



FORUM PROCEEDINGS REPORT



BUILDING SCHOOLS, BUILDING COMMUNITIES:

A FORUM ON THE ROLE OF STATE POLICY IN CALIFORNIA

Report Prepared by

CENTER FOR CITIES & SCHOOLS, UNIVERSITY OF CALIFORNIA-BERKELEY

Convened by

AMERICAN ARCHITECTURAL FOUNDATION

and

CENTER FOR CITIES & SCHOOLS, UNIVERSITY OF CALIFORNIA-BERKELEY

In partnership with

CALIFORNIA CENTER FOR PHYSICAL ACTIVITY, DEPARTMENT OF PUBLIC HEALTH

and

U.S. ENVIRONMENTAL PROTECTION AGENCY

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Women's Faculty Club
June 11-12, 2007

CONVENED BY:

AMERICAN ARCHITECTURAL FOUNDATION

The American Architectural Foundation (AAF), with support from Target, launched the *Great Schools by Design* initiative in 2004 by conducting focus groups around the country to assess the need for such a program. In October 2005, AAF held the National Summit on School Design held in Washington, D.C. The summit brought together 200 leaders from across the country to identify key issues in educational facility design. The report from the summit summarized the dialogues, presented examples of innovative schools from across the country, and described eight key principles of school design generated by participants.

AAF conducts a range of activities to support these principles by working with public school officials and community stakeholders throughout the country at school design institutes – where specific projects are reviewed to illustrate how design can impact student achievement – and forums. The forums bring experts together to explore specific topics related to design and education. In addition, AAF produces video documentaries and discussion guides that illustrate successful designs for new and renovated schools. In early 2006, Target became the presenting sponsor of the *Great Schools by Design* program. It has been a successful association, combining Target’s commitment to supporting smart school design and community building with the professional architectural field.

In October 2006, a follow-up event, the Design for Learning Forum: School Design and Student Learning in the 21st Century, was held in Minneapolis. This forum advanced the agenda of the 2005 summit by probing in greater depth why design is important to student achievement and how it relates to the core and future mission of our schools, namely to create opportunities to advance learning for all students while making a significant and sustained effort to close the achievement gap.

<http://www.archfoundation.org/aaf/gsbd>

CENTER FOR CITIES & SCHOOLS, UNIVERSITY OF CALIFORNIA-BERKELEY

The Center for Cities & Schools (CC&S), in the University of California-Berkeley’s Institute of Urban and Regional Development (IURD), was founded to research the synergy between cities and public education and to promote understanding and collaboration between educators and urban policy makers.

CC&S is driven by three core beliefs:

- 1) *The built environment impacts educational quality.* Housing, land use, school facilities, and transportation shape the nature and quality of public education and must be talked about in relation to schools and educational quality.
- 2) *The quality and nature of public schools impact urban and metropolitan vitality.* When schools that are socio-economically diverse and have rigorous curriculum relevant to all learners are united with public policy that connects schools and local planning efforts, the result is a stabilized and revitalized urban environment.

- 3) *Collaborative and participatory institutions sustain systemic reform.* Breaking down the institutional and disciplinary barriers between city planning, education, and other related fields is necessary to create alternatives to these traditional silo governance approaches and improve both cities and schools.

CC&S is also a research partner with Building Educational Success Together (BEST), a national community of practice dedicated to sharing and developing knowledge to improve urban public school facilities and the communities they serve. Additionally, CC&S recently launched the PLUS Leadership Initiative, which brings together civic and educational leaders to further develop and expand collaborative, intergovernmental initiatives aimed at improving public education quality and creating more vibrant and healthy neighborhoods for all families.

<http://citiesandschools.berkeley.edu>

<http://www.bestschoolfacilities.org>

ADDITIONAL PARTNERS:

**CALIFORNIA CENTER FOR PHYSICAL ACTIVITY, CALIFORNIA DEPARTMENT OF
PUBLIC HEALTH**

The California Center for Physical Activity creates opportunities for everyday activity by connecting partners to active living resources and helping develop more walkable and bikeable communities. The center supports strategic alliances with physical activity experts, local health departments, community-based organizations and like-minded public- and private-sector partners. Programs of the center are nationally and internationally renowned. The center's work to promote more walk- and bike-friendly communities is commended for its ability to engage non-traditional partners such as transportation engineers and land use planners. The center's work to establish community-based physical activity programs for older adults serves as a model across the nation and has received state, national, and international honors.

<http://www.caphysicalactivity.org>

U.S. ENVIRONMENTAL PROTECTION AGENCY

The Smart Growth Program at the U.S. Environmental Protection Agency (EPA) conducts innovative research, creates communication products, and analyzes policies as part of the EPA's efforts to help communities harness the benefits of community and regional growth with minimal impacts on public health, air, water, and land resources. The program works with local, state, and national experts to discover and encourage successful environmentally sensitive development strategies. The EPA funded the widely cited 2003 study, *Travel and Environmental Implications of School Siting*.¹

<http://www.epa.gov/dced>

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Lesson One:

California needs a statewide vision for its ongoing major public investment in school facilities that is connected to broader visions of educational, community, and regional growth and prosperity.

Lesson Two:

California needs state level policy incentives to foster effective local practice in building of high-quality school facilities and creating prosperous communities, while ensuring educational equity.

Lesson Three:

California needs research, best practice documentation, and education to guide local school facility planning.

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EXECUTIVE SUMMARY

Building Schools, Building Communities: A Forum on the Role of State Policy in California was convened on June 11 - 12, 2007, at the University of California-Berkeley, and sponsored by the American Architectural Foundation (AAF) and the UC Berkeley Center for Cities & Schools (CC&S) in close partnership with the U.S. Environmental Protection Agency and the California Center for Physical Activity within the California Department of Public Health.

This forum was designed to open a needed dialog and critical discussion on the massive and growing investment in public school construction funding in California, where more than \$30 billion in state bonds has been passed over the past five years. The forum was convened in the belief that California has a unique opportunity to use this massive public investment in school facilities as a mechanism to create superior learning environments that are integrated into and viewed as strategic assets in their communities. Too many new schools are often “simply adequate” and lack the innovative siting and design solutions that enhance teaching, learning, and community life. As a result, California is missing a significant opportunity, indeed a once in a generation opportunity, to link billions of dollars in school construction funding to a broader vision of community and regional growth and prosperity.

Bringing together more than 40 policymakers and practitioners from across the state as well as national experts, the forum examined the wide range of California state policies on school planning, design, and construction, and the ways those policies influence local decisions. In particular, the forum sought to understand what California policies and practices influence, promote, and/or hinder:

- 1) The location and size of new school sites
- 2) Building shared use and joint use school facilities and/or sites
- 3) Innovative school design (especially in relation to location, site size, and use of schools)

The forum’s participants came up with three overarching lessons and a set of recommendations for each lesson:

Lesson One: California needs a statewide vision for its ongoing major public investment in school facilities that is connected to broader visions of educational, community, and regional growth and prosperity.

Lesson Two: California needs state level policy incentives to foster effective local practice in building high-quality school facilities and creating prosperous communities, while ensuring educational equity.

Lesson Three: California needs research, best practice documentation, and education to guide local school facility planning

I. INTRODUCTION



“Because we tend to build large schools far from neighborhoods, nobody can walk to school anymore. Pulling an element out of the neighborhood and putting it on the fringe of the community separates the public from public education and has negative consequences in terms of what we know about sustainable design.”
-Ron Bogle, American Architectural Foundation

Building Schools, Building Communities: A Forum on the Role of State Policy in California was convened on June 11 - 12, 2007, at the University of California-Berkeley. The forum was sponsored by the American Architectural Foundation (AAF) and the UC Berkeley Center for Cities & Schools (CC&S) in close partnership with the U.S. Environmental Protection Agency and the California Center for Physical Activity within the California Department of Public Health.

Building Schools, Building Communities was designed to open a needed dialog and critical discussion on the massive and growing investment in public school construction funding in California, where more than \$30 billion in state bonds has been passed over the past five years. While hundreds of new schools are being built across the state each year, Los Angeles Unified School District’s building program alone is the largest one undertaken by any U.S. school district ever and is one of the largest public works programs in the nation’s recent history. To better understand and improve the policy making and practices around the administration and implementation of these state and local funds, the cross-sector sponsoring organizations came together to explore the ways California policy makers and practitioners can maximize the benefits of this historic and greatly needed public school investment for schools *and* communities.

Where California’s new schools get located and the types of places they are designed to be will likely have profound effects on thousands of neighborhoods and families across the state. This spending may in fact be one of the most important public investments that impact families’ quality of life and economic development in California communities for future generations.

California’s ongoing investment in school facilities infrastructure presented the sponsors with a unique opportunity to build on lessons from previous AAF national events in the *Great Schools by Design* initiative and CC&S’s national and California research on school facilities to examine and discuss realigning school construction and renovation policies and practices with innovative thinking around design, planning, and educational reform efforts. AAF intends to use this report as a model for similar convenings in other states to inform their policy and practice on school facilities development, especially the relationship between the schools and the neighborhoods they serve.

“Where California’s new schools get located and the types of places they get designed as may be two of the most important things that impact communities, economic development, and quality of life across California.”
-Jeff Vincent, Center for Cities & Schools

The four main sponsoring organizations brought together a diversity of perspectives to discuss planning new schools. Having participated in previous *Great Schools by Design* national gatherings, the CC&S began a dialogue with the AAF on the need to hold similar events that focused on individual states and talked more specifically about state policy on school planning and design. Given the tremendous amount of school building occurring in California, and CC&S’s ongoing work in the state, California emerged as an excellent focus for an initial forum.

Bringing together more than 40 policymakers and practitioners from across the state as well as national experts, the forum examined the wide range of California state policies on school planning, design, and construction, and the ways those policies influence local decisions. In particular, the forum sought to understand what California policies and practices influence, promote, and/or hinder:

- 1) The location and size of new school sites
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To achieve these goals, the Forum had three main objectives:

- 1) **Identify California’s policies on these issues and how they influence local decisions**
- 2) **Identify stakeholders concerned with these issues and develop strategies and recommendations to further address policy and/or practice issues**
- 3) **Generate a proceedings report on the forum’s findings to inform statewide policymakers and local practitioners, and to help instigate similar discussions in other states**

The issues brought up during the forum were vast and cut across local, state, and market issues. This report organizes, distills, and presents a critical reflection on the complex nature of building new schools in California based on the dialogue among forum participants. The report concludes with key lessons and specific recommendations put forth by forum participants to support more effective local practices for building high-quality schools that enhance teaching, learning, and communities.

II. SETTING THE CONTEXT: NATIONAL, STATE, AND LOCAL PERSPECTIVES



Prominent national and state leaders opened the forum by setting the policy, practice, and outcome context of building new schools.

Following the opening dinner with keynote speaker California Senator Tom Torlakson and a school design slideshow from architect Tom Blurock, the day's agenda began with three presentations providing overviews of the forum's topics. Tim Torma of the U.S. EPA gave a national perspective on schools and land use planning. Kathleen Moore of the California Department of Education's School Facilities Planning Division described California's school facility planning and financing regulatory structure. Jeff Vincent of the CC&S, Lisa Cirill of the California Center for Physical Activity, and Connie Busse of the Cities, Counties, Schools Partnership of California each presented findings from recent statewide surveys of school districts, local public health officials, and local governments, respectively, on school planning issues. Each presentation is summarized below.

BUILDING SCHOOLS AND BUILDING COMMUNITIES: A NATIONAL PERSPECTIVE

Tim Torma, Senior Policy Analyst, U.S. Environmental Protection Agency (EPA)

“The work that you have in front of you in this Forum, in figuring out how to bridge different turfs, different egos, different structures, different histories is very daunting, so I commend you for coming together to do that.”

-Senator Tom Torlakson

Tim Torma, who works in the Smart Growth Program in the U.S. EPA Office of Policy, Economics, and Innovation, gave an overview of state policies and practices across the country on school planning and siting that run counter to smart growth goals of efficient land use, mixed-use development, walkable neighborhoods, and communities with a strong sense of place. He noted that the primary goal schools serve is to provide a safe, healthy place where children go to get a great education. With this as a baseline that we all can accept, Torma argued, there's room for more discussion; specifically, what else can we get from major public investments in school facilities?

Torma described the ways schools both respond to land use development and influence future development patterns. With schools being funded by tax dollars, Torma noted, these investments can either work for or against a whole list of broad goals that every community has, including promoting children's health, ensuring educational equity, supporting local fiscal health, preserving open space, and alleviating traffic congestion.

“We all talk about how schools need to be sustainable, how schools need to be the center of community, and yet we all go out and build a bunch of portables. And frankly that’s what the State is telling us to do. We know costs are crazy, but hopefully in this Forum we can figure out how to get a handle on that.”

-Tom Blurock, FAIA,
IBI/Blurock

Torma argued that school siting decisions across the country made over the last few decades have helped cause a profound drop in the number of children who walk or bike to school, and this has contributed to increased automobile use, traffic congestion, and higher rates of childhood obesity. “It’s almost as if we planned it that way. We’ve been successfully implementing the ‘National No Child Shall Bike or Walk to School Campaign,’” he noted. “Even though many children don’t necessarily attend their local school, those that do should be given every opportunity to be able to walk or bike to school.” Torma then described ten key strategies for building “smart schools” to encourage good planning that creates opportunities for walking and biking to school.

Torma concluded his presentation by noting that California has some very good policy language in its school planning and siting guidebooks. To illustrate this, he pointed out the Site Selection Criteria worksheet in the state’s School Site Selection and Approval Guide,¹ which includes criteria such as “safe walking areas [around schools]” and “centrally located [school facilities] to avoid extensive transporting and to minimize student travel distance.” “This scorecard has some great items in it, but what I want to know is, how are local school districts being held accountable for meeting these criteria? What real role does the scorecard play in affecting siting decisions?” Overall, he noted, these kinds of tools can be beneficial if they are enforced. “I think that school construction policies and school transportation policies have to be part of the solution [in meeting California’s environmental targets of reduced vehicular emissions and greenhouse gases], because if they’re not, they’re part of the problem.”

TOP TEN STRATEGIES FOR BUILDING “SMART SCHOOLS” TO ENCOURAGE WALKING AND BIKING TO SCHOOL

Strategy #1: *Build smaller schools.* Half of all U.S. schools enroll more than 1000 students. Smaller schools have been associated with increased student performance, less absenteeism, increased student engagement, and higher rates of walking to school.

Strategy #2: *Eliminate minimum acreage standards for school sites.* Twenty-three states do not have set minimum acreage standards.

Strategy #3: *Locate schools close to the students they serve.* Research finds that distance to school is the number one barrier cited by parents in having their children walk or bike to school.

Strategy #4: *Preserve and renovate existing neighborhood schools.* Funding and other policies often incentivize school districts to build new schools in suburban locations rather than renovate existing schools in older neighborhoods.



“It’s a two-way relationship: schools respond to development patterns and development follows schools. New schools are a really huge public investment that the community bears - those tax dollars can either work for or against a whole list of goals that every community has.”
 -Tim Torma, U.S. Environmental Protection Agency

Strategy #5: *Locate schools on walkable roads.* Schools often get located on major thoroughfares that lack pedestrian enhancements. In turn, parents will not let children walk on or cross such roads.

Strategy #6: *Increase “pedestrian route directness” around schools.* Suburban cul-de-sac street layouts typically make walking distances longer and force travelers onto high-speed arterial roads.

Strategy #7: *Provide sidewalks or crosswalks.* In many localities, sidewalks and crosswalks are simply not provided for many streets.

Strategy #8: *Upgrade inadequate sidewalks.* Even when sidewalks exist, they are often not appropriate; they are too narrow, blocked with obstructions, cracked, or not adequately connected to other area sidewalks.

Strategy #9: *Encourage and support walking and biking to school.* For example, adopt *Safe Routes to School* programs.

Strategy #10: Do not base school siting decisions solely on the desire for massive athletic facilities. The desire for large sports fields often drive school siting decisions.

THE CALIFORNIA REGULATORY PROCESS

Kathleen Moore, Director, School Facilities Planning Division, California Department of Education (CDE)

Kathleen Moore of CDE gave an overview of how state policy governs school planning and siting in California. She described how four main state agencies regulate new school projects in California ((CDE/SFPD), Office of Public School Construction (OPSC), Division of the State Architect (DSA), and Department of Toxic Substances Control (DTSC)), but depending on local circumstances, a myriad of other agencies can become involved. Moore also noted the timeliness of this forum; her staff is currently working to update the state guidelines and recommendations documents, including Title 5 and the School Site Selection and Approval Guide, and they seek input on these changes.

But in California, Moore argued, the real struggle right now is construction and land cost. “The cost to build new schools has skyrocketed beyond the capacity of state and local funding availability.” Overall, as California is building and renovating so many schools, we are doing so, she argued, in a “very, very competitive environment. We’re all vying for the same contractors, people are vying for our land – it’s a very difficult environment to work within, and we’re having constantly changing circumstances.” Moore described what she sees as three fundamental issues in California: the tension between state standards and local control

and flexibility, the unintended consequences of the state's finance-driven model of school planning, and concerns over student safety.



“California uses a financial model to drive school design. We’re at a juncture where we’re having a very difficult time accomplishing the very laudable goals talked about nationally by AAF and others, let alone making sure we’re not just building portable schools in California.”

-Kathleen Moore,
California Department
of Education

THREE KEY ISSUES SHAPING NEW SCHOOL PLANNING IN CALIFORNIA

- 1) *The tension between state standards and local control and flexibility.* In California, school districts have local control of their school construction planning. But, the state provides funding to cover about 50 percent of the cost of a new school. With that portion of the financing comes a host of standards set by state policy to ensure safety, equity, and accountability. Moore noted that many of the state standards exist as a result of lawsuits. In describing this reality, she asked, “How do we allow for innovative design locally, for school districts to respond differently in their educational specifications according to the needs of their community and the needs of their educational board, and yet not have equity and other lawsuits? What is the appropriate role of the state here?”
- 2) *The unintended consequences of California’s finance-driven model of school planning.* Moore argued that because California uses a financial model for school design, cost drives decision making rather than educational programming needs. For example, even though the benefits of small schools are lauded by many in California, the larger the school the more capable the school district is of actually funding the construction and operation of that school.
- 3) *Concerns over safety and potential lawsuits.* Moore argued that the vast majority of the state’s site acquisition requirements, which so many people across the state complain about, are in place for the safety of students, and in particular to safeguard the state from lawsuits.

Moore concluded by noting that California has done fairly well in making policies based on best practices, particularly around the maintenance of schools. “But we can always do better.” She noted that while, “some people will always say, ‘I don’t want state policies, I want to be able to do what I need to do locally,’ I welcome input on how to do that as a state – we should be open to the criticisms out there, and all work together to do better in delivering education to our students.”

PLANNING NEW SCHOOLS IN CALIFORNIA: SURVEY RESEARCH FINDINGS

Jeff Vincent, Deputy Director, Center for Cities & Schools, University of California-Berkeley

Lisa Cirill, Acting Chief, California Center for Physical Activity, California Department of Public Health

Connie Busse, Executive Director, Cities, Counties, Schools Partnership of California

To further set the context for the Forum, the results of three recent surveys of California professionals working on school planning and siting issues were presented. Jeff Vincent of the CC&S presented findings from a survey of the state's public school districts. Lisa Cirill of the California Center for Physical Activity presented findings from school board members across the state. Connie Busse of the Cities Counties, Schools Partnership of California presented findings of a survey of California local governments. All three entities will be releasing separate reports of their respective surveys, but the presenters noted three trends shared by the surveys, which speak to the complexity in planning California's new schools.



THREE OVERARCHING FINDINGS FROM THE SURVEYS ON PLANNING NEW SCHOOLS IN CALIFORNIA

- 1) *Little local collaboration between school districts and local governments exists on new school siting issues in California.* While collaboration does exist in some locales, it appears that this is not at all the norm, yet is highly desired in many locales.
- 2) *There is little understanding of the planning processes across different local entities in California.* Local government officials and planners typically do not have detailed knowledge of the state-regulated school planning processes and timelines school districts must follow. Similarly, school districts often do not have detailed knowledge of local land use planning policies and practices. This creates and supports isolated silo planning practices.
- 3) *No policy framework exists to incentivize and/or guide local agency collaboration on California school siting.* While wording in state school facilities policy encourages local government entities to work together in planning and siting new schools, there are no state policies mandating, incentivizing, or offering guidance in such local collaboration. Nor are there incentives for local governments to include schools and school districts more concretely in their planning processes and documents.

III. BUILDING CALIFORNIA'S NEW SCHOOLS: DRIVERS AND CONSTRAINTS



Following the morning presentations, participants divided themselves into six small facilitated discussion groups. The following issues were each addressed by two groups:

- 1) The location and size of new school sites
- 2) Building shared use and joint use school facilities and/or sites
- 3) Innovative school design (especially in relation to location, site size, and use of schools)

Led by facilitators, the small groups identified and discussed the issues that drive and/or constrain how siting, joint use, and design decisions get made, listing these items on white boards for display. Following the small group discussions, all participants reconvened and spokespersons from each group presented a summary of the discussion to the larger group.

In general, participants articulated that facility decisions are greatly influenced by three broad issues:

- Local trends and projections of demographic shifts
- Local trends in land cost, availability, and competition
- The characteristic of proposed sites (e.g. environmental cleanup or topography)

First, demographic shifts are projected to occur in particular locations across regions. The nature of these changes will mean new populations in various geographic areas, which drives school siting decisions.

Second, school districts compete locally among other land developers in purchasing new sites. The required public process school districts must follow in purchasing sites puts them at a disadvantage compared to private developers who can move on transactions much quicker. The typical result is that districts must seek out land that is of less interest to other developers. Sometimes new school sites are chosen by private developers and sold or given

to the district for below market value. However, these sites are often ones with difficult or less desirable characteristics that districts must then fund to mitigate.

Finally, the characteristics of proposed sites (e.g., environmental cleanup or topography) create specific risks and costs that school districts may be reluctant to take, even though a site may be in a preferred community location.



A. NEW SCHOOL SITING

The new school siting groups discussed the importance of siting decisions for schools and communities throughout the state. Many saw siting decisions as tools in contributing to “sensible” suburban growth and combating suburban sprawl. Therefore, many argued, the siting process must be a mechanism that cultivates greater collaboration between local governments and school districts on land use planning. The school siting process also holds the potential for many other opportunities including:

- cost reduction for school districts and local governments (e.g., coordinating new school sites with existing infrastructure).
- opportunities for joint uses, which may provide increased community amenities and cost savings to local entities.
- support for local schools from community members and parents through their engagement in the siting process.
- opportunity for community reinvestment in urban and/or older areas.
- opportunity for school districts to revisit their existing assets with an eye toward creating safer schools, small schools, and/or neighborhood schools that enable children to walk or bike to school, which may increase student health and lower local traffic congestion and greenhouse gas emissions.
- preservation of local open space.

**“We strived to get a city planner on our district master plan committee, but had no luck and the city’s general plan committee has no school district representatives on it. They literally fax me the form about school capacity and I fax it back. That’s the planning process! There is no integration of planning.”
-Forum Participant**

However, because the process of siting new schools in California is difficult, complex, expensive, and detached from other local land use decision making, these opportunities often get lost in the process that is first and foremost designed to finance and build new seats for children.

“A big issue is that there is no funding for local planning and collaboration.

Currently, there is no state policy framework to incentivize collaborative planning.”

-Forum Participant

“We need to remember that there is a lot of flexibility in Title 5 in the way it was written and the way it’s applied. For things like site sizes and classroom sizes, the regulations allow documented exemptions to the standards.”

-Forum Participant

What factors drive and/or constrain how new sites get chosen?

Local Politics and Practices:

- The level of collaboration between school districts, local governments, and developers. Quite often school districts and local governments collaborate very little on planning new schools.
- The costs required to cover “off-site costs” requested by local governments such as landscaping or traffic impact mitigation.
- The varied levels of experience and expertise of school district staff on new school planning.
- Perceptions among school board members and parents of student safety with respect to proposed sites.
- The level of community support and/or opposition to proposed sites. Community opposition has successfully derailed many local siting decisions.

State Policy:

- California’s school facility funding structure. Existing policies encourages larger schools on undeveloped suburban sites.
- California’s tax structure. Taxes are derived from revenue generating land uses – not public goods like schools – thereby often making schools unwanted land uses from the perspective of local governments.
- The availability or unavailability of state funding for “infill” sites that may be expensive and/or require clean up and CEQA study.
- State regulations and/or recommendations on class size, site size, program space, and physical education space.
- California’s “50 percent rule.” This policy affects whether school districts will renovate existing schools or choose to find new sites to replace an old school. This “rule” is base on the fact that the state recommends that if renovating an existing

school costs 50 percent or more than the cost of building a new school, the district should build a new school. Although not a mandate, this “rule” has become common practice throughout the state, which has encouraged abandoning old schools.

“From a built-out community’s perspective, when we have to site a new school, the issue is that we can’t find a site that’s big enough. It’s really about trying to assemble and cobble together some minimal-size thing that you can call a postage-stamp of a school site.”
-Forum Participant

B. JOINT USE SCHOOLS

Joint use schools – ones that share facilities such as libraries, recreation facilities, or playfields with municipalities, other educational agencies, or nonprofit organizations – present numerous opportunities for schools and local communities. There was general agreement that joint use is a strategy to “put the public back in public education” and to “reconnect” schools with their communities. Some commented that joint use is “good public policy” and can have cost effective outcomes by leveraging a variety of funding streams and resources. In general, when done effectively, participants suggested that joint use schools can meet regional and local needs for services and amenities, create greater educational opportunities, can offer more efficient use of land and facilities, and can be a tool for strengthening neighborhoods and communities. Yet, participants noted the extreme complexities involved in making joint use schools work in California.

What factors drive and/or constrain how joint use schools are incubated and operationalized?

Local Politics and Practices:

- Public demand of local government collaboration, which can support joint use proposals.
- Entrenched bureaucracies and issues of agency “turf” to build trust, particularly between school districts and local governments.
- The attention paid to relationship building during planning, design, and operation of a joint-use project.
- The amount of support and leadership shown by partnering entities’ leaders.
- The challenge in blending different funding sources for joint use projects.
- The detailed legal negotiations on funding, liability, and operations that are required for joint use projects.

“Good leadership and good relationships drive joint use projects. One of the main constraints is that these relationships aren’t institutionalized and they aren’t in policy.”
-Forum Participant

“Joint use offers a way to bring the public back into public education. With around 70% of Californian’s not having school-age children, what is their incentive to financially support schools? You have to connect those people to the schools by giving them benefits of services and amenities.”
-Forum Participant

- A host of operational issues found in joint use projects including, for example, different pay structures for similar staff of partnering entities, coordinating and funding custodial needs, maintenance, and energy costs.
- Local community opposition to site and/or project.

State Policy:

- The amount and structure of funding/resources for planning, design, construction, and operation.
- Perceptions of security and liability problems.
- Lack of support from current state policy. While the state encourages joint use and has limited state funds for it, current policy does little to make joint use projects easier to do.
- Lack of information and models on best practices in joint use.

“We feel there is a gap between what we’re planning for and what we often get at the end of the pipeline – educators need to get away from old-school thinking in terms of design.”
-Forum Participant

C. SCHOOL DESIGN

Recent research and publications have made significant strides in demonstrating how good school design can positively affect teaching and learning. Participants noted how the increasing awareness of these ideas coupled with the tremendous school construction and renovation spending in California provides opportunities to incorporate innovative design into the state’s schools:

- Design can not only enhance traditional learning environments but can also be instrumental in supporting increased numbers of alternative educational programs being offered in schools.
- Design can also help neighborhood schools build local identity and better connect physically to their communities.
- Design should both derive from and support “principles of learning.”

“Principles of learning should drive ‘architectural programming’ first and foremost.”
-Forum Participant

Participants generally agreed that California has an eager public that wants good schools; therefore they should support high-quality school design. Also, design plays a key role in crafting creative solutions to the constraints of small sites, limited funding, or old buildings needing major upgrades. Thus, design is intricately

connected to issues of school siting and joint use. However, participants noted the difficulties in implementing innovative designs into new and/or renovated schools in California.

What factors drive and/or constrain how new school designs get determined?

“We’re experimenting with building small primary centers of about 200 kids in K-2 or K-3. One reason is that we can buy relatively fewer acres with less community impact, but the cost of operation is going to kill us. Educationally, everyone knows small schools are the right thing to do, but we can’t afford to operate them.”

-Forum Participant

“California has a real problem with doing schools that are reused buildings or mixed use. I think reuses are some of the most interesting schools out there.”

-Forum Participant

Local Politics and Practices:

- Design is largely driven by three things: budget, site size, and educational program needs.
- The lack of knowledge among key decision makers (such as school board members) about how design affects teaching and learning and successful innovative practices limits nearly every local design process. Particularly with schools, many people resort to “old school thinking” and “nostalgic gravity” when considering how a school should look, thereby stifling innovative design ideas.
- The perceived threat of litigation against the state and local school districts, particularly on perceptions of security and safety constrains innovative design choices.

State Policy:

- State rules and standards constrain local design choices and flexibility (e.g., classroom sizes, and space allotments)
- The state mandated lowest responsible bidder (“low-bid”) requirement for awarding school construction projects can limit innovative design because contractors vary in their experience in building outside the norm.

As evidenced by the discussion, the landscape for building new schools in California is highly complex and transcends many levels of policy. The next section presents the three fundamental lessons learned by the forum and lists recommendations for state and local action to improve school facilities for California’s students.

IV. LESSONS LEARNED AND RECOMMENDATIONS



From this forum of leaders in school facility planning from across the state, three key lessons were learned and specific recommendations were generated for California’s policy makers at the state and local levels.

This Forum was convened in the belief that California has a unique opportunity that only occurs once in a generation to use the recent massive public investment in school facilities as a mechanism to create superior learning environments that are integrated into and viewed as strategic assets in their communities. This critical juncture notwithstanding, building new schools and modernizing existing ones to provide for California’s diverse and growing student population is a complex endeavor. The state’s voters have been supportive of the need by approving more than \$60 billion in both local and state bonds since 2000. Indeed California’s need for school facilities is great as the state continues its steady growth trends. Many districts struggle to find sites for new schools amidst competitive real estate markets and identify adequate funding to build them as well as make necessary renovations to older existing schools. The result is that districts often settle for less than optimal site locations and/or school buildings themselves because of budget or other constraints.

LESSON ONE: *California needs a statewide vision for its ongoing major public investment in school facilities that is connected to broader visions of educational, community, and regional growth and prosperity.*

“There has to be a state vision for school facilities in California. First in relation to educational outcomes and second in relation to how they fit into our communities. This bottom-up vision should be the guide, rather than the current funding allocation framework, which requires reexamining the state’s school facilities funding priorities.”
-Forum Participant

As the state continues to allocate more than \$30 billion in recent state school construction bonds, the main drivers shaping this investment appear to be: (a) the race to provide enough seats for students in overcrowded schools, and (b) the building and renovating of schools to maximize student safety. For a host of reasons, namely the high cost of California’s land and construction, too many new schools are often “simply adequate” and lack the innovative siting and design solutions that enhance teaching, learning, and community life. As a result, California is missing a significant opportunity, indeed a once in a generation opportunity, to link billions of dollars in school construction funding to a broader vision of community and regional growth and prosperity.

A fundamental illustration of this lost opportunity is seen in the lack of policy and practice that exists between school facility planning and local and regional land use and community planning. According to forum participants, the status quo is upheld by **two key tensions**, which impede different stakeholders from

understanding their respective goals and processes and from collaboratively working together on school facilities planning.

“The first thing that happens when standards are eliminated or don’t exist is an equity lawsuit. And the first thing that happens in an equity lawsuit is they ask for standards.”
-Forum Participant

First, a tension exists between the need for state school facility standards and the desire for local flexibility and innovation. While many forum participants argued that current state facility standards are constraining, representatives from state agencies, including the Department of Education and the Division of the State Architect, noted that these standards and recommendations exist:

- As a policy response to lawsuits or the threat of lawsuits, especially those related to equity and liability
- To ensure parity, equity, and adequacy in school facilities across the state
- To ensure state funding is being spent appropriately to meet the state’s interest in building safe and educationally appropriate schools



Second, a tension exists between educators and community planners, especially smart growth advocates. Four issues were raised that highlight this tension:

- Education goals and community goals are implicitly intertwined, yet local decision making rarely considers them explicitly together because school districts and local governments are autonomous and largely unaccountable to each other
- Smart growth goals of curbing sprawl and encouraging compact development can run counter to parent and educators desire for larger, comprehensive schools that offer wide programmatic and extra curricular activities
- Smart growth planners have not had success involving school districts in local and regional planning, and conversely, school districts have not adequately sought the council of smart growth planners.
- Educational leaders do not necessarily have the training or knowledge of smart growth principles and smart growth principles can positively influence to school construction and development.

RECOMMENDATIONS for creating and implementing a statewide vision for public school facilities that is connected to broader visions of educational, community, and regional growth and prosperity include:



Establish Statewide Task Force to Craft Vision for California’s Public School Buildings. A task force should be created to define a vision and articulate a master plan for the state’s public school capital investment. This endeavor should involve a dialogue and planning process that has wide participation from state agencies and lawmakers, local governments, local school districts, local community groups, and land use and education-related organizations throughout the state. Task force members and participants should represent a variety of perspectives related to issues of education, school facilities development and management, community revitalization, land use planning, public health, and smart growth.

Facilitate Public Participation Process in Revising California Department of Education Policy Documents. A broad participatory process should guide and inform the revision and update of California Department of Education, School Facility Planning Division documents.² These revisions would help the state to provide more “comprehensive” and “clear” guidance on school siting for local school districts. In particular, the task force would revisit current policies on:

- site size recommendations
- classroom size
- space allotments for program needs, especially physical education
- joint use schools

“There seems to be a lot of inequality in school facility quality across California. The state needs to ask itself, how does new construction today create equity or inequity, given the funding and cost crises we are facing?”
-Forum Participant

LESSON TWO: *California needs state level policy incentives to foster effective local practice in building high-quality school facilities and creating prosperous communities, while ensuring educational equity.*

To implement a new vision for school facilities in California as recommended above, the state will inevitably need legislative and policy change to better inform, incentivize, and provide guidance for the largely local practice of planning and siting new school facilities. Perhaps most important, is the need for policy where none exists, such as ways to incentivize local interagency collaboration. This requires not just amending existing policies, such as site size recommendations, but devising fundamentally new policy where there is currently a vacuum. While some participants argued that “sticks” are just as important as “carrots,” the majority

of forum participants emphasized that the state should seek to create incentives, not mandates, to support more effective local practice in crafting state policy change.

RECOMMENDATIONS for state policy change include:

“Collaboration and trust is a huge issue. Local ‘2x2 committees,’ with two school board members and two city council members who regularly meet, are a good mechanism to build trust and institutionalize collaboration between the school district and city.”

-Forum Participant

Support Local Government Partnerships. Local school districts and other local government entities need better incentives and guidance to collaborate on initiatives that include:

- Establishing local ‘2x2’ committees, whereby executive level staff from districts and city agencies meet regularly to discuss operations, policy, and development issues
- Aligning district long-range facility plans and the local government general plans and perhaps exploring the possibility of making education a more robust element of local municipal general plans
- Investigating joint use opportunities with each new school planned at the local level

Incentivize the Creation of Local School District Facility Master Plans. All school districts should have up-to-date long-range facility master plans, which should be aligned with the goals crafted in statewide vision and master plans noted above. These plans should squarely link to the district’s educational programming plan and concretely address school design. In addition, school district facility master plans and individual school designs should be created with authentic participation from parents, teachers, and community stakeholders.

“The external costs of school siting alternatives need to be evaluated by school districts and presented to school boards to better guide siting decisions. These would include environmental, economic, and social impacts, not just student safety. State legislation could be used to require and assist with this type of analysis.”

-Forum Participant

Establish Local School Siting Criteria. In line with local master plan creation that follows a state vision, school districts and local governments should work collaboratively to establish criteria for school siting decisions that aim toward meeting broader community outcomes such as smart growth, open space preservation, community revitalization, environmental sustainability, effective land use, and healthy and sustainable communities.

Support Innovative “Pilot” Schools. Innovative “pilot” schools, such as mixed-use schools and schools in reused buildings, that have freedom from some state design standards should be encouraged and allowed to foster experimentation with new practices and solutions.

Further Streamline the State Agency Process. The four main state agencies involved in school planning and siting have made tremendous strides in streamlining the processes local school

districts must follow. Still, participants repeatedly noted two key issues that have been addressed in more detail in recent reports by the Little Hoover Commission (2000) and the California Performance Review (2004):³

- The state-mandated process of school design and construction approval should be further streamlined
- Better cooperation, agreement, and clarity from state agencies (e.g., CDE, DSA, DTSC, and OPSC) on design requirements, flexibility, and possibilities are needed.

“Local practitioners don’t feel they have the information, the training, or the knowledge to even know how to collaborate. Our group talked about leaving no school board behind, no municipality behind – they need better training so they can be more accountable for their decisions about school facilities.”

-Forum Participant

Provide Sufficient Funding to Incentivize Effective Local Practice

- Allocate funding to support planning process phases. Currently state funding focuses on outcomes rather than process, even though building new schools entails detailed processes.
- Stabilize state school facilities funding. A continuous, stable, and predictable flow of capital funding from the state is needed for local districts to better plan, site, and design new schools. The episodic, voter proposition system currently in place encourages school districts to compete for state funding, which can work against careful local-level planning and collaboration among local government entities. Additionally, this system is believed to inadvertently increase construction costs, namely because it does not support or encourage local district long-range master planning.
- Provide adequate capital funds. The state should reevaluate school construction costs to ensure that its facility grants are adequately contributing to the actual costs incurred by local districts.



LESSON THREE: *California needs research, best practice documentation, and education to guide local school facility planning.*

In order to build high-quality new schools that are superior learning environments and strategic assets in their communities, research, best practices information, and education of key stakeholders are needed.

Professional organizations and research entities have an important role in informing policy makers and practitioners. These groups can conduct independent research, provide interdisciplinary educational forums and discussions, and generate/disseminate publications documenting best practices.

RECOMMENDATIONS for documenting and disseminating information:

“This idea of ‘schools as centers of community,’ who decided that? My school board doesn’t agree with that. I think it’s a really great idea, but all of the state laws don’t point to that. I’m going to go back home to my folks and say hey, did you know that we’re centers of community?”
-Forum Participant

Conduct Research on Innovative School Facility Planning and Design: Empirical research is needed to analyze and measure the benefits and potential costs of implementing the range of policies discussed and identified throughout this report. This research could include:

- Longitudinal analysis of new schools built with innovative design strategies to demonstrate the benefits of these strategies for schools and communities. This should include analysis of how these concepts might be applied differently in different regions, communities and schools.
- Measurement of the costs and benefits of implementing and operating joint use schools in short and longer term scenarios to school districts, schools, communities, and local government entities
- Analysis of the use of public-private partnerships to build new schools, particularly for creating joint use schools and/or multi-use sites.

Document best practice models of innovative school facility planning and design and disseminate information across the state to better guide local practice. This information should provide a range of possibilities recognizing the differing socio-economic contexts and political environments that exist across California.

- One key example discussed frequently at the forum, and advocated for by the AAF and other attendees, is designing and building “schools as centers of community.”⁴ This model weaves public schools into the fabric of their local community through strategies such as colocating schools and other services and/or amenities, siting schools to encourage walking and biking to school, or building joint use schools.



Additional topics for best practices information include:

- Meaningful community involvement in planning and siting
- Collaboration with local governments
- Site selection strategies
- Cost savings related to site selection
- “Land banking” strategies for future new schools⁵
- Funding, designing, and constructing joint use schools
- Roles for third party entities (e.g., community based organizations and foundations) in joint use projects
- Use of “form-based codes” for school design⁶
- Examples of key legal, political, and financial documents used in innovative new school projects

“There’s always a need to be equitable across all districts, and I have trouble envisioning our huge state machine making such broad changes like we’ve talked about today. Policy changes happen incrementally, and I think something we could do almost immediately is come up with ways to educate each other so that we’re dealing with a level playing field and not pointing fingers at each other.”

-Forum Participant

Provide Professional Education on Innovative School Facilities for Key Stakeholders. Public advocacy for school facilities investment outlined in this report requires local leaders, policy makers, and communities to be better educated on the benefits and possibilities of collaborative practices, such as joint use schools. Specifically:

- School district leaders need better understanding of local land use planning processes and outcome goals
- Local government leaders need better understanding of school district planning processes and state guidelines
- State legislators need better understanding of the complex obstacles in school siting, joint use, and school design on the state and local level
- Local school districts and local governments need information and best practices on why and how to work together
- State entities should better educate state legislators on the challenges local school districts face in building and renovating schools.

V. CONCLUSION



Building Schools, Building Communities: A Forum on the Role of State Policy in California brought together a diverse set of stakeholders from across the state for the first time and highlighted an array of important issues in building new schools for California's six million school children, their families, and their broader communities.

The forum offered a rare venue for these practitioners and policymakers to come together for an open and critical discussion about the very complex and important opportunities, struggles, and tensions in siting new schools, building joint use schools, and incorporating innovative school design to support teaching and learning. In particular, participants spent a great deal of time discussing issues related to the often complicated relationship between local governments and school districts on school planning practices. While collaboration at the local level was identified as crucial to effective practice and good planning for both schools and communities, incentives and guidance on how to do so are lacking and highly desired.

A key concept that underscored nearly every issue discussed and recommended by forum participants was that interagency trust and relationship building is paramount to realize the goals, objectives, and policy changes proposed in this report.

Specifically, trust and relationship building must be improved at three levels between:

- The different state agencies governing school planning and construction (i.e., CDE, DSA, OPSC, and DTSC)
- Local school districts and these state agencies
- Local school districts and local governments

The forum pointed to the complexity of school facilities planning. While school districts need to incorporate smart growth principles into their criteria for building new schools, the processes by which schools and communities are planned also need fundamental transformation, in order to better align with each other. Thus, the onus for change lies not only with state agencies governing California's school construction policies and regulations, but also on the bodies that oversee policies guiding local government planning. With fundamental transformation and alignment at the

state level, local level actors will be empowered to change their practice to also bridge across jurisdictions.

The recommendations put forth by participants in the forum outline a series of steps toward improving trust and building relationships within localities and with state agencies. Many of the issues and recommendations identified in this report mirror those made by the Little Hoover Commission in their 2000 report, *To Build a Better School*, addressed to the Governor and State Legislature. However, nearly a decade later, few of the recommendations have been addressed. As California continues its growth patterns and the state continues to make important major investments in new public school facilities, now is the time to craft a vision and the strategic supporting policies to ensure educational, community, and regional growth and prosperity for generations to come.



VI. APPENDICES



APPENDIX I FORUM AGENDA

MONDAY, JUNE 11, 2007, DINNER

Welcome and Introductions

- Deborah McKoy, Executive Director, Center for Cities & Schools, UC Berkeley
- Nancy Zivitz Sussman, Program Director, American Architectural Foundation
- Harrison Fraker, Dean, College of Environmental Design, UC Berkeley

Keynote Speaker

- California State Senator Tom Torlakson
Presentation on current and proposed California policies and legislation affecting school planning and design

Emerging Trends in School Design

- Tom Blurock, Principal, IBI/Blurock
Presentation and slides on unique and innovative school designs from across the country.

TUESDAY, JUNE 12, 2007, ALL DAY FORUM

Welcome and Introductions

- Jeff Vincent, Deputy Director, Center for Cities & Schools, UC Berkeley
- Ron Bogle, President/CEO American Architectural Foundation

Building Schools and Building Communities: A National Perspective

- Tim Torma, Senior Policy Analyst, U.S. Environmental Protection Agency
Presentation on the relationship between building new schools and meeting local and regional smart growth goals.

The California Regulatory Process

- Kathleen Moore, Director, School Facilities Planning Division, California Department of Education
Presentation on state policies guiding new school construction in California and the ways in which these policies seek to promote equity across the state.

Planning New Schools in California: Survey Research Findings

- Jeff Vincent, Deputy Director, Center for Cities & Schools, UC Berkeley
- Lisa Cirill, Acting Chief, California Center for Physical Activity, California Department of Public Health
- Connie Busse, Executive Director, Cities, Counties, Schools Partnership of California

Presentation of the findings from three recent surveys of school district leaders, local public health officials, and local government officials from across the state on school planning issues.

Going Deep: What are the promises and challenges to building California’s new schools?

- *Facilitated small group work sessions*
- *Groups focus on state policies and local practices on one of three themes:*

- 1) *New school siting*
- 2) *Joint use schools*
- 3) *Innovative school design*

(Reference materials provided summarizing key state regulatory points.)

- *Small groups report out*

Lunch and viewing AAF Great Schools by Design videos

Moving into Action: Small group action planning and report back

- *How can we move our best ideas forward from vision to reality?*

Looking through new lenses: Where do we go from here?

- *Small groups report back*
- *Large group discussion – Next steps (local level, state level, and big picture)*

Closing Remarks followed by wine and cheese reception

- Ron Bogle, President/CEO American Architectural Foundation
- Deborah McKoy, Executive Director, Center for Cities & Schools, UC Berkeley



APPENDIX II

FORUM PARTICIPANTS

- Janet Abelson, Councilmember, City of El Cerrito, El Cerrito, CA
- Bruce Appleyard, AICP, Doctoral Student, College of Environmental Design, UC Berkeley, Berkeley, CA
- Constantine I. Baranoff, Associate Superintendent, Facilities and Planning, Elk Grove USD, Elk Grove, CA
- Victoria Bergsagel, Director, Architects of Achievement, Seattle, WA
- Ariel Bierbaum, Program Manager, Center for Cities & Schools at UC Berkeley, Berkeley, CA
- Thomas Blurock, Principal, IBI/Blurock, Irvine, CA

Ron Bogle, Hon. AIA, President/CEO, American Architectural Foundation, Washington, DC

Duwayne Brooks, Education Facilities Consultant, Murdoch, Walrath, and Holmes, Sacramento, CA

Shirl Buss, PhD, Senior Associate, Leslie Stone Associates, Sausalito, CA

Connie Busse, Executive Director, Cities, Counties, Schools Partnership of CA, Sacramento, CA

Stephan Castellanos, FAIA, Former California State Architect, Director of Architecture, Quad Knopf, Visalia, CA

Kathleen Chavira, Principal Consultant, California Senate Education Committee, Sacramento, CA

Lisa Cirill, Acting Chief, California Center for Physical Activity within the CA Department of Public Health, Sacramento, CA

Scott Clark, Project Manager, Local Government Commission, Sacramento, CA

Leigh Coop, Facilities Director, Vacaville Unified School District, Vacaville, CA

Janet Dixon, Director of Planning and Development, Riverside Unified School District, Riverside, CA

Dennis Dunston, AIA, Principal, HMC Architects, Coalition for Adequate School Housing Board (CASH), Sacramento, CA

Mary Filardo, Executive Director, 21st Century School Fund/BEST, Washington, DC

Harrison Fraker, FAIA, Dean, UC Berkeley, College of Environmental Design, Berkeley, CA

Bruce Fuller, PhD, Professor, UC Berkeley, Policy Analysis for California Education (PACE), Berkeley, CA

Mavonne Garrity, Assistant Executive Officer to the State Allocation Board, Office of Public School Construction, Sacramento, CA

Chris Grimes, AICP, REFP, Director of Facilities Development, Roseville Joint Union High School District, Roseville, CA

Deb Hubsmith, Founding Coordinator, Safe Routes to Schools National Partnership, Fairfax, CA

Curt Johansen, Executive Vice President, Triad Communities, Vallejo, CA

Ellis Kaufman, Director, Small Learning Communities and School Redesign, Los Angeles Unified School District (LAUSD), Los Angeles, CA

Dan Levernier, PE, Regional Manager, Division of the State Architect, Department of General Services, Sacramento, CA

Deborah McKoy, PhD, Director, Center for Cities & Schools, UC Berkeley, Berkeley, CA

Kathleen Moore, Director, School Facilities Planning Division, CA State Dept of Education, Sacramento, CA

Marguerite Noteware, Research Consultant, California School Boards Association, West Sacramento, CA

Michael O'Neill, Consultant /Field Representative, CA Department of Education, School Facilities Planning Division, Sacramento, CA

Linn Posey, Doctoral Student, Graduate School of Education, UC Berkeley, Berkeley, CA

Ted E. Rozzi, Assistant Superintendent of Facilities, Corona-Norco Unified School District, Norco, CA

William Savidge, AIA, Engineering Officer, West Contra Costa County Unified School District, Richmond, CA

Tony Smith, PhD, Superintendent, Emery Unified School District, Emeryville, CA

Jason Spencer, Legislative Aide, Senator Tom Torlakson's Office, Sacramento, CA



Mamie Starr, Administrative Director, Operations and Support Services,
San Joaquin County Office of Education, Stockton, CA

Kevin Sullivan, Advisor, American Architectural Foundation,
Washington, DC

Nancy Zivitz Sussman, Program Director, American Architectural
Foundation, Washington, DC

Tom Torlakson, Chair, Appropriations Committee, CA State Senate,
Sacramento, CA

Tim Torma, Senior Policy Analyst, Office of Policy, Economics and
Innovation, U.S. Environmental Protection Agency, Washington, DC

Joyce Tsepas, Program Assistant, American Architectural Foundation,
Washington, DC

Edwin Van Ginkel, Senior Development Manager, New School
Construction Program, Los Angeles Unified School District, Los
Angeles, CA

Jeff Vincent, PhD, Deputy Director, Center for Cities & Schools, UC
Berkeley, Berkeley, CA

James Watts, Director of Architecture and Planning, San Diego Unified
School District, San Diego, CA

Jess Wendover, Director of Mayors' Institute on City Design,
Washington, DC



¹ See <http://www.cde.ca.gov/ls/fa/sf/schoolsiteguide.asp>.

² e.g., *Guide to School Site Analysis and Development, Educational Specifications: Linking Design of School Facilities to Educational Program and School Site Selection and Approval Guide*

³ Little Hoover Commission. 2000. *To Build A Better School*. Sacramento, CA: Little Hoover Commission; California Performance Review. 2004. *Government for the People for a Change*. INF 31 One-Stop Shop for School Facility Approval. Available online: <http://cpr.ca.gov/report/cprprt/issrec/inf/inf31.htm>.

⁴ For examples, see U.S. Department of Education. 2000. *Schools as Centers of Community: A Citizen's Guide for Planning and Design*; Council of Educational Facility Planners International, Inc. and U.S. Environmental Protection Agency. 2004. *Schools for Successful Communities: An Element of Smart Growth*; and American Architectural Foundation and KnowledgeWorks Foundation. 2005. *Report from the National Summit on School Design*.

⁵ "Land banking" is the process of buying and holding land for future sale or development. Parcels of land desirable for "land banking" are those that lie directly in the growth path of developing cities.

⁶ "Form-based codes" are a method of regulating development to achieve a specific urban form and are designed to create a predictable public realm by controlling physical form primarily, with a lesser focus on land use, through city or county regulations. "Form-based codes" address the relationship between building facades and the public realm, the form and mass of buildings in relation to one another, and the scale and types of streets and blocks.

AUTHORS:

Jeffrey M. Vincent, PhD
Ariel H. Bierbaum, MCP
Deborah L. McKoy, PhD
Linn E. Posey, MA

LAYOUT:

Nicole Kite

CENTER FOR CITIES & SCHOOLS

Institute of Urban and Regional Development
316 Wurster Hall
University of California-Berkeley
Berkeley, CA 94720

<http://citiesandschools.berkeley.edu>

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