

MAKING SCHOOLS THE CENTERS OF COMMUNITIES: MOVING THE LOS ANGELES  
UNIFIED SCHOOL DISTRICT FROM POLICY TO PRACTICE

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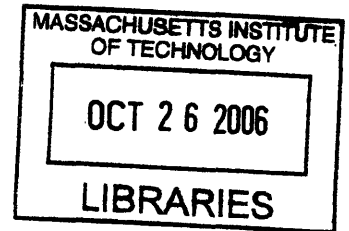
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## **Thesis Abstract**

Schools often represent the largest, single community public infrastructure investment. In light of this, California's Los Angeles Unified School District (LAUSD) is in a unique and critical position as it attempts to undertake the largest, single capital improvement campaign in the Nation's history. With a growing public investment of \$19.2 billion for local schools, LAUSD's efforts create an opportunity to attract greater physical, programming and economic resources using a joint use school development approach. Through joint use development, LAUSD acts as a development anchor, driving community and economic development by leveraging resources from public and private entities. The benefits of joint use include greater overall project value; public investment maximizing; more efficient use of scarce community resources; and increased number of resources available to local communities. In order to achieve these goals, LAUSD recently adopted a formal Joint Use Program that lays out a strategy for identifying community resource needs, seeking out joint use opportunities, and outreaching to potential partners. Despite these efforts, however, joint use remains an incidental development activity that lacks full integration within LAUSD's overarching school development framework. Hence this thesis examines LAUSD's current Joint Use Program in context of its ongoing capital improvement campaign, policy development and past implementation efforts. Based on review of District reports, policies, independent case studies, and interviews, this thesis examines current implementation challenges and advances recommendations for improving LAUSD's joint use practice. Effective joint use school development holds positive implications for local communities: it can serve as a catalyst for community revitalization; as well as help to integrate schools and communities and make schools the centers of communities.

Thesis Advisor: Professor J. Phillip Thompson  
Department of Urban Studies and Planning



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Finally, I dedicate this thesis to Boyle Heights, Los Angeles, for helping shape the lens through which I view and understand the world around me.



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## **Methodology**

This research study is informed by primary documents including LAUSD policy reports and Board records; secondary data including literature, publications, and case studies; and stakeholder interviews.

*Primary Research:* The scope of research focuses on Los Angeles Unified School District's (LAUSD) Joint Use Program. Program investigation includes review of public records at the State, District Staff, Board and Bond Oversight Committee (BOC) levels. Data was gathered from: official communications, reports, presentations, meeting minutes, and policy documents.

*Secondary Research:* The author looks at a broad scope of literature on K-12 public school facilities, joint use, and related implications for community and economic development. Secondary data sources include: academic research; advocate publications, as well as school district and practitioner reports. Case studies, best practices and joint use policies were examined. The National Clearinghouse for Educational Facilities served as significant source for literature.

*Interviews:* Interviewees represent various local public agencies; primarily LAUSD Staff, Board and BOC personnel; and civic and community leaders with direct knowledge and expertise in LAUSD's joint use school development practice. Individuals associated with private and non-profit organizations who have worked with LAUSD on joint use policy development and planning efforts are also represented. Interviewees were chosen to reflect a cross-section of individuals with direct experience in the various technical aspects of carrying out joint use projects within LAUSD.



## **Ch 1. Introduction**

The Los Angeles Unified School District (LAUSD, District) is the first and second largest school district in California and the nation, respectively. With over 745,000 students enrolled in 2005, it is estimated to serve about 1 of 8 children attending California's K-12 public school system<sup>1</sup>. The District's budget in 2004-05 was \$13.4 billion; which would rank LAUSD 147th on the list of Fortune 500 companies if it were a publicly traded company<sup>2</sup>. Moreover, by some estimates, LAUSD accounts for about 15 cents out of every dollar allocated to public education in the State<sup>3</sup>. Considering California dedicates about 42% of its \$85 billion general budget for education purposes, LAUSD's cut is significant by any measure<sup>4</sup>.

While the majority of the District's budget is allocated to education-purpose programs, a significant share is devoted for capital projects such as new school development, rehabilitation, renovation and upkeep of existing facilities. In 2004-05, for example, the budget share for capital projects was 35%<sup>5</sup>. This represents a significant long-term economic and physical investment for the various schools and communities across the 29 southern California cities that encompass the District.

As if the level of ongoing investment in capital projects is not significant by itself, LAUSD's recent bond-financed school construction campaign means a large stream of capital and resource opportunities for communities that are home to LAUSD.

### LAUSD Facilities Inventory...

- Over 1000 schools, community centers and special education facilities
- 13,000 buildings
- 69 million sq ft of facilities
- 57,000 acres of land,
- District boundaries span 704 square miles
- District includes 28 separate cities, and unincorporated areas of Los Angeles County

Source: LAUSD

<sup>1</sup> <http://www.ed-data.k12.ca.us>

<sup>2</sup> Ibid; <http://money.cnn.com/magazines/fortune/fortune500/>

<sup>3</sup> <http://www.lao.ca.gov/>

<sup>4</sup> Ibid

<sup>5</sup> LAUSD, "Overview of School Finance." Presentation to Joint Commission, Aug 2005

Beginning in 1997-98, LAUSD embarked on a massive school construction campaign that aims to build about 160 schools and nearly 20,000 modernization and expansion projects by year 2012. In pure physical terms, the District is recognized to have undertaken the single, largest school development campaign of any school district in the nation. This effort is so large that it has been compared to rebuilding the entire San Diego Unified school district, California's third largest school district<sup>6</sup>. In economic terms, LAUSD will be injecting over \$19.2 billion of local and state monies into many of Los Angeles County's communities.

The magnitude of LAUSD's school construction campaign becomes even more significant when considering the local context. The District's efforts will contribute positively to an ailing and inadequate educational infrastructure system that is part culprit to a 50%-plus student failure rate<sup>7</sup>. Also, with over 44% of LAUSD students English-learners and over 75% eligible for free lunch, the district's demographic characteristics mirror a general population that is predominantly minority (Latino) and low-income<sup>8</sup>.

Additionally, many of the communities where LAUSD works and will build its new schools are within Los Angeles County's most distressed, dense, urban neighborhoods. These communities are recognized to suffer from historic disinvestment and face a shortage of public, physical and natural resources such as community centers, parks, open space, and libraries<sup>9</sup>. Moreover, given the scarcity of land and expensive real estate in Los Angeles County, hard challenges arise for local communities where competing development interests will be decided against seemingly less important community needs. Already, there are many examples where school development is pit against efforts to provide affordable housing or parks, and where communities are forced to decide between classrooms or libraries, for example. The implications are that communities will continue to forego critical basic necessities where public and private entities fail to work together to better utilize limited physical and economic resources.

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<sup>6</sup> <http://laschools.org/>

<sup>7</sup> Harvard Civil Rights Project, "Confronting the Graduation Rate Crisis in California," 2005

<sup>8</sup> <http://www.ed-data.k12.ca.us/>, LAUSD District Profile

<sup>9</sup> Bond Oversight Committee Resolution No. 2003-2, Healthy Schools

Given the scale and position of LAUSD's operations, the District plays a critical and influential role in defining the physical, social and economic experience of its host communities. Not only is LAUSD accountable to its students, but it is also inherently tied to local environments in which it operates. Because schools often make up the largest single community resources in terms of facilities, open space, and programming, it is exigent upon LAUSD's to ensure that its facilities and investments can be used in ways that crate an added benefit its students and surrounding community alike.

By working with other public and private entities to capitalize on its campaign effort, LAUSD can influence the availability of important resources in order to meet a variety of community needs. Particularly, a joint use school development approach presents the District with a useful tool for building partnerships with public and private entities for leveraging physical, programming and economic benefits from its school construction and investment efforts.

Through joint use school development, LAUSD can match capital, physical assets or programming resources with those of partnering agencies. Already, there are many examples where LAUSD partners with community-based groups to allow use of school recreational facilities on weekends or after-school hours. Through formal joint use collaborations, however, LAUSD can work with city departments to site and co-develop parks, open space, libraries, or other facilities that are accessible to both, students and the community on an ongoing basis.

In the former instance, schools retain full ownership of facilities and make them available on a conditional basis through use of permits and fees. In the latter case,

*Joint-Use:*

Joint-Use is where two or more public, non-profit or private entities pool resources (capital funds, assets, in-kind funds, operational and maintenance funds) in order to provide or maximize new and/or existing facilities for shared-use by a school and the local community. Joint-Use agreements are legal documents signed by all contributing parties which articulate terms and conditions of use by all signatories. Typically, Joint-Use agreements are long-term (30 to 40 year) contracts between parties, provide exclusive rights and uses, and also define operational and maintenance obligations of all parties involved. Joint-Use facilities traditionally fall under the following categories; athletic fields and facilities, recreation and open space, public meeting space, libraries, health and human service facilities, preschool and child care facilities, teacher education facilities, and after-school enrichment facilities.

Source: LAUSD FSD

schools and partners work collaboratively to identify a critical local need, and bring their capital and programming resources together to develop facilities in a manner leads to greater public community infrastructure investment. Given the leveraging aspect of a joint use approach, benefits are enjoyed on a long-term basis by school districts, partner entities and, most importantly, communities. These benefits include greater overall project value; public investment maximizing; more efficient use of scarce community resources; and increased number of resources available to local communities.

By prioritizing joint use development, LAUSD can have significant impact in the overall physical space and environment that influences the educational experience of its students inside and outside of the class. The immediate beneficiaries of LAUSD's investment efforts are students and community residents, given availability and increased quality of school facilities and neighboring physical resources. What is more, beyond resources, investing in public school infrastructure through joint use creates value within local communities through increased interest and investment from outside sources. Not only does this improve local conditions, but it can also serve as a tool for broader community economic development and neighborhood revitalization efforts

In addition to the economic benefits, joint use development also plays an important role in helping to reestablish schools as the hearts and centers of communities. This idea builds on the concept that schools should serve as more than just places for learning and are centers for civic, recreation, and extended learning activities. A fully integrated joint use school in this case can act as a community center, providing residents alternative activities from which to remain constantly engaged with educational and public community environments.

LAUSD recognizes the unique opportunity that it has with its capital construction campaign as well as the increased benefits of pursuing a joint use development approach. LAUSD has participated in past joint use collaborations and continues to do so, understanding that it is in the business of building more than just boxes to house school seats. However, despite LAUSD's past joint use record, few of these projects can be positively credited to LAUSD initiation. Many of LAUSD's past joint use

involvement has occurred on an ad-hoc and reactionary basis, where community pressures, local opposition and politics have played a decisive role in getting the District to act.

As LAUSD's joint use practice continues to unfold it is unclear how far the District will go in terms of fully integrating it as part of its current development framework. The largest challenge to LAUSD joint use practice is itself, given its development priorities are focused purely on meeting its school development goals by 2012. Other challenges posed to LAUSD joint use efforts include partner outreach and identification; funding support; liability issues, and cross-agency coordination. In addressing some of these challenges, LAUSD has implemented various measures to help improve its program. However, some of these efforts are piecemeal and come short of addressing critical governance, policy and programmatic accountability factors that will facilitate future implementation.

Towards improving its joint use practice, it is important that LAUSD look to past experiences that may serve as models for providing future guidance. In particular, three recent joint use projects highlight the important role of strengthening community impact and needs assessments; cross-agency coordination; and partner outreach. Moreover, the role of third-party convener and facilitator appears instrumental in being able to effectively engage various parties and stakeholders in planning dialogue and collaborations that are necessary to make joint use practice successful.

As LAUSD manages to balance its near-term priority for school development with its long-term commitment to many of the economic and resource-poor communities that it serves, it will be able to move beyond the symbolic language of its current policy, build accountability and make head in formal joint use planning and development. In light of Los Angeles' Mayor recent proposal to increase mayoral control over LAUSD, various opportunities may arise for implementing joint use development. Strengthening links between city hall and LAUSD can strengthen multi-agency partnerships and communication, and contribute to formal integration of planning and development goals under a joint use framework. Moreover, it may very well be that the Mayor's "strong mayor approach" to LAUSD governance creates the necessary operational

entity that can cut through challenges associated with politics, funding and agency bureaucracy, making joint use the preferred school development model instead of the alternative of last resort that it is today.



## **Ch 2: Investing in Schools and Communities: Background of LAUSD Capital Improvement Campaign**

LAUSD began school improvement efforts in the mid-1990's in order to address class-reduction requirements and to fix its badly-rattled school facilities as a result of the 1994 Northridge earthquake. Following this effort, pressures to address needed maintenance and upkeep of facilities led the district to initiate a modernization program in 1997. Increased student growth and legal and legislative pressures in the following years would ultimately force LAUSD to revisit its initial school renovation plans, making it the massive school construction effort that it is today.

In its early stages, the LAUSD's 1998 Master Plan outlined a method delivering 85,000 new seats, which roughly meant building 80 new schools by year 2004. In its 2000 Master Plan, the District highlighted the need for about 200,000 new seats, declaring that it would launch a multiphase development effort in order to meet current student demand for seats. LAUSD's new development roadmap entails about 160 new schools, and over 19,000 modernization and expansion projects. A school modernization program that was first initiated in 1997 and was due to conclude in 2004 is now nearly double its initial construction goals and will continue to build until year 2012.<sup>10</sup>

In order to accomplish the school development feat, LAUSD has undertaken a series of four general obligation bond programs totaling about \$13.4 billion of local taxpayer money. The total bond amount dedicated for this purpose makes LAUSD's effort the largest bond-financed school development program in Nation. Beyond the need to reduce class size and deal with overcrowding, a large factor driving the District's bond schedule is the need to secure state level matching funds. Prior to the District's bond in 1997, LAUSD had not passed a single school bond for 34 years.<sup>11</sup>

LAUSD coordinated four issuances from 1997 to 2004, modeling its bonds closely with the State's in order to maximize the amount of qualifying general funding for

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<sup>10</sup> LAUSD Strategic Execution Plan, January 2006

<sup>11</sup> LAUSD Measure Y, Safe and Healthy Neighborhood Repair & Construction Measure Presentation, May 2005

construction purposes and special programs such as early education centers, charter schools and joint use development. From 1998 to 2004, California voters passed three general obligation bonds, making available over \$30.5 billion to support school district development efforts. With a total of \$100 million for joint use planning and development at the state level, this would create both an opportunity and a challenge for LAUSD to include a joint use allocation as part of its bond issuances. Ultimately, LAUSD would include \$30 million of its own bond money in order to leverage state and third-party funds for joint use purposes.

Other State and local public agencies were also undertaking their own set of capital improvement programs around the same time as LAUSD. These efforts targeted hundreds of millions of dollars in public funding for Los Angeles' communities, providing badly needed financing for parks, open space and library capital projects. Given complimentary and overlapping development and financing activities LAUSD was able to capitalize on a number of opportunities to leverage its own funding while at the same time creating enhanced school-community joint use projects. In the case of libraries, LAUSD missed the opportunity to connect books with schools and tap into one of the largest influx of public library funding for Los Angeles' communities altogether.

## **2.1 Student Growth and Need For Schools**

In 1997, prior to initiating the first phase of its construction program, LAUSD had reported building only 27 new schools within the previous 30 years<sup>12</sup>. Around this same time, the District was busing over 75,000 students daily, on a voluntary and involuntary basis, partly to deal with shortage of classroom space and school desegregation issues<sup>13</sup>. Through the 1980's, and early 2000's, LAUSD's student population had increased by unprecedented proportions. Despite this growth, LAUSD had built few additional schools and instead relied on inter-district student busing and

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<sup>12</sup> LAUSD Measure Y, Safe and Healthy Neighborhood Repair & Construction Measure Presentation, May 2005

<sup>13</sup> LAUSD School Reform Office, Facilities Task Force

temporary portable classrooms to deal with overcrowding throughout specific parts of the District<sup>14</sup>.

From 1980 to 2002, the District's K-12 student population grew by over 208,000. Meanwhile, during this period LAUSD had only built 34,500 new, permanent seats to accommodate this growth<sup>15</sup>. In its initial 1997 school development draft master plan, LAUSD estimated a severe shortage of seats totaling over 200,000. At this time, the District's student population was nearing 682,000. In an attempt to deal with actual and projected growth, the District declared in its finalized 1998 Master Plan that it would create 78,000 new seats by year 2004.

Within a short five-year span the District would see its population grow by 65,000 students to 746,000 in 2002-03, only to experience a population decline thereafter. In 2004-05, District data show that student population has decreased from its 2002-03 peak to 742,000. For 2005-06, student enrollment is estimated at 737,000. Moreover, the District's 2008-09 projections show a substantial enrollment decline to 685,000 students.

According to the District, its past school development efforts have lagged so far behind that current and projected decline in student enrollment will not mitigate the need for new schools. A report from the District's Master Planning and Demographics Unit suggests the District's pace of new development will not meet the current need for classrooms even at the conclusion of the District's building campaign in 2012.

In 1996, the California Legislature enacted the Class Size Reduction Program, which made funding support available to local school districts to reduce class sizes for Kindergarten through third grades. In response to this program, many school districts relied on portable classrooms, and also converted libraries, childcare facilities, and teacher lounges into classrooms<sup>16</sup>. A few years from the beginning of the program, LAUSD estimates use of about 11,000 portable classrooms as a result of class size

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<sup>14</sup> Little Hoover Commission, Report to Governor, November 1999

<sup>15</sup> LAUSD Demographic Unit, Analysis of Declining Enrollment and Bond History

<sup>16</sup> Legislative Analyst Office, Proposition 1A Analysis, August 2004

reduction efforts<sup>17</sup>. While this has provided relief for classroom space, it has also impacted use of facilities for educational related programming, playgrounds, recreation and open space.

In 1998, State Senator Martha Escutia introduced a bill that offered financing assistance to LAUSD to help it achieve its class size reduction goals as well as deal with the problem of classroom overcrowding. As part of this effort, LAUSD would have to also address potential educational and related health implications of crowding out playground and open space on school facilities. In what became known as the “Escutia Program,” LAUSD assessed its use of portable classrooms, proposing to free up over 30 acres of playground space in some of the District’s most impacted and overcrowded schools<sup>18</sup>. By District estimates, 600 portable classrooms were removed, leaving an additional 10,000 in use throughout the District<sup>19</sup>.

## **2.2 Pressure to Build: Williams Settlement**

The increased costs and time demand of new school construction that led LAUSD to implement its bussing policy and use of portable classrooms also provided the impetus for increasing the District’s use of the Concept 6 schedule. Concept 6 meant that schools would be placed on a multi-track, year-round schedule in order to “fit” a greater number of students in schools. One of the implications was that student annual instruction days would be cut from 180 to 163. Although, these measures were first employed as a short-term fix for dealing with overcrowding, over time they became standard practice. This resulted in a statewide legal challenge that would ultimately define the scope and breadth of LAUSD’s \$19.2 billion, 160-school construction campaign.

In 2000, LAUSD intervened and became party to a settlement in the class action lawsuit *Eliezer Williams, et al., vs. State of California, et al. (Williams)*, a suit initiated by about 100 students against the State and State education agencies. Plaintiffs alleged that the

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<sup>17</sup> LAUSD New Construction Program Report to Board, “Escutia Program,” May 2005

<sup>18</sup> LAUSD Demographic Unit, Analysis of Declining Enrollment and Bond History

<sup>19</sup> Ibid

State and relevant public agencies had failed to ensure California public school students with “equal access to instructional materials, safe and decent school facilities, and qualified teachers.”<sup>20</sup> The suit pointed to Concept 6 practice, overcrowding, busing, lack of school maintenance and investment as examples of educational inequality.

Through the Williams settlement in 2004, the State agreed to a package of legislation (adopted in August 2004) that addressed, amongst other education-related factors, aid, restructuring and reporting on the state and health of local school district facilities. For LAUSD, one of the provisions meant that the District would receive increased state aid (approximately \$49 million in 2004-05) for emergency facilities repairs targeting some of the districts lowest academically performing schools. However, one of the greater implications of the Williams settlement for LAUSD was that it had to remove all of its schools from the Concept 6, multi-track system and restore the traditional two-semester calendar throughout the District. This provision, in the form state legislative mandate, would have to be met by July 2012. To comply, in 2004 the LAUSD set a roadmap for completing 160-schools, totaling nearly 180,000-seats, by 2012.

### **2.3 Financing LAUSD’s Schools**

Prior to 1997, LAUSD’s last school bond was passed in 1963, which marks a 34 year school financing gap<sup>21</sup>. Given the increased need for schools LASUD has approached local voters for a series of bond issuances to help finance its modernization and capital construction campaign. Overall, these efforts have resulted in LAUSD securing four local voter-approved general obligation bonds from 1997 to 2005, totaling about \$13.6 billion. The four bond issuances include (see Table 1):

- Proposition BB, 1997: \$2.4 billion;
- Measure K, 2002: \$3.35 billion
- Measure R, 2004: \$3.87 billion
- Measure Y, 2005: \$3.99 billion

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<sup>20</sup> <http://www.cde.ca.gov/co/ce/wc/index.asp>

<sup>21</sup> LAUSD Measure Y, Safe and Healthy Neighborhood Repair & Construction Measure Presentation, May 2005

With local general obligation bonds contributing the majority of LAUSD's construction and modernization campaign, the District counts on State matching funds, local revenue bonds and developer fees to make up the balance. In January 2004 the District announced that the capital campaign would cost an estimated \$11.9 billion. Since, the District has posted a sum of \$19.4 billion expected investment for new construction and facility modernization efforts.

Prop. BB was designated primarily for modernization purposes, while Measures K,R, and Y going primarily to support new construction and constitute the major financing sources for LAUSD's capital improvement program. In addition to providing the funding for schools, Measures K, R and Y also included significant funds to help support other educational related capital initiatives such as early as education centers, charter schools, and joint use development.

Support for joint use development was \$100 million, with funding coming from Measures R and K. In 2005 when the Board considered authorization of its fourth bond, Measure Y, the \$30 million joint use funds from the previous two measures were still unspent and lacked a formal plan for implementation. Hence, the joint use program did not receive any direct funding and was included as an implicitly qualifying activity under Measure Y's vague \$100 million Innovation Fund. Per LAUSD Board funding policy, joint use funds are set up to provide support for joint use planning and development efforts and leverage additional partner funding.

Table 1: LAUSD Capital Construction Campaign Bond summary<sup>22</sup>

	Prop BB	Measure K	Measure R	Measure Y
New Construction		\$2.58 billion	\$1.557 billion	\$1.6 billion
Modernization	\$2.4 billion	(\$526 million	(\$1.65 billion	\$1.48 billion
Technology		\$66 million		\$325 million
Bus Replacement				\$25 million
Charter Schools		\$50 million		\$50 million
Adult Education				\$50 million
Early Education		\$80 million		\$100 million
Library/Books		\$38 million	\$663 million*	\$5 million
Innovation Fund				\$90 million**
Joint Use		\$10 million	\$20 million	
Other				\$260 million***

\* would be shared by technology, other programs such as adult education and early education, charter school facilities, library books, refinancing and audits, and school police for safety

\*\* "Innovation for alternative education models," not exclusive for joint use planning and development

\*\*\*Includes \$240 million in debt refinancing (freeing up money for operational needs); \$10 million for low-performing schools; and \$10 million for audit and oversight of bond projects

## LAUSD School Bond Programs 1997-2005

LAUSD's bond funds are specifically structured to help meet the District's capital campaign goals by year 2012, with additional allocations to help support special programs such as early education centers, charter schools and joint use development. Each issuance includes language defining accountability and safeguards (oversight requirements); and, project lists outlining qualifying expenditures and dedicated uses of bond monies. The general characteristics of each bond are as follow:

- Proposition BB Bonds – \$2.4 billion. On April 1997 district voters passed Proposition BB with 67 percent of the voter support. The purpose of Prop. BB was to finance needed health and safety improvements for over 800 deteriorating school buildings; to reduce class size and decrease busing; and create over 15,000 new classrooms through expansion efforts. Per legal requirements, District's Board of Education included a provision directing the creation of a Blue Ribbon Citizens' Oversight Committee (BOC). The BOC was charged with: monitoring and assessing bond expenditures; reporting and communicating on progress to the District Board; making Board recommendations and serving as a policy advisory entity. The BOC remains intact today, overseeing bond activity related to the bond measures that followed Prop BB.
- Measure K – "Safe and Healthy Neighborhoods School Improvement Act of 2002" – \$3.35 billion. On November 5, 2002, ballot Measure K was approved with 68.08 percent of voter support. Measure K monies are expected to result in an additional 35,000 schools seats for the district, and will be dedicated to building new neighborhood schools (\$2.58 billion); modernize and repair ailing schools (\$526 million); improve Early Childhood Programs (\$80 million); upgrade safety and technology (\$66 million); support public charter school expansion (\$50 million); invest in joint-use partnerships between schools, parks, and libraries (\$10 million); and enhance library resources and services (\$38 million).
- Measure R – "Safe and Healthy Neighborhoods School Improvement Act of 2004" – \$3.87 billion. On March 2004, ballot Measure R was approved by 63.7% of the voters. The bond provides for new construction and acquisition projects to create approximately 49,100 new seats (\$1.557 billion); construction, upgrade and development (\$1.65 billion); and the remaining (\$663 million) would be shared by technology, other programs such as adult education and early education, charter school facilities, library books, refinancing and audits, and school police for safety, in addition to joint use planning and development (\$20 million)
- Measure Y – "Safe and Healthy Neighborhood School Repair and Construction Measure of 2005" – \$3.99 billion. In November 2005, ballot Measure Y was approved with 66.09 percent of voter support. Measure Y will support: new school construction (\$1.6 billion); school repair (\$1.48 billion); information technology (\$325 million); debt refinancing (\$240 million); early education (\$100 million); innovation fund – promote alternative education models such as JU (\$90 million for); adult education (\$50 million); charter schools (\$50 million) replace all special education buses (\$25 million); for low performing schools added resources to improve results (\$10 million); audit and oversight of bond projects (\$10 million); and \$5 million for library books .



## **2.4 Leveraging State Support for School Development**

In early 1997, California initiated the first of three general obligation bond programs, Propositions 1A, 47 and 55, setting new successive records for the amount of single school bond issuances in California's history. (See table 2.) Totalling \$33.05 billion altogether, within a span of 7 years voters authorized Proposition 1A, in 1998, and Propositions 47 and 55 as companion bond measures in 2002 and 2005, respectively, with the majority of this money going to support class reduction goals, modernization and new schools. All three bonds would offer qualifying projects a 40/50 State/District match for modernization, and 50/50 for new construction efforts. How much of these resources LAUSD and other local school districts would be able to secure would ultimately depend on how far they had come with their own matching funds and school development plans.

Prop. 1A adopted by California voters in November 1998, made available \$6.8 billion as part of a package offering local school districts finance relief for years of deferred State funding for school construction and modernization efforts. According to the State Allocation Board (SAB), the state-level entity that handles school bond apportionments, LAUSD received a total of \$1.17 billion in total matching funds from Proposition 1A<sup>23</sup>.

In November 2002, State voters elected to authorize Proposition 47, another record-setting bond for school capital improvement purposes. Proposition 47 was called the Class Size Reduction Kindergarten – University Public Education Facilities Bond Act of 2002, and was the first of two companion bonds authorized by the legislature as a multi-year school finance plan. By itself, Proposition 47 provided nearly \$14 billion in matching school funds. Of this, \$11.4 billion would be dedicated to K-12 districts, with the majority going to support new school construction. Proposition 47, State apportionments to LAUSD have totaled about \$1.14 billion<sup>24</sup>. (SAB, OPSC)

Proposition 55, the third and most recent State bond passed in March 2005, was presented to California voters as the Kindergarten – University Public Education Facilities Bond Act of 2004. Prop. 55 made available an additional whopping \$12.5

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<sup>23</sup> State Allocation Board, Office of Public School Construction, Data Request, April 2006

<sup>24</sup> Ibid

billion for school construction and modernization. K-12 districts' portion of the bond is \$10 billion, with over 53% of these funds dedicated to new construction and about 22% for modernization. In an effort to support projects for schools with significant need, \$2.44 billion was dedicated to overcrowded schools. Prop. 55 bond awards are still in the process of being made to local districts, however, to-date LAUSD's matching share of this bond is calculated at \$2.4 billion<sup>25</sup>.

**Table 2. California K-12 Public School Bond Issuance Summary 1998-2004<sup>26</sup>**

<b>Bond</b>	<b>Proposition 1A, (Nov, 1998)</b>	<b>Proposition 47 (Nov, 2002)</b>	<b>Proposition 55 (March, 2004)</b>
Amount	\$6.7 billion	\$13.95 billion	\$12.3 billion
<b>K-12 dedication</b>		\$11.4 billion	\$10 billion
<b>New Construction &amp; Land Acquisition</b>	2.9 Billion	\$6.35 billion	\$5.26 billion (\$300 million charter schools)
<b>Backlog projects*</b>	2.1 Billion	\$2.9 billion	
<b>New Applications**</b>		\$3.35 billion (\$100 million charter schools)	
<b>Dist contribution</b>		50% match	50% match
<b>Modernization</b>		\$3.3 billion	\$2.25 billion
<b>Backlog projects*</b>		\$1.9 billion	
<b>New projects **</b>		\$1.4 billion	
<b>District contribution</b>		40% match	40% match
<b>Critically over-crowded schools</b>		\$1.7 billion	\$2.44 billion
<b>Joint use</b>		\$50 million	\$50 million

The State's bonding schedule and funding requirements help shaped the structure of LAUSD's own bond programs. In the case of State Proposition 1A, State apportionments were made on first-come-first-served basis, with greater funding success for districts with matching fund availability and school development plans in order. In anticipation of Proposition 1A fund availability, LAUSD attempted and failed

<sup>25</sup> Ibid

<sup>26</sup> Ibid

(by 1.2% of the vote) to pass a local bond in 1996, which would have positioned it to receive increased State matching funds. Consequently, the District received lower than expected state apportionments under Proposition 1A, however, was still able to leverage State funds with local Proposition BB, which the District successfully passed in 1997<sup>27</sup>. Hence, comparing District and State bond programs (LAUSD Campaign Timeline below) it becomes apparent that the District would have to model its issuances and bond structures close to the State's in order to successfully leverage the necessary funds to help it achieve its school development goals.

Table 3.

<b>Los Angeles Unified School District State Bond Apportionment Actual and Estimated Future Funding (\$ in thousands)</b>			
<u>Bond Measure</u>	<u>New Construction</u>	<u>Modernization</u>	<u>Total</u>
Proposition 1A	\$973	\$202	\$1,175
Proposition 47	\$1,020	\$122	\$1,142
<u>Proposition 55</u>	<u>\$1,868</u>	<u>\$545</u>	<u>\$2,413</u>
	\$3,861	\$869	\$4,730

Source: Los Angeles Unified School District, Measure Y Official Statement Report

Altogether, LAUSD has secured a total of \$4.7 billion of state matching funds from Proposition 1A, 47 and 55. (See table 3.) Analysis of Propositions 47 and 55, projected disproportionate level of funding that would be dedicated LAUSD compared to other districts, suggesting that Propositions 47 and 55 were disingenuously tailored to provide relief to LAUSD<sup>28</sup>. By some estimates, LAUSD's share of total Proposition 47 and 55 combined funding for critically overcrowded schools (\$4.1 billion), for example, would qualify LAUSD for a share of 24%, despite only having about 12% of the state's public school student population<sup>29</sup>.

<sup>27</sup> Okimoto, Dean, California Initiative Review-Proposition 55. March 2004

<sup>28</sup> Ibid

<sup>29</sup> Ibid

## LAUSD Capital Improvement Campaign Timeline

### **May 1992, Rodriguez Consent Decree**

Court agreement establishes school site density goals

### **April 1997, Proposition BB Passes**

Voters allocate \$2.4 billion for the modernization of facilities and the addition of classroom space.

### **December 1997, School Board establishes District Facilities Goals and Guidelines:**

Guidelines: students should attend a neighborhood school; schools should provide space for growth;  
Reduce class size

### **June 1998, School Board adopts Master Plan**

The District prepares a master plan for development which calls for 78,000 new classroom seats in the next six years.

### **November 1998, passage of Proposition 1A**

State voters approve a school bond with over \$4 billion in new construction funding.

### **July 2000, School Board adopts the Priority Plan for School Construction**

The Board of Education adopts a list of priority efforts for new school construction.

### **December 2001, Strategic Execution Plan published**

This report establishes program budgets and schedules for 80 new schools and 79 additions.

### **November 2002, Local Measure K and State Proposition 47 pass**

Voters approve \$3.35 billion in local funding and \$13.05 billion in state funding for school construction. Joint use allocations include \$20 million local and \$50 million statewide

### **January 2003, Strategic Execution Plan Update published**

This report details the expanded program scope, estimated at \$5.05 billion.

### **January 2004, Strategic Execution Plan Update published**

Total estimated scope and budget of \$5.9 billion.

### **March 2004, Local Measure R and State Proposition 55 pass**

Voters approve local bond Measure R, which provides \$3.87 billion for new school construction, modernization and repair. Statewide, Proposition 55 is approved, providing \$12.3 billion of matching funds for projects throughout the state. Total estimated scope of the LAUSD New School Construction Program including Measure R and associated state matching funds is \$9.2 billion.

## **LAUSD Capital Improvement Campaign Timeline (continued)**

### **August 2004, Williams Settlement Implementation**

Agreement The Williams Agreement is executed in reference to Williams v. State of California. The terms of this agreement involve addressing a number of equity issues including: instructional materials, uniform complaint process, school facilities, teacher training and credentials, and the Concept 6 multi-track, year-round calendar.

### **December 2004, School Board adopts construction plan to eliminate Concept 6 calendar**

The Board of Education adopts a plan that prioritizes school construction to ensure all schools are removed from the Concept 6 calendar by 2012. Delivery of these classrooms will meet both Williams Settlement requirements.

### **November 2005, Local Measure Y passes**

Voters approve local bond Measure Y which provides \$3.985 billion for new school construction, modernization and repair. The total estimated scope of the LAUSD New School Construction Program including Measure Y and associated future state matching funds is \$11.7 billion.

### **January 2006, Strategic Execution Plan Update Published**

Total estimated scope and budget of \$11.7 billion; 53 new schools, 1,889 classrooms have been completed

Source: LAUSD 2006 Strategic Execution Plan, January 2006;  
modified

LAUSD has been relatively successful at securing state level matching funds for school development, however, few of these funds have gone to support joint use development projects that can add significant value to its projects. With \$100 million of state joint use funds made available through Propositions 47 and 55, LAUSD dedicated \$30 million of its own bonds programs in order to leverage state apportionments. Based on SAB funding guidelines, LAUSD can apply for matching funds to cover the extra costs associated with undertaking a joint use project. Qualifying projects provide 50% State match (capped), with LAUSD and local partner contributing 25% each. State support is made available only for multipurpose rooms, gymnasiums, and libraries that are jointly used by the school and the community. Currently, LAUSD has secured a total of \$1.9 million for two projects. To date, the District has failed to use access any joint funds from Proposition 55. According to the District staff, State joint use fund matching guidelines are too narrow and restrictive, preventing LAUSD from leveraging additional State funds.

<b>Table 4. State, LAUSD Joint Use Funding</b> <sup>30</sup>		
<b>Bond</b>	<b>Proposition 47</b>	<b>Proposition 55</b>
<b>State</b>	\$50 million	\$50 million
<b>LAUSD</b>	\$20 million	\$10 million
<b>Total Leveraged</b>	\$1.9 million	0

## **2.5 Linking Schools and Community Infrastructure Investments**

In 1996, Los Angeles City voters passed Proposition K, a park bond measure to enhance and develop existing and new park and recreation space. Largely as a response to City recognition of inadequate and deteriorating “youth park infrastructure,” Proposition K generates \$25 million per year, for 30 years, for acquisition, improvement, construction, and maintenance of city parks and recreational facilities<sup>31</sup>. In total, through its lifespan Proposition K is expected to allocate about \$299 million for 183 projects (specified in the ordinance), making available about another \$144 million on a competitive grant basis for capital improvements, maintenance and land acquisition purposes. With the majority of this money available to fund park, recreation, childcare, and community facilities, funds would be dedicated to areas of the City with the most critical needs. In many cases, these areas correlate with LAUSD sites, where the District is similarly targeting new construction for communities that are experiencing significant student growth and overcrowding<sup>32</sup>.

In early 2000’s another two park bonds would become available at the State level to support local public agencies and community groups address the lack of park and open space. Proposition 12, the first of the two bonds, was passed in 2000, making available over \$588 million in State matching funds to local groups for parks and open space capital improvement efforts. As part of this bond, two programs were created (Robert-Z’berg-Harris and the Per Capita Program), which significantly increased funding likelihood for Los Angeles’ communities based on urban population density, needs for

<sup>30</sup> State Allocation Board, Office of Public School Construction. Data Request, April 2006

<sup>31</sup> Los Angeles City, Proposition K Summary

<sup>32</sup> Interview with City Official

parks and open space and low-income community designation. Proposition 40, the second park bond known as the Resources Bond Act of 2002, marks an increased State commitment for parks and open space, making available an unprecedented \$2.6 billion for similar purposes. Under Proposition 40, funding priorities would again provide a qualifying advantage to Los Angeles County communities, targeting resources for park-poor, economically disadvantaged areas with a large proportion of at-risk youth and significant lack of youth-related services<sup>33</sup>.

Per funding guidelines for local Proposition K and State Propositions 12 and 40, community-based organizations, city agencies and other public entities may submit requests for funding. These two State bonds, like their local predecessor, would not only create leveraging opportunities for LAUSD, but would also equip local area community groups and public agencies with the necessary funds to partner with the District for purposes of developing school-community joint use projects. According to the District, it has successfully leveraged over \$23 million from these fund sources for a total of 20 projects, with an overwhelming proportion of the funds coming from Proposition K at the local level.

Table 5. State and Local Park Bond Program Apportionments to LAUSD for Joint Use\*

<b>Funding Source</b>	<b>Measure</b>	<b>Amount</b>	<b>Purpose</b>	<b>LAUSD Apportionment</b>	<b>Total Projects</b>
<b>LA City</b>	Proposition K, 1996	\$30million/ 30Yrs	Parks/Open Space, Community Infra.	\$21.3 million	18
<b>State</b>	Proposition 12, 2000	\$588 million	Parks Open/Space	0	
<b>State</b>	Proposition 40	\$2.6 billion	Parks/Open Space, Community Infra.	\$2 million	2

\*Actual and expected as of April 2006  
Source: LAUSD, FSD

Around the same time that LAUSD and Los Angeles City issued their respective schools and parks capital improvement programs, the Los Angeles Library Department (LALD) was undertaking its own public infrastructure investment campaign. In 1998,

33 [http://www.parks.ca.gov/default.asp?page\\_id=1008](http://www.parks.ca.gov/default.asp?page_id=1008)

LALD successfully passed a \$178.3 million bond issuance to improve, renovate and expand its library system. As part of this effort, LALD set out to build 32 new libraries, completing 36 libraries in all with total public investments of \$210.4 million by 2004<sup>34</sup>. Like LAUSD and the City park bonds, priority funding was targeted to areas of the city that had been assessed to have the greatest critical need. Once again, many of these communities included low-income, public resource poor communities that coincided with LAUSD's school construction and renovation plans<sup>35</sup>. Despite LAUSD's library resource reduction and low national grade for some of the lowest ratio of available books per student, no joint use development or programmatic partnerships were forged between the District and LALD. Sources at the LAUSD Board level explain "the library district never contacted us; by the time joint use partnerships are considered both districts have very defined project scopes and it is hard to deviate from those"<sup>36</sup>

## 2.6 Conclusion

At the core of LAUSD's school construction campaign is the goal to deal with student class size reduction and overcrowding, reduce involuntary student busing, and increase in-class student time. Toward accomplishing these goals, LAUSD's Facilities Services Department, the District's construction arm, has a narrowly defined task: expand and build additional schools to increase District school seat capacity.

LAUSD's construction campaign is driven by the realization that its facilities are inadequate to house student population growth, and that temporary housing and busing measures are insufficient as a long-term strategy for providing an adequate learning environment. As LAUSD moves to reach its 160-school, 180,000-seat goal, it also deals with the challenge of a shrinking student population and changing physical landscape.

While its clear that demand for classrooms will continue in short-and near terms, it is not conclusive that the same demand will remain in far into the future. According to the

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34 Los Angeles Public Library, 1998 Library Bond Program, Quarterly Report, January 2006

35 Interview with Los Angeles City, LAUSD Board Representative

36 Interview with District Staff



district, low academic performance and lack of affordable housing options are fueling decline in district enrollment<sup>37</sup>.

In November 2005, the District reported that as part of its new construction program, 53 new schools have been developed, including 139 new projects, bringing total classroom completions to 1,889. The massive scale of LAUSD's construction program will require significant acquisition and development of new land around the district. According to the District, its new construction and expansion efforts will require acquisition of over 450 acres of land; since the beginning of the capital construction campaign, over 900 parcels of land have been acquired. Additionally, to date, the District reports that it has removed close to 300 businesses, as well as relocated over 1250 households. Considering declining enrollment trend, this raises important issues with respect to how flexibility, student and communities needs are being factored in as part of the Districts' long-term school development plans.

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37 LAUSD Demographic Unit, Analysis of Declining Enrollment and Bond History

### **Ch. 3: From School Seats to Schools as Centers of Communities: LAUSD JU Policy Development**

LAUSD's joint use policy is relatively recent and has been slowly instituted into LAUSD operational departments beginning in the early 2000's, years after the initiation of the District's building and modernization effort in 1997. LAUSD's joint use policy development can be largely credited to advocacy and pressure from civic and community groups<sup>38</sup>. One such group is the Proposition BB Blue Ribbon Citizen's Bond Oversight Committee (BOC, Bond Committee), which was instituted in 1997 per Proposition BB bond requirements to monitor, report and advise on bond expenditures and on progress over modernization and construction efforts<sup>39</sup>. To a large degree, the BOC has played a key role in defining a vision for making schools the centers of communities, working with LAUSD staff and board – sometimes on contentious terms – to ensure that joint use goals and principles are adopted and inform policy and practice.

LAUSD's history of policy development on joint use can be best understood by looking primarily at relevant activity happening at the BOC level and tracing it to LAUSD's Board and staff response and adoption. Overall, there are four primary policy documents that came out of BOC deliberations in the form of Board recommendations that helped inform and spur communications with LAUSD Board and District Facilities Services Department (FSD) for purposes of defining a direction on joint use development. These include: 1) BOC 2000 Report to staff to prepare Strategic Execution Plans (SEP) and include principles defining schools as the centers of communities; 2) the 2001 Community Use of Schools, Playgrounds and Parks Resolution; 3) the Healthy Schools, Healthy Parks, Healthy Communities Resolution in 2003; and, 4) BOC adoption of a Joint Use Task Force in 2006.

There were also some critical policy pieces at the District staff and Board levels that helped define joint use programmatic functions within District FSD and create

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<sup>38</sup> Environmental Law Institute, School District2003

<sup>39</sup> See previous Overview of LAUSD Bond Programs, BOC extended through each bond program.

opportunities for ongoing fund support. One recent policy adopted in 2003 is the LAUSD/City of Los Angeles' Redevelopment Agency (CRA) memorandum of understanding (LAUSD/CRA MOU), which promotes joint-planning, sitting and use between LAUSD and City departments. Additionally, more recently, the District Board is considering increasing joint use funding and expanding guidelines for qualifying support to potential partnering agencies.

### **3.1 Defining a Vision for Making Schools the Centers of Communities**

In the early stages of LAUSD's joint use policy development, the District adopted joint use language as part its 2001 Strategic Execution Plan (SEP), a formal document outlining goals, scope and vision of the District's construction campaign. This was done in response to a BOC Report in 2000 and repeated recommendations from the BOC to act on this matter. Included in the SEP were joint use principles that were the basis for: "schools designed to become the centers of communities," "sustainable design driven by instructional objectives," "and community engagement at all steps of the process."<sup>40</sup> At this time the District had yet to fully address the issue of joint use and what it meant for its immediate campaign goals, operational or organizational framework. This language, while significant, failed to provide much more than symbolic value in terms of guiding the District's campaign goals. However, this policy set the stage for ongoing examination and exploration of ways to manifest, in real terms, the necessary programmatic functions that would facilitate joint use, sustainable community design, and community outreach. Policy development at the BOC and Board level would serve to guide these efforts.

Building on the joint use language within the SEP, in November 2001 the BOC approved the Community Use of Schools, Playgrounds and Parks resolution (Community-Schools Resolution) putting the Bond Committee on record for adopting a formal policy that would help promote partnerships between LAUSD and LA City agencies for purposes of

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<sup>40</sup> Bond Oversight Committee, Third Quarter Report, September 2002

expanding after-school recreational and park programming activities<sup>41</sup>. Using the District's (Superintendent) own language, the BOC built on a previous LAUSD Board resolution, quoting: "Every child and youth should have a safe place to be in the presence of a responsible, caring adult with engaging activities that support achievement and promote social, emotional and physical development beyond the school day."<sup>42</sup> This served to build tacit support for the BOC's direction on joint use, and would prove instrumental in drafting an expanded, holistic mission for the District that went beyond the core responsibility of the classroom to include youth development and community building goals.

Additionally, the BOC Community-Schools Resolution served to highlight principles of adequate community and resource planning, underscoring the issues of land scarcity and need for physical space and natural resources within Los Angeles' communities. In light of the District's recent and upcoming bond issuance, this resolution would mark the first formal recommendation to allocate bond monies to "invest in ways that promote the full development of the child, are educationally and environmentally sound, and reflect equitable and efficient use of limited land and public resources."<sup>43</sup> Hence, this measure would be followed with increased BOC and community pressure to resolve lack of funding support for joint use objectives. As a result, in 2002, Measure K would provide \$10 million for joint use development and partnerships.<sup>44</sup> However, given continued lack of internal programmatic support or policy direction, Measure K joint use funds would ultimately be rolled over with 2004 (joint use) bond funds, and together not be spent until 2006.

### **3.2 Informing LAUSD's Joint Use Process**

In August 2003 the BOC adopted a resolution that called upon LAUSD's Facilities Chief Executive, Superintendent and District staff to respond to a previous BOC

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<sup>41</sup> Bond Oversight Committee, Resolution 2001-9, Community Use of Schools, Playgrounds and Parks, 2001

<sup>42</sup> Ibid

<sup>43</sup> Ibid

<sup>44</sup> Interview with stakeholder

memorandum request for information on internal programs and policies related to joint use development.<sup>45</sup> The resolution and memorandum, both named “Healthy Schools, Healthy Parks, Healthy Communities,” (Healthy Schools), was an effort to address various programmatic and administrative issues, which the BOC framed as “implementation concerns.”

The initial June 2003 Healthy Schools memo to LAUSD serves as a prospectus, framing the challenges and opportunities for achieving the vision for making schools the centers of communities. It elaborates on the understanding of need and opportunities for joint use by highlighting educational, environmental health, environmental justice and sustainability implications for LAUSD’s communities. It addresses these by making reference to LAUSD’s overcrowding and Concept 6 issues; lack of parks and open space; student health disparities and crime and safety issues within the district. Similarly, it notes the District’s demographic composition (primarily ethnic minority, Latino), making reference to economic and social disparities and how lack of access to resources and funding equity serves to magnify differences for various socio-economic, racial and ethnic groups. Moreover, the BOC connects LAUSD’s ongoing programs and capital improvement campaign goals with the need and opportunities to maximize economic and physical resources for local communities.

Toward addressing the above issues, the BOC requests responses from District staff on current challenges and potential solutions concerning implementation factors involving planning, school design, procurement, communications, management and funding. The BOC memorandum directs staff attention and response to above factors in terms of how they relate to joint use implementation, amongst other things. However, it also includes an explicit section in which associated planning, design and operational issues are considered in context of LAUSD’s current programmatic implementation of joint use goals and objectives.

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<sup>45</sup> Bond Oversight Committee Resolution 2003-2, “Healthy Schools, Healthy Parks, Healthy Communities.” July 2003

In January 2004, 7 months after the initial Healthy Schools request, LAUSD staff had yet to respond to the joint use questions posed by the BOC.<sup>46</sup> However, in the proceeding months the BOC's Healthy Schools memo would set the stage for pointed discussions between the BOC, District Board and staff on strategic joint use implementation solutions and next steps. (Staff response, JU implementation and strategies explained in next chapter).

### **3.3 Building a Joint Use Framework**

In May 2003 the LAUSD Board adopted policy that addresses cross-agency coordination, a key issue to advancing LAUSD's joint use development. Per the memorandum of understanding known as the Site Selection and Neighborhood Revitalization Agreement (Revitalization Agreement), LAUSD agreed to work with the Los Angeles Community Redevelopment Agency and various other City departments for purposes of facilitating strategic school siting efforts. At the heart of the Revitalization Agreement was a process for engaging public agencies in joint-planning and data-sharing activities to inform the school site-selection efforts.<sup>47</sup>

Accordingly, the Revitalization Agreement framed the goal to increase investment and leveraging opportunities in order to positively impact community economic development.<sup>48</sup> Another explicit goal in this process was to minimize potential land-use conflicts and coordinate on planning and community outreach activities in order to minimize public expenditures. This latter goal underscores the more pragmatic reasoning that may have driven the cross-agency agreement. While the principles of joint use development are encapsulated in the Revitalization Agreement, it comes short of drawing explicit language that points to this method as a mechanism for purposefully drawing the MOU. In practice, District programmatic implementation of the Revitalization Agreement is driven by the Real Estate Branch, with little coordination with the Joint Use office. Additionally, it has translated into a community charrette,

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<sup>46</sup> Bond Oversight Committee, Qrt1 Rpt. January 2004

<sup>47</sup> LAUSD, Los Angeles, Community Redevelopment Agency MOU, May 2003

<sup>48</sup> Ibid.

which is conducted on a project-by-project basis as part of the school site identification process.<sup>49</sup> Moreover, the Revitalization Agreement, while meaningful, was drawn to last only two years and has expired since. (LAUSD News Item, 2003, LA/CRA MOU)

Another critical LAUSD Board decision that has led to development of a formal joint use process is captured in the Policy for the Use of Measure K Joint Use Funds (JU Program). In October 2004 the staff introduced to the Board a recommendation for adopting guidelines and programmatic framework for implementing \$30 million in joint use bond proceeds from Measures K and R.<sup>50</sup> Measure K and R joint use funds, from 2002 and 2004, respectively, were initially structured for purposes of supporting joint use development, creating partnerships and leveraging opportunities. How joint use funds would be used to promote these objectives remained undefined prior to adoption of the Joint Use Program. Thus the Joint Use Program provided the following framework for use of joint use funds:

- Help improve the school through provision of additional amenities or facilities to be used by the school and the community; and,
- Help leverage other community amenities (such as parks, libraries and other commonly used facilities) or other funding sources; or,
- Assist in providing an unmet community needs; or
- Provide the opportunity to either reduce negative impacts or enhance positive impacts of public projects in the surrounding community; or
- In the aggregate, the project will result in more efficient use of funding resources

(LAUSD Bd. of Ed. Rpt. No. 136-04/05)

Building on staff recommendation, the Board expanded this to include specific allocation provisions to support new and existing construction. As part of the policy adoption, LAUSD staff presented to the Board a formal LAUSD Joint Use Plan that outlined prospective projects and created an inventory and analysis of all current LAUSD joint use activity. This held three primary policy implications: first, a Board

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<sup>49</sup> Phone conversation with LAUSD Official

<sup>50</sup> LAUSD Board of Education Report. No. 136-04/05, Policy for the Use of Measure K Joint Use Funds, October 2004

policy was formally adopted that would define joint use objectives; second, a framework was instituted, providing direction from which to evaluate joint use development opportunities; and third, a data process was developed to help to inform programmatic direction on joint use development.

### **3.4 Joint Use Policy Direction**

Two recent policies stand out in terms of indicating potential LAUSD direction on Joint Use: Board bond allocation increase for joint use development; and renewed BOC commitment and assumed official capacity to lead a Joint Use Task Force.

At a recent Board general meeting, a motion was passed to allocate \$30 million from Measure Y Innovation fund for joint use purposes (see Measure Y description).<sup>51</sup> This motion highlights past joint use allocations from Measures R and K, indicating the need for increased funding support to continue building joint use partnerships. This marks a turn in previous Board treatment of funds under Measure Y; as mentioned previously, signaling lack of District support, negotiation of Measure Y funding priorities had relegated joint use to an undefined activity under the generally vague Innovation Fund. What is more, this resolution points to previous Board policy framework under the Joint Use Program (above), affirmatively reinforcing it as acceptable precedent and programmatic directive. The motion was approved with full support of the Board on May 9, 2006.

A BOC Resolution Regarding Joint Use, adopted in January 2006, also provides a good measure of future District direction on joint use development.<sup>52</sup> Under BOC Resolution Regarding Joint Use, the BOC has positioned itself as a mediating entity on joint use challenges, indicating: the BOC “will continue to serve as a meeting place and forum for representatives of all interested community groups, resource providers and individuals to meet with LAUSD staff to review the needs and resources available to meet them” It

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<sup>51</sup> Board of Education Meeting, Agenda Item “Measure Y Funds,” April 25, 2006

<sup>52</sup> Bond Oversight Committee Resolution 2006-06, “Resolution Regarding Joint Use,” January 2006



adds further, “the BOC will maintain a BOC Joint-Use Task Force,...as an available tool for resolving joint-use challenges on an ad-hoc basis...”<sup>53</sup>

Leading up to this resolution, the BOC, through a subcommittee on joint use development (JU Subcommittee) had served as a source for discussion and exploration on challenges and opportunities associated with program implementation. Through various District reports and stakeholder feedback, the JU Subcommittee had come to identify specific, ongoing challenges that continued to surface in the District’s joint use practice: partner identification and funding support; maintenance; liability; operations and coordination. An additional issue recently raised by the LAUSD Board to staff equally highlights an administrative challenge: where and to who would the joint use coordination function and responsibility fall?<sup>54</sup> Toward addressing these challenges, the BOC had recommended in a previous resolution that the Board appoint a Joint-Use Technical Committee.<sup>55</sup> The present (Jan 2006) resolution represents an amendment to this recommendation, suggestion instead that BOC remain the formal, responsible body to continue addressing joint use development concerns within the District.

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<sup>53</sup> Ibid.

<sup>54</sup> LAUSD Board of Education Meeting, General Board Meeting, April 2006

<sup>55</sup> Bond Oversight Committee Resolution, 2005-17. “Resolution Regarding Joint Use,”

**Table 6. LAUSD Joint Use Policy Development**

<b>Year</b>	<b>Policy</b>	<b>Objective</b>	<b>Implication</b>
Nov. 2000	BOC Report to Staff Re: Strategic Execution Plans	Request to prepare annual report on capital improvement campaign goals, vision and scope	Integrated vision for developing schools as centers of communities as part of construction plan
Nov. 2001	BOC Resolution Community Use of Schools, Playgrounds and Parks	Promotes cross-agency partnerships for purposes of increasing community-school programming	Expanded core educational goals to include after-school, community activities
July 2003 (revised)	BOC Memo, Healthy Schools, Community and Parks	Frame joint use objectives; Issued staff request to report on operational methods and activities	Put District staff on the line regarding joint use; created transparency and informed process and challenges
May 2003	LAUSD, CRA/LA Site Selection and Neighborhood Revitalization Agreement	Create process for cross-agency coordination to promote strategic school siting	Established process for data exchange & communication; reinforced joint use goals for LAUSD development efforts
Aug. 2005	LAUSD Policy for the Use of Measure K Joint Use Funds	Enact joint use fund project allocation plan	Refined joint use objectives; created programmatic framework for funding and evaluating joint use projects; initiated data monitoring process
Jan. 2006	BOC Resolution Regarding Joint Use	Reinforce BOC commitment to joint use program development; support Board policy and program direction	Instituted BOC as oversight and advisory body to address joint use challenges
May 2006	LAUSD Measure Y Innovation Fund	Authorize Measure Y bond funds for joint use program	Matched funding allocation from previous two bond measures; affirmed Board commitment to joint use program

### **3.5 Conclusion**

LAUSD policy development efforts have been critical to defining objectives, organizational and programmatic framework for undertaking joint use development.

Additionally, through a process of reporting and communications on joint use, LAUSD staff, Board and BOC have been able to identify critical areas that continue to pose implementation challenges: partner identification and funding support; maintenance; liability; operations and coordination.

Toward addressing the challenges above, the BOC has moved to adopt a formal role as a joint use mediating and conflict resolution body (BOC Joint Use Task Force). This presents an opportunity for strengthening joint use practice given the BOC's clear commitment. However, it also raises a number of challenges in itself: 1) the BOC's remains an advisory body, without formal program or policy-making authority; 2) programmatic efforts are not grounded within the BOC, as such it remains disconnected from "real" practice; 3) the relationship between the BOC and District is sometimes contentious, which can negatively impact access to data that is critical for informing future policy and program direction in joint use.

Two other important policy actions that demonstrate affirmative District leadership in promoting joint use development. These include the Revitalization Agreement and approval for additional funding allocation. Based on the manner in which the Revitalization Agreement is structured, it would seem that it has the force to effectuate meaningful advancement in joint use implementation. In order to

become an effective tool, however, the emphasis on site conflict resolution must balance with joint planning and joint-sitting objectives. Moreover, while increased funding allocation signals renewed District commitment to joint use development, it also signals that joint use continues to be considered separate and outside of LAUSD's standard school development framework. It is quite different to say that there is \$19 billion available for school development, of which joint use is part of; than to say that there are

On the Relationship Between LAUSD and BOC Re: Policy Development...

In May 2002, four years after BOC establishment and in anticipation of LAUSD's second (Prop.K) bond issuance, a draft audit report from the State Controller's office was released challenging the BOC's effectiveness. (BOC, 2002-Q4 Rpt) In a June 2002 letter of response to the Office of the State Controller, the BOC would counter that it has demonstrated leadership and courage in moving the District to adopt a series of policies and reforms that will help define and strengthen the direction and scope of the District's capital improvement campaign. (BOC Reply to State Controller, June 12, 2002) In reference to the challenges of working with the District to implement some of these policies, the BOC letter adds: "...the acting facilities chief had dismissed our demands for planning – literally on the grounds that the plans were in his head but did not have the time to write them down."(Ibid)

\$19 billion for school development, with \$30 million aside for joint use development purposes.

## **Ch.4 Moving From Policy to Practice**

LAUSD's joint use objectives are to promote student enrichment, student development and community use. Where the District finds that there is a community need, it outreaches to a potential joint use partner based on perceived benefits that it will provide to the local school and community alike. The District then works with potential partners to identify the most effective way to physically integrate partner's programs and services into the school setting. Along this process, both the District and prospective partner arrange a joint use contractual agreement that defines the terms and individual responsibilities of the partnership. Hence, LAUSD's joint use program is implemented following a series of successive steps. These include:

- 1) Identifying school and community programmatic need;
- 2) Identifying a partner and their utilization need;
- 3) Engaging with partner in planning and development activities;
- 4) Defining costs, responsibilities, terms and conditions of joint use partnership;
- 5) Negotiating joint use agreement with partner; and,
- 6) Building or enhancing school facility based on joint use agreement

(LAUSD FSD, JU Program Guidelines, summarized)

In working through these steps, the District weighs additional costs and potential liabilities that may result from the partnership in the near to long term. Some of these considerations relate to the financial strength, management and operating capacity of the partner. Ultimately, the District also wants to ensure that its development and programmatic goals are in line with the partner's, and from a practical perspective, that its capital investment is secure. "This process is really more art than science," shares a District staff person.

Following LAUSD's school development continuum helps to highlight how the joint use process is facilitated. Key implementation factors, as well challenges, become apparent

and serve to highlight a tension between theory and practice. Some of these challenges include identifying community needs, outreaching to prospective partners and stakeholders in the early planning stages in order to effectively inform the prospects of undertaking a joint use development project. Other critical tensions that play out in joint use practice relate to funding requirements, legal complexities and burdens associated with negotiating joint use (contractual) agreements.

Cross-agency coordination, while not an explicit step of the joint use process, underscores the dynamic and activities that are integral to implementing it. Not surprisingly, cross-agency coordination also represents one of the largest challenges to undertaking joint use. For example, data sharing and ongoing collaborations are central to identifying potential partners or strategic joint use opportunities. Given the various operational goals and objectives of agencies and organizations, there is sometimes little incentive to coordinate with each other; and typically this happens only on a procedural basis or in response to conflicts.

Recently, LAUSD has undertaken three joint use development projects that contain elements that may help address some of the challenges for future joint use practice. These involve partnerships with local agencies and community based organizations that have been driven by informed assessments of community needs; proactive partner outreach; and joint planning frameworks that have facilitated the process of undertaking a joint use project. Another key element particular to these projects is the role of a third party facilitator and convener, who provides predevelopment support and directs coordination and negotiation processes in a balanced and collaborative format. These three projects are highlighted below in the form of case studies. They include:

- LAUSD and Los Angeles Universal Preschool Joint Use Partnership
- Gratts/Westlake Primary School and Housing Joint Use Development
- Glassell Park Early Education Center and Housing Joint Use Development

#### **4.1 Fitting the Joint Use Into the School Development Framework**

The process by which LAUSD undertakes the initial steps in joint use development can be best understood by tracing the school development process. The three main development stages include Planning, Site Selection and Design. (Construction, occupancy are two others, however are not considered here.) Opportunities for joint use development are assessed along each one of these stages as the District attempts to identify community needs and evaluates strategic opportunities for partnering with external parties for purposes of enhancing a school's physical and instructional attributes. On the other end of the spectrum, the District is sometimes forced to contend with joint use alternative where plans for school development conflict with community plans or are perceived as not going far enough in addressing other local needs. Thus community and public outreach plays a critical role for purposes of being able to fully understand local needs, identify prospective joint use partners, build relationships and achieve local support. In many cases outreach influences not only pace and costs of the project, but also the form and function of the end product and its relationship to the local community.

##### ***Identifying School and Community Programmatic Need***

At the outset of the school development process is the planning, or project definitions stage, where the District, School Planning and Design Department (PDD), determines the need for additional schools. This process comes down to numbers where the District measures available seats within a defined area against estimated number of seats that it will need in the future. Ultimately this forms the basis for what the District calls project definitions, which determine the demand for a specific school type (elementary, high school, ect.), number seats, required school space and general location.<sup>56</sup>

As the name implies, the planning, or project definitions stage, sets the rules that drive the District's development objectives. This marks a critical point for capitalizing on the prospects of carrying out joint use.

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<sup>56</sup> LAUSD Strategic Execution Plan, January 2006

The opportunity to integrate joint use at the project definition stage occurs through a planning and a community needs assessment. This informs understanding regarding community needs and directs the District's attention to consider how a school may enhance its educational and physical development goals while also meeting a community need.

If when undertaking planning and need assessment the District is able to identify that there is equally a need for, say, parks or libraries, than it could more pointedly engage the relevant entities in discussion regarding joint use planning and development. However, following LAUSD's traditional development framework, the planning and community assessment process happens typically within the context of the environmental review, during site selection, where the District weighs the synergy, physical and environmental impacts of sitting a school in a specific location. Thus physical and community assessments are evaluated on the basis of avoiding potential negative impacts on local communities, and not necessarily along the terms of identifying community needs. In response to the suggestion that the District may conduct these analysis internally in order to inform joint use, FSD responded: "People sometimes forget that this is a school district; it's not the planning department; our job is to identify the need for schools and meet that need."

Additionally, the District claims to carry out a community needs assessment through communication and data exchanges with public agencies, civic officials and community representatives. Accordingly, these processes are procedural requirements as part of undertaking a public development project. Meetings are carried out formally, in official capacity as well as through charrettes, and involve District project development teams and external parties. The main focus of these meetings is to declare the District's intent to develop a school, and not necessarily to inform the school development process. "The nature and structure of these meetings don't guarantee that joint use ideas will be



exchanged, nor do they guarantee that agencies will attend; this extends to community meetings.”<sup>57</sup>

Community and organizational outreach also play a critical and important role for providing information regarding local needs. Here, again, standard District practice is to schedule stakeholder and community resident meetings to publicize the District’s intent to build a school. District carries out community and stakeholder meetings in context of its school development agenda, not necessarily with the aim of defining an alternative development strategy that may detract from its core mission to create school seats. Where a community is not vocal about other non-school needs, or a partner not readily apparent, then the District continues along its critical path of development and a joint use opportunity is missed. Given the structure of this process, the responsibility for identifying community needs is shifted from the District to community residents and stakeholders. This underscores the District’s ongoing experience with joint use practice – it is reactive in the manner that it moves only where there is critical objection and opposition by the local community. This approach sets a confrontational tone and also distorts understanding of community need.

Moreover, the following quote demonstrates the trivialized nature that community outreach can sometimes play in this process: [early development goals were] “driven by the need to meet a June 2002 funding deadline...therefore, stakeholder involvement in the project definition phase was limited.”<sup>58</sup> According to the District, about 60 schools were planned and completed during this period.

### ***Identifying Partner and their Utilization of Need***

During the site acquisition stage the District’s Real Estate team (RET) works to identify prospective sites; prioritizes sites through a process of site evaluation and official “preferred site” designation; conducts due diligence; and in the final step, acquires the site. RET evaluates every site for its strengths in meeting the District’s instructional and

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<sup>57</sup> Phone conversation with civic leader

<sup>58</sup> LAUSD Staff response to BOC Memo, Resolution No. 2003-2

seat capacity needs, also offering consideration to other potential attributes that may enhance the District's development objectives. Joint use considerations come into play particularly during the site identification and "preferred site" designation process. Here again, data availability, community outreach and community input remain an important part of setting joint use priorities.

In identifying potential sites the RET depends on project definitions to guide their search based on instructional space requirement, as well as various physical and environmental attributes of the site. RET looks at potentially positive physical features of the vicinity that may create value for the school and local community, such as adjacent parks or libraries. Additionally, the RET leads a series of meetings with public agencies and local stakeholders to inform on the District's intent and solicit community preferences. Once a public information process is complete, the RET narrows down a list of potential sites and declares a single location the "preferred site." At this point, assuming that there is joint use partner interest, the District engages the prospective joint use partner in a non-binding MOU to carry out predevelopment and site planning work. Where there is no declared joint use partner interest, joint use considerations become mute.

The RET site assessment process provides an opportunity for joint use by strategically locating a school nearby key community resources in order to facilitate partnering and bring additional value to existing community assets. However, from a practical standpoint, real estate costs and land availability are the main factors that drive site identification process. Within this are also considerations for minimizing environmental mitigation and other related costs associated contaminated sites or housing relocation. Although joint use is an option, the RET is not accountable to it; as such, it is not clear that the RET assessments will weigh in favor of opportunities for joint use over, say, less expensive real estate and available land. Paradoxically, it is out of the same practical concerns over maximizing public and natural resources, and creating greater public benefits that the concept of joint use development grew.

Additionally, because the current site selection process may favor joint use where existing resources already exist, it may fail to capitalize on joint use opportunities that create new assets and provide an unmet community need. Here again, the role of District data analysis fails to supplement local knowledge, direct prospective partner outreach, as well as provide a basis for weighing and evaluating development objectives.

### ***Engaging Partner in Planning and Development***

During the design phase the District appoints an architectural and engineering team (design team) to formulate the physical layout and structure of the school. This is largely guided by both, value-based and practical goals and objectives established during the project definitions and site identification phases. Where joint use development is identified as a preferred development alternative, this is reflected as part of the design goals and prospective partners work through the process of negotiating joint facilities. As mentioned previously, this process is guided through a non-binding agreement that brings the District and prospective partner together to carry out predevelopment and planning activities. Civic leaders and community representatives are engaged in this process in order to build consensus and contribute input as the development takes physical form.

The design team works to integrate a set of design-based principles, which have been framed over time by school construction field standards and best practices. These provide that the school design should: be educationally supportive, accommodate teacher and student needs; support technological integration; and be energy efficient. Additionally, through recent BOC and District Board policy adoptions, new design principles include environmentally conscious design and public and community accommodation.

### ***Defining Partner Responsibility/Contribution***

Based on District joint use guidelines, a partner must meet a 50 percent funding contribution for the capital cost of the facilities to be shared jointly; the District contributes the other 50 percent out of its own bond funds dedicated for this purpose. In the initial stages of the program's development, this was a hard requirement,

meaning that very little funding flexibility was afforded to potential partners. Accordingly, given the assumption that the District's matching requirement posed significant barrier, the District has loosened this provision.

Currently, the 50 percent matching requirement still applies, however, it can count toward non-capital costs of the project, effectively lowering the overall project costs to the joint use partner. Additionally, recent Board discussion involved the possibility that the District may allow a joint use partner to use some funds from its matching contribution to finance operations and management costs; this would be contingent there being any savings from undertaking the joint use development. District and partnering agencies alike agree that increasing development costs make this policy nearly meaningless.<sup>59</sup>

Beyond capital development costs, operational and maintenance funds act as larger barrier for potential joint use partners. Understandably, the District will want to ensure that a prospective joint use partner has the operating budget capacity to live out the terms of the agreement for purposes of ensuring continued programming and preserving its capital investment. The District assessment on this matter creates an inherent bias toward public, government partners, who represent a more stable investment.<sup>60</sup> However, there is growing recognition that even here, there is an additional level of bureaucracy to contend with, that when taken with recent budget shortfalls and cutbacks, take away from the appeal of entering joint use agreements with public entities. "We have bond money for schools, parks, pools, libraries; this is for capital costs; we can leverage this. What we don't have are partners with long-term operating fund commitments and capacities. At the end of the day, we still need a program coordinator or a lifeguard," comments an LAUSD staff on the challenges associated with meeting operating funds requirements.

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<sup>59</sup> Interview with LAUSD Facility Services Division Official; Stakeholder

<sup>60</sup> LAUSD JU Program, Report to LAUSD Board of Education, April 2006

### ***Negotiating Joint Use Agreements***

Joint-Use agreements are legal documents signed by prospective partners entering joint use arrangements. These articulate terms and conditions and are typically 30 to 40 year long-term contracts which provide exclusive rights and uses and also define operational and maintenance obligations of all partners involved. The District acknowledges that negotiating the joint use agreement is one of the largest administrative burdens of the joint use process. “When all is said and done, we still need to agree on the fine print; these are the details that define the nature of the relationship; sometimes it’s harmonious, other times it’s contentious, but it always involves lawyers and it’s always one of the most draining parts of the process,” says a LAUSD FSD staff member.

In early 2003 there was LAUSD staff consideration to working with the City of Los Angeles to draft a master joint use agreement. (BOC Memo to LAUSD Staff, July 2003) The objective was to create a template that could provide some legal guidance for all similar agreements entered into between the District and the City. Similarly, the District would work with all other 28 cities within the district to apply features of the master agreement to their respective projects. Three years later the master joint use agreement has not been formulated, largely in recognition that “this represents a lofty goal. It’s the one-size-fits-all approach to an extremely complicated process – all projects are different; partners have different needs.”<sup>61</sup>

Despite the complexities of designing a master agreement, there remains consideration that a general legal framework can be drafted to guide future joint use agreements for like-types of arrangements. That is, considerations for schools-park agreements typically focus on maintenance and repair, and public access issues. Similarly, in school-library arrangements, security, library content and public access hours are some of the primary considerations that enter agreement negotiations. “Where projects involve similar partnerships, the general joint use framework could provide guidance. However, the details still remain to be seen.”<sup>62</sup>

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61 Conversation with LAUSD FSD Staff

62 Ibid

### ***Cross-agency Coordination***

Joint use participant at all levels agree that cross-agency coordination represents the largest barrier and challenge to carrying out joint use development. This particularly applies to joint use projects involving public entities, however, also comes into play when attempting to partner with prospective private or non-profit entities whom may have different organizational objectives. The complexities involved in cross-agency coordination relate to overcoming the “silo” mentality and aligning goals and missions of prospective partners for purposes of facilitating joint use partnerships.

As articulated previously, for LAUSD, a core tension is meeting its capital improvement campaign goals by 2012 and developing schools in a manner that provides community benefits beyond school seats. While it claims to promote latter goal, it prioritizes the former. Similarly, for other entities such as cities and public departments, there remains little incentive and organizational accountability to promote joint use partnerships. “In many cases, simply sharing of information becomes a challenge because of the It’s-not-in-my-description mentality.” shares a Los Angeles civic leader.

Towards addressing the issue of cross-agency coordination, in May 2003 the Los Angeles City Redevelopment Agency (CRA/LA) signed an MOU with LAUSD. The MOU provided that LAUSD and other public entities would share data on school sitting in order to strategically locate new schools, promote joint use development and create opportunities for community revitalization. (See Ch2: Revitalization Agreement) The MOU provided a date for initial reporting, however, it lacked any provisions for oversight or accountability for ensuring that these tasks would be carried out on an ongoing basis. One of the biggest and most obvious shortcoming of the Revitalization Agreement is that although LAUSD will continue to build schools far into 2012, the MOU was set to sunset only two years after its implementation in May 2005. It is not clear that the MOU is currently being carried out or that it will be renewed.

## **4.2 Modeling Joint Use Development: Three Case Studies**

Recent joint use partnerships with LAUSD have navigated the complexities associated with joint use development from different angles. These have included data-driven community needs assessment; active partner outreach through a public solicitation process; predevelopment support and joint-planning approaches. Additionally, third-party facilitation appears a key factor to navigating the joint use process; this has helped overcome agency coordination obstacles, as well as provided a collaborative planning framework where partner and community interests are well represented.

Many of the above elements are captured in three particular projects, including:

- a. Partnership between LAUSD and the Los Angeles Universal Preschool (LAUP), a quasi-public entity – LAUP conducted a needs assessment and approached LAUSD to explore partnership opportunities to jointly develop and provide preschool programming in areas of greatest need.
- b. Joint planning agreement between Gratts/Westlake and A Community of Friends (ACOF), a supportive services and special-needs housing developer – LAUSD and ACOF negotiated competing use of land through a master planning agreement, resulting in a joint use partnership with expanded after school and recreation services for the local community.
- c. Gassell Park, LAUSD partnership with the Los Angeles Community Design Center (LACDC), an affordable housing developer – Southern California Association of Non-profit Housing performed an independent development feasibility analysis for a joint school and housing partnership and worked with LAUSD to structure a Request for Proposal (RFP) process. LACDC has been chosen as joint use development partner for a joint housing and Early Education Center project.

## **LAUSD/Los Angeles Universal Preschool Joint Use Partnership<sup>63</sup>**

***Summary:*** In February 2006 LAUSD and Los Angeles Universal Preschool (LAUP) finalized a memorandum of understanding to undertake joint planning and development efforts that will lead to increased pre-kindergarten services throughout the District. This effort was initiated through a LAUP-led community needs assessment that found a severe lack of preschool programming availability in 16 zip codes within LAUSD boundaries. With the help of third-party convener and facilitator, LAUSD and LAUP carried out predevelopment planning to identify strategic locations for matching pre-Kindergarten centers with LAUSD schools in order to ensure the largest program impact. LAUSD will leverage partner investments with capital joint use bond funds from Measures K, R and Y. Meanwhile, LAUP has committed over \$42 million of ongoing operating funds to support program development within various Los Angeles County schools.

***Partners:*** Joint use partners include LAUSD and the Los Angeles Universal Preschool (LAUP). LAUP is quasi-governmental non-profit organization that was instituted through the Los Angeles County First-Five Commission who's mission is to help support healthy childhood development from stages pre-natal to age 5. LAUP's mission is to make voluntary high-quality preschool available to every 4-year old child in Los Angeles County.

***Identifying community Need:*** LAUP conducted an analysis of preschool availability in Los Angeles County, finding that about 34 zip codes suffered from severe to significant shortage of service availability. Particularly, LAUP's study showed that there are only enough licensed preschool spaces to serve about half of all 4-year olds within these areas, and that in 16 of the 34 zip codes, there is space for 1 of every ten children. Additionally, an analysis of elementary schools within these zip codes found that the majority of schools were performing at the lowest levels academically (API scores of 1, 2,3). LAUP's basis for its study is research evidence that links preschool to early childhood development and future academic performance. Successive joint use

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63 New Schools Better Neighborhoods, LAUSD, Los Angeles Universal Preschool



partnership efforts will seek to build a direct physical and service link between early childhood support and students' educational environment.

*Planning and pre-development support:* In early 2005 LAUP commissioned New Schools Better Neighborhoods (NSBN), a third-party intermediary and convener with expertise in master planning and facilitating joint use partnerships. With technical assistance from NSBN, LAUP carried out planning and development activities for purposes of identifying strategic school locations, evaluating local physical space and programming targets, and matching LUAP preschool service providers with prospective schools. Moreover, NSBN facilitated conversations with LAUSD, schools and local stakeholders, building on its established relationships and community networks to facilitate the joint use process and build public support.

*Funding Support:* LAUP receives long-term funding from the Los Angeles County First-five commission. LAUP has committed about \$42 million to support program development and operating needs. This will be dedicated to schools through LA County, of which a significant proportion will be allocated to LAUSD. In order to leverage LAUP's operating funds, LAUSD will also commit local joint use bond funds out of its three bond Measures, K, R, and Y, for purposes of supporting capital development costs. At the present time no estimates has been presented regarding possible state matching joint use funds.

*Cross-Agency Coordination:* LAUSD and LAUP's joint use program objectives were complimentary and clearly defined. LAUP acts as quasi-governmental organization, however, it is chartered as an independent, non-profit entity. As such, it has additional operating and funding flexibility, through which it could originate contracts and engage in partnerships as it has with LAUSD. Also, as mentioned previously, NSBN role as convener and facilitator during the planning and pre-development process helped to identify individual program interests early in the process, and was key to brokering relationships and making connections across various parties. Additionally, given LAUP's mission to expand preschool services in order to increase academic performance, its program objectives are clearly aligned with LAUSD's educational goals. Moreover, LAUP's preschool and community needs assessment not only helped inform

its own program direction, but also served as an useful tool to help LAUSD evaluate how it could support an activity that creates value and provides benefits to itself and local communities.

### **Gratts/Westlake Primary School and Housing Joint Use Project<sup>64</sup>**

Summary: In March 2003, LAUSD entered into a formal joint use development agreement with A Community of Friends (ACOF), a Los Angeles Based non-profit affordable housing developer. As part of the development agreement, LAUSD and ACOF would agree to master plan and co-develop a 4-acre site to include a primary school and about 55 units of affordable housing for individuals and families with special needs. This project resulted out of intense initial confrontation between parties over competing site development plans for school and housing uses. While LAUSD could have claimed the site by eminent domain, a third party convener was commissioned by Los Angeles City to facilitate predevelopment negotiations that eventually resulted in an increased variety of community services and uses beyond the initial respective projects. Predevelopment facilitation and stakeholder participation played a significant role in defining the project's scope and positive outcome. Total leveraged joint use development investment is estimated at about \$45 million.

Partners: Joint use partners include LAUSD and ACOF, a Los Angeles based affordable housing developer. ACOF's mission is to provide affordable housing options for populations with special needs, and to collaborate with community-based agencies to offer residents a variety of supportive services on-site.

Identifying community Need: Near downtown, Los Angeles' Westlake area is widely recognized to be one of the city's most, dense urban areas with significant shortage of affordable housing and need for open space. In the early stages of the project, it is not clear that either ACOF or LAUSD carried out a formal community need assessments beyond each partner's respective development feasibility analysis for affordable housing or a primary school. As planning and development progressed, outreach and

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<sup>64</sup> Various sources: New Schools Better Neighborhood; LAUSD; ACOF; The Planning Report; Metro Investment Report

stakeholder participation would serve to guide understanding of community needs – the development plan includes provisions for open space, childcare center, and space to accommodate an after-school youth programming organization; all elements not included in original development plans.

Planning and pre-development support: In early 2003, the City of Los Angeles called on the involvement of New Schools Better Neighborhoods (NSBN), a third-party convener with expertise in carrying out collaborative master planning of joint use facilities. Conflict over development plans had produced a heated deadlock between LAUSD and ACOF, and local civic leaders deferred to a negotiated joint use outcome rather than face the implications of choosing schools over affordable housing, or vice-versa.

NSBN facilitated conversations between LAUSD, ACOF and community leaders to ensure that the master plan would reflect favorable terms to each of the partners including local community residents. The final master plan includes arrangements for a primary school, Early Education Center, child-care facilities, community park space, as well as programming space for a Boys & Girls Club.

Funding Support: NSBN provided seed funding for planning and predevelopment with support from the Los Angeles County's First Five Commission. This helped secure parties' participation in the planning and development agreement, which ultimately produced the master plan for the 4-acre community block. The District was able to undertake the extended development schedule given its deep development pockets and large operating support; increased development costs to the District were nominal. However, ACOF reports that it had to absorb an additional \$1-2 million in development costs as a result of delays and escalating construction costs; ultimately the developer was able to pull from its development reserves and additional financing support to meet the financing gap.

Cross-Agency Coordination: Not only are LAUSD and ACOF's organizational missions non-aligned, but their development plans were in conflict with the other. ACOF shares that while it was very tough to negotiate its initial plans, it was even harder to walk away given the scarcity of developable land and high costs of real estate in the Westlake area

and surrounding communities. Similarly, the District reports that the cost of pulling away from the project would have meant increased cost in real estate as well as additional potential costs borne by displaced residents elsewhere. Moreover, ACOF believes that but for the (NSBN-led) collaborative planning process, additional value for local communities and organizational players in the form of investment, resources, relationships and capacities would not have been created.

### **Glassell Park Early Education Center and Housing Joint Use Development<sup>65</sup>**

Summary: In Sept 2005 LAUSD issued its first ever Request for Proposals (RFP), seeking to partner with a private developer to jointly develop a site that would include an Early Educational Center, parking structure and affordable housing. This process was initiated with the help from the Southern California Association of Non-Profit Housing (SCANPH), who carried out its independent predevelopment work and feasibility studies, and approached LAUSD with the concept of structuring a RFP process. Most recently, in February 2006, LAUSD assigned the project to the Los Angeles Community Design Center, who is now working closely with the district to negotiate a facility design and joint use of space. The District acknowledges the importance of having a third-party (SCANPH) provide initial predevelopment assistance to inform community needs on the ground and identify potential joint use opportunities. While this represents new approach and opportunity for LAUSD to undertake joint use development, the District does not have additional plans to issue another similar RFP process. At present moment, the District regards this as a “test case.”

Partners: Partners include: LAUSD; Los Angeles Community Design Center, a Los Angeles-based non-profit affordable housing developer; and Southern California Association of Non-Profit Housing as third party facilitator and predevelopment support.

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<sup>65</sup> Various sources: SCANPH; LAUSD; California State Board of Education; LACDC

Identifying community Need: Community stakeholder outreach was carried out as part of SCANPH's effort to provide technical assistance and predevelopment support. This helped provide a basis for informing local community need for affordable housing. Additionally, as a regional advocacy entity for affordable housing, SCANPH's efforts are well-informed in terms of understanding technical and policy aspects of housing development as well as understanding greater dynamics for housing demand.

Planning and pre-development support: SCANPH provided predevelopment support, carrying out development feasibility study, as well predevelopment and planning tasks. SCANPH prepared a joint use development feasibility study that looked at various underutilized LAUSD sites for opportunities to include housing as a joint use option. Based on its study, SCANPH found that Glassell Park site could effectively accommodate a housing development component. Per its findings, SCANPH approached LAUSD with a plan of structuring an RFP process through which the District could successfully identify a housing developer that it believed best matched the goals and needs of the project.

Funding Support: In addition to support provided from SCANPH, LACDC will receive funding support for joint use capital cost from LAUSD. Current joint use bond allocation totals \$1 million from Measures K & R, and it is likely that additional support may be allocated from State apportionment of Prop 55 joint use funds. Further, per RFP guidelines, the LACDC will form a land-lease arrangement by which it will provide LAUSD with an ongoing revenue source that will be used to finance school development and maintenance.

Cross-Agency Coordination: SCANPH structured and facilitated the RFP process with LAUSD, also working along the way to ensure strong community, stakeholder and political support. The RFP assisted with partner identification process as well as ensured upfront commitment and buy-in into development process. Moreover, given LAUSD's control over the RFP language, the District could set favorable terms that would serve to support its school development goals while also meeting an important

school and community need. SCANPH's efforts are only the beginning as it has developed a permanent program within its organization titled "Building Allies" which plans on working with LAUSD and other Southern California school districts to replicate the predevelopment, school-housing joint use development approach. This has the implication of facilitating predevelopment support for LAUSD, while also ensuring effective, targeted outreach as carried out through an RFP process. However, LAUSD has indicated that it treats the Glassell Park project as a "test case," and has no current plan to replicate another similar RFP process for a separate site. According to SCANPH, it is currently in the process of working in a funded collaboration with the Los Angeles City Planning Department and Environment Now, to craft an arrangement that would allow LAUSD to develop a high school in conjunction with an affordable housing developer. The project plans include about a 30 acres of land, and will include a 3200-seat elementary school, a 3600-seat school, affordable housing and other community uses. SCANPH reports that it is currently working on raising political and stakeholder support for the joint use project.

### **4.3 Conclusion**

Joint use development was considered in context of the District's traditional school development framework. It becomes clear that the approaches to identifying local community need, partner identification and public input process in the early stages of the development path are critical and can be improved for purposes of strengthening joint use practice.

Additionally, the District and BOC have identified partner funding requirements and liability as two significant challenges to effectively initiating and maintaining joint use agreements. As an example, LAUSD's current joint use inventory includes about 52 partnership agreements, of which 22 are actively working, with school and partners meeting the established terms; the remaining projects are either in negotiation, under compliance review, or not in compliance. This means that nearly 57% of current joint

use agreements are not fully active.<sup>66</sup> According to the district, a large number of these are going through dispute resolution, and involve disagreements over shared operations cost and maintenance. While there is no “silver bullet” approach to dealing with the process of joint use agreements, it would seem that a project-type agreement approach would be beneficial to the District. Additionally, as evidenced by the case studies, there are indications that predevelopment efforts may seem to clarify partner expectations and responsibilities going into the projects. This serves to facilitate the process of agreement negotiation and produces balanced arrangements, which partners are comfortable signing on to.

Cross-agency coordination can also bear down on the joint use process and serve as significant barrier. The three case studies provide an example of how a third party convener – as exemplified by New Schools Better Neighborhoods and SCANPH in recent joint use planning and development efforts – can provide ways for navigating the multi-agency bureaucracy for carrying out agency outreach, communications and securing necessary community, stake holder, and political support.

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<sup>66</sup> LAUSD Joint Use Program, Report to Board of Education, April 2006





## **Ch.5 Recommendations for Strengthening Joint Use Program**

LAUSD has made joint use a part of its school development framework, largely based on the acceptance that its educational goals are fundamentally interrelated with providing adequate, healthy and nurturing environments for the communities that it serves. LAUSD continues to support joint use and has taken a number of measures and exploratory efforts to improve program implementation. Some of these key efforts include:

- strengthening joint use partner outreach within the planning and project definitions stage of school development;
- increasing bond fund allocation for joint use by \$30 million from Measure Y's Innovation fund;
- working with the City of Los Angeles to structure a joint use master agreement that addresses operational, management and liability issues up front;
- forming a BOC Task Force to act as an outreach, problem-solving and mediation body; and,
- collaborating with the City of Los Angeles and the Community Redevelopment Agency to implement a cross-agency agreement to share information and participate in strategic school siting activities.

Each one of these measures has been in response to assessed challenges with joint use, and speak particularly to partner identification, funding support, liability, cross-agency and internal coordination issues. As discussed in previous chapters, the above efforts to address joint use challenges represent relative improvements to the District's program and are only a small step toward providing comprehensive solutions. Additionally, as currently proposed, the above efforts leave some of the root challenges unaddressed and in some cases fail to provide direction and accountability that is necessary to have the intended impact.

As the District continues exploring potential solutions for strengthening its Joint Use Program, it must get at fundamental issues concerning programmatic and organizational challenges. This includes moving beyond its current reactionary approach to joint use, taking leadership in assessing community needs and building strategic partnerships where it is clear that a school can serve an anchor for service and resource delivery to local communities. Additionally, recognizing that funding

continues to be huge obstacle for potential partners, LAUSD must step up its own funding commitment to joint use as well as work with other public and private entities to ensure availability of funding to provide capital and programmatic support. Moreover, cross-agency coordination seems to be the “eight hundred pound guerilla” of joint use. Seeing as the District cannot act alone on this issue, it is important that public administrators and civic leaders explore the role that alternative policy instruments, governance structures, and third-party entities can play to help facilitate joint use planning and partnership objectives.

Below are a number of recommendations for strengthening LAUSD’s Joint Use Program. They address the various programmatic, policy and structural challenges discussed in previous chapters. The goal of these recommendations is to guide implementation strategies that will bring LAUSD to a point where joint use is a formal, fully integrated part of its school planning and development framework.

### **5.1 Outreach and Partner Identification**

Carrying out outreach or partner identification during planning and project definitions phase is critical for identifying and creating an opportunity to undertake a joint use development project. Partner identification must go beyond general outreach and public meetings, and must be informed by a formal assessment of local community needs. It follows logically that where the District is able to ascertain a specific community need or opportunity, this knowledge will guide its outreach and help it target a specific agency, community based organization or stakeholder group. Additionally, the District’s efforts for partner identification should build on its current experience as with LAUP and the Glassell projects, to formalize relationships across closely aligned public service providers and act proactively in outreaching to potential partners.

***Recommendation 1:*** Partner identification must go beyond general outreach and public meetings, and must be informed by a local community needs assessment. The basis for initiating a joint use project is first uncovering a local community service or

programmatic gap that could be met through strategic school-community collaborations. Public and community meetings only provide one layer of important data necessary for understanding local needs. In order to supplement data received at the community level, it is necessary for the District to communicate with other public agencies through formal data gathering and analysis, in order to learn about possible physical and service resources that could be leveraged through school facility investment and development efforts. At the most basic level, communications channels must be drawn with key agencies whose mission's and program's are in line with school educational outcomes; these include parks departments and library districts, as well as youth development, health and social service agencies. The District's partnership with LAUP provides perfect model of how data can inform strategic engagement between the District and outside service providers.

***Recommendation 2:*** Partner identification and outreach must seek out potential partners in a proactive manner. LAUSD's traditional approach to joint use is reactive in the sense that is dependent on outside entities to engage the District regarding possible exploration of joint use opportunities. LAUSD's Glassell Park School-Housing Project represents an alternative approach where the District initiated a partner outreach through a formal RFP process. This was based on LAUSD's assessment that a joint use opportunity existed and that it needed to identify partner who could effectively meet dual school-community objectives. This marks a positive move for LAUSD's Joint Use Program and it is important that the District take an additional step forward in terms of replicating this approach. This would require that LAUSD effectively carry out an inventory of other underutilized sites, inviting other agencies and organizations to partner with it in order to enhance current programs and meet other community needs. Additionally, while the Glassell Park Project involved the creation of affordable housing, it is important that the District consider how a similar (RFP) outreach process can be coordinated to effectively engage other resource types.

## **5.2 Funding Support**

LAUSD has recently made efforts to step up its funding commitments and help partners meet their required share of joint use capital and operating costs. In early 2006, LAUSD increased its joint use bond allocation from Measure Y. The District also explored ways to decrease partners' matching requirement for joint use capital costs, allowing partners to use own share to meet operating budget needs. However, LAUSD lacks formal funding commitment or long-term financing support for joint use. Additionally, the District recognizes the restrictiveness of State level joint use apportionment requirements, however, has remained mute on necessary policy changes. In continuing with efforts to decrease funding challenges, the District must provide dedicated capital financing and programmatic support to ensure future joint use development. Additionally, LAUSD must work to address State funding constraints as evidenced by its minimal success for leveraging State level joint use matching funds. Lastly, given that bond funds are typically restricted for capital financing purposes, the District must explore alternative funding sources in order to help partners meet their programmatic and operational funding needs.

***Recommendation 1:*** LAUSD must increase funding and create dedicated allocation to help support both joint use program and capital development efforts. The current incremental allocation process is insufficient for providing the necessary funding support to achieve a significant volume and scale of joint use development. Increased funding levels will ensure ongoing program investment into the future as well as elevate the program to priority level from its current insular position.

***Recommendation 2:*** State level District advocacy on joint use is important in order to facilitate funding access as well as effectively ensure District leveraging of State joint use financing resources. Per LAUSD staff communications to the Board, State level funding guidelines are restrictive given required local match and limited scope of qualifying activities for funding purposes. LAUSD must increase State advocacy in order to appropriately guide future policy development and administrative decision-making based on implementation realities on the ground. Senate Bill 1677 (SB1677), sponsored

by Senator Torlakson, was recently introduced in April 2006 and provides one such opportunity to the District. SB 1677 would expand the type of funding activities allowed under current State joint use grant guidelines and well as add flexibility to partner matching fund requirements. In addition to this policy bill, LAUSD must advocate for increases in State level joint use funding. The District and State both acknowledge that additional capital costs are associated with joint use, also recognizing that that it creates greater overall aggregate benefits for local communities. State interest goes beyond LAUSD's narrower education-focused goals, and as such LAUSD must advocate for State leadership and financing for joint use development.

**Recommendation 3:** Consistent with District Board and BOC recommendations to leverage outside funds for joint use development, District staff must explore alternative funding mechanisms to help finance program and capital development efforts. One clear example of available funding sources is New School Better Neighborhoods' (NSBN) seed funding support for joint use predevelopment and planning efforts – a third-party convener such as NSBN can create additional leveraging opportunities for the District by matching partners with outside funding sources. Additionally, the BOC's "Healthy Schools, Healthy Parks, Healthy Communities" memorandum to the District outlines a number of potential funding strategies that must be considered and instituted programmatically. To date, it is unclear that LAUSD staff have move on BOC recommendations or even begun exploratory efforts.

### **5.3 Program Coordination**

The current organizational structure of LAUSD's Facilities Services Department (FSD) is relatively recent, as it was largely formed following of the District's capital modernization efforts after 1997 as a result of the increased need for school development and in response to political pressures. Given a recent and almost retroactive introduction of the District's Joint Use Program, it is important that the District evaluate joint use programmatic efforts to date, focusing on overall program structure and placement within the District's overarching FSD; operational goals and responsibilities; and accountability measures for ensuring continued and effective

implementation. Additionally, in light of recent BOC's move to institute a Joint Use Task Force, the District must examine its relationship to the BOC and how it will treat and implement various programmatic recommendations stemming from the Joint Use Task Force.

**Recommendation 1:** LAUSD's Joint Use Program must be fully integrated as part of the District's FSD. Currently FSD is comprised by about 2,700 employees that are placed throughout a multitude of departments and branches that carry out various tasks to support new construction, modernization and facilities maintenance. The Joint Use program involves about four staff persons and is placed within FSD's School Planning and Design Branch, meanwhile the Real Estate and Outreach Branches carry out independent activities that have direct implications for the work of the Joint Use Program. LAUSD FSD must evaluate how joint use fits into FSD's overall operational framework and make efforts to ensure that program objectives are reflected in the goals and work of other key branches.

**Recommendation 2:** LAUSD must develop joint use evaluation and accountability measures across broader FSD, in order to reinforce program and ensure that joint use objectives are being carried out. Currently, joint use is regarded as an after-thought, without explicit accountability or evaluation measures in place to guarantee that staff aggressively explores opportunities for joint use. Building on the previous recommendation, it is not only important that joint use objectives be formally integrated as part of other related operational branches, but also that accountability and performance measures are in place in order to ensure that joint use is implemented.

**Recommendation 3:** In order to strengthen LAUSD joint use coordination, the District must evaluate its relationship with and lack of participation on the BOC Joint Use Task Force. The BOC acts as a bond advisory body with no policy-making or program implementation authority. Nevertheless, the BOC is committed to strengthening joint use and has agreed to act as a convener and problem-solving entity. Given the BOC's disconnect from staff and its various programmatic efforts, it is important that the District implement mechanisms for communication and reporting

between itself and the BOC Joint Use Task Force. This will help to inform BOC recommendations and policy-making efforts, providing the BOC with a more accurate picture of program-level challenges and issues that need to be addressed. Additionally, the District must explore formal procedures for handling BOC requests and recommendations in an openly, timely, adequate manner. Failure to change the current arrangement between District and BOC Joint Use Task Force creates the risk of making the Task Force's efforts symbolic and nearly meaningless.

#### **5.4 Cross Agency Coordination**

LAUSD cross-agency coordination is critical for facilitating joint planning and joint use development efforts. Given LAUSD's planning authority, physical resource stock, and economic position, it carries additional responsibility to engage relevant public and community agencies in formal joint planning and development activities. LAUSD must take leadership in bringing agencies beyond the "silo" mentality, using policy development, political support and funding incentives as tools for encouraging collaboration. The recent agreement between LAUSD and the City of Los Angeles Community Redevelopment Agency provides an example of a good first policy effort for promoting data and resource exchange. In looking at ways to improve cross-agency coordination, LAUSD must explore policy options that will provide useful frameworks and needed accountability to ensure ongoing collaboration. Here, a third party convener model – as exemplified by New Schools Better Neighborhoods and SCANPH in recent joint use planning and development efforts – provides a proven method for carrying out agency outreach, communications and necessary stake holder support.

***Recommendation 1:*** LAUSD must take leadership in carrying out joint planning, calling on relevant agencies to share data, economic and physical resources for purposes of advancing integrated joint use school development projects. Although the current joint planning policy agreement with the City of Los Angeles and Community Redevelopment Agency provides a useful model, it also highlights some inherent limitations in LAUSD's joint planning process. LAUSD must ensure that future policy development includes direction on implementation that emphasizes joint use objectives

over efforts to avoid development conflicts between agencies. Additionally, a framework must be adopted that supports joint planning on an ongoing basis, as part of overall school development activities and not as a one-time deal or ad-hoc basis. Finally, accountability provisions must be included in order to ensure commitment and follow through.

***Recommendation 2:*** LAUSD should work with public and community agencies to develop a joint use master plan that serves as vision and policy guide for accomplishing joint use District-wide. As with city wide master plans, the joint use plan would not only assist with project and resource identification, but could also present an overarching comprehensive policy document that presents a central and unified vision for guiding cross-agency joint use planning and development efforts. Currently, LAUSD carries out a similar effort with the Los Angeles City for parks and swimming pools, however, does it on a school-by-school, ad-hoc basis, where joint use opportunities may appear to be present. A District-wide master plan could provide a more comprehensive view of public community resources beyond parks.

***Recommendation 3:*** Institute a role for third party convener and facilitator to assist with cross-agency coordination, partner identification, public information and community outreach efforts. A third party convener has proven instrumental for facilitating joint use planning and development activities involving a number of entities, including the District, public agencies and local stakeholders. In recent projects, such as Gratts/Westlake and Glassell Park, the third party convener was critical for providing necessary predevelopment support that helped secure multiparty joint use negotiations; ultimately this resulted significantly greater benefits for local communities beyond the District's initial traditional school development objectives. Additionally, a third party convener can act as an independent consultant, bringing necessary expertise and calling on civic leaders and public agencies to participate in joint planning and development activities. Given the conveners position, it is able to effectively navigate various bureaucratic channels, as well as facilitate public outreach, and negotiation dialogues in a manner that looks to create a win-win outcome for everyone, principally for local communities.





## **Ch.6 Summary and Conclusion**

### **Background**

In 2000, Los Angeles Unified School District (LAUSD) initiated the largest and most heavily public-financed school capital improvement campaign of any school district in the nation. With over 10,000 schools, community centers and learning facilities throughout 28 Los Angeles area cities and county, LAUSD is currently the second largest school district in the nation. By the end of the school construction and modernization effort, LAUSD will have added an additional 160 schools to its facilities inventory as well as undertaken over 19,000 school expansion and modernization efforts. The current price tag for this feat is estimated at \$19.2 billion. The development scale and amount of public financing represents a large direct investment for many of Los Angeles County's neighborhoods, and holds particularly important implications for many of LAUSD's urban, dense, resource-poor and traditionally disinvested communities. Given the significant scale of LAUSD's efforts, attention has turned to examine how LAUSD can leverage additional community and economic development benefits for local communities through a joint use school development approach.

### **Joint Use Program and Policy Development**

In order to create greater economic and service investment opportunities for LAUSD's communities, the District initiated a Joint Use Program in the early 2000's, largely the result of political and community advocacy pressure. The Joint Use Program has slowly evolved through LAUSD Board and BOC policy development, and had initially struggled receiving full implementation support given little administrative and programmatic direction at the District staff level. Only recently in 2006 has the LAUSD Board fully realized a formal programmatic framework and implementation guidelines to help ensure the Joint Use Program is carried out. At the core of LAUSD's Joint Use Program is to make schools the centers of communities, by promoting increased programming and school-community access. Strategies to achieve LAUSD's joint use goals include mechanisms for promoting private and public partnerships for purposes of leveraging economic, physical and service resources for the most needy communities within the District.

## **Joint Use Program Implementation and Practice**

LAUSD's Joint Use Program has been implemented in a reactive manner, typically in response to community, stakeholder, or public agency pressure on the District to expand and capitalize on existing school development opportunities. In addition to challenges arising from LAUSD's weak internal joint use operational framework, are funding, liability and cross agency issues, which serve as barriers to the District's implementation efforts. To date, LAUSD efforts to address some of these challenges have not materialized, and in other cases have only reflected piecemeal and symbolic efforts that have fallen far short of being able to address the root issues facing LAUSD's Joint Use Program. However, recent LAUSD joint use projects represent a significant departure from the traditional joint use implementation track and can be useful models for guiding future policy development and practice. Particularly, these projects highlight positive District direction in carrying out community needs assessments; proactive and targeted partner identification and outreach; and involving a third-party facilitator and convener to help support joint planning and negotiation efforts.

## **Recommendations**

LAUSD must move beyond the symbolic language of its current joint use policy, build accountability and make head in formal integration. Until then, the District will continue to pass on joint use opportunities despite obvious benefits. Similarly, community economic development opportunities for local communities will continue to go unrealized unless the District changes its joint use approach from "a thing to do," to "a way of doing."

Toward addressing some of the challenges facing LAUSD's Joint Use Program, LAUSD must take active leadership and move beyond its reactionary, ad-hoc approach. Ultimately this requires re-establishing its joint use operational framework to go past the "silo" state, as well as carrying out various capacities that form the basis for identifying or creating strategic joint use opportunities. This includes assessing community needs, carrying out outreach and building strategic partnerships with key public and private entities. Additionally, recognizing that funding continues to be huge obstacle for potential partners, LAUSD must step up its own funding commitment, as

well as become as strong advocate for increased funding support at the local and State levels. Additionally, LAUSD must continue to work to improve cross-agency coordination by pursuing formal policy and planning tools that can help build engagement; develop a comprehensive vision for joint planning and development; and provide necessary accountability measures to ensure that implementation follow-through.

### **Future Direction**

In April 2006, the Los Angeles City Mayor announced plans for increasing Mayoral control over LAUSD' Board of Education. The Mayor currently enjoys lots of public support and political capital, which makes the plan for LAUSD mayoral control a feasible option. This holds significant implications for joint use practice considering the level of influence that the Mayor will have over policy-making and District governing structure. The Mayor has announced publicly his strong support for joint use development, and has directed various staff and agencies to support the District's efforts for cross-agency collaboration. Most recently, in April 2006, the Mayor submitted a city budget with funding provisions that will go to support joint planning and development activities at the City level. Hence, there is strong possibility that the Mayor will choose to exercise control of over District's school planning and development activities in favor of joint use development practice.

Increased Mayoral control over LAUSD raises the potential for creating a consolidated, city-wide planning approach to help facilitate cross-agency coordination. The challenge will be directing LAUSD's organizational school development and planning framework to look beyond school seats toward a more holistic planning approach that includes community needs and benefits. The strict timeline imposed by the Williamson Agreement and to finish school construction by 2012 will press against any effort to revise school development plans that may increase school delivery time. Referring to the challenge of trying to implement joint use in light of LAUSD's rush to build schools, a civic leader expressed that it was "like trying to mount a running bull."

The effort to meet school seat requirements is not necessarily mutually exclusive with goals to provide equally important community benefits. While the need for new schools is clearly important, LAUSD's growth and school development reflects the magnitude and impacts that it can have in local communities – this brings extra responsibilities unto the District. The focus for the District should not be whether LAUSD and local communities choose between schools and, say, parks, housing or libraries, but how the District can work with local communities to ensure that school building efforts help to meet a multitude of student and local community needs. Only until LAUSD manages to integrate joint use planning as part of its overarching school development framework will it be able to capitalize on opportunities to fully leverage badly-needed physical and economic resources for Los Angeles' communities. If Los Angeles' Mayor is successful in garnering control over LAUSD, a more significant move will come from shifting the District's joint use practice from “a way to build,” to “a way of building.”



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