformly applied to each school district to ascertain whether it was economically and efficiently utilizing its facilities. However, the variability of factors relevant to determining what constitutes efficient utilization precludes formulation of meaningful standards which can be uniformly applied to school facilities throughout the state.

Three of these factors are especially relevant to determining use efficiency: 1) the space requirements for the educational program, 2) the space design efficiency of the buildings and 3) the viable options for alternate use patterns. Each factor can vary not only between districts, but even within the same district. Since these variable factors can affect a district's ability to achieve optimum utilization, the universal application of occupancy standards would be an artifical and inaccurate measure of efficiency.

This should not be construed as suggesting that no determination can be made about whether facilities are being efficiently utilized. Rather, it means that such a determination can only be accomplished on a case-by-case basis. Indeed, it is an inherent responsibility of each district's administration to assess its facility use and strive for efficiency.

In light of this, the study's focus was adjusted to concentrate on determining how effective district administrations are in achieving optimum

utilization and developing ways to increase that effectiveness. However, the primary objective of the study--i.e., the promotion of more efficient and economical utilization of school facilities--remained constant.

B. METHODOLOGY

This study was conducted along several avenues of investigation:

1) Enrollment projections and pertinent demographic trends were examined.
2) Each educational program area administered by the State Department of Education was reviewed for statutes and guidelines which could have an effect upon the utilization of facilities (e.g., required or recommended pupil/teacher ratios.)
3) Literature and studies regarding declining enrollment and school facility utilization were researched.[3]
4) A selected sample of school districts was surveyed through on-site visits to ascertain their facility use practices and problems.[4]
5) A host of experts was consulted for their perspective and advice. Among these were representatives of the Association of California School Administrators (ACSA), the California Association of School Business Officials (CASBO), the California School Boards Association (CSBA), the California Chamber of Commerce, the California Taxpayers Association and the California Association of Realtors.[5]
6) Two public hearings were held to receive testimony on school facility utilization issues.[6]

C. INEFFICIENT UTILIZATION

This study revealed that disturbingly little action has been taken to implement, or even plan for, ways to use school facilities efficiently. Although a few districts have dealt with the challenges of declining enrollment in responsible,skillful and timely ways, many more districts have not. This is especially distressing because declining enrollment and excess capacity are not entirely new phenomena. Enrollment has been declining since 1970. Some districts experienced declines and substantial excess capacity well before the trend was apparent statewide. Professional publications for educators forewarned of enrollment decline and its impact on school operations as early as the late 1960's. Despite these forecasts, few school districts developed plans to cope with the effects of declining enrollment. Even now, after large numbers of pupils have disappeared from the classroom, many school districts are not seriously developing a strategy for dealing with the situation.

There are a number of reasons why such comprehensive action has not been taken or has been late in coming. These range from legitimate logistical and legal problems to managerial incompetence. The most prominent of these reasons are discussed below.

First, however, it should be noted that school district characteristics vary greatly and this variation precludes blanket statements about their condition or operation. There are 1,043 elementary, high school and unified districts in the state and their essential features differ widely. Mammoth Los Angeles Unified has over 560,000 students while Alpaugh Unified in Tulare County has but 183. Many districts are experiencing enrollment declines, but many others have static or increasing enrollments. Still other districts face the paradoxical situation of declines in one area and increases in another area. Administration of districts ranges from highly competent to much less than proficient. The list of relevant differences among school districts also includes the ethnic composition of their student populations, the age and space design efficiency of their facilities, the demographics of their areas, the health of their budgets and their geographic and climatic features.

There is little that can be said about all districts. Therefore, the following issues are not meant to be applicable to all districts. Rather, they are presented because they are common to enough districts to warrant recognition as a widespread situation. The specific issues which are relevant will vary from district to district.

D. FACTORS RESPONSIBLE FOR INEFFICIENT UTILIZATION

Poor Management

Orientation Toward Growth. For some 20 years, school district administrators were confronted with enrollment increases and the resulting need to enlarge budgets, work force and facilities. Consequently, they tended to become growth-oriented. Decreases in the size of anything were not part of an administrator's consciousness. When early forecasts of smaller enrollment were published, many administrators did not take them seriously. Even when the accuracy of the forecasts was borne out by actual enrollment drops, there was a general failure to fully appreciate the implications for all aspects of district management. Little or no attempt was made to examine the potential impact of lower enrollment, or to lay plans for dealing with it.

Failure to Engage in the Basic Management Practices of Assessment and Planning. Gradually, the impact of lower enrollment has caused district budget problems which cannot be ignored. Fewer students mean less state apportionment revenue. But underutilized facilities are contributing to higher per-pupil costs and an unnecessarily large work force resists reduction through layoff.

In response to these problems, many district administrators seem to have fallen into a management-by-crisis mode of operation. Rather than comprehensively evaluating the condition of their districts and anticipating what circumstances the district might encounter over some reasonable span of the future (say, three to five years or more), administrators tend to look no further than ensuing six months to a year--the absolute minimum planning period demanded for preparing next year's budget. As a consequence, there has been a tendency not to confront problems seriously until they are unavoidable and need immediate solution.

Comprehensive assessment and planning have not been thoroughly embraced by school districts as an approach essential to good management.

Some districts argue that they do not have adequate funds to engage in comprehensive facilities planning. Such planning requires time, money, trained manpower and the collection and evaluation of information on facilities capacity, anticipated enrollment and educational program format. For districts of some size or socioeconomic complexity, thorough planning may greatly benefit from a detailed and up-to-date demographic study. All of this, it is claimed by some district administrators, would require funds not available from already strapped budgets.

Administrators in other districts, however, showed surprise and some disbelief when told of this attitude. To these administrators, regular facilities assessments and planning are seen as fundamental to responsible management. Such activities are considered normal ongoing operations. Also, more than one superintendent pointed out that the money spent for a consultant and initial establishment of a plan can easily be recovered from the improved efficiency which results.

Absence of Proper Administrative Training. This failure to engage in basic management practices is a manifestation of an absence of proper administrative training. Typically, district administrators are teachers or counselors who were promoted first to principal and then to a position within the district administration. Their fundamental training and experience havebeen in the area of teaching and not in administration or management. The law requires that one hold a teaching credential and an "administrative services" credential to fill virtually any administrative position in a district. But the requirements for those credentials are ineffective in ensuring proper administrative training.

The law (Education Code Section 35029) does permit a district governing board to waive any credential requirements for the chief administrative officer of its district, thus enabling the board to hire someone with a business management rather than an education background to fill the position of superintendent. However, the education profession is strongly predisposed against the concept of a non-educator, especially a businessperson, heading a school district. Largely because of this negative atmosphere, it is virtually unheard of for a board to hire a businessperson as a superintendent.

That there are some highly proficient school district administrators is more a consequence of their personal initiative and self-education than any established system which emphasizes effective training in management and administration. Although many colleges and universities in the state offer graduate and doctoral programs in education administration, and although completion of such a program is a commonly used means of satisfying the requirements for an administrative services credential, there is substantial evidence that these programs have generally failed to impart necessary managerial skills to their students. Several administrators confided during the study that their formal training in education administration had not prepared them to assume their role as managers of school district operation.

In testimony before the Commission, one administrator detailed the problems of planning, personnel management and community politics he faced in coping with declining enrollment in his district and candidly remarked, "My office deals with these problems and I was trained to be an educator and, obviously, I had to retrain myself over the last three years to deal with these kinds of situations."[7]

A district superintendent described for the Commission a fundamental deficiency prevalent among administrator training programs:

> But the reason (administrators are not adequately trained) is that the training for administrators...has been based upon teaching them specific modus operandi related to the management of schools, and the management of schools did not change very much from the 30's to the 40's to the 50's. But in the last 10 years or 15, particularly in the last 5 years, there has been a dramatic change in the role and function of a school administrator...(For) the administrators of today the critical significant difference is that they must be a change agent and they must be a manager of change... (S)chool administrators have not been trained to deal with critical,emergency kinds of problems, or conflict situations or changing conditions and because of that, they are not efficient.[8]

This superintendent went on to indicate, however, that many education administration programs are now being redesigned to correct these failings. Nevertheless, current practitioners are in immediate need of retraining.

> (T)hey are bringing in management theory and conflict management, change theory and the political ramifications into the curriculum, but, unfortunately, we are not in a growth cycle with kids now and the people administering your kids never had those....Our problem is the retraining and retreading of the people who are already out there who don't recognize the problem. They don't think we have a problem.[9]

Administrator Attitude: Excess Capacity Not a Problem. This testimony is supported by an attitude, commonly found among the district administrators surveyed, that underutilized facilities pose no problems. This attitude, especially prevalent among administrators of districts experiencing only moderate enrollment decline, contributes to a less-than-concerted effort to effect efficient utilization. These administrators view declining enrollment as a boon to district needs for space. For them, having fewer students represents an opportunity to enjoy relief from years of what they consider to have been overcrowded classrooms. They typically use the vacated space for elective educational and community activity programs.

Administrator Perception: Low Priority of Facilities Considerations. More pervasive than this attitude is a general administrator perception which militates against serious consideration of facility use matters. Outside of providing adequate space to allay cries of overcrowding from teachers

and parents, there is a strong tendency among administrators to place a low priority on consideration of facility issues. To a large degree, facilities are treated as peripheral to the district's administration. Even district business managers tend to be disproportionately concerned with educational programs and employee issues at the expense of support programs such as planning for the efficient utilization and proper maintenance of facilities. This is a further manifestation of the administrator selection and training system which virtually mandates an educator background and then generally fails to provide proper managerial training.

Lack of Specific Knowledge About How to Handle Declining Enrollment. In addition to a lack of general managerial skills, inefficiencies have also been fostered by a lack of specific knowledge. Even for those highly competent administrators who early acknowledged the importance of developing strategies for handling declining enrollment, the newness of the phenomenon left them without the knowledge of how best to proceed. As the first districts affected by a large enrollment drop grappled to adjust to the change, a body of knowledge and experience developed regarding how to cope with new issues such as community response to school closure and alternative uses for closed schools. Although this information has existed for some time and has continued to develop, its dissemination has been slow and lacking in leadership. Thus, many districts have ended up re-inventing the wheel, often at unnecessary expense in community and administration strife, as well as in time and money.

The Commission staff has found the situation described in the following statement--made by a district administrator at a Commission public hearing--not uncommon among school districts:

> We were not, and still are not aware of a clearing house regarding (declining enrollment) matters. The best thing we could do was to talk to one or two districts that were experiencing the shrinking district phenomena and we went ahead and developed our own resources. We spent time developing demographics. We spent time developing our own facility utilization steps. We spent time developing our own projection techniques. We also spent time developing a technology program that would answer the "what if" questions, because when you close one school, there's a domino effect.[10]

Lack of Leadership

Although much of the fundamental information and technology necessary for achieving greater utilization efficiency has existed for nearly a decade, its dissemination has been haphazard and its value has not been adequately promoted. The reason for this is an absence of effective leadership in 1) sensitizing administrators to the benefits and potential of attaining greater utilization efficiency and 2) providing them with the information and training necessary to attain that efficiency.

Leadership and Professional Organizations. One logical source for such leadership would be the two prominent statewide associations of school district administrators, the Association of California School Administrators (ACSA) and the California Association of School Business Officials (CASBO). Over the past several years, each has devoted some attention--either through publications or seminars--to the impact of declining enrollment. However, neither organization has committed the energy and resources necessary to deal with this issue comprehensively. This is unfortunate, because scattered throughout their memberships are a number of administrators with valuable experience and training in facility matters. A compilation of the knowledge of these administrators, properly disseminated, would be invaluable.

Leadership and the State Department of Education. Leadership and coordination directed toward reducing management deficiencies and increasing facility utilization efficiency could also be provided by either of two units within the Administrative Services Division of the State Department of Education. These two units are the Bureau of Management Services and the Bureau of School Facilities Planning.

Bureau of Management Services. The primary purpose of the Bureau of Management Services is to provide school districts with information on all noncurricular aspects of school and district operation (e.g., budgeting techniques, insurance matters, pupil and employee safety, transportation, etc.) A major Bureau function is to provide information and assistance in establishing effective management practices.

The Bureau maintains "management assistance teams" to provide technical aid and advice on operational matters to districts which specifically request such services. The teams have utilized the Department of Finance's 1971 report, "How To Get More Out Of Your School Dollars," a comprehensive guide to more efficient management.

The resources of this Bureau offer the potential for significantly raising the level of managerial ability among school district administrators. However, the Bureau's services are employed solely on a request basis and relatively few districts have sought and thoroughly tapped its resources. Furthermore, the Bureau has failed to take up a leadership position and vigorously promote the establishment of efficient and effective management practices.

The Bureau of School Facilities Planning. The Bureau of School Facilities Planning also provides districts with management assistance of a more specialized nature, dealing directly with school facilities. The Bureau offers districts advice and assistance on such matters as long-range facilities master planning, evaluation of existing facilities and designing building space to meet educational program needs. The Bureau is also capable of helping districts develop more efficient facility use practices under declining enrollment circumstances.

However, this Bureau's operation has not appreciably helped reduce deficiencies in facilities use management.

In spite of the fact that both the Management Services and School Facilities Planning bureaus offer management assistance, they work largely independently of one another. They do not necessarily assist the same district at one time and, even when they do, they do not unify their efforts. They prefer instead to conduct separate studies and issue separate reports. The ability of these two bureaus to overcome widespread managerial deficiencies is not enhanced by the lack of unity between their operations.

The inability of administrators to manage declining enrollment efficiently is indicative of a failure of the Department of Education to provide leadership in promoting the economical administration of education. Long established and strongly recommended guidelines of the Department regarding optimum school capacity and site size have even detracted from the economical delivery of education services.

Throughout the period of great enrollment growth when many schools were built, and even today, the Department of Education recommended an optimum elementary school size of around 500-600 students with an accompanying school site size of 10 acres--a typical student/acre ratio of around 55 to 1. However, there is no substantiation that this prescription is optimum for educational purposes. In fact, a number of elementary schools have, and do, successfully provide a quality education with a much higher student/acre ratio--up to 130 to 1. Similarly, the Department recommends a site of at least 41 acres for a high school with 2,000 students, while some high schools provide a quality education for 2,000 students on a site as small as 26 acres.

The fact that educational services are successfully delivered at a number of schools with higher student/acre ratios than those recommended by the Department of Education, casts serious doubt upon both the educational efficacy and fiscal prudence of those recommendations. As school size and student/acre ratio decrease, the number of schools and the amount of land necessary to serve a given number of students increases. To the extent that the number of schools and the size of their sites are unnecessarily large, the price tag of providing education will be unduly inflated. In addition, a larger number of schools raises administrative operating costs by requiring the employment of a greater number of principals, vice-principals and support staff.

Although the Department's recommendations regarding school and site size do not constitute legal mandates upon school districts, the authoritative position of the Department has made its recommendations highly influential, and a great many school districts have followed the Department's guidelines.

In addition, the influence of the Department's "recommendations" is strengthened by the Department's role in the State School Building Aid Program. Under this program, which lends capital outlay funds to school districts, applicant districts must receive Department approval of their project plans before a loan will be granted. As one superintendent put it "...and they, in essence, said we're the authorities and the experts; and they gave the guidelines and if you didn't follow their guidelines, you didn't get their cooperation." [11] More than $3.6 billion worth of site acquisition and school construction and rehabilitation has been accomplished under the building aid program since 1947.

State and Federal Mandates

In many areas of school district responsibility the laws and regulations of higher levels of government limit the authority and ability of districts to institute innovative, effective and cost-efficient educational services. In particular, optimum facility utilization may be frustrated by state and federal mandates which necessitate an increased usage of space or a less economical mode of utilization. [12]

Court-Ordered Desegregation. A growing number of school districts are coming under court orders to implement a program of desegregation. Such orders tend to have a double-edged effect on facility utilization. On the one hand, being required to develop a desegregation plan has also meant being required to assess and carefully plan facility utilization. On the other hand, achieving desegregation can necessitate inefficient facility use and significantly increase costs for such other operations as transportation.

New Programs. Some of the space made available by decreased enrollment is being absorbed by the requirements of new educational programs. A number of these programs have been implemented at the district level in the last several years in response to state and federal mandates or incentives. Often the programs require lowered pupil/teacher ratios or an enlarged curriculum and, therefore, require more space per pupil than previously. Early Childhood Education (ECE), Educationally Disadvantaged Youth (EDY), English as a Second Language (ESL) and "mainstreaming" the handicapped are examples of such educational programs.

Many of these new programs have also seriously complicated the administrator's task of planning and managing district resources because they have been established without consideration of their impact on administrative operations. To implement these programs, districts must frequently do one or more of the following:

- Retain a larger certificated staff than would otherwise be necessary so as to provide additional or specialized instruction, counseling or administration.

- Retain a larger classified staff than would otherwise be necessary so as to provide additional ancillary services such as pupil transportation, custodial services, maintenance and reporting and record-keeping (educational programs tend to require much assessment and accountability paperwork.)

- Acquire specialized educational equipment.

- Locate and schedule the use of more facility space than would otherwise be necessary.

- Construct new facilities or modify existing ones to meet specialized needs (e.g., to provide for wheelchair access to buildings.)

With few exceptions, the implementation of a new educational program requires additional money, manpower and facilities. Typically, however, proposed legislation and administrative regulations to establish new educational programs are not analyzed with respect to their effects upon the administration of school districts. To the extent that these effects are considered at all, the examination usually addresses only the obvious (e.g., requirements for teachers or counselors with specialized skills.) Secondary effects such as the impact on ancillary services and facility utilization go largely unexamined. Consequently, the full costs and feasibility of implementing new programs are never explored. After a program is established in law, it then becomes the task of the individual district to discover any impracticalities or hidden costs associated with attempts to implement the program. Furthermore, it is usually the case that little or no funds are provided to the districts to implement the programs, and the cost ends up being borne largely by property taxpayers.

30 Per Class. The Education Code contains various fiscal sanctions and incentives designed to keep school districts from maintaining an average class size in excess of about 30 students. While such a class size may be educationally optimal for some types of instruction, for others it may be completely irrelevant. There is strong evidence that some types of instruction can be effectively taught to large classes.

The Commission received testimony regarding a technique that has been used in the State of Nevada to teach typing to 125 high school students at a time. The technique utilizes one large classroom and one teacher who instructs a class of 125 for just one hour per week. During the rest of the week the students practice their typing skills largely on their own. If they need help, three secretaries of accomplished typing ability are available to provide assistance--the cost of having secretaries do this being substantially less than the cost of having teachers do it. According to the testimony given to the Commission, as a result of this approach to teaching typing, students learned to type faster, better and at only 30% to 40% of the cost of the instructional mode used in California. [13]

In California, the technique usually involves using a room with 30 typewriters and a teacher who teaches the same thing to five classes per day, each class having just 30 students. The sanctions connected with the Code prescription of 30, however, greatly discourage school administrators from utilizing cost-efficient education techniques which would involve larger class sizes, fewer teachers and fewer classrooms.

Criticism of these constraints and others contained in the Education Code is widely voiced by district administrators and governing boards. In the words of a high school district superintendent:

> ...the Legislature pays school districts a bonus for inefficiency. You people are looking for inefficiency and causes of inefficiency. Go look at the laws of the State of California... If they would take away the restrictions of the laws of the State of California... I could increase the efficiency of (my) district 20% decrease costs 20% and increase learning 20%. [14]

Strong Community Resistance to School Closure and Reorganization

State and federal mandates are not the only constraints faced by district officials seeking to achieve efficient school district operations. Frequently, the constituents of a district inhibit or prevent such efforts.

The decision to close and consolidate schools--a fundamental means of increasing utilization efficiency--is rarely accepted as a non-controversial move of managerial prudence. There is a strong tendency for the community around a school to develop a sense of identity with, or even a vested interest in, that school and to resist its closure vigorously. Parents object to their children having to travel further to another school. Participants in the community programs held at the school protest the loss of their meeting place. Graduates of the school view closure as the elimination of a part of their own history. Small businessmen who profit from the traffic brought by the school complain of lost income.

This community resistance is usually quite vocal and tends to put strong pressure on the district's elected governing board to quash any administrative efforts at closure. Such community resistance is often not reduced by presenting facts on the cost savings to be realized from closure.

The savings from any single school closure frequently represent only a small fraction of a district's total budget and would not likely produce a property tax reduction. The savings are usually applied to improving or enlarging some other area of the district's operation. Consequently, to the community whose school is being closed, those savings are seen simply as resources being used to benefit some other school. Community groups have even filed suits to block school closures.

An elementary school district administrator expressed to the Commission a sentiment which is probably shared by most of his colleagues throughout this state: "I've been involved in the closing of schools for the past three years as well as strikes--teacher strikes--and personally, I'd rather face a teacher strike than a school closing."[15]

Under the right conditions, an alternative to closure is simply redrawing attendance boundaries around schools to more adequately distribute students among the schools. However, this action also tends to draw opposition from those residents whose children will be forced to change schools.

It is ironic in this time of loud complaints over government inefficiency and burdensome property taxes, that there is such fierce public opposition to school district efforts to increase operating efficiency through school consolidation and attendance boundary change.

Though community opposition admittedly poses difficulties, far too few district administrators and governing boards have strongly supported the principles of economic management by resolutely contending with this opposition. More commonly, they abandon the goal of attaining fiscal efficiency to mollify the political upheaval which is a virtually universal accompaniment to the closure and consolidation of neighborhood schools.

The intense community feelings that confront district governing boards and administrators proposing to close and alter the attendance boundaries of schools was illustrated with special strength by San Francisco Unified's early 1978 effort to accomplish a major reorganization of its schools. That effort included more than a month of emotional, often tumultuous public hearings, and culminated in a demanding nine hour Board meeting which ran until three thirty in the morning before producing a final decision on reorganization. However, as a consequence of the political fortitude of the district's administration and Board in dealing with the pressures generated by the community, reorganization was realized with an estimated minimum annual savings to the district of $1 million. In testimony before the Commission, one of San Francisco's administrators presented this conclusion:

> (It's) a very difficult call to close schools. It takes a gutsy Board of Education, it takes a gutsy Superintendent and it really takes a community that looks at the long-range adherence to quality education and cost control to back up a decision in relationship to closing a school.[16]

Conclusions

Inefficient school facility utilization stems from four conditions which are basic components of the overall environment of school district administration in California:

1) As a whole, school district administrators lack the fundamental managerial skills and specific knowledge needed to ensure

efficiency in district support operations. Neither their background nor their training have imbued them with an appreciation for delivering education services economically.

2) The State Department of Education does not provide leadership in promoting the efficient administration of education. The Department does not vigorously seek to increase managerial capability and does not provide guidelines aimed at minimizing the cost of a quality education.

3) State and federal mandates have limited the authority and ability of districts to engage in efficient facility utilization practices and generally deliver education services economically.

4) The local politics of community opposition to school closure and reorganization strongly inhibit actions to effect efficiency in facility use and district operation.

Beyond the issue of inefficient facility utilization alone, these conditions are responsible for fundamental deficiencies in the ability of school districts to provide an economical education sytem.

E. INCREASING FACILITY UTILIZATION EFFICIENCY

For most districts with a declining enrollment problem, the most effective means of increasing facility utilization efficiency is through the closure and consolidation of schools. Simply boarding up or "mothballing" a closed school, however, usually does not constitute the most cost-efficient method. Mothballed facilities must still be maintained and insured, and are more prone to vandalism than are occupied structures. Instead of mothballing closed schools, it is almost always more economical for a district to use them for other purposes, lease them or sell them.

Other District Uses

Closed school facilities can economically be used to serve other district needs or functions. Alternative district uses for a closed school include conversion to offices, storage space or maintenance shops.

Selling The Surplus

Reluctance to Sell. After a district has closed a school there is commonly a strong reluctance among the district's administrators and board members to

sell the building. Usually, all other possible uses will be explored before sale is seriously considered. Even when no other use can be found, it is not uncommon for a district to mothball the school rather than sell it. In the absence of a reasonably foreseeable need, however, mothballing a school is wasteful and keeps the property off the local tax rolls. Nevertheless, some administrators acknowledge that they can foresee no enrollment upswing in the area of their mothballed school, yet oppose selling it for fear that some day it might be needed.

If a future need is not foreseen, sale of closed facilities generally constitutes their most economical use. The receipts from sale can help pay off district bonded indebtedness or finance needed construction or remodeling in other areas of the district. If sold to a private party, the property would go back on the tax rolls, thus creating a larger tax base and the possibility of a lowered tax rate. (Revenue from the sale of property might also be used to help meet backlogged major maintenance needs. See Part IV.)

Unused Sites. As with sites formerly used for school purposes, districts are also reluctant to sell sites that have never been used for school purposes (i.e., "unused sites.") However, the reluctance to sell unused sites is generally less strong than the reluctance to sell closed schools. In part, this stems from the penalties which must be paid on such sites. Beginning in the 1974-75 fiscal year, the State Allocation Board began to levy a penalty against any site purchased by a school district for school purposes, but which has not been used for such purposes within a specified number of years. This penalty applies whether the site was purchased solely through a district's own financing or with the assistance of the State School Building Aid program. However, the Allocation Board may grant an exemption from the penalty if there are extenuating circumstances which indicate that the site may actually be used for school purposes within the reasonably foreseeable future.

In fiscal year 1976-77, school districts sold 133 unused sites comprising 1,735 acres. As of May 31, 1978, however, penalties were being levied against 294 sites, comprising 4,759 acres, because they had not been used within the prescribed time period and because there was no convincingly foreseeable need for them.

Procedures of Sale. Once a district decides to offer a surplus school or site for sale, the Education Code (Section 39363.6) requires that certain parties be given priority opportunities to buy the school. First, the property must be offered to local government for park or recreational purposes. If that use is declined, the following parties, in order, must be accorded the opportunity to buy the school at not less than the fair market value: The Regents of the University of California, the Trustees of the California State University and Colleges, the county, the city, the local public housing authority, any other public authority or agency of the state, non-profit charitable organizations and the former owner of the property. If all these parties decline to purchase it, the surplus school may then be placed up for bid on the open market. However, it may not be sold for less than fair market value as this would be considered a "gift of public funds" prohibited by Article XVI Section 6 of the State Constitution.

Education Code Section 39363 requires that funds derived from the sale of real property be used only for capital outlay purposes, except under specified conditions. Essentially, those exceptions are that the property be sold to a governmental or non-profit entity and that the district have no anticipated need for additional site purchases or construction for five years after the sale. If these conditions are met to the satisfaction of the State Allocation Board, the proceeds from the sale may be placed in the district's general fund.

Marketability of Surplus School Facilities. Other than educational institutions, few potential buyers of surplus schools have considered doing anything with the buildings on a site but razing them. The value of a surplus school has been perceived as lying solely within the developability of the land upon which it sits. The marketability of a surplus school, therefore, has been dependent upon the zoning of its land and the construction costs associated with developing land. When construction demand is low for land zoned like that of a surplus school, then there may be no bids for the school which equal its fair market value. In that case, the district must continue to hold the property.

The marketability of a surplus school, however, need not be confined to the developability of its site minus its buildings. Both purchasers and district administrators have tended to limit their thinking with respect to what can be done with a school building. For instance, a Kansas City, Missouri, high school has been converted into a retirement center, and some elementary school buildings now house a small business; in Wilcox County, Georgia, two schools have been turned into nursing homes; in Claremont, California, a high school has been converted into a shopping center; in Elkhart, Indiana, a former elementary school is now an office complex. When such alternate uses for school buildings can be identified, the marketability of that school should increase to the extent that its conversion is less expensive than its demolition and construction of a new building.

Leasing the Surplus

Consideration of alternative uses for school buildings need not be limited to those up for sale. Temporarily surplus facilities (i.e., closed schools for which a future need is anticipated) might also have marketable uses. Under the right circumstances, it may prove financially feasible to lease out a school building for conversion and use by another party, with the proviso that it be reconverted to serve educational purposes at the end of the lease period.

Furthermore, consideration of alternative uses need not be limited to closed schools. It is possible to successfully lease surplus space in operating schools as well. (See page 24).

The benefits of leasing out temporarily surplus property can be substantial. Actively used buildings have a tendency to deteriorate less rapidly than mothballed buildings, and are less likely to be vandalized. In addition, the rents received might well provide revenue beyond that needed to pay their maintenance and operations costs before they are used again as schools.[17]

As with other aspects of the impact of declining enrollment upon school operations, there is no comprehensive source from which districts can obtain information about such alternate uses. Because of the lack of precedents regarding the leasing of school property--especially for long periods--there are many unanswered questions about legal constraints. More importantly, however, there is a general absence of creativity and leadership with respect to exploring which options are open.

Non-Closure Alternatives

There are non-closure alternatives which can improve the economic efficiency of operating underutilized facilities. However, these alternatives are not as widely known or practiced as they could be. For instance, 1976 legislation altered Education Code Sections 39384 and 39440 to permit leasing excess space within an operating school. To ensure that the space is only let for uses acceptable to the community, the legislation requires establishment of an advisory committee of district officials and a representative group of community persons. Its function is to investigate and review pertinent aspects of a potential lease agreement. In addition, the legislation requires public meetings regarding proposed leases.

While this option appears to be widely known to districts, few are investigating its potential seriously. Asked about the viability of this option in their own districts, most administrators questioned by the Commission staff expressed great skepticism and little interest in the idea. "Who in the world would want to rent a classroom?" was a typical response. However, in the Belmont Elementary School District--where the idea originated and where its implementation is being pioneered--the initial results from the use of this non-closure alternative are quite promising.

Rather than closing a school altogether, it may be possible to scale down its operation by closing portions of it and reducing overhead costs. One of the better known aspects of this kind of approach is placing two schools under one principal ("splitting" the principal.) However, a few imaginative district administrators have carried the approach much further and other districts could benefit by following their lead. Some districts are also splitting other staff, including custodians, nurses, counselors and teachers.

One district is moving to consolidate classrooms and completely shut down surplus classrooms. This process involves scheduling as many classes or activities in as few rooms as practical. Any surplus rooms are then completely blocked off from all use and their utilities are shut off. The district thus saves on utility bills and maintenance costs. When enough rooms are closed off, the district is able to reduce its custodial staff.

Year-Round Schools

Implementation of the year-round school concept, an alternative to the traditional nine-month school calendar, was widely expected to be a means of achieving more efficient utilization of school facilities. Theoretically, a year-round program would increase the capacity of a school's plant 33% by

placing students on staggered schedules and using the facilities for twelve rather than nine months of the year. It was thought that fewer facilities would be needed and unit costs would be reduced. Unfortunately, this has not generally proven to be the case in actual practice.

During the time of this study, five of the 15 school districts visited were operating a total of 24 year-round schools. None of the districts indicated that their year-round programs were significant money-savers. In some instances, the programs were reported to be more costly to operate per student than a traditional nine-month program.

This finding concurs with conclusions of an October 1977 report by the State Auditor General on the fiscal impact of year-round school programs. That report examined the operation of 78 year-round schools in 11 districts. It found that,

> compared to a traditional nine-month academic school calendar, year-round education.....generally has:
>
> - Been operated for education rather than financial reasons.
> - Increased per-pupil costs by between 0.5 and 3.6 percent for state-mandated education.
> - Increased overall district costs.
> - Increased the number of days that students attend classes.
> - Been implemented as a voluntary program with an optional nine-month traditional schedule at the same school or other schools.

However, the Auditor General's report notes that year-round programs can result in long-term savings if the program is used to 1) increase the district's student capacity and thereby avoid expenditures for additional facilities or 2) reduce the amount of facilities maintained by the district through consolidation. In practice, most year-round programs have not been significant money-savers because they have not been used to achieve either of these goals. Rather, year-round programs have generally been implemented in a limited number of a district's schools primarily as a temporary solution to overcrowding or to offer additional educational programs.

Parental, student and teacher opposition to mandatory year-round programs has been a fundamental reason that districts have not been inclined to use year-round schools. This opposition generally arises because year-round school schedules are not compatible with traditional life style patterns. The general expectation is that adjusting to year-round scheduling will mean inconvenient and undesirable changes in those traditional patterns. However, at least two districts which extensively use year-round schedules have found that the non-traditional calendar is broadly supported once the affected people become accustomed to it.

Use of year-round in the Escondido Union Elementary School District was primarily a consequence of the refusal of the voters to pass any bonds for additional school construction. Enrollment growth forced the district into choosing between double sessions and year-round scheduling. In 1971 three of the district's 13 schools were placed on year-round, and in 1973 another three went to year-round. In 1975 an opinion survey was made of the parents, students, teachers and principals of those six schools. The survey results showed that 81.8% of the respondents preferred the year-round schedule to a traditional nine-month calendar. That same year, the district electorate overwhelmingly voted to have year-round implemented in all 13 schools.

In the Corona-Norco Unified School District, support for year-round programs has grown well beyond the expectations of the district administration. Initially, the district implemented the program in only three schools as an experiment to determine whether the program could help cope with anticipated enrollment growth and overcrowding. Participation was strictly voluntary. After some experience with year-round scheduling, most of the participants preferred it to the traditional school calendar and they communicated this to their friends. The number of voluntary participants grew and year-round scheduling was expanded to other schools. Corona-Norco now offers year-round programs at 19 of its schools and the concept enjoys strong support among parents, students and faculty.

When used to maximize the student housing capacity of school facilities, year-round scheduling can result in significant savings. According to an official of the Escondido School District appearing before the Commission, "Maintaining year-round schools with the growth that we have, we will be able to accommodate the children we have now plus the children we anticipate in the next five years without any new buildings."[18] Because of this situation, Escondido has avoided more than $5 million in capital outlay and debt service costs for additional facilities.[19]

Year-round scheduling could also be employed to enhance the fiscal benefits of school consolidation in areas of declining enrollment. Integration of year-round with a general move toward consolidation could increase the amount of surplus facilities available for more efficient alternate uses or disposal. Surplus facilities thus made available could then provide revenue for the district by being sold or leased. In addition, a reduction in the amount of facilities to be maintained and administered, and a concomitant reduction in operating costs would be possible.

The limited use of year-round scheduling appears to be a result of overly skeptical attitudes and a general reluctance to change rather than any significant defects in the concept or its implementation. Of course, the savings to be realized through year-round may be limited or completely offset in some districts by complicating factors such as unusually high bussing costs which become prohibitively expensive when attendance centers are too centralized. Such a condition could obviously constitute a legitimate reason

for a district not to utilize year-round. However, skepticism and reluctance to change are of questionable legitimacy as excuses for avoiding year-round considering its demonstrated potential for reducing education costs--especially in view of the strictures of Proposition 13 (the Jarvis-Gann tax initiative of 1978 which limits property taxes to 1% of market value.)

School District Reorganization

In some instances, more efficient utilization of school facilities can be obtained if district boundaries are redrawn. Declining overall enrollment combined with localized growth can redistribute student populations, while facilities generally remain where they have always been. Consequently, adjoining districts may find themselves with underutilized and overcrowded schools very near one another, with the imbalance in utilization perpetuated by a district boundary separating them.

In the early 1960's a major state-level effort was made to encourage reorganization and consolidation of school districts through unification. Out of this effort came a body of laws mandating the formation of a county committee on school district organization within each county. These committees were required to submit to the State Board of Education by 1963 a master plan for the unification of all territory within their respective counties.

The Board of Education was then charged with reviewing those plans for conformance with legal standards and criteria for unification. As voter approval is required for district reorganization, elections were held in 1964 and 1965 in those districts which the master plans recommended be unified. As a result, the number of school districts in the state was reduced from 1,483 in 1964 to 1,099 by 1967. Further changes in district organization, including district splits as well as unification, have brought to 1,043 the current number of elementary, high school and unified school districts.

The number of attempts at unification diminished appreciably after the 1964-65 elections. It is fair to say that in recent years there have been as many moves to split districts as there have been to unify them, although there has not been much action of either type. Despite this lack of reorganization activity, the county committes on school district organization have continued to remain in existence in most counties.

It is the function of each committee to consider for reorganization the territory within its purview. The nature and frequency of such reviews are largely matters of discretion for each committee. However, a valid petition by voters can compel a committee to consider reorganization of a particular area. When a committee decides reorganization is warranted, it must develop a specific reorganization plan for approval by the State Board of Education.

County committees have not been examining the possibility of more efficient utilization of facilities through district reorganization. Although current Education Code language appears to be worded broadly enough to permit a committee to make such an examination, the Code does not specifically encourage it. And practically speaking, a committee is not likely to undertake

such an examination on its own initiative. This is because both the Education Code and the State Board of Education have placed heavy emphasis on other criteria for reorganization, especially the Education Code-prescribed criterion on ethnic balance.

Only through legislative amendments to the Education Code are county committees likely to take up declining enrollment and facility use as a criterion for considering reorganization. If a bill were enacted to encourage county committees to consider declining enrollment and facilities utilization, it would be ineffectual unless it included an appropriation. County committees do not now have the resources to conduct the kind of demographic and use studies necessary to properly analyze the issue.

Such a directive would not appear to have a very good chance of materialzing, however, since the Legislature and the Office of the Governor over the past several years have consistently reduced the incentives and avenues for effecting unification. These reductions have largely been a reaction to extremely intense school district opposition to any boundary changes. Since revenues are so closely tied to average daily attendance, districts strongly fight any move that might result in a loss of pupils. In addition, a district consolidation is intensely resisted by district administrations and their constituencies out of desires to preserve autonomy and control.

Despite this strong reluctance to reorganize, school district consolidation could be used to bring about a significant reduction in the average per-pupil cost of education. The state's 1,043 school districts represent a redundancy of administrative facilities and manpower. This plethora of districts also represents a level of decentralization which militates against realizing economies of scale in such areas as transportation, purchasing and insurance.

Santa Clara County alone has thirty-three separate school districts in addition to a county superintendent of schools. Four of these districts have just one school apiece. Lakeside Joint Elementary School District, in Los Gatos, has an enrollment of 130 students and Montebello Elementary School District in Cupertino has just 33 students. The Luther Burbank Elementary and Orchard Elementary School Districts, with enrollments of only about 300 students apiece, are located virtually in the middle of the city of San Jose which contains thirteen separate school districts.

In Los Angeles County, which has 82 school districts, the 1976-77 average total expense per average daily attendance (a.d.a) of the County's six smallest districts was $2,425. This was nearly double the $1,297 average total expense per a.d.a. of the six largest school districts in the County.[20]

PART IV

FINDINGS: SCHOOL FACILITY MAINTENANCE NEEDS

A. Maintenance Deficiencies

As was noted in Part III of this report (see p. 13), facilities matters carry a low priority in the scheme of most school district administrations. This brings forth an issue which was not originally a major focal point of this study, but which is of such importance that it warrants reporting. This issue is the poor maintenance attention which has been given to the taxpayers' investment in school facilities.

In a recent survey conducted by the State Department of Education, the state's elementary and secondary school districts reported a backlog of major maintenance needs which would cost over $742 million to perform.[21] This figure indicates that, overall, school buildings have reached an advanced stage of deterioration. According to estimates of the California Association of School Business Officials, less than 5% of the state's districts have adequately maintained the condition of their facilities. The replacement cost of the state's school facilities is estimated at $15.9 billion.[22]

B. Factors Responsible for Deficiencies

Three primary causes for this maintenance problem and its size can be identified. Two of these stem from conditions which are also responsible for poor facility utilization practices, i.e. poor management and the demands of state and federal mandates on district resources.

Poor Management and Preventative Maintenance. Many districts have failed to establish any sort of preventative maintenance programs. Basically, such programs involve making an assessment of the useful life of facilities or parts of facilities which can, at some time, be expected to need reconditioning or replacement (e.g. roofing, flooring, asphalt.) The district can then anticipate when it will be necessary to commit manpower and money for such work.

Instead, districts typically wait until a major maintenance need is obvious (e.g. a leaky roof). The immediacy of the need does not necessarily guarantee, however, that the resources will be immediately available to rectify it. Handling major maintenance on such a crisis basis tends to result in budgetary hardships or a delay in solving the problem. Delay, however, may enlarge the problem and the costs of rectifying it. (Leaky roofs, for example, have a tendency to cause damage to wiring, insulation and flooring.)

This failure to employ programs of preventative maintenance is another reflection of the managerial deficiencies described in Part III. School district administrators often lack the background and training necessary to 1) recognize and appreciate the importance of an operations program like preventative maintenance and 2) competently design and implement such a program.

State and Federal Mandates and Low Budget Priority. A second cause of the major maintenance problem and its size is that a great many districts have repeatedly deferred committing funds to perform maintenance work. This decision to defer maintenance is a response of governing boards to an environment of tightly limited fiscal resources and many strong pressures for expenditure. The revenue-generating ability of school districts has been constrained by SB 90 (1972 tax reform legislation which, among other things, limited the amount of revenue per pupil that a district could raise through property tax levies) and decreasing enrollment (state aid to school districts is based upon numbers of pupils.)

However, pressure for spending district revenues has not been similarly constrained. Over the past several years, school district operating costs have been forced upward beyond the inflation rate by a multitude of legislative and court mandates from both the state and federal levels of government. The mandating parties rarely provide districts with money to carry out the mandates, leaving the burden of financing to the general funds of the districts. Consequently, the portion of a district's budget available for discretionary allocation by its governing board has been sharply curtailed. Many special interests, including various advocates of particular education programs and employees seeking wage increases, lobby their governing boards strongly for that budget portion. Year after year, as decisions are made about how the district budget is to be divided up, many governing boards consistently sacrifice funds for maintenance to meet the demands of those advocating other interests. The result is the current massive backlog of major maintenance needs.

In testimony before the Commission, a member of the Governing Board of the Los Angeles Unified School District graphically delineated these conditions by way of explaining why the Board had consistently failed to allocate sufficient funds to prevent the district's current maintenance backlog of $147 million. It is illustrative to quote this Board member at length.

> (T)he mandates and requirements on boards of education have increased in such a way that they are now almost to the point where I don't believe school districts are manageable because of them...Now, I'd like to pass out to you...what I would call a brief major list of requirements that are put on school boards--and these are responsibilities added in just the last three years; I am not picking any long-term history...Now let me go through these...The Crawford Decision is the integration issue--desegregation of the L.A. school district. We have a court order as of June of 1976, and that first year cost could be as high as a hundred million, although

the budgeted figure right now is somewhere over seventy million... Collective bargaining--that in itself is an authority and responsibility issue because we no longer have unilateral decision like we had before as to working conditions, salaries and many other priorities that we could have set these past two years...The next one is the increased share of public retirement requirements, and I need not elaborate on that. I think you all are sophisticated enough to know what has occurred in the public sector in terms of retirement costs; they are rising for many reasons. Service to the handicapped--Public Law 94-142 of the Federal Law...This is a law which had no funding, really, to it, and it basically means we have to redo a lot of our facilities to allow for the ability of the handicapped to move in and out of facilities and the use of facilities and it also, of course, mandates many, many educational requirements that were not there before. We have to search for every student that's handicapped. Actually go out and try to find them rather than be permissive as to the market coming to us and saying "I want my student to be educated." It was permissive before--it's no longer permissive, its mandatory. The Law decision is a U. S. Supreme Court decision that says, basically...for students who are non-English speaking, you must provide a bilingual teacher. Before, it was permissive. Now, I can't tell you the exact numbers, but it is a huge, astronomical increase in costs to be able to implement this. Before, of course, we were able to cope with it on a permissive basis; should you have a student who is non-English speaking, you tried to approach that problem as best you could to reach that individual. But the state, of course, has its Chacon laws which mandate also that we would go out and make sure we test and find out how many students are non-English speaking or limited-English speaking, and then provide a bilingual teacher under that law... 'Norwalk-La Mirada' has to do with personnel issues; how and when and under what conditions you can lay off people...you cannot lay off a person because you have no money. You lay them off because you are either cutting back or eliminating a program, and that has a very severe impact on our local decision-making authority as far as who we can lay off and who we can't. I don't think I'll go through the rest of (the list); I'm only trying to make my point as follows...<u>The environment we're in has increasing responsibilities with decreasing funds and authority to accomplish them</u>. That's my point, and I can give you a long list of other requirements. I haven't talked about the kind of rules that every large organization faces when another agency who is over you says 'I want ten reports and I want them by next Monday morning.' Obviously, you need people to go do all those reports; and so I'm not just talking about the administration that is required to answer and comply with all the new laws in Education Code requirements.[23]

The L. A. Board member went on to describe the budgetary decision-making process that usually results in maintenance receiving a low budget priority.

> First we follow the philosophy of spread the wealth and bank as many pressure groups and fires that they produce as possible... you always have to face up to the pressure groups that come in who want their thing over anybody else. So the candid answer is, first you look at how are you going to bank the fires with limited resources and increasing responsibility? The second approach that we've used is that we kind of 'peel-the-onion' in terms of reducing staff or reducing expenses. In other words, you peel a little bit off of everybody instead of knocking out one whole program. Basically, the reason for that...is because of a lot of the legal and administrative requirements that go with a lot of these programs that come in new from the state and federal. You'd have a difficult time trying to eliminate (any of these programs) entirely...(It) finally resolves down to where you get four votes out of seven that say "this has more priority than that"...So, the bottom line, I believe, is that the judgments that we reach, and the value judgments that we reach based on our board role, are based on the political and philosophical aspects of the four out of the seven--but still limited by the authority that we don't have.[24]

Concentrated Construction Period. A third factor contributing to the large maintenance needs is the relatively short period during which many of the state's school facilities were built. Fifty-five percent of school facilities were constructed between 1949 and 1964, making them 14 to 29 years old. Many kinds of major maintenance items (roofs, asphalt, etc.) have a useful life expectancy of 15 to 20 years. Given this natural life cycle and the fact that so much maintenance has been deferred up to now, the major maintenance of those facilities is essentially coming due at one time.

C. Relationship Between Facility Utilization and Maintenance

The longer major maintenance is deferred, the greater the likelihood that other costly problems will arise. If timely steps are not taken to relieve the backlog, the deterioration may soon reach a state at which the costs of rectification would become completely unmanageable. Indeed, there is some evidence that this might already be the case.

When asked where and when funds would be secured to begin reducing their maintenance backlog, district administrators frequently responded that they really didn't know. One district official flatly said that without massive state assistance, the buildings would simply continue to deteriorate.

The passage of Proposition 13 promises to further limit the fiscal resources of school districts and their ability to meet backlogged maintenance needs. But the maintenance problem cannot go on being ignored without serious and costly consequences. School facilities represent a multi-billion dollar

taxpayer investment. It would be fiscally shortsighted to continue deferring the maintenance of this investment to expediently handle other demands for expenditures.

At least a part of the solution for rectifying the maintenance problem might be found in improved facility utilization. The underutilization of facilities and the poor maintenance of facilities tend to be mutually aggravating conditions. Conversely, the improvement of one can be an aid to correcting the other.

Serious underutilization generally indicates that a district is spreading its maintenance dollars over more facilities than are necessary to meet pupil housing needs. Consolidation, which can serve to reduce underutilization, can also serve in two ways to improve the condition of facilities. First, since consolidation usually reduces the number of facilities actively being used, it affords the district an opportunity to concentrate its maintenance funds on fewer facilities and thus more adequately meet its needs. Since even unused facilities require maintenance to keep them from deteriorating, this benefit will be realized only if maintaining the unused facilities is eliminated from the regular maintenance budget. There are basically two desirable ways of achieving this: 1) sell the facilities, or 2) lease them for a charge which covers their ongoing maintenance costs. As described in Part III, the Education Code currently requires that the revenue derived from the sale of property (or in some cases the lease of property) be used first for capital outlay purposes. However, if a district can demonstrate to the satisfaction of the State Allocation Board that it will have no capital outlay needs for at least five years subsequent to the sale, then the district may use the revenue for expenditure on general fund items. Since major maintenance is a general fund item, the revenue derived from the sale or lease of surplus facilities could be used to reduce maintenance backlogs or deficiencies. As pointed out earlier, however, there is a tendency among districts to use available general fund monies for items other than maintenance.

Consolidation can also serve to improve facility maintenance conditions through directing attention--and ultimately funds--toward rehabilitation. Consolidation may require rehabilitation or remodeling of some facilities, presumably bringing those facilities up to an acceptable level of maintenance condition. Once brought up to an acceptable level, the facilities could then be more easily maintained at that level because maintenance funds are spread among the fewer facilities after consolidation.

Conversely, consolidation efforts aimed at improving facility utilization can be adversely affected by maintenance deficiencies which prevent full usage in terms of loading (e.g., a leaky roof may prevent occupancy of an area) or range of application (e.g., a facility's deteriorated wiring could preclude the installation of heavy duty electrical shop equipment for industrial arts classes.) These factors can have an especially important impact on consolidation efforts which often depend upon remodeling or modification of an existing facility. In order to consolidate some schools with others, it may be necessary, for instance, to convert an elementary school to a junior high school. Such conversion could require the addition of certain kinds of teaching stations (e.g. industrial arts shops.) However, maintenance deficiencies in the elementary facilities could preclude such modification or require rehabilitation before modification could be done.

FOOTNOTES

1/ Information on expenditures provided by the Office of the State Architect, January, 1978.

2/ California State Department of Education, California School Facilities Equalization Survey, April 1, 1977.

3/ See appendix C, "Bibliography"

4/ See appendix A, "Survey Methodology"

5/ See appendix B, "Persons Interviewed or Consulted in Conjunction with School Facilities Utilization Study"

6/ These hearings were held April 24, 1978 in Sacramento and June 15, 1978 in Los Angeles. Transcripts of these hearings are available from the Commission upon request.

7/ From testimony of Ronald Rescigno, Director of Personnel and Staff Development, Campbell Union Elementary School District; Sacramento public hearing of April 24, 1978; page 27 of transcript.

8/ From testimony of Leland Newcomer, Superintendent, Grossmont Union High School District; Los Angeles public hearing of June 15, 1978; page 17 of transcript.

9/ Newcomer, ibid., page 21

10/ Rescigno, op. cit., page 29.

11/ Newcomer, op. cit., page 22.

12/ One of the other areas of district responsibility affected by these mandates is facility maintenance. For a discussion of this, see pages 30-32 in Part IV of this report.

13/ Newcomer, op. cit., pages 19-20.

14/ Newcomer, op. cit., page 20.

15/ Rescigno, op. cit., page 28.

16/ From testimony of Milton Reiterman, Associate Superintendent for Management Services, San Francisco Unified School District; Sacramento public hearing of April 24, 1978, page of transcript.

17/ In discussing the possibility of school districts leasing surplus property to either public or private entities, it is not the intent of the Commission to encourage districts to speculate in real estate or to seek permanent revenue sources through the leasing out of district property. Rather, the Commission's intent is simply to outline the feasibility of utilizing surplus school facilities in an efficient way in those cases where there is some reasonable question regarding the viability or efficacy of the district permanently disposing of the property. As pointed out earlier, a general upswing in enrollment, accented in some areas by new construction or urban renewal, may make holding onto currently surplus facilities a prudent management decision on the part of some districts. In the interim, however, such districts should find cost-efficient uses for those facilities as alternatives to either operating them at significantly below capacity or mothballing them.

18/ From testimony of Elmer Cameron, Deputy Superintendent, Escondido Union Elementary School District; Los Angeles public hearing June 15, 1978; page 8 of transcript.

19/ Office of the Auditor General, State of California. Fiscal Impact of California's Year-Round School Programs, a Report to the California Legislature. September, 1977; page 20.

20/ Statistics developed by Richard Wales, Special Services Coordinator, Office of the Los Angeles County Superintendent of Schools.

21/ California State Department of Education, California School Facilities Equalization Survey; April 1, 1977.

22/ This estimate was developed from the square footages reported in the School Facilities Equalization Survey of April, 1977 and the Office of Local Assistance "Base Schedule of Allowable Unit Costs for School Construction" as adjusted on September 13, 1977. The OLA schedule represents building construction costs only. It does not include other costs such as architect's fees or site preparation.

23/ Testimony of Phillip Bardos, Trustee, Los Angeles City Board of Education; Los Angeles public hearing of June 15, 1978; pages 35-36. of transcript. (emphasis added)

24/ Bardos, ibid., pages 37, 39.

Appendix A

SURVEY METHODOLOGY

To determine what is being or has been done at the district level in response to declining enrollment and its impact on the utilization of facilities, a selected sample of districts was surveyed. Fifteen districts in nine counties were included in the sample:

Alameda County
- Oakland Unified
- Castro Valley Unified

Contra Costa County
- Mt. Diablo Unified

Fresno County
- Fresno Unified

Los Angeles County
- Norwalk-La Mirada Unified

Orange County
- Anaheim Union High
- Garden Grove Unified

Sacramento County
- San Juan Unified

San Diego County
- Grossmont Union High
- La Mesa-Spring Valley Elementary
- San Diego Unified

San Mateo County
- San Mateo City Elementary
- San Mateo Union High

Santa Clara County
- Campbell Union Elementary
- Campbell Union High

Appendix A

Each district was selected for one or more of the following reasons:

*Department of Education projections indicated enrollment changes significant enough to seriously affect the utilization of facilities.

*Evidence suggested that the district would illustrate particular aspects of facilities utilization.

*The district would contribute to a varied sampling which would include elementary, high school and unified districts from throughout the state.

In each district the superintendent and/or other district personnel responsible for facility use matters were interviewed utilizing the open-ended survey questionnaire below as a framework for discussion. However, the detail in which each topic of the questionnaire was discussed varied, depending upon its relevance to each district.

Appendix A

SURVEY QUESTIONNAIRE

Has the district formally assessed the adequacy of its facilities with respect to the district's enrollment and the district's educational program policies? Does the district have a facilities Master Plan?

*Has the Master Plan been useful as an aid to guiding facilities planning?

*Has the district formally assigned someone ongoing responsibilities for facilities planning?

To what extent are the district's schools experiencing excesses or deficiencies in facilities capacity?

*How is "capacity" determined?

What actions are being taken or are being planned to reduce such facilities capacity imbalances?

*portables

*busing

*new facilities

*redrawing attendance boundaries

*closing schools

*restructuring grade grouping

*interdistrict agreement

*voluntary attendance center attendance choices, e.g. voluntary participation in a "basic school"

*year round schools

*ordinance requiring fee from builders in impacted areas; SB 201

What is the status of these actions or plans?

How has the community responded to these actions or plans? What has been the general community attitude toward them?

*Especially regarding:
boundary changes
closing schools
busing to relieve overcrowding
interdistrict agreements

Does the district currently have any unused (closed) schools?

What is planned for these schools?

*Location

*Community or administrative reluctance to selling?

*Appraised value -- tax base?

*Interagency agreement?

*Adult Ed. program?

Has the district established per unit costs for operating its facilities?

*per square foot

*per pupil

*salaries for administrators and classified employees, utilities, insurance, security, etc.

Has the district established per unit costs for grounds upkeep?

To what extent has the district incurred vandalism costs?

*More at underutilized facilities?

Has the district established a specific listing of major facilities maintenance needs?

Does the district currently have a backlog of major maintenance which should be performed? What is the estimated cost of performing this backlogged maintenance?

Does the district have a major maintenance schedule?

Does the district earmark a specific portion of its budget for exclusive application to major maintenace work?

*As a percentage of replacement cost

*As a percentage of total budget

*Intensity of reaction: those opposed; those supporting

*How involved is the community generally?

*Community Schools

Has the district projected its enrollment over some span of the future?

*Time span?

*School-by-school?

What methodology was employed to make these projections?

*Cohort survival?

*District canvassing and census leading to the development of student yield factors?

*Assistance or guidance from SDE people or publications?

*Assistance from other sources?

What do these projections indicate? What effects will future enrollment levels have upon the current facilities needs situation of the district?

Is it anticipated that the district will need one or more additional attendance centers to handle future enrollment levels? How will the construction of such centers be financed?

Is it anticipated that the district will be able to close schools as a result of declining enrollment?

*Have dollar savings and costs of closure been calculated (salaries, utilities, insurance, maintenance, etc.)?

*Has the property been appraised?

*Potential tax base and revenue generation.

*Community attitude toward closing.

Appendix B

Persons Interviewed or Consulted in Conjunction with the School Facilities Utilization Study.

Dixon Arnett
Assemblyman, 20th District
Redwood City

Alden Badal
Associate Superintendent, Support Services
Oakland Unified School District

Roy Bagley
Chairman, School Finance Committee
California Taxpayers' Association

Phillip Bardos
Trustee
Los Angeles City Board of Education

Samuel L. Barrett
Director of Vocational Education
State Department of Education

Arthur O. Bachelor
Business Manager
San Ramon Valley Unified School District

Kyle Berkey
Director of Maintenance, Operations and Construction
Fresno Unified School District

John Boice
Educational Facilities Laboratories
Menlo Park, California

Tom Burns
Budget Analyst
State Department of Finance

Bruce Butler
Business Manager
Norwalk - La Mirada Unified School District

Philip Cali
Director, Facility Planning
San Francisco Unified School District

Elmer Cameron
Deputy Superintendent, Supplemental Educational Services
Escondido Union Elementary School District

Davis Campbell
Associate Superintendent, Special Programs
State Department of Education

Vern Chang
Facilities Planner
San Juan Unified School District

Peter Chiang
Bureau of School Apportionments and Reports
State Department of Education

Keith Chun
Board Member
Fresno Unified School District

Lew Clingan
Chief, Buildings and Grounds Division
State Department of General Services

Donald Cruce
Director, Capital Planning
Oakland Unified School District

Harold Culver
Director, Land and Facilities Planning
San Diego City Unified School District

Xavier Delbuono
Associate Superintendent, Adult and Community Education
State Department of Education

Janet Denton
Associate Consultant
California State Senate Education Committee

Jack Downing
Business Manager, National Association of Independent Schools
Boston, Massachusetts

Francis Ebert
Superintendent
Castro Valley Unified School District

Harold Fielding
Administrative Assistant
Corona-Norco Unified School District

Nick Floratos
Superintendent
Rio Linda Union Elementary School District

Rudy R. Gatti
Superintendent
Santa Clara Unified School District

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Vern Chang
Facilities Planner
San Juan Unified School District

Peter Chiang
Bureau of School Apportionments and Reports
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Keith Chun
Board Member
Fresno Unified School District

Lew Clingan
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State Department of General Services

Donald Cruce
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Oakland Unified School District

Harold Culver
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San Diego City Unified School District

Xavier Delbuono
Associate Superintendent, Adult and Community Education
State Department of Education

Janet Denton
Associate Consultant
California State Senate Education Committee

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Francis Ebert
Superintendent
Castro Valley Unified School District

Harold Fielding
Administrative Assistant
Corona-Norco Unified School District

Nick Floratos
Superintendent
Rio Linda Union Elementary School District

Rudy R. Gatti
Superintendent
Santa Clara Unified School District

Charles E. Gocke
Deputy Director
State Department of Finance

Henry Grauten
Assistant to the Deputy Superintendent of Business Services
Long Beach Unified School District

Walter Hauss
Superintendent
Campbell Union Elementary School District

Basil Hick
Chief, Bureau of Educational Plant Planning
New York State Education Department

Donald E. Hills
Demographic Research
State Department of Finance

John Hills
Acting Associate Superintendent, Business Services
Oakland Unified School District

Dale Hobson
Assistant Superintendent, Business Services
La Mesa - Spring Valley Elementary School District

Darlyne Houck
Legislative Analyst
California Association of Realtors

Walter Houston
Office of Engineering
Kansas City Public Schools
Kansas City, Missouri

David Howard
Director, Buildings and Grounds
Oakland Unified School District

Melvin J. Isenberger
Business Manager
Monterey Peninsula Unified School District

Appendix B

Ralph Johnston
Director, Maintenance Branch
Los Angeles Unified School District

James Kennedy
Director, Taxation Department
California Chamber of Commerce

Ferd Kiesel
Deputy Executive Director
California School Boards Association

Ted Kimbrough
Director of School Facilities Planning
Los Angeles Unified School District

Gordon King
Stafford and King, Architects
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John L. Krieg
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Jack Liebermann
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State Allocation Board

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Virginia Macey
President
California State Parent-Teacher Association

Richard Maxfield
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William May
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Nicholas Montesano
Superintendent
Campbell Union High School District

Alton Morse
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James Murdoch
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David Shapiro
Associate Superintendent
San Mateo City Elementary School District

Joe Shaughnessy
Architect
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John Stallings
Department of Education Administration
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Sonoma County Alliance
Santa Rosa, California

Zaven Tatarian
Haines, Tatarian, Ispen and Associates - Architects
San Francisco, California

William Tenhoff
Chief of Facilities
Minneapolis Special School District
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Peggy Tribly
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Escondido Union Elementary School District

Claude C. Turner
Superintendent
Belmont Elementary School District

Howard Ulrich
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Superintendent
Anaheim Union High School District

Appendix C

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