

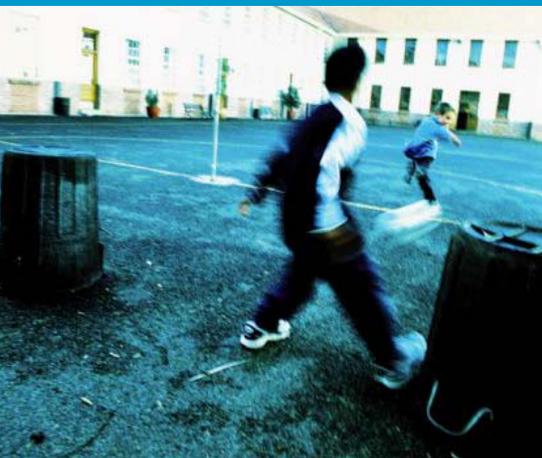
# San Francisco's Public School Facilities as Public Assets:

## A Shared Understanding and Policy Recommendations for the Community Use of Schools

*Prepared for*

San Francisco Unified School District and

San Francisco's Department of Children, Youth, and Their Families



<http://citiesandschools.berkeley.edu/>

**Authors**

Jeffrey M. Vincent, Mary Filardo, Jordan Klein, and Deborah L. McKoy

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The Center for Cities & Schools (CC&S) at the University of California, Berkeley works to promote high quality education as an essential component of urban and metropolitan vitality to create equitable, healthy and sustainable cities and schools for all.

Center for Cities & Schools  
Institute of Urban and Regional Development  
University of California, Berkeley  
316 Wurster Hall #1870  
Berkeley, CA 94720-1870

<http://citiesandschools.berkeley.edu/>

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# Executive Summary

SFUSD has a unique opportunity to both fully utilize one of its greatest assets – the facilities and grounds – while simultaneously helping to realize the goals of the district’s strategic plan and coordinate with city agencies, other public entities, and community organizations that provide programs/services to children and families. The Department of Children, Youth, and Their Families (DCYF) and San Francisco Unified School District (SFUSD) commissioned UC Berkeley’s Center for Cities & Schools (CC&S) to inform their ongoing joint efforts to improve policy and procedures relating to community use of SFUSD school facilities. This report presents research findings and policy recommendations from a yearlong investigation to establish a more effective “joint use” strategy in SFUSD. Additionally, CC&S has an ongoing collaboration with 21<sup>st</sup> Century School Fund (21CSF) in Washington, DC and its national BEST collaborative, to provide resources and tools to support community use of schools; 21CSF/BEST contributed greatly to this project.

## Project Scope

Engaging a diverse set of local stakeholders, CC&S worked with DCYF and SFUSD leadership to:

- a. Develop a shared understanding among school, city, and community partners of how public school facilities are a public asset; and
- b. Recommend the policy changes needed to implement this shared understanding.

## Research Findings

Through quantitative and qualitative data analysis, we come to the following findings, related to Utilization, Management, Policy, and Budget. Additionally, detailed descriptions and diagrams of current SFUSD policies and processes were created to provide clarity among stakeholders (see the Appendices for more information).

## Utilization Findings

- 1) **Many SFUSD school buildings and grounds are underutilized during the instructional day according to California Department of Education standards.** Focusing just on SFUSD’s educational buildings and grounds that have immediate community use potential, there are 134 schools with about 7.5 million square feet of indoor space and about 5.5 million outdoor square feet (approximately 127 acres of outdoor space). With current enrollment at more than 55,000 students from Kindergarten through 12th grade, this means there is on average about 134 indoor square feet per student and 100 outdoor square feet per student in SFUSD during the instructional day. The California Department of Education’s (CDE) recommended indoor space per student ranges from 63 square feet (ES) to 95 square feet (HS).
- 2) **Demand exists for school spaces by CBOs and other members of the San Francisco community.** Analysis of available SFUSD data on facilities use by non-school district users do show what appear to be high (and steady) levels of use. The Real Estate Office issues about 1,200 Facility Use Permits per year and the Student Support Services Department coordinates with more than 450 CBOs providing services/programs for SFUSD students.
- 3) **Use varies among schools and neighborhoods.** Permitted community use of public school facilities is widely distributed across San Francisco; schools in the central and eastern neighborhoods of the city tend to experience less permitted community use than those in the western and northern areas.
- 4) **Community users and uses vary across the district.** A wide variety of users and uses occur in SFUSD school facilities, from CBO program/service provision to before- and after-school care, to sports leagues, city department activities, and private individuals or entities renting space for single-use activities or multiple days. Nearly 40 percent of CBOs using school space report to address “Academic Enrichment.”

## Management Findings

- 1) **SFUSD has not fully developed its capacity to support community use, compared to other school districts.** Compared to nine case study school districts, SFUSD has a less robust set of policies, procedures, and guidelines on community use of facilities.
- 2) **SFUSD has three formal programs managing community use of facilities; the main two lack procedural alignment.** The Real Estate Office's Facilities Use Permit Process and the Student Support Services Department's Community Based Organization Program lack alignment in policy and procedures to maximize community use and assessment. The third program, the "Schools as Community Hubs Pilot Project" is a partnership between the City and County of San Francisco and SFUSD, whereby 10-12 school playground gates are open for community use on the weekends.
- 3) **SFUSD lacks adequate information collection tools to fully understand facility use and demand.** As a result, SFUSD does not have solid information on: the different types of users, the amount of space each user utilizes, the purposes of the uses, or who is denied use and why. Not having this information adds difficulty to establishing policies and procedures to meet the variety of user needs. In particular, the lack of information inhibits SFUSD's ability to conduct community use revenue/cost recovery projections or understand untapped demand found in the Use Permit denials.

## Policy Findings

- 1) **Little community use policy and procedural guidance is provided by the State of California and/or the SFUSD School Board.** California's Civic Center Act requires school boards to establish rules and regulations to encourage community use, but provides little policy guidance. SFUSD's School Board policies provide vague direction on community use.
- 2) **Lack of formalized vision exists for SFUSD schools to serve as public assets.** Stakeholders in San Francisco have not yet established a shared philosophical vision for schools as public assets, that acknowledges both the costs and the benefits of community use of school spaces and the role these facilities play in supporting programs and services for students and communities.
- 3) **Lack of overarching strategic policies and/or procedures exist to fully support SFUSD schools as public assets.** While community and CBO use of school facilities occurs frequently, the district currently does not have a single, overarching joint use policy framework that is structured to coordinate and maximize efficiencies among the variety of uses, users, and programs/services being offered.

## Budget Findings

- 1) **SFUSD's revenue from facilities use permits appears low.** Recent years of Use Permit revenues have ranged between \$1 million and \$1.5 million, with the district only generating about \$0.20 per indoor square foot from community use. Given that SFUSD is paying \$28.74 per square foot per year to operate and maintain its facilities, SFUSD is recouping less than one percent of its facilities costs (.7 percent) through community use revenues. As a result, SFUSD significantly subsidizes the community use of its facilities.
- 2) **While significantly subsidizing community uses, SFUSD has limited capital funds for facilities renovation and repair.** Intensifying the utilization of school buildings and grounds (no matter who the user) incurs costs to the district, including increased custodial needs and additional wear and tear on facilities. SFUSD's current capital program totals about \$850 million, focused mainly on repair and renovation of existing buildings and replacement of existing modular buildings with permanent classroom structures. There is an additional \$690 million dollars in identified facilities needs over the coming decade.

## Recommendations

- 1) **Formally adopt a vision statement for SFUSD school facilities to serve as public assets that support the District's Strategic Plan and community needs.** The adoption of a vision statement by the SFUSD Board of Education and the SF Board of Supervisors will set a clear direction on district and municipal philosophy and intent. The vision statement will set the framework for the development of policy by encouraging a “culture” of community use within the district, from top leadership to the school sites, and with buy-in from stakeholders who have a vested interest in more intensive community use.
- 2) **Establish defined policies and procedures for community use with guiding principles as the foundation.** SFUSD should formally adopt a set of *Guiding Principles* for Community Use of School Facilities: a) community use policies will be clearly defined and communicated; b) community use policies will prioritize partnerships with organizations that provide programs and services inside schools to SFUSD students, and that are aligned with the District's goals and strategies; c) costs associated with community use will be shared by SFUSD and users; and d) community use policies, procedures, and outcomes will be consistently evaluated to ensure accountability and improvement. Three inter-related policies are recommended to align community use to the strategic plan: 1) adopt a multi-tiered fee structure for community use; 2) establish a method to assign users to the cost tiers; and 3) establish a procedure for CBO outcome assessment. Implementing such a fee structure should enable SFUSD to charge less to CBOs, while simultaneously increasing facilities use revenues.
- 3) **Expand management capacity and support for community use of SFUSD buildings and grounds.** To address the challenges identified in this report, the SFUSD must develop a comprehensive space management infrastructure that efficiently and appropriately facilitates community use. There are two key components of the management infrastructure: staffing and implementation tools.
- 4) **Establish budget and revenue support for public school buildings and grounds that are healthy, safe, well maintained and designed for optimal education and community use.** Three key steps are recommend: 1) To secure adequate revenue to support more intensive community use, SFUSD needs to know the full cost of operating and maintaining its facilities; 2) SFUSD should model different tiered fee structure approaches on revenues and test the feasibility among stakeholders; and 3) SFUSD and the City should develop operating and capital budgets to adequately support maintenance, repair, and capital projects to enable high quality public school infrastructure for optimal education and intensive community use.

## Abbreviations

BEST	Building Educational Success Together
CBO	Community Based Organization
CC&S	UC Berkeley’s Center for Cities & Schools
CCCA	California Civic Center Act
DCYF	San Francisco Department of Children, Youth, and Their Families
MOU	Memorandum of Understanding
REO	SFUSD’s Real Estate Office
SFUSD	San Francisco Unified School District
SSSD	SFUSD’s Student Support Services Department
21CSF	21 <sup>st</sup> Century School Fund

# I. Introduction

Commissioned by the San Francisco Department of Children, Youth, and Their Families (DCYF) and San Francisco Unified School District (SFUSD), and guided by a diverse stakeholder group, this report presents research findings and recommendations for improving policies and procedures related to the community use of SFUSD's school buildings and grounds. The report recommends a comprehensive four-pronged approach: 1) formally adopt a vision statement for SFUSD school facilities to serve as public assets that support the district's strategic plan and meets community needs; 2) establish defined policies and procedures for community use with guiding principles as the foundation; 3) expand management support and capacity for services and processes associated with community use of SFUSD public buildings and grounds; and 4) establish budget and revenue support for public school buildings and grounds that are healthy, safe, well-maintained and designed for optimal education and community use. The recommendations are intended to improve the process and outcomes associated with appropriate and effective community use of SFUSD school facilities.

## Background

In 2008, SFUSD and DCYF commissioned UC Berkeley's Center for Cities & Schools (CC&S) to inform their ongoing joint efforts to improve policy and procedures relating to community use of school facilities. SFUSD and DCYF are both active participants in CC&S's PLUS Leadership Institute, which provides training and technical assistance to educators and civic leaders on collaborative and mutually-beneficial policies and practices. This report grew out of the work of the Committee for CBO, City and School District Partnerships (also referred to as the Partnership Committee), a representative group of community-based organizations (CBOs), city departments, and the school district focused on fostering successful partnerships. The Partnerships Committee identified the effective, coordinated use of school facilities (often referred to as "joint use") as a fundamental element supporting successful partnerships. Committee members agreed that while extensive services and programming are provided to SFUSD students by local CBOs, challenges exist in effectively coordinating the provision of these services inside SFUSD school facilities. Currently, San Francisco lacks a comprehensive, strategic approach to maximizing the benefits of CBO use of school facilities to deliver services to schools, students, families, and communities.

Working in partnership with the 21<sup>st</sup> Century School Fund (21CSF) and its national Building Educational Success Together (BEST) collaborative, a non-profit engaged in research, policy, and projects to improve urban school facilities, CC&S also situates this local work within a national conversation on the importance of developing inclusive and sustainable policies and practices among educators and civic leaders for the joint use of school facilities. National and local leaders alike are calling for improved approaches to maintaining high quality school facilities while maximizing use by non-school users. CC&S and 21CSF/BEST are working together to create resources and tools for effective community use of school facilities.

The goals of this project in San Francisco were to:

1. Develop a shared understanding among school, city, and community partners of how public school facilities are public assets, and
2. Recommend the policy changes needed to implement this shared understanding.

## Study Scope: Driving Questions and Methodology

The project's key questions were:

1. What are SFUSD's current policies and procedures on community use of facilities?
2. What are the characteristics of community use?
3. What are the successes and challenges associated with the current policies and procedures?

4. What are best practices in supporting effective community use of school district facilities?
5. How can SFUSD better support community use of their facilities, especially by entities providing programs/services to students?

To answer these questions, the following methodological approaches were used:

1. *Joint Use Stakeholder Group Facilitation*. A stakeholder group was convened, whose membership consisted of relevant city, school district, and CBO representation. The group came together for three meetings to guide and inform the study (See Appendix 1 for Stakeholder Group Scope and participant list).
2. *Analysis of SFUSD Community Use Policies, Procedures, and Uses*. Utilizing quantitative data provided by the Real Estate Office (REO) and the Student Support Services Department (SSSD), we analyzed the amount, type, and location of community uses of SFUSD facilities. Additionally, qualitative information was collected through interviews with SFUSD staff and other stakeholders.
3. *Joint Use Policy Research*. Relevant joint use best practices from across California and the country were collected and analyzed.
4. *Stakeholder Interviews*. One-on-one interviews were conducted with relevant stakeholders, including staff from the school district, city agencies, CBOs, and other entities.

The balance of the report presents the research findings and the policy recommendations.

## II. Research Findings

The research findings are presented in four categories: utilization, management, policy, and budget findings that are relevant to the community use of public school buildings and grounds.

### Utilization Findings

#### **Utilization Finding 1: Many SFUSD school buildings and grounds are underutilized during the instructional day, according to California Department of Education standards**

SFUSD has a building portfolio of nearly 200 facilities and more than 9 million square feet of space on about 180 properties across the city. These include child development centers, elementary schools, middle schools, high schools, alternative grade level schools, charter schools, county community schools, non-educational facilities, facilities leased to outside agencies, and vacant buildings and land,<sup>1</sup> as shown in Figure 1. Focusing just on SFUSD's educational buildings and grounds that have immediate community use potential, there are **134 schools** with about **7.5 million square feet of indoor space** and about **5.5 million outdoor square feet (approximately 127 acres of outdoor space)**. With current enrollment at more than 55,000 students from Kindergarten through 12th grade, this means there is on average about **134 indoor square feet per student and 100 outdoor square feet per student in SFUSD during the instructional day**. The student-to-space ratio is a common measure of utilization of school buildings and grounds. The California Department of Education's (CDE) recommended indoor space per student ranges from 63 square feet (ES) to 95 square feet (HS).<sup>2</sup> Therefore, on average, SFUSD's school buildings may be considered underutilized for school uses by an average of at least 39 indoor square feet during the instructional day. However, it is important to note that this utilization ratio can vary greatly from school to school. It is also important to remember that community uses can occur during the instructional day and/or outside of instructional time (e.g., before school, after school, on weekends or holidays) and our measure of utilization only reflects instructional time use.

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<sup>1</sup> For more information on SFUSD's portfolio of surplus properties, see the recent report, CBRE Consulting. "San Francisco Unified School District (SFUSD) Evaluation of Potential Surplus Sites." February 2009.

<sup>2</sup> California Department of Education, School Facilities Planning Division. 2007. Report on Complete Schools. Outdoor square footage standards are more complicated to pinpoint because they focus on physical education (PE) spaces (not parking and roads). For example, the CDE requires approximately 6.07 acres of PE space for a 700-student K-6 school, which equals 377 square feet per student. CDE's small school site policy sets a maximum student density per acre of 185 students for K-6 schools, which equals about 172 square feet per student of outdoor space.

**Figure 1: SFUSD Facilities and Grounds by Type and Space per Student Comparisons**

Facility Type	Number of Facilities	SFUSD Indoor Space (ft <sup>2</sup> )	Enrollment (08-09)	SFUSD Space per Student (2009) (ft <sup>2</sup> )	California SFP Funding Model Space per Student (ft <sup>2</sup> )	Western Region Space per Student (2006) (ft <sup>2</sup> )	SFUSD Outdoor Space (ft <sup>2</sup> )
Elementary Schools*	101	3,429,853	n/a	n/a	76	88	1,376,239
Middle Schools	14	1,791,700	9,670	185	80	106	918,806
High Schools	19	2,357,125	18,742	126	95	120	3,234,272
Other*	63	1,685,644	n/a	n/a			1,993,249
<b>Total</b>	<b>197</b>	<b>9,264,322</b>		<b>District Wide Avg Space per Student (ft<sup>2</sup>)= 134</b>			<b>7,469,026</b>

\*Elementary Schools also includes child development centers (CDCs) and alternative grade level schools. Other includes charter schools, county community schools, non-educational facilities, facilities leased to outside agencies, and vacant buildings and land. Enrollments and accurate space per student calculations were not readily accessible for these schools.

Sources: SFUSD 2007 Capital Plan; May 2008 SFUSD Property Report; SFUSD.edu; California Department of Education.

**Utilization Finding 2: Demand exists for school spaces by CBOs and other members of the San Francisco community**

Many stakeholders reported a recent increase in demand for access to SFUSD spaces, including use by entities running programs/services for SFUSD students and families, and for open community use. Numerous factors were cited that likely increase need for access to public school facilities, including:

- the city’s high density (2<sup>nd</sup> densest city in the country);
- lack of ample public spaces, especially parks (San Francisco’s 7.8 acres of open space per 1,000 residents is less than the National Recreation and Park Association’s standard of 10 acres per 1,000 residents);<sup>3</sup>
- large numbers of disadvantaged students (56 percent of SFUSD students qualify for free/reduced lunch) needing support programs/services during the out-of-school time hours/days; and
- high rents for privately owned spaces. DCYF, city agencies and numerous foundations support the work of nonprofit CBOs to provide programs and services to students and families in San Francisco. Most of these organizations do not own their own spaces and could not afford to rent adequate space at current market values.

Analysis of available SFUSD data on facilities use by non-school district users<sup>4</sup> (provided by the Real Estate Office (REO) and the Student Support Services Department (SSSD)) do show what appear to be high (and steady) levels of

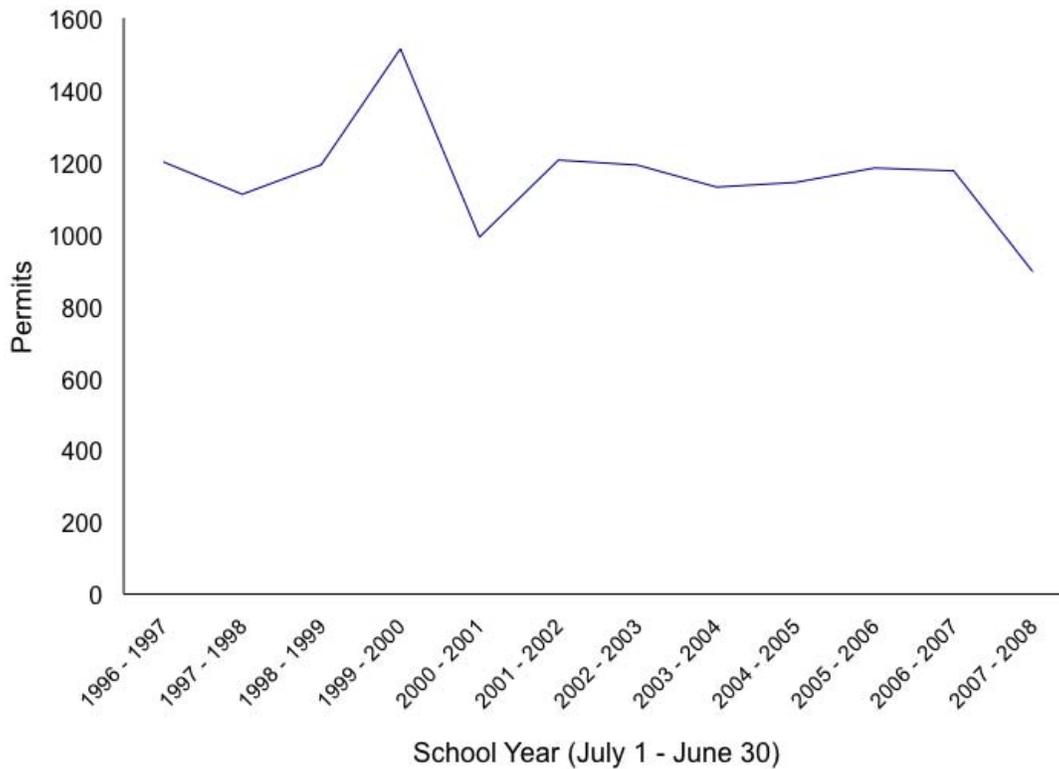
<sup>3</sup> Neighborhood Parks Council. 2007. Green Envy: Achieving Equity in Open Space. San Francisco: SFNPC.

<sup>4</sup> As defined by 21<sup>st</sup> Century School Fund and Center for Cities & Schools, “The use of school district controlled, owned, or utilized facilities by a non-district entity is joint use. There are five types of entities that constitute the joint users. They are: Individuals: Persons, generally residents of a community, who have access to exterior spaces, such as play equipment, athletic fields or courts, and open space for personal use; Civic Groups: Individuals, groups, or organizations, who seek occasional use of school buildings and grounds for activities or events such as voting, community meetings, and special events; Other Public Agencies: A public agency that is not part of the school district which may offer programs, need to lease space and offer no program connection to the school, and/or may seek joint development with ongoing joint programming; Private Non-Profit Organizations: The use of school buildings and/or grounds by a non-profit organization; and Private For-Profit Corporations: The use of school building and/or grounds by a private for profit corporation. Joint use could be shared with school users or dedicated exclusively for use by an outside entity. Joint use is “shared” when the regularly scheduled space is used by the school during school hours, a classroom, for example used in an after school program, or “dedicated” when a school space is exclusively available to the outside entity, for example, an after school office or storage area. Source: 21CSF and CC&S. 2010. “Joint Use of Public Schools: Developing a New Social Contract for the Shared Use of Public Schools.”

use, but not necessarily increases in use or demand. Between 1996 and 2008, the REO issued about 1,200 Facility Use Permits per year, as shown in Figure 2. REO staff estimate that they receive between 1,300 and 1,500 permit requests each year; about 5 to 10 percent are rejected or canceled, usually due to a lack of insurance by the applicant.

During the 2006-2007 school year (the most recent year with complete data) the REO issued 1,175 permits authorizing 22,631 uses at 110 different facilities. The way that the use permits are tracked does not permit a good understanding of which uses are related to serving SFUSD students or the general public.

**Figure 2: SFUSD Facilities Use Permits Granted, 1996-2008**



Note: Data from 2007-2008 is incomplete due to a fire in SFUSD offices.

Source: SFUSD Real Estate Office.

Separately, the CBO Program within the SSSD maintains a database of CBOs who generally only serve SFUSD students and their families, generated through the online self-registration website.<sup>5</sup> According to SSSD staff, there are currently 467 different CBOs providing services/programs in 97 different schools through current MOUs or Contracts. (The details of MOUs and Contracts are discussed later in the report.) However, the CBO database provided by the SSSD contains only 269 CBOs, analysis of which is presented throughout this report.<sup>6</sup>

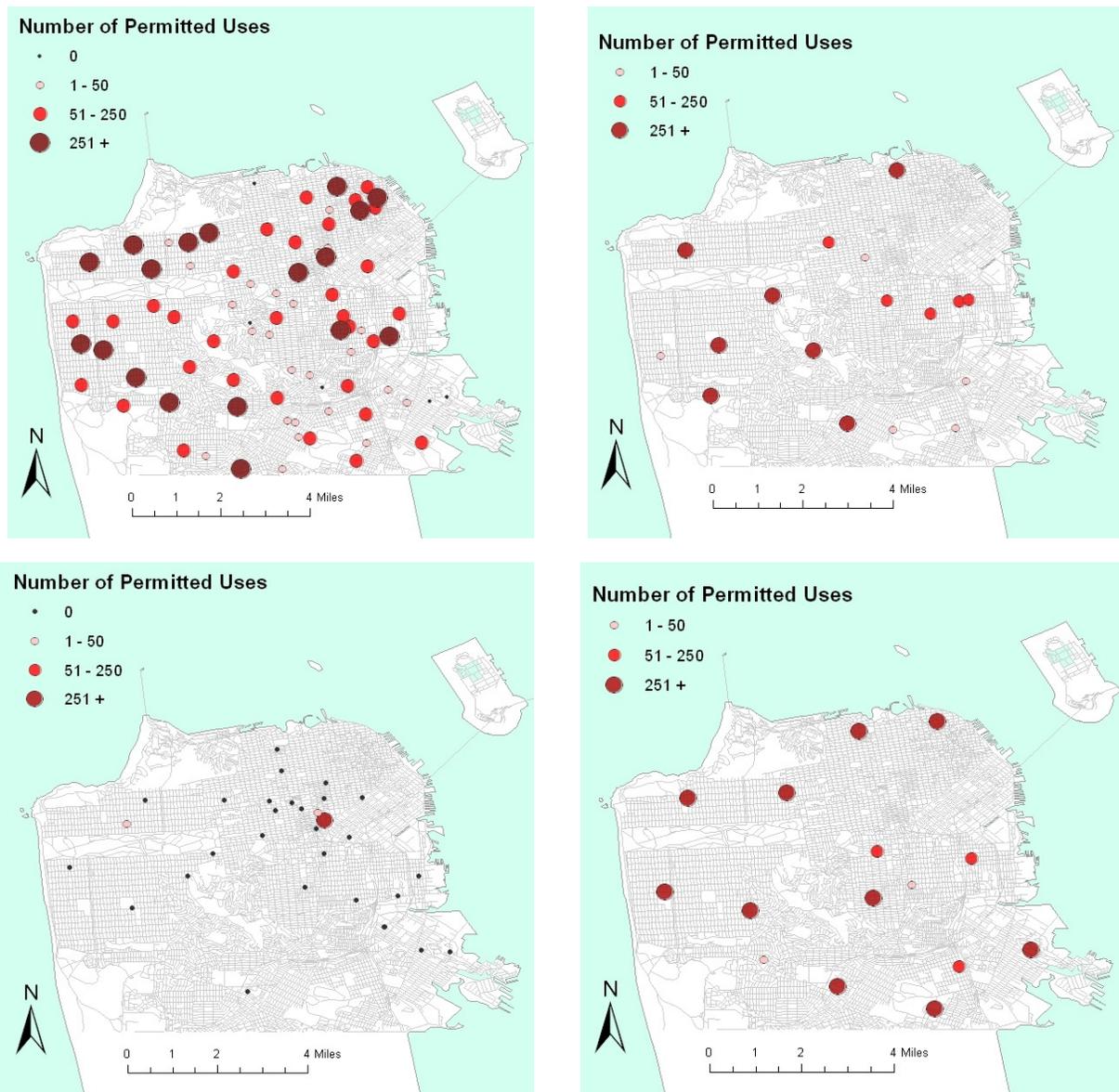
<sup>5</sup> The CBOs may be searched via the online databank: [http://www.healthiersf.org/cbo/search\\_criteria.cfm](http://www.healthiersf.org/cbo/search_criteria.cfm).

<sup>6</sup> The CBO database was provided just prior to the Fall 2009-10 school year. SSSD staff noted that many CBOs had probably not registered in the online system yet and were not reflected in the dataset. A more complete dataset was requested during the fall, but never provided.

### Utilization Finding 3: Community use varies among schools and neighborhoods

Generally, permitted community use of public school facilities is widely distributed across San Francisco. However, schools in the central and eastern neighborhoods of the city tend to experience less permitted community use than those in the western and northern areas. Figure 3 shows maps of the number of permitted uses during the 2006-2007 school year by school, more than half of which occurred at elementary school and K-8 sites which is expected given that 75 percent of facilities are used for those age groups. However, the school with the largest number of uses was Lowell High School, with 1,310. Only a few elementary schools did not experience any permitted uses (Claire Lilienthal School (3-8), George Washington Carver Elementary School, Junipero Serra Elementary School, Malcolm X Elementary School, and Rooftop Elementary School - Nancy Mayeda Campus) while all middle schools and high schools had use permits granted. It is not known why some schools have had little to no permitted use. The “other” SFUSD facilities having community uses included administrative facilities.

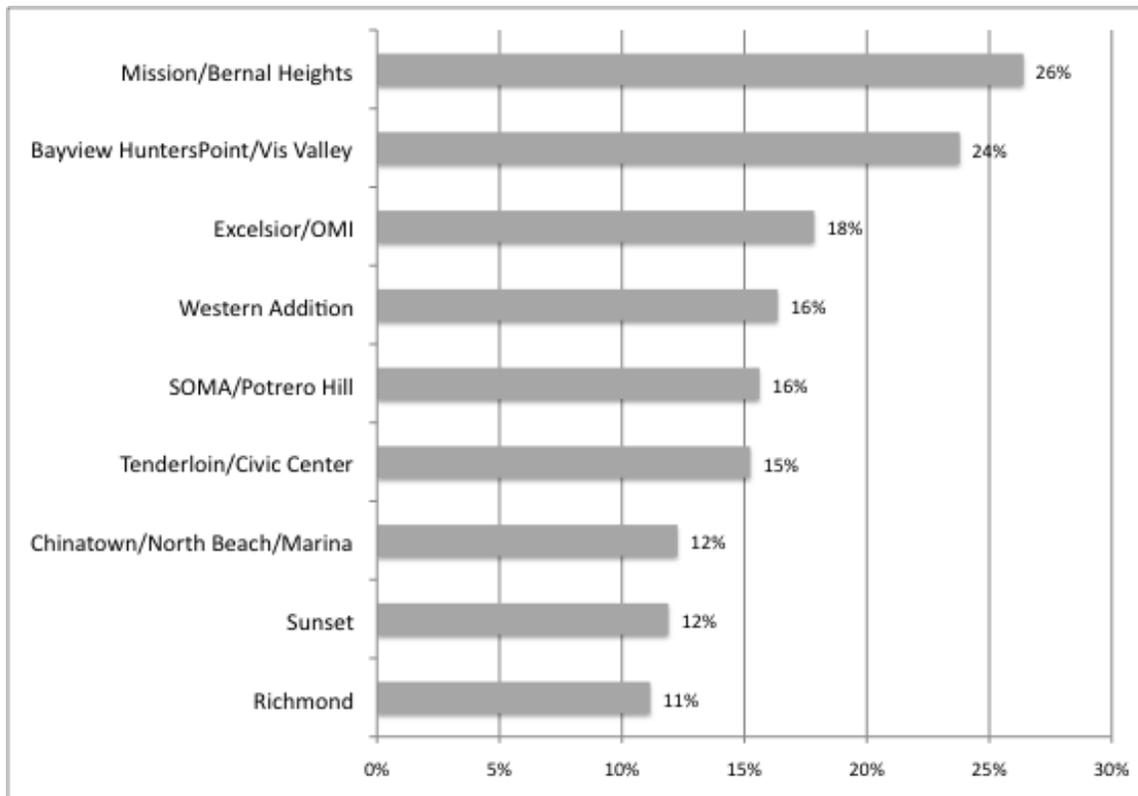
**Figure 3: Permitted Uses, SFUSD Schools, 2006-07. Clockwise from top left: Elementary Schools, Middle Schools, High Schools, and Other SFUSD Facilities**



Source: SFUSD Real Estate Office

Based on the data in the SSSD database, CBOs provide services and/or programs in schools throughout the district. Mission/Bernal Heights and Bayview Hunters Point/Visitation Valley have the highest concentration of registered service providers, as shown in Figure 4. (Note: About 200 CBO records were missing from the database, so the data below is based only on available data.)

**Figure 4: Community Based Organization Programs by School Location, 2009 (N=269)**



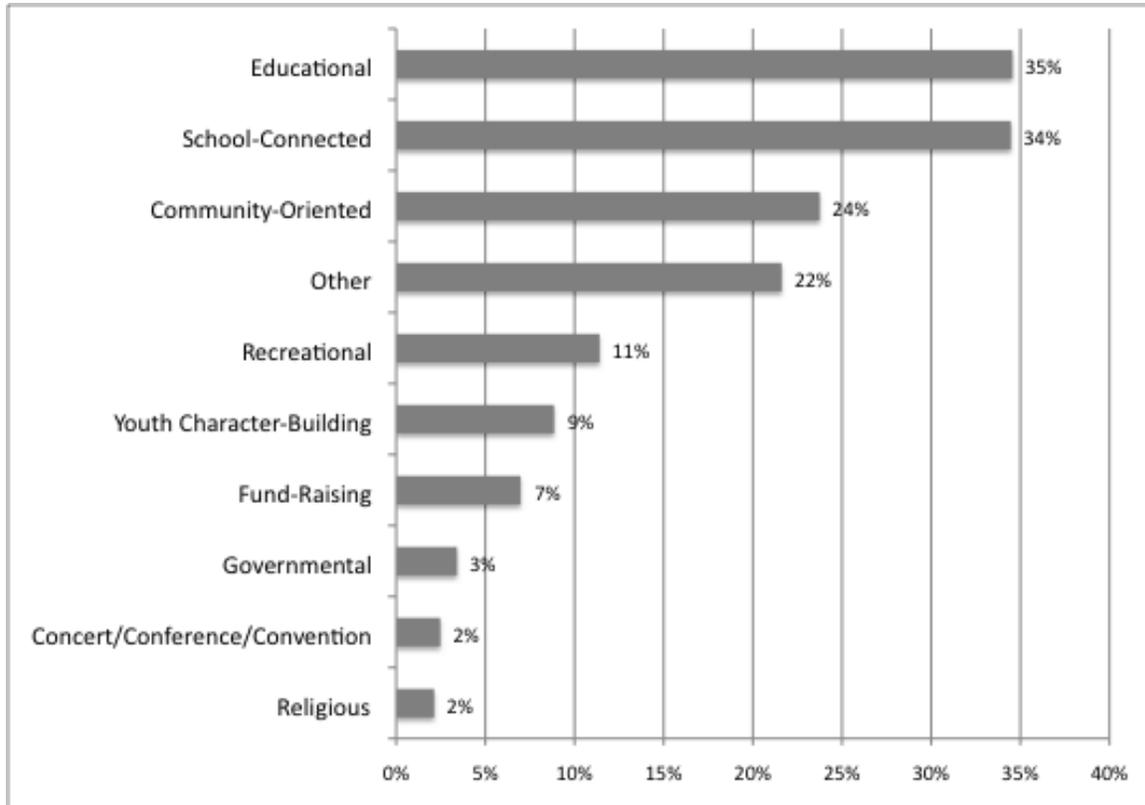
Source: SFUSD Student Support Services Department.

**Utilization Finding 4: Community users and uses vary across the district**

A wide variety of users and uses occur in SFUSD school facilities, from CBO program/service provision to before- and after-school care, to sports leagues, city department activities, and private individuals or entities renting space for single-use activities or multiple days. However, based on the information collected by the REO on users, it is difficult to adequately determine the users. While the users are divided into four categories (private users, civic center users, city users, and SFUSD users), it is not readily possible to classify them as CBO, for-profit entity, an individual, faith-based entity, or volunteer group (See Budget Findings section for more information on the four user categories).

Use Permit holders are asked to self-classify their use within 10 provided categories. Applicants most often reported that their use was “educational” or “school-connected,” as shown in Figure 5. It is important to note that applicants self-select into these provided categories which are not defined beyond their title and applicants may check all that they feel apply.

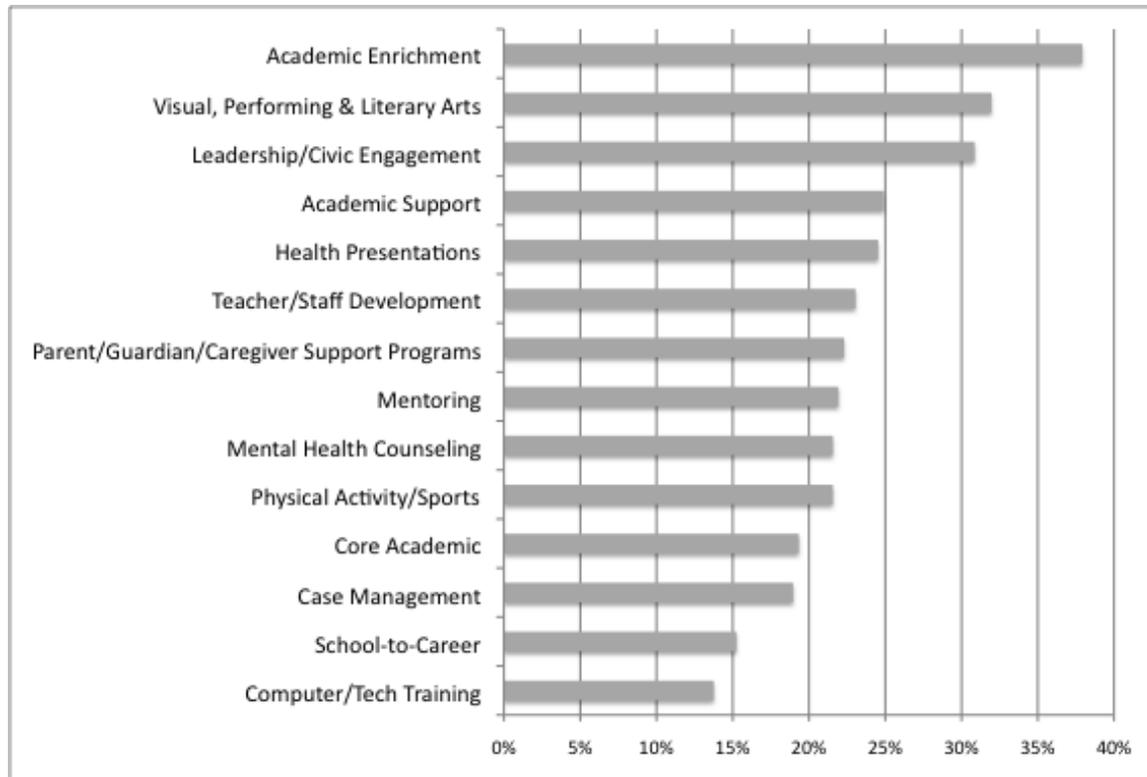
**Figure 5: Characteristics of SFUSD Facilities Use Permits, 2006-2007 (N=1,175)**



Source: SFUSD Real Estate Office.

Similarly, in SSSD’s CBO database, CBOs self-select into 14 provided categories (also not defined) to describe their offerings. Nearly 40 percent of the 269 CBOs with complete information in the database report to address “Academic Enrichment,” as shown in Figure 6.

**Figure 6: Community Based Organization Programs in SFUSD Schools by Type, 2009 (N=269)**



Source: SFUSD Student Support Services Department.

## Management Findings

### **Management Finding 1: SFUSD has not fully developed its capacity to support community use, compared to other school districts**

Policies and practices on community use of school facilities were collected from nine school districts across California and the country to inform SFUSD’s policy options. Figure 7 compares SFUSD to these districts on a variety of factors: communicating joint use policies, application processes, scheduling, use fees, and liability and insurance. In general, this information refers to the school districts’ granting of the equivalent of SFUSD’s Use Permits, not necessarily the MOU/Contract relationship. Many of these school districts have a more defined set of policies and procedures on community use of facilities than does SFUSD. In particular, the following are six policies and procedures that at least a majority of the nine school districts have in place that SFUSD does not currently have:

- Policy handbook (6 school districts)
- Clear guidelines for denial (6 school districts)
- Set number of days prior to use permit is due (7 school districts)
- Site-based scheduling (6 school districts)
- Prioritization of users (5 school districts)
- User responsibility guidelines (6 school districts)

With regard to “communicating joint use policies,” many of the CBO stakeholders interviewed noted that there exists a lack of clarity on policies and procedures for securing facilities use.

**Figure 7: School District Community Use Policy and Procedure Comparison**

Communicating Joint Use Policies	California						National			
	SFUSD	OUSD	WCCUSD	LAUSD	SDUSD	SJUSD	Montgomery County, MD	Seattle	Chicago	Philadelphia
Policy Handbook	✗	✓	✓	✗	✗	✗	✓	✓	✓	✓
Policy Makers	School District	School District	School District	School District	School District	School District	Interagency Coordinating Board	School District & Parks/Rec	School District	School District
Website Outlining Policy	✗	✗	✓	✗	✗	✓	✓	✓	✗	✗
Tools for Principals	✗	✗	✗	✓	✗	✗	✓	✓	✗	✓
<b>Application Process</b>										
Registration	✗	✗	✗	✓	✗	?	✓	✓	✗	✗
Web-based Application	✗	✗	✗	✗	✗	✗	✓	✗	✗	✓
Principal Approval Required	✓	✓	✓	✓	✓	✓	✗	✗	✗	✓
Clear Guidelines for Denial	✗	?	✓	✓	✗	✓	✓	✓	✗	✓
Appeal Process	✗	✓	✓	✓	✗	?	✓	✗	✗	✓
# days prior to use permit is due	?	15	10	14	?	14	1	10	?	21
Event Evaluation	✗	✓	✗	✗	✗	✗	✗	annual evaluation	✗	✗
<b>Scheduling</b>										
Centralized Calendar	✗	✗	✓	✓	✗	?	✓	✓	✗	✗
Site-based Scheduling	✗	✓	✗	✓	✓	✓	✗	✓	✗	✓
Prioritization of users	Can't interfere w/ school	1. School, 2. City of Oakland, 3. Youth Groups, 4. Other NPOs, 5. First-come-first-served	1. Schools, 2. Public Agencies, 3. NPOs	Can't interfere w/ school	✗	?	1. Schools, 2. Child Care, 3. PTA, 4. Government administrative bodies, 5. Montgomery County and City Recreation Departments within their programming area, 6. Other publicly supported programs such as colleges or universities, 7. All other community organizations, 8. Non county-based groups and groups with less than two-thirds Montgomery County resident membership, 9. Business/corporate organizations	Priority given to programs that directly involve youth	✗	Priority given to non-profit groups/orgs
<b>Use Fees</b>										
# of fee categories	2	2	2	3	4	?	6	Cost-sharing	?	Personnel + Utilities
Transparent Formulation	✗	✗	✓	✓	✗	✗	✓	✓	✗	✗
<b>Liability &amp; Insurance</b>										
User Responsibility	✗	✓	✓	✓	✗	✓	✓	✗	✓	✗
Insurance Coverage	\$1mil	\$500K/\$1mil	\$1mil	None	\$1mil	\$1mil	\$300K	\$1mil	\$1mil	\$1mil
Insurance Waivers	✗	?	✗	✗	✗	?	✓	✗	✓	✗

**Management Finding 2: SFUSD has three formal programs managing community use of facilities; the main two lack procedural alignment**

SFUSD currently has three formal programs promoting community use of the district’s facilities, the two main programs are closely related (REO’s Facilities Use Permit Process and the SSSD’s Community Based Organization Program) but lack alignment to maximize community use and assessment. The third program, the “Schools as Community Hubs Pilot Project” is a partnership between the City and County of San Francisco and SFUSD, whereby City staff unlock outdoor school playground gates for open, unsupervised use at 10-12 public schools throughout the city on the weekends and selected school holidays during daylight hours.<sup>7</sup> In this report, we focus our investigation on the first two programs.

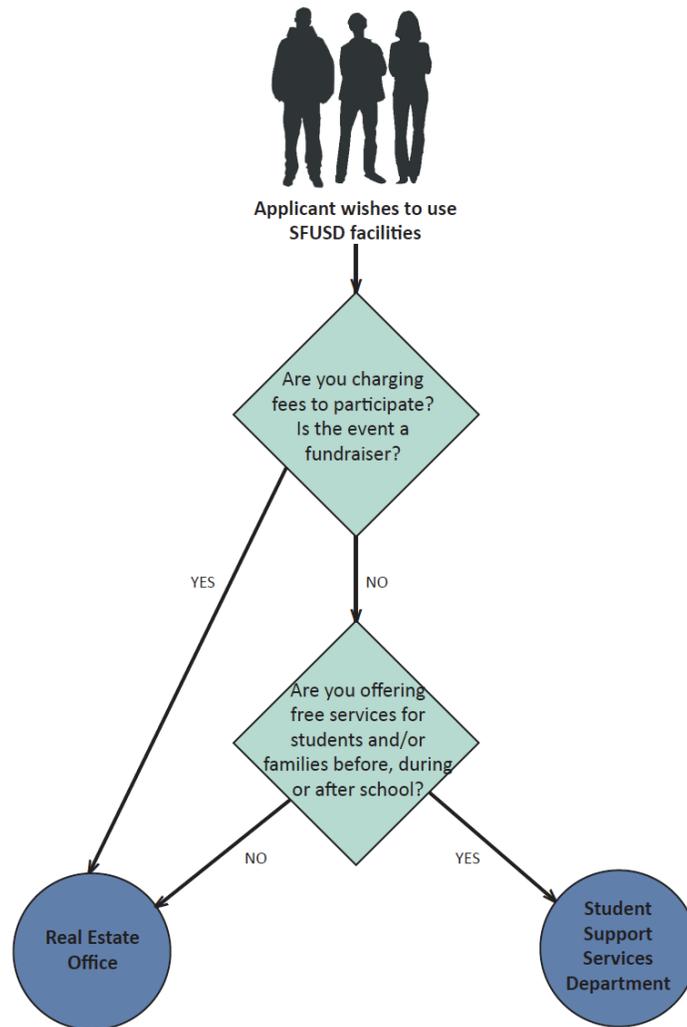
To reserve SFUSD space for use, an applicant must obtain a Facilities Use Permit from the REO or work through the SSSD’s Community Based Organization Program and enter into a Memorandum of Understanding (MOU) or a Contract (and accompanying Site Agreement). The appropriate procedure for a given user is determined by several

<sup>7</sup> For more information on the Schools as Community Hubs Project, see Appendix 2.

factors, including the type of use proposed, the targeted participants of the use, whether or not the applicant is charging individuals for participation, and whether or not SFUSD is paying the applicant to provide services/programs. To follow these procedures, the applicant completes a combination of steps, including various types of paperwork, registration, and approval processes. In Figure 8, we have created a decision-tree for a user to determine if they should first go to the REO or to the SSSD.

There are important differences between the two processes. Awarded on a first-come, first-served basis, Use Permits are processed by the REO and may cover a single, one-time use or multiple uses over a longer period of time. The use of SFUSD facility space can also be secured through an MOU or a Contract between the SSSD and a community-based organization (CBO) that provides services and/or programs to students. Organizations entering into an MOU or Contract are viewed by SFUSD as addressing the educational and programmatic objectives of the school district, reflecting a more defined relationship between a school and the CBO. Contracts are used when a CBO is funded by SFUSD to run its program, whereas an MOU is used when the CBO is not funded by SFUSD, but still providing programs/services to students. CBOs with MOUs or Contracts are also supposed to obtain a Use Permit from the Real Estate Office (in addition to going through SSSD's process) if they are not coming in under the umbrella of an existing program run by SFUSD or the Beacon Initiative.

**Figure 8: SFUSD Community Use of Facilities Process Flowchart**



To provide clarity on the policies, processes, and procedures associated with Use Permits, MOUs, and Contracts, CC&S compiled detailed descriptions of these programs based on available documentation and interviews with SFUSD staff. See Appendix 3.

While there is some administrative coordination between the REO and the SSSD, the current systems have insufficient capacity for efficient and well-managed asset management in relation to the intensity of community use in SFUSD. Specifically:

- the policies and procedures of these programs are not communicated in full to users (either in writing or online);
- the application processes for these programs appear disconnected to users; and
- neither program collects adequate or aligned information on users and uses to accurately analyze community use patterns.

### **Management Finding 3: SFUSD lacks adequate information collection tools to fully understand facility use and demand**

The numbers provided in the Utilization findings give a good – but limited – sense of the characteristics of community use occurring in SFUSD schools. They do not provide a true understanding of the full spectrum of use because SFUSD does not collect adequate information on users and uses. As a result, SFUSD does not have solid information on: the different types of users, the amount of space each user utilizes, the purposes of the uses, or who is denied use and why. Nor can SFUSD know these differences separately among Use Permit holders, MOU recipients, or Contract recipients. Not having this information adds difficulty to establishing policies and procedures to meet the variety of user needs. In particular, the lack of this information inhibits SFUSD’s ability to conduct community use revenue/cost recovery projections or understand untapped demand found in the Use Permit denials.

At the heart of the problem is that the REO and the SSSD do not collect the same information on users and the important pieces of the information they do collect are undefined, limiting their usefulness. Specifically:

- Although both the REO and the SSSD collect information on the “purpose of use” and/or types of services/programs offered by a facility user, the categories provided are not aligned nor defined. The applicant self-selects the ones they feel apply to them, with little direction on what SFUSD actually means by them. Additionally, the responses are not mutually exclusive; the applicant can check all that apply, and/or fill in a black line labeled “other.” For example, in 2006-2007, approximately one third of Use Permit holders indicated that their use was “educational” in nature; about the same number indicated that their use was “school-connected.” It is unclear what the difference is, if any. This information would be far more valuable if these terms were clearly defined by the District, and/or if there were some process to determine whether a program meets a standard to warrant its distinction as “educational.”
- In the Use Permit data, the “Private Users” category is nearly 75 percent of users, but little more is known about the different types of private users.
- No information is collected on which spaces and how much spaces used by CBOs with MOUs or Contracts.

## **Policy Findings**

### **Policy Finding 1: Little community use policy and procedural guidance is provided by the State of California and/or the SFUSD School Board**

How things happen in public schools is typically a function of both state and local school board education policy (or lack thereof it). Community use of schools is no different. At present, SFUSD has little policy guidance on the subject.

## California's Civic Center Act Requires School Districts to Encourage Community Use, but Provides Little Policy Guidance

California state policy explicitly establishes that public school spaces may be used by the public. In 1917, the State Legislature enacted the California Civic Center Act (CCCA), creating a policy foundation for local school districts on community use of their facilities.<sup>8</sup> The Act establishes California's public schools as "civic centers" where

*[...] citizens, parent teacher associations, Camp Fire girls, Boy Scout troops, veterans' organizations, farmers' organizations, school-community advisory councils, senior citizens' organizations, clubs, and associations formed for recreational, educational, political, economic, artistic, or moral activities of the public school districts may engage in supervised recreational activities, and where they may meet and discuss, from time to time, as they may desire, any subjects and questions that in their judgment pertain to the educational, political, economic, artistic, and moral interests of the citizens of the communities in which they reside (California Education Code, Section 38131(a)).*

The Act *requires* school boards to establish rules and regulations to encourage the use of school facilities for purposes listed in the Act. Three key policy areas are specifically addressed:

- **Users and Costs:** The governing board of any public school shall make facilities available to "nonprofit organizations, and clubs or associations organized to promote youth and school activities" (hereafter referred to in this report as "Civic Center Act eligible users") at a price not to exceed the direct costs associated with that use. "Direct costs" are defined by the CCCA as "those costs of supplies, utilities, janitorial services, services of any other district employees, and salaries paid school district employees necessitated by the organization's use of the school facilities and grounds of the district." For-profit users, churches, and any groups conducting fundraisers (hereafter referred to as "private users") may be charged "fair rental value." "Fair rental value" is defined by the CCCA as "the direct costs to the district, plus the amortized costs of the school facilities or grounds used for the duration of the activity authorized." The CCCA does not provide further guidance on the cost elements that may (or may not) be charged by school districts.
- **Liability:** In the case of authorized use of school facilities, the school "shall be liable for any injuries resulting from the negligence of the district in the ownership and maintenance of those facilities or grounds," while the group using the facilities "shall be liable for any injuries resulting from the negligence of that group during the use of those facilities or grounds."
- **Insurance Coverage:** The CCCA determines that "the district and the group shall each bear the cost of insuring against its respective risks and shall each bear the costs of defending itself against claims arising from those risks."

### California's Civic Center Act: Who is Eligible?

#### "CCA Eligible Users"

- Girl Scouts, Boy Scouts, etc
- Parent-Teacher Associations
- School-community advisory councils
- Other nonprofits, clubs, and associations organized to promote youth and school activities

#### "Private Users" (Examples)

- Fundraisers
- CBOs charging fees for service
- Adult sports leagues and activities
- Valet parking
- For-profit businesses

<sup>8</sup> California Education Code, Section 38131-38139. Available online: <http://law.justia.com/california/codes/edc/38130-38139.html>

## **SFUSD School Board Direction Vague on Community Use of SFUSD Schools**

In Resolution 56-14A10 School Facilities Usage Fees (Aug 2005), the SFUSD School Board noted that SFUSD “enjoys” partnerships with many groups who provide worthwhile services to SFUSD students. To better support these entities in delivering these services, the Board directed “staff to review the District’s permit fee structure in order to propose a fee structure that *will not result in reduced revenues for the District*, but will allow organizations that work directly with SFUSD students to *pay some level of reduced permit fees* to the District” (emphasis added). From this resolution, the current use permit fee schedule was established. Thus, the School Board wishes to both maximize cost recovery associated with community use of facilities and grounds while also enabling San Franciscans to use the district’s facilities at minimal costs. Accomplishing both is impossible without fully understanding what the cost is for non-school users to use SFUSD spaces. Currently, SFUSD has not compiled this information.

## **Policy Finding 2: Lack of formalized vision exists for SFUSD schools to serve as public assets**

Stakeholders in San Francisco have not yet established a shared philosophical vision for schools as public assets, that acknowledges both the costs and the benefits of community use of school spaces and the role these facilities play in supporting programs and services for students and communities. Likewise, SFUSD does not have a formally adopted guiding vision on the level of desired/appropriate utilization of its school facilities by non-school users.

## **Policy Finding 3: Lack of overarching strategic policies and/or procedures exist to fully support SFUSD schools as public assets**

While community and CBO use of school facilities occurs frequently, the district currently does not have a single, overarching joint use policy that is structured to coordinate and maximize efficiencies among the variety of uses, users, and programs/services being offered.

## **Budget Findings**

### **Budget Finding 1: SFUSD’s revenue from facilities use permits appears low**

Revenues generated by SFUSD through the community use of its facilities are arguably low compared to the revenue opportunity that exists in having non-school users contribute to facilities costs. As a result, SFUSD subsidizes the community use of its facilities. To reach this conclusion, we created a “Joint Use Calculator” to determine the SFUSD’s costs to operate and maintain its facilities and compared that to the Use Permit revenue data.

### **SFUSD Facilities Expenses**

A Joint Use Calculator was developed by the Center for Cities & Schools and the 21st Century School Fund to assist school districts in fully understanding the costs associated with facilities in order to develop appropriate policies and fee structures for community use of their facilities. Many San Francisco stakeholders expressed the desire to better understand SFUSD’s facilities costs to aid in the policy discussion. Adaptable to any school district, the Calculator precisely defines and tallies all expenses associated with a school district’s facilities construction, operation, and maintenance. Costs are divided into four main categories: Asset Value (the value of SFUSD real estate, viewed as an opportunity cost for SFUSD), Capital Costs (building construction and renovation), Operating Costs (utilities, maintenance, etc.), and Administrative Costs (central SFUSD staff necessary to operate and maintain SFUSD facilities).<sup>9</sup> The result is the total cost to the school district to operate and maintain its school facilities.

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<sup>9</sup> Cost data was collected from a variety of sources, including SFUSD’s 2008 Annual Budget, SFUSD’s Facilities Division, San Francisco Assessor’s Office, and other sources of relevant data as noted in the calculator.

SFUSD’s average annual facilities related expenses are \$126,000,000 on its total building space of 9,317,862 square feet. As shown in Figure 9, this means **SFUSD spends \$28.74 per square foot per year on its facilities.**<sup>10</sup>

**Figure 9: SFUSD Facilities Expenses per Square Foot Per Year, 2009**

Category	SFUSD Facilities Expenses per SF/YR
Asset Value	\$6.61 sf/yr
Capital Costs	\$14.80 sf/yr
Facilities Operating Costs	\$5.65 sf/yr
Facilities Administrative Costs	\$0.60 sf/yr
<i>Total</i>	<b>\$28.74 sf/yr</b>

With accurate expenditure data from the district, the Calculator provides absolute clarity on actual facilities-related costs to the district and can be updated frequently based on the most current district expenditures.<sup>11</sup> Further, the Calculator is a tool that:

- a. Identify the “incremental costs” associated with individual community uses;
- b. enables SFUSD to continue to offer reduced-rate or free use for users and programs the district wishes to incentivize; and
- c. establishes a mechanism to charge “private users” a fee that is clear, fair, and aids the district in recovering expenses associated with community use.

**SFUSD Facilities Use Revenue**

Total Use Permit revenue data from 1998-2008 show revenues of between \$1 million and \$1.5 million in recent years, as shown in Figure 10. For example, in 2007-8 (the year of highest use permit revenues), the district only generated about \$0.20 per indoor square foot.<sup>12</sup> By comparison, in 2008 Washington, DC Public Schools generated about \$0.30 per square foot.<sup>13</sup>

**Given that SFUSD is paying \$28.74 per square foot per year to operate and maintain its facilities, SFUSD is recouping less than one percent of their facilities expenses (.7 percent) through community use revenues.** The result, in effect, is a substantial subsidy provided to community users of SFUSD facilities.

<sup>10</sup> The Calculator uses a 5 percent fair market rate of return on value of the school district property assets, seen as an opportunity cost for the district and used to understand the “fully loaded” expenses related to facilities. See Appendix 4 for the Calculator and a more detailed description of its use.

<sup>11</sup> See Appendix 4 for the Calculator and a more detailed description of its use.

<sup>12</sup> Calculated by the total revenue (\$1,513,240) divided by the total square footage of all schools (7,578,678 SF, from Figure 1).

<sup>13</sup> 21<sup>st</sup> Century School Fund and DCPS Realty Office. 2008 data, user fees and permits.

While SFUSD’s cost recovery appears low compared to the potential for community users to share in contribution to the district’s facilities expenses, SFUSD has not established a clear goal for how much of the facilities costs the district would like to recoup through its facilities use fees. Establishing a “cost recovery” target would aid in a more informed discussion about possibly reevaluating the fees charged, particularly with the School Board’s 2005 resolution for staff to “propose a fee structure that will not result in reduced revenues for the District, but will allow organizations that work directly with SFUSD students to pay some level of reduced permit fees to the District.”

**Figure 10: SFUSD Use Permit Revenues, 1999-2008**

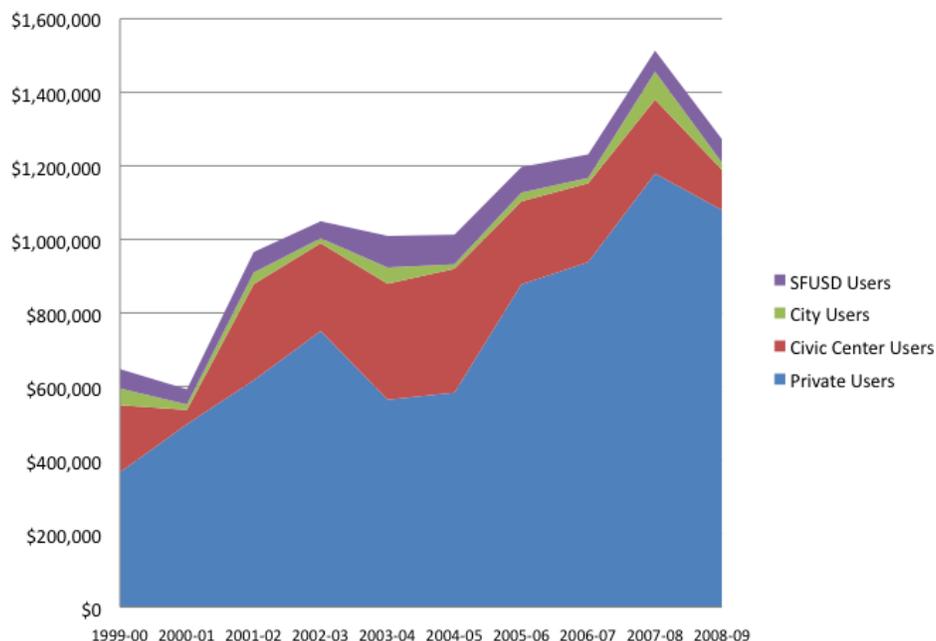
Year	Private Users		Civic Center Users		City Users		SFUSD Users		Total		Difference from Permit Data #	
	#	\$	#	\$	#	\$	#	\$	#	\$	#	%
1999-00	355	\$366,435	331	\$182,729	153	\$45,386	460	\$52,629	<b>1299</b>	<b>\$647,179</b>	-215	-16.6%
2000-01	374	\$497,087	40	\$38,854	32	\$15,015	176	\$41,244	<b>622</b>	<b>\$592,200</b>	-369	-59.3%
2001-02	485	\$616,727	118	\$261,569	77	\$31,482	315	\$55,786	<b>995</b>	<b>\$965,564</b>	-210	-21.1%
2002-03	418	\$750,528	77	\$238,925	24	\$13,535	124	\$46,246	<b>643</b>	<b>\$1,049,234</b>	-548	-85.2%
2003-04	339	\$563,758	281	\$315,312	50	\$44,283	476	\$86,092	<b>1146</b>	<b>\$1,009,445</b>	16	1.4%
2004-05	351	\$582,998	209	\$336,891	36	\$12,357	550	\$80,371	<b>1146</b>	<b>\$1,012,617</b>	3	0.3%
2005-06	401	\$877,352	157	\$226,001	73	\$23,520	529	\$69,497	<b>1160</b>	<b>\$1,196,370</b>	-23	-2.0%
2006-07	441	\$937,967	120	\$214,473	65	\$14,846	554	\$63,774	<b>1180</b>	<b>\$1,231,060</b>	5	0.4%
2007-08	467	\$1,178,742	148	\$201,440	79	\$75,752	524	\$57,306	<b>1218</b>	<b>\$1,513,240</b>	n/a	n/a
2008-09	471	\$1,079,565	53	\$109,407	35	\$19,311	529	\$63,852	<b>1088</b>	<b>\$1,272,135</b>	n/a	n/a

Note: The revenue data divides users into four categories: “private users,” “Civic Center Eligible users,” “city users” (defined as any city department), and “SFUSD users” (defined as any use by someone in SFUSD). The right hand columns show the differences in number of use permits found in the permit data compared to those listed in the revenue report provided by the REO. Staff notes that changes in record keeping procedures in FY0203 explain the difference prior to that year.

Source: SFUSD Real Estate Office.

Still, there has been an upward trend in use permit real revenues since 1999, with the proportions of revenues from the different user types remaining fairly constant, as shown in Figure 11. Note that if adjusted for inflation, the graph would be much flatter.

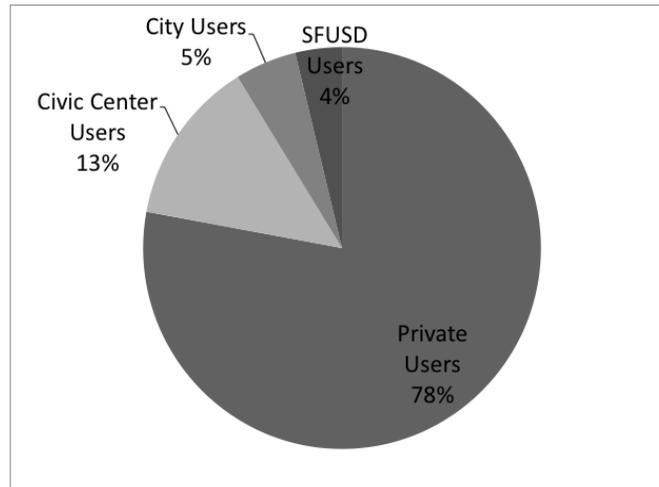
**Figure 11: SFUSD Use Permit Revenues by User Type, 1999-2008 (real dollars)**



Source: SFUSD Real Estate Office.

While “private users” make up only 38 percent of users, they account for the bulk of revenues (78 percent in FY 2007-08), as shown in Figure 12. Unfortunately, the information collected by SFUSD does not allow for a more detailed understanding of the users and uses among the “private users.” This is a challenge because the “private users” are a main source of potential increased revenue for SFUSD, especially those that might be for-profit entities.

**Figure 12: SFUSD Use Permit Revenues by User Type, FY2007-2008 (Total=\$1,513,240)**



Source: SFUSD Real Estate Office.

## **Budget Finding 2: While significantly subsidizing community uses, SFUSD has limited capital funds for facilities renovation and repair**

Intensifying the utilization of school buildings and grounds (no matter who the user) incurs costs to the district, including increased custodial needs and additional wear and tear on facilities that increases maintenance and repair needs.

Like every other school district, SFUSD must continually raise funds to keep its facilities open and safe and maintain “the best learning environments possible.”<sup>14</sup> To do so, **SFUSD’s current capital program totals about \$850 million**, focused mainly on repair and renovation of existing buildings and replacement of existing modular buildings with permanent classroom structures. Thirty percent of this amount goes towards ADA (Americans with Disabilities Act) upgrades (e.g., adding exterior entry ramps, elevators, etc.) as part of the *Lopez vs. SFUSD* lawsuit and the balance to the modernization of over 90 District sites. SFUSD’s capital program is funded through local general obligation bonds, state matching modernization and new construction funds, Mello Roos parcel taxes, developer impact fees, and other sources. **On top of the currently available capital budget, an additional \$690 million dollars in facilities needs has been projected for the coming decade**, including the modernization of the remaining 50+ district sites and ongoing deferred maintenance. Additionally, as noted in the Capital Plan, “The loss of 4,000 students over the last five years has resulted in a reduction of approximately \$20 million in funding annually. While some costs disappear with students, millions in fixed costs remain.”<sup>15</sup> To further compound the problem, the current statewide economic and budget funding crisis has also severely reduced funding for deferred maintenance and the monies annually received from Developer impact Fees. For more detailed information on SFUSD’s capital program, see the district’s Capital Plan.

<sup>14</sup> San Francisco Unified School District. 2009. Capital Plan FY 2009-2018, pg. 6.

<sup>15</sup> San Francisco Unified School District. 2009. Capital Plan FY 2009-2018, pg. 4.

## III. Recommendations

SFUSD can strategically position its school facilities as public assets by improving policies and processes on the community use of the district's school buildings and grounds while simultaneously bolstering the District's Strategic Plan. The implementation of the following recommendations will improve clarity, efficiency, and reciprocity among entities by establishing a more comprehensive, strategic approach to the management of joint use in San Francisco. Thus, SFUSD can maximize the benefits of school facility use for schools, CBOs, students, families, and communities. The recommendations build upon SFUSD's current administrative structure, but do require the district to think and operate differently.

### Recommendation 1: Formally adopt a vision statement for SFUSD school facilities to serve as public assets that support the whole community

The adoption of a vision statement by the SFUSD Board of Education and the SF Board of Supervisors will set a clear direction on district and municipal philosophy and intent. The vision statement will set the framework for the development of policy by encouraging a "culture" of community use within the district, from top leadership to the school sites, and with buy-in from stakeholders who have a vested interest in more intensive community use. Key to the vision statement is that the SFUSD and the City agree on the potential benefits of community use of facilities. The vision statement should be co-constructed and shared with key partners that make up the vast amount of current stakeholders who have a vested interest in community use in the district's facilities. Currently those partners are: the Department of Children, Youth, and Their Families, the community-based organization community, and other city departments. We recommend that the vision statement be agreed upon by the Joint Use Stakeholder Group and then a Resolution in support of it be brought before the School Board for approval.

Five main points are found in the vision statements collected from members of the stakeholder group and the discussion at group meetings:

1. The purpose of community use should be clearly defined;
2. School facilities should meet educational, cultural, and recreational needs;
3. School facilities should be safe and inviting;
4. Community use procedures should be transparent and have an accountability system; and
5. Costs of facilities use should be known so that fees can be "reasonable and fair;" some said CBO use should be free of charge.

Below is a proposed **Vision Statement** derived from stakeholder points.

*The San Francisco Unified School District envisions its school facilities as...*

*...public assets where San Franciscans of all ages have a healthy, safe, and well-maintained place to learn and play and where all facilities are used to their fullest extent to meet San Francisco's varied educational, cultural, and recreational needs.*

## Recommendation 2: Establish defined policies and procedures for community use with guiding principles as the foundation

First, SFUSD should formally adopt a set of **Guiding Principles** for Community Use of School Facilities. Based on the information collected from stakeholders, the following are proposed Guiding Principles:

- Community use policies will be clearly defined and communicated.
- Community use policies will prioritize partnerships with organizations that provide programs and services inside schools to SFUSD students, and that are aligned with the District’s goals and strategies.
- Costs associated with community use will be shared by SFUSD and users.
- Community use policies, procedures, and outcomes will be consistently evaluated to ensure accountability and improvement.

To support the Guiding Principles, three specific inter-related policies are recommended:

- 1) **SFUSD should adopt a multi-tiered fee structure for community use of facilities that aligns fees, users, and district goals.** Because SFUSD facilities expenses can be determined using a tool such as the Joint Use Calculator, precise fee tiers can be created that assign responsibility to certain users for sharing in the district’s facilities-related expenses in return for facilities use.

Doing so would be consistent with both SFUSD School Board Resolution 56-14A10 (Aug 2005) directing staff to “propose a fee structure that will not result in reduced revenues for the District, but will allow organizations that work directly with SFUSD students to pay some level of reduced permit fees to the District” and California’s Civic Center Act.

We recommend that SFUSD consider adopting a four-tiered fee structure that aligns fees, users, and district goals. In the structure, Tier One allows facilities use free-of-charge, Tier Two charges only the “incremental cost” associated with the use, and Tiers Three and Four involve greater “cost sharing” by the user.

- **Tier One: “Program Partners”** – Facilities use is free of charge. Users offer programs and/or services to SFUSD students that are closely aligned with district/school needs and goals and are either nonprofit organizations or public agencies. Program partners also have high Strategic Plan alignment and high outcome evaluation score.
- **Tier Two: “Incremental Costs – Civic Center Rate”** – Facilities use fee is nominal and considered the “incremental costs” associated with facilities use; only Facilities Operating Costs are charged. Incremental costs refer to only the facilities-related expense of the exact amount of time and space associated with the specific community use (i.e., incremental cost refers to the direct cost associated with the use). This is consistent with the CCCA’s definition of “direct costs” in § 38134(g).<sup>16</sup> Users eligible for this Tier may include any community group, nonprofit organization, or public agency providing programs/services to SFUSD students that have less-than-high strategic plan alignment and/or less-than-high outcome assessment score as determined by an evaluation rubric. This tier is consistent with “Civic Center Act Eligible” users as described in California law.
- **Tier Three: “Community Users”** – Facilities use fee includes Capital Costs, Facilities Operating Costs, and Facilities Administration Costs. Users eligible for Tier Three include any individual, nonprofit organization, or public agency providing programs, services, or activities to San Francisco residents, that do not promote youth and school activities” (CCCA § 38134(a)) and/or do not have

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<sup>16</sup> “As used in this section, “direct costs” to the district for the use of facilities or grounds means those costs of supplies, utilities, janitorial services, services of any other district employees, and salaries paid school district employees necessitated by the organization’s use of the school facilities and grounds of the district.”

high alignment with SFUSD’s strategic plan. Individual, nonprofit, or public agency users holding fundraisers would fall into this tier.

- **Tier Four: “Fully Loaded - Private Users”** – Facilities use fee includes Asset Value, Capital Costs, Facilities Operating Costs, and Facilities Administrative Costs and is considered the “fully loaded” cost. Users in this tier are for-profit entities using the facility for a private event or program. User may or may not be charging fees to attendees. Tier Four is consistent with CCCA § 38134(e) (“In the case of entertainments or meetings where admission fees are charged or contributions are solicited and the net receipts are not expended for the welfare of the pupils of the district or for charitable purposes, a charge shall be levied for the use of school facilities or grounds which charge shall be equal to fair rental value.”) According to § 38134(h), “fair rental value” “means the direct costs to the district, plus the amortized costs of the school facilities or grounds used for the duration of the activity authorized.”

Figure 13 illustrates the four tiers, showing the *cost per square foot per year* and the *cost per square foot per hour* using actual SFUSD facilities-related expenses. It also illustrates that Tier 4 (considered “fully-loaded costs”) is consistent with current Class C office space rental in San Francisco, which points to the accuracy of the Calculator when compared to current market conditions.

**Figure 13: Summary of Joint Use Calculator Costs and Fee Tiers**

	Tier 1: “Program Partners”	Tier 2: “Incremental Costs - Civic Center Rate”	Tier 3: “Community Users”	Tier 4: “Fully Loaded - Private Users”
Asset Value				
Capital Costs				
Facilities Operating Costs				
Facilities Administrative Costs				
<i>Rental Costs per SF/YR</i>	\$0	\$5.65	\$21.06	\$28.74
<i>Rental Costs per SF/Hour</i>	\$0	\$0.0019	\$0.0070	\$0.0096
<i>Class C Office Space in SF Rental Costs per SF/YR</i>	-	-	-	\$27.41

Implementing such a fee structure should enable SFUSD to charge less to CBOs providing programs/services to SFUSD students, while simultaneously increasing facilities use revenues by charging more for community users that do not serve SFUSD students and/or have less than high alignment with the district’s Strategic Plan. See the Calculator tool in Appendix 4 for facilities use fees in example scenarios of typical community use.

SFUSD should consider removing a differentiation between programs that charge fees and those that do not (but keep the distinction between for profit and non-profit agencies). The current economic reality is that many nonprofits

do charge fees to parents for programs, often because public and/or foundation support is not always sufficient to fully subsidize programs and services (which may still be highly aligned with the district/school goals). Also, in at least one case, a current afterschool program (CDC) is mandated by its state funding source to charge low-income parents fees. Thus, having a “fee/free” approach to facility use would be incongruous with these funding sources that bring substantial benefits to SFUSD students.

SFUSD should also consider removing the differentiation between summer and school year use. The Calculator is designed to account for the facilities-related costs for the entire calendar year.

Additionally, SFUSD should consider charging more to some users for use of the district’s highest quality spaces and/or ones they have invested the most in maintenance and repair (high-quality auditoriums, science labs, etc). Other school districts have utilized this approach to help offset their investment.

- 2) **Establish a clear method to assign users to the cost tiers based on the type of facilities use and its alignment with SFUSD’s strategic plan.** Proposed definitions of who qualifies for each tier are provided above. The assignment process should be clear and transparent; additionally, SFUSD should determine an appeals process for users who feel that they have been categorized mistakenly.
- 3) **Establish procedure for CBO student programs/services outcome assessment.** CBO outcome evaluation is a key component to ensuring accountability and maintaining a high level of offerings to SFUSD students. The cost tier assignment and the outcome evaluation will create a formal policy connection between facilities use and the district’s strategic plan, “Beyond the Talk,” including the Balanced Scorecard process that ensures that all schools are focused on a few common goals designed to improve student achievement. Program outcome assessment is needed that appropriately holds providers accountable, to ensure that providers are providing high quality offerings to students and “earn” the waiver or reduction of facilities use fees. Working through the Partnerships Committee, DCYF has already made significant progress toward the creation of such a tool. See *Examples of Scorecard Measures for School-Community Partnerships: Possible Ways to Align School-Community Partnerships with SFUSD’s Plan and Balanced Scorecard Approach* (available online: <http://www.dcyf.org/WorkArea/showcontent.aspx?id=3312>). SFUSD, DCYF, and CBO representatives should work through an appropriate venue to finalize and adopt outcome measures.

Key elements of the CBO outcome evaluation should include:

1. Identify core services CBO provides
2. Identify outputs, outcomes, and/or performance measures CBO program assessment
3. Map alignment of CBO offerings to the Balanced Scorecard

This strategic policy approach aims to expand young people’s access to services, programs, and supports they need to be successful in school and life, as well as help close the achievement gap in San Francisco.

## Recommendation 3: Expand management capacity and support for community use of SFUSD buildings and grounds.

To address the challenges identified in this report, the SFUSD must develop a comprehensive space management infrastructure that efficiently and appropriately facilitates community use. There are two key components of the management infrastructure, staffing and implementation tools.

- 1) Staffing.** SFUSD will need staff capacity to carry out policies and procedures of an effective intensive community use program. Ideally, the Real Estate Office should include a deputy who specifically manages the community use program. The deputy should report to the chief facilities officer of the school district, but because community use is so multi-faceted and related to more than just facilities, the person in this position should also maintain close communication with the chief financial officer and the executive responsible for student support programming and services in the SSSD. Ideally, it should be a cross disciplinary position. Additionally, this position should maintain formal communication with the city and city agencies that may be able to use public school space for the delivery of services. The position should be funded through the increased community use revenues associated with the revised fee structure. Alternatively, this staff position could be located in the SSSD, interfacing closely with the facilities department (and others) as described above. The bottom line is that effectively managing the intensity of community use experienced in SFUSD will require enhance coordination by a staff member.

Additional staff time in the short term may also be needed to operationalize the implementation tools below. This includes legal support for drafting and reviewing memorandum of understanding, use permits, lease agreements, liability terms, and interagency agreements with other city or county agencies, as well as legislative modifications needed for policy guidelines. Existing SFUSD staff who have these tasks in their current purview should be tapped for these supports.

In addition to legal support, the community use office needs the capacity to support principals with some space planning to ensure that more space is available for community use, as well as to make the sharing of space more acceptable to school sites; principals will need guidance/support in working with scheduling and communicating with community users.

There will need to be staff that are able to maintain records on the terms of agreements, the spaces used, the fees paid, and the programs and services provided. The information and records should be accessible to the public and applications should be viewable and doable online. It is likely that existing staff could take on these responsibilities, but these tasks should be combined (or at least better aligned) instead of separated among SSSD and REO staff as is the current structure. There may also be technology solutions to aid in this endeavor.

- 2) Implementation Tools.** SFUSD non-school facility users note that the use scheduling process and its technology tools could be more efficient to save time and ensure users have desired access to their preferred school sites. The current technology tools used to track users and permits are not sufficient to maximize efficiencies, analyze permit applications and demand, or enable applicants to submit permits via the District website. District staff and users note that currently tools (technological or other) do not exist to prioritize and/or assess CBO use permit applicants by how well their planned programming contribute to and/or support the District's Strategic Plan and individual school site goals/needs. The following technical tools and procedures are recommended:

- a. Align and improve information collected about facility users and uses** – and create a single database of facilities users and uses is needed to track all instances of facilities use, including use permits, MOUs, and Contracts. Because the SSSD and the REO collect different information and some of the data fields are loosely defined, a complete analysis of users, uses, and related trends is not currently possible. More aligned and defined information will enable improved facilities use planning and revenue forecasts. The SSSD and REO should align and sharpen their information collection forms (Site Agreement and Use Permit, respectively), including:
- Complete information on user/applicant
  - Clearly defined categories describing type of facilities use
  - Clear description of use/activities
  - School site name and address
  - Space/facility needs and times
  - Track information on applicants denied use of facilities
- b. Create comprehensive “Facilities Use Handbook.”** The handbook should be available online and provided to any and all facility users, including CBOs. Handbooks created by comparison districts can serve as a guide; content typically includes:
- School Board policies on facilities use
  - Facilities use Application Procedures
  - Facilities use guidelines for different spaces (e.g., classrooms, multi-purpose rooms, theaters, gymnasias, fields, etc.)
  - Facilities use forms and/or applications
  - Facilities use fee schedule(s)
  - Facilities use evaluation procedures and forms
- c. Create “Tools for Principals” guide.** This companion document to the Facilities Use Handbook will serve to communicate a consistent message to school principals on district vision, policy, and procedures. It is also a good PR tool for SFUSD. Principals play a major role in promoting, supporting, or discouraging community use and need clear guidance on their roles and responsibilities with regard to community use of their schools. The handbook will help minimize the reported inconsistencies in CBO experience from school to school. Handbooks created by comparison districts can serve as a guide; content typically includes:
- Benefits of community use of school facilities, with particular attention to role of CBOs as student program providers
  - School Board policies, commitment, and intent
  - Role of principal in community use
  - Role of school district offices in support of site level staff
  - Responsibilities of user/program provider
  - Criteria for principal approval/denial of use permits
  - Criteria for principal decision to require security guards as condition of use permit request
- d. Provide complete facilities use information online.** Currently, the SSSD website provides good information to CBOs interested in using SFUSD facilities. The REO website provides contact information and an electronic copy of the use permit. The websites for the two offices should provide clear and consistent information to use applicants, including:
- Outline entire use application process to applicants
  - SSSD and REO websites link to each other

- All instructions, forms, and applications should be provided in PDF form
  - REO should establish an online use permit application submission process similar to the one SSSD uses.
- e. Establish appeals process for disputes.** A clear process should be outlined for resolving any disputes regarding facilities use. An interagency committee (for example, the Partnership Committee) should be designated as the arbiter of such disputes.
- f. Maintain centralized master calendar.** Many districts utilize a centralized master calendar of facilities use to avoid double booking, track use, demand, etc. SFUSD should consider this option to provide better alignment and communication internally between the SSSD, REO, and school sites. Master calendaring will also allow facilities use efficiencies, such as allowing two or more CBOs to coordinate use at a single location rather than at separate schools, thus reducing the District's operating costs. Implementing the comprehensive facilities use database noted above can form the basis of the master calendar. The District should explore the potential utilization of third party vendors who offer specialized software for coordinating and scheduling community use of public school facilities.

## **Recommendation 4:** Establish budget and revenue support for public school buildings and grounds that are healthy, safe, well maintained and designed for optimal education and community use.

To establish budget and revenue support for high quality public school infrastructure for optimal education and intensive community use, we recommend three key steps:

- 1. To secure adequate revenue to support more intensive community use, SFUSD needs to know the fully loaded cost associated with operating and maintaining its facilities and the level of subsidy for approved community uses or net gain from non-school users who pay use permit fees.** The Joint Use Calculator tool should be used in an ongoing fashion to know full facilities costs. SFUSD should also establish a “cost recovery” goal for community use of its facilities. Knowing the full costs of facilities and community use is the first step to maximizing cost recovery for SFUSD to support community use. Specifically, SFUSD should conduct a detailed annual analysis of facilities use costs, revenues, and the terms of all MOUs/Contracts to fully understand the level of “subsidy” provided by SFUSD through community use of its facilities.
- 2. SFUSD should model different tiered fee structure approaches on revenues and test the feasibility among stakeholders.** The numbers in the Joint Use Calculator should be used as the starting point in the development of a new, multi-tiered fee schedule. To determine the exact fee amounts, SFUSD should conduct an analysis of how the implementation of the new fee structure will affect revenues. This can be done by extrapolating from data from the Real Estate Office and Student Support Services Department to estimate the number of users and uses in a given year that will fall into each tier. In this way, the District can develop and model different potential fee schedules, and ultimately develop a new fee system that increases access without diminishing (and potentially increasing) revenues for community use cost recovery.
- 3. SFUSD and the City should structure their operating and capital budgets to adequately support maintenance, repair, and renewals for public school infrastructure to support and enable more intensive general public and community use.** Based on the analyses of costs and tiers, SFUSD and the City should explore the possibility of an intergovernmental agreement to reduce/relieve SFUSD’s subsidizing of non-school users to an agreed-upon level. For example, the agreement could establish the transfer of City funds to be used for SFUSD facilities-related expenses to support community use. If such an agreement is pursued, SFUSD and the City should establish:
  - standards for services required for building use, ex: custodial needs per hour per square foot; and
  - standards for maintenance and repair for building use.

Additionally, all revenue from SFUSD use permits should go into a protected fund to be used for maintenance and repair for schools seeing intensive community use. SFUSD should consider structuring incentives for school sites to encourage community use, which could include a percentage of use permit revenues go back to school sites for facilities-related expenses; school providing more community use would receive more of these funds.

## IV. Proposed Implementation Plan for Recommendations

Below is a proposed plan for implementation of the recommendations in this report. It assumes that SFUSD and DCYF wish to move forward on the full set of recommendations. There is “low hanging fruit” in the recommendations, such as the Implementation Tools described in Recommendation 3. Many participating stakeholders who reviewed the draft report commented that SFUSD should, at the very least, implement these tools. However, SFUSD leadership has expressed interest in pursuing the larger structural and policy recommendations first to establish a more effective policy framework. Myong Leigh, deputy superintendent for policy and operations, has been designated as the person in charge of moving the recommendations forward. Doing so should involve developing a way to engage all stakeholders in this next phase of the work. The implementation plan proposed below is a roadmap for guidance over the course of one year.

**Figure 14: Proposed Implementation Plan**

MONTH 1-3	LEAD	MONTH 4-9	LEAD	MONTH 10-12	LEAD
1. Align REO and SSSD data collection to enable testing of any proposed fee changes (Rec 3).	SFUSD / Consultant (CC&S)	1. Develop categories of user types to guide tier structure development (Rec 2.1-2.2).	Working Group	1. Test financial impact and feasibility of preferred tier structures. (Rec 4.1) <ul style="list-style-type: none"> <li>o Determine if additional investment needed to support use by comparing projected revenues with SFUSD cost recovery target.</li> </ul>	CC&S / Consultant
2. SFUSD decide goal/target for cost recovery of facilities expenses through community use	SFUSD	2. Develop preferred tier structure(s) and create method for determining how users are assigned to the tiers (Rec 2.1-2.2)	Working Group	2. Adopt vision and policy, including preferred tier structure (Rec 1-2)	SFUSD
3. Form working group to guide Month 4-12 implementation work.	SFUSD / DCYF	3. Develop CBO assessment measures and process as a tool for tier assignment (Rec 2.3).	Working Group	3. Draft handbooks (public and principals) (Rec 3)	CC&S / Consultant or SFUSD staff
		4. Develop user appeals process (Rec 3).	Working Group	4. Create web content (info, application forms, etc) (Rec 3)	CC&S / Consultant or SFUSD
		5. Explore online registration and master calendaring technology options (Rec 3)	CC&S / Consultant	5. Implement online registration and master calendaring tool (Rec 3)	SFUSD
				6. Update Calculator with 2010 expenditure data (Rec 4.2)	SFUSD / Consultant

## V. Conclusion

By implementing these recommendations, SFUSD will be taking a coherent and strategic approach to enabling community use of its facilities that directly supports the district's Balanced Scorecard. In this way, SFUSD can be a state and national model for effective facilities use and CBO partnerships. SFUSD should continue to provide community use of its facilities by continuing to view CBOs as partners in the whole portfolio of offerings to SFUSD students.

Further, SFUSD should work with the City of San Francisco to explore policies and procedures for the district to utilize city property and facilities to enhance student experiences. This "facilities use reciprocity" would fulfill the 2004 SFUSD School Board Resolution (No. 49-14A12) instructing the Superintendent to "develop a comprehensive joint-use plan for District and City property and facilities. As part of the development of such a plan, the Superintendent will prepare, as soon as possible, an analysis of the costs and revenues associated with current and future agreements that the District has regarding the use of District facilities." Pursuing enhanced "facilities use reciprocity" opportunities was of strong interest to the stakeholders in this project, but was outside of the project scope.

Utilizing the findings and implementing the recommendations from this report will much more adequately support extensive community use of SFUSD facilities and lay the groundwork for improved "joint use" of SFUSD and City facilities to enhance community and educational life for San Franciscans.

## 1. Joint Use Stakeholder Group Scope, Participant List, Identified Challenges, and Vision Statements

### Stakeholder Group Scope

San Francisco Unified School District (SFUSD) and the City of San Francisco's Department of Children, Youth, and their Families (DCYF) have partnered to explore potential benefits to more effectively utilizing school facilities as public assets, namely through the joint-use of these facilities for school, city, and community uses beyond the school day. UC Berkeley's Center for Cities & Schools (CC&S) (<http://citiesandschools.berkeley.edu>) has been hired to provide technical assistance and facilitate the stakeholder group that will guide and inform the project.

**Project Goals:** 1) Develop a shared understanding among school, city, and community partners of how public school facilities can be utilized as public assets, and 2) to recommend policy changes needed to implement this shared understanding.

**Group Purpose:** To guide and inform the development of joint-use policies for San Francisco.

**Group Facilitation Process:** Facilitated by UC Berkeley's Center for Cities & Schools (CC&S).

**Group Members:** A small group of individuals representing the City of San Francisco, San Francisco Unified School District, and other services providers and community-based organizations will be invited to participate.

**Group Meeting Timeline:** Three stakeholder group meetings will be held in January/February, April, and December 2009. Notes from each stakeholder group meetings will be provided to participants.

Goals for each meeting will include:

#### (1) February 18, 2009 Meeting

- CC&S presents a general overview of joint-use policies, procedures, and practices both in California and nationally and a very preliminary assessment of what is already known about joint-use in San Francisco
- Initial discussion of proposed goals of joint-use Stakeholder Group and the need to craft a vision on the role of school facilities in meeting broad community needs.

#### (2) May 27, 2009 Meeting

- CC&S presents research scan of how other communities similar to San Francisco approach the use of school facilities beyond the school day and best practices may be helpful to consider.
- Group confirms their vision on the role of school facilities in meeting broad community needs.
- Initial discussion of policy options.

#### (3) December 7, 2009 Meeting

- CC&S presents project findings sharing the pros and cons (cost/benefit analysis) of developing a joint-use policy and provide key recommendations for a meaningful and sustainable joint-use policy for the students and families of San Francisco. These recommendations will reflect the shared vision of the stakeholder group and the CC&S analysis of the fiscal, logistical, and political impacts of those options.

## Stakeholder Group Participant List

Chris Armentrout, SFUSD

Trish Bascom, SFUSD

Margaret Brodtkin, New Day for Learning

Al Dea, SFUSD, Principal, Presidio Community School

Jim Dierke, SFUSD, Principal, Visitacion Valley

Michael Farrah, Mayor's Office of Neighborhood Services

Dave George, SFUSD

Dave Goldin, SFUSD

Claudia Jasin, Jamestown Community Center

Dennis Kern, Recreation & Parks Department

Elizabeth Lee, SFUSD

Myong Leigh, SFUSD

Asha Mehta, San Francisco Beacon Initiative

Hydra Mendoza, Mayor's Education Advisor

Ingrid Mezquita, First 5 San Francisco

Aileen Murphy, Wallenberg Principal, SFUSD

Sandra Naughton, DCYF

Judy Nemzoff, Arts Commission

Johnette Pagan, Youth Treatment and Education Center

Jeannie Pon, SFUSD

Ellie Rossiter, Parents for Public Schools

Terry Schwartz, Recreation & Parks Department, Superintendent of Citywide Services

Philip Smith, SFUSD

Maria Su, DCYF

John Updike, SF Office of Real Estate

Anna Kelleher, Incoming Second District PTA President

## Stakeholder Identified Challenges with Current Community Use Policies and Procedures

Through the Stakeholder Group meetings and one-on-one interviews conducted by CC&S, stakeholders identified a variety of policy and implementation challenges with the current community use processes. These ranged from big picture philosophical differences to very technical logistical issues. The challenges identified across the stakeholders fell into five main categories:

1. *Lack of Overarching Strategic Policies and/or Procedures.* While community and CBO use of school facilities occurs frequently, the district currently does not have a single, overarching joint use policy that is structured to coordinate and maximize efficiencies among the variety of uses, users, and programs/services being offered. Such a strategic approach would aim to expand young people's access to services, programs, and supports they need to be successful in school and life, as well as help close the achievement gap in San Francisco.
2. *Lack of Vision for SFUSD Schools to Serve as Public Assets.* Stakeholders in San Francisco have not yet established a shared philosophical vision for schools as public assets, that acknowledges both the costs and the benefits of community use of school spaces and the role these facilities play in supporting programs and services for students and communities. Likewise, SFUSD does not have a guiding vision on the level of desired/appropriate utilization of its school facilities.
3. *Lack of Clarity of Policies and Procedures.* Many non-school stakeholders feel there is a lack of clarity on the district's policies and procedures for securing facilities use. Specific areas of concern include fee

structures and calculations and how they apply to different applicants, clarity of instructions on processes, and adequacy of advance notice of which facilities will be available over the summers. The result is wasted time and resources navigating the system.

4. *Lack of Consistency and Accountability in Policies and Implementation.* Many stakeholders noted that use of school facilities by CBOs often occurred based on informal agreements and personal relationships. Thus, there is concern that different groups are being treated differently, such as being granted privileged access and/or reduced rates. Because the consistency and accountability are not built in, CBOs are less able to plan their programming, principals approach CBO relationships very differently between schools, CBOs are not held accountable for the success/quality of their programming, and the district is limited in its ability to generate revenues from facilities use. There are currently no clearly communicated policies/procedures governing the negotiation process for securing MOUs and/or Contracts.
5. *Lack of Understanding of the Costs and Benefits of Joint Use of Public Schools.* All use of facilities incurs some cost, through normal wear and tear, utilities, and/or janitorial services. Currently, there is not a full understanding of the costs incurred by SFUSD for other entities to use its facilities. At the same time, jointly using school facilities can bring a host of benefits to schools and communities. Among the stakeholders, there was general consensus that the programs/services that CBOs provide in schools to students was of benefit to the school district. Most also agreed that, in order to ensure high quality offerings and outcomes for students, evaluation systems for CBOs and programs need improvement. Many stakeholders noted the desire to better understand costs associated with community use and collectively explore different fee options for different users that might be structured to encourage more student supportive uses.

## **Vision Statements Submitted by Stakeholder Group Members**

Below are participant's vision statements; underlined text shows key themes found in the visions.

*For San Francisco's public school facilities to serve as public assets means....*

"...that their purpose is clearly defined as part of a greater whole."

"...that the SFUSD and the community partner to create an extended learning environment that goes beyond the school day. Students would be able to explore many interests such as cultural enrichment, the arts, math, science, physical activities, and nutrition education, gender specific health issues and school success interests. The center would reach out to hard to reach populations by creating an environment that is safe and inviting; making the connection to school a positive one. By default truancy would be addressed because students will want to be at school beyond the classroom hours. A caring community will be created to help youth be ready to learn and succeed in school."

"...that they offer community members of all ages a safe place to play and learn."

"...that there would be a database online for scheduling use of rooms and space and that the proper documentation would be collected ahead of time and kept on file so that all of the paperwork/permissions would not be needed/as well as the phone calls, etc. each time you need space."

"...providing a safe and accessible space to the neighborhood community. This may also be a way for San Franciscans to link children and schools to the neighborhoods they live in."

“Schools become community hubs open at no charge for learning and community building.”

“...that there is a consistent and transparent policy supported by procedures and practices which all promote community groups’ use of school facilities, particularly when those groups are providing services and programming that helps children, youth and their families be ready to learn and succeed in school; be healthy; live in safe, supported families and communities; and contribute to the development and vitality of San Francisco.”

"...that those assets are utilized to their fullest extent (as much of the day/night and as many days of the week as possible) to benefit the community in meeting educational, cultural and recreational needs."

“...there would be a spirit of partnership between CBOs and the school district that would start at the top and reverberate through the system, as opposed to us being completely at the whim of principals. CBOs are partners, and together with SFUSD, they do everything to make sure they can have positive impacts on the kids. The district steps forward with its assets (people, facilities) to help out CBOs. Staff at schools would be evaluated for how much they can bring to bear for their students.”

“...overhauling the whole system. Not just on the school district side, but on the CBO side as well. SFUSD should not incur additional costs from joint use. However, it has to be reasonable and fair.”

“...school sites will be welcoming to all families, accessible to the surrounding community by partnering with local CBOs, and meeting and responding to local demand.”

## **Stakeholder Group Meeting #1 Summary (February 18, 2009)**

### **San Francisco's Public School Facilities as Public Assets**

#### **Stakeholder Meeting, 2/18/09**

#### **Meeting Notes (Prepared by Center for Cities & Schools)**

#### **Attendees**

Chris Armentrout, SFUSD

Trish Bascom, SFUSD

Margaret Brodtkin, NDFL

Tracy Brown, DCYF

Al Dia, Principal of Presidio Community Schools

Mike Farrah, Mayor's Office of Neigh. Svcs.

David Goldin, SFUSD Facilities Director

September Jarrett, DCYF

Claudia Jasin, Jamestown Community Center

Elizabeth Lee, SFUSD

Myong Leigh, SFUSD

Asha Mehta, SF Beacon Initiative

Hydra Mendoza, SFUSD & Mayor's Office

Ingrid Mezquita, First 5

Judy Nemzoff, Arts Commission

Johnette Pagan, Youth Treatment & Ed. Center

Jeannie Pon, SFUSD

Ellie Rossiter, Parents for Public Schools

Sandra Naughton, DCYF  
Terry Schwartz, Park & Rec  
Philip Smith, SFUSD

### *Center for Cities & Schools*

Deb McKoy, Jeff Vincent, Ariel Bierbaum, Tamar Cooper, Jordan Klein

## **Welcome & Opening Remarks**

Myong Leigh, SFUSD

- There are many different perspectives on the issue of joint use: the city, the schools, the CBOs. It is relevant to anyone who is using the space, or partnering to benefit the students.
- SFUSD is very enthusiastic to undertake this work, and wants to come at the issue with a broad view.
- In the absence of an effective joint use policy, it's "Who's on first?" There's an absence of a strategic approach.
- SFUSD & CC&S have worked together for 3 years; They are the right partner to take this work on. We look forward to learning from and with CC&S on how to partner more effectively.

Sandra Naughton, DCYF

- At DCYF, facilities use comes up in so many different contexts. Many of the CBOs we fund use school facilities to deliver services to youth – from afterschool programs to youth employment opportunities to school-day activities and learning opportunities to girls groups during lunch time. Having access to youth to provide programming and services that augment what the school district provides is a win-win for everyone. Figuring out ways to ensure facilities foster that rather than limit that type of partnership is important, which is why we wanted to have this discussion and focus on tangible outcomes.

September Jarrett, DCYF

- Jurisdictional boundaries don't exist in the lives of kids and families.
- There are pockets of challenges... but the opportunities are greater than the challenges.

Margaret Brodtkin, NDFL

- The idea for this project came out of the Partnership Committee which is a representative group of community based organizations, city departments and the school district who focus on how to foster successful partnerships..
- The most important element of partnership, according to the committee, is the effective joint use of facilities. There's a real consensus that this is a high priority.
- We have introduced this project to the Joint City & School District Select Committee, which is made up of Board of Supervisors and Board of Education Commissioners, who are now engaged in this conversation.
- Funding for this effort came from DCYF and from the Stuart Foundation which has enabled us to partner with the Center for Cities & Schools.

## **Project Overview**

Deborah McKoy, CC&S

- 3 years of CC&S and SFUSD working together, namely through CC&S's PLUS Initiative
- PLUS Initiative
  - In cities around the Bay Area, bringing city and school leaders together to discuss shared policies; each city implements a separate project.

- In SF, it has evolved into Joint Use policy.
- Joint Use has become a national topic, with focus from foundations, government.
- CC&S: Established (and has the expertise) for this type of work exactly.
- Goals for today:
  - Describe and get feedback on project scope, deliverables, and timeline
  - Overview of joint use of school facilities
  - Group Discussion: Vision, Research, and Next Steps
- Goals for the project:
  - Develop shared understanding among school, city, and community partners of how public school facilities can be utilized as public assets
  - Craft policy recommendations

Q, Terry: How do we give you feedback and share info we know re: joint use?

A, Deb: We'll start gathering info from you today, and subsequently we'll follow up individually.

### **'Joint Use 101'**

Jeff Vincent, CC&S

- There are a lot of different definitions of the term 'Joint Use'. Most basic: an agreement to share access to a piece of property/facility.
- Elements: types of uses, spaces, hours, responsibilities (including logistics, process, funds).
- In CA joint use is governed by the Civic Center Act.
  - Schools can be used, districts can charge for use.
- There's a spectrum, from opening schoolyard gates to mixed-use community center school campus, and many things in between.
  - Variety of users that have different needs/requirements (e.g., CBOs, parents, community groups, churches, others).
  - Variety of characteristics of use... e.g., number of rooms, amount of time, recurring or not.
- Joint use = an opportunities to maximize resources.
- Challenges abound, re: relationships, logistics, understanding benefits and costs, complexity.

### **Project Goals and Priorities**

Myong Leigh, *SFUSD's Top 3 Goals/Priorities*

- Programmatic Alignment
  - Any partnership beyond a single transaction (i.e., permitting for a single instance of joint use) requires a demonstration of the win-win.
  - Work in complimentary ways.
- Get better at building agreements re: transactions.
  - How precise does the MOU have to be?
  - How do we resolve issues re: who pays what, who is responsible for what?
  - Work through nuts and bolts of formulating agreements.
  - Let's not conflate program and logistics.
- Aspire to mixed-use community centers... something more robust.
  - We'd like to learn who has done that successfully.

Sandra Naughton, *DCYF on The Partnership Committee's Top 3 Goals/Priorities*

- Expand youths' access to the services, programs and supports they need to be successful in school and in life
  - In order to help schools close achievement gap, CBOs need adequate access to students and space to deliver their services/programming.
  - Including after school, evenings, weekend, summers.
- Explore how joint use policies relates to the other school district & city policies and procedures in place that relate to school-community partnerships; strive to align them
  - CBOs interact with SFUSD at several different access points. Must register and go through an orientation with one department, access facilities permits from another, interact with teaching staff in another – are they all aligned/sharing information?
  - This is an opportunity to get people on same page re: how CBOs support students.
- Ensure that district policy is effectively and consistently implemented at the site level.

*Other Goals and Priorities from the Group*

- Establish a shared philosophy regarding schools as public assets. (Claudia)
- Enhance transparency regarding decision-making (e.g., calculation of fees). (Claudia)
- Conduct a thorough cost-benefit analysis. (Margaret)
- Need clarity of expectations of all parties (e.g., CBOs, Principals) and ensure that all groups feel supported by this policy. (Chris)
- Clarify alignment of programs with schools. (Hydra)
- Process/policy must include SFUSD's use of city facilities. (David)
- Learn from past examples. (September, Terry)
- Explore opportunities for increase revenues through joint use. (Margaret)

**CC&S: Early Lessons and Priorities**

Jordan Klein, CC&S

- Commitment to getting this right
  - 2004 Board of Ed resolution to establish joint use policy.
  - Strong stakeholder support
- Context driving the need for joint use policy.
  - Density of SF
  - Student need, expansion of school day priorities
  - Economic and budgeting crises
- Demonstrate win-win for all parties.
  - Conduct an extensive cost-benefit analysis.

**Group Discussion**

*How are we defining joint use for the purposes of this project, policy?*

- Just about community use of SFUSD properties, or working toward a larger community policy of joint use?
  - Deb: This project is primarily about developing policy re: school buildings. But we want to honor this interest in looking at the full day for learning And the role city facilities play in that. We will discuss internally what our capacity is, and make recommendations regarding the scope of work over the next six months.
- First tier: initial cost-benefit analysis regarding school facilities; next tier is city space; next tier is CBO space.

## Examples and Resources

- Healthy Neighborhood Toolkit, Public Health Department (Judy)
- GeoMap: asset mapping of child care facilities (Ingrid)
- City waiving fees for SFUSD use of Civic Center, City Hall North Light Court; would like to explore options beyond the occasional (Hydra)

## Themes of Discussion

- Alignment of programs with school curriculum makes it easier to align resources.
  - But even when you have an alignment of program and philosophy, there are differences re: program quality (in both directions).
- Lack of neighborhood schools raises difficult issues.
- There is *informal* joint use.
  - Sometimes informal use leads to innovation. (Al Dea, Richmond example)
  - Policy shouldn't become a bureaucratic hurdle that stifles innovation. (Ariel)
- Categorize types of use: For example, 3 levels of joint use of schools (Johnette):
  1. I need space.
  2. I provide a program that benefits kids.
  3. We are co-constructing program.
- There are other relevant discussions happening concurrently in other arenas (e.g., the Partnership Committee). These groups' progress must be integrated and mutually supportive of this effort.

## What other info do we need?

- Map out current community use of school facilities. (Margaret)
  - Can we do this? Do we have the data?
  - It would be impossible to map all informal use. (Deb)
- Learn from other California school districts' policies

## Next Steps

Deb and Jeff, CC&S

- We'll send notes from meeting along with discussion questions. Please respond with your examples.
  - What can be formalized?
  - What do we want to accomplish with this tool, joint use?
- We'll revisit the scope of work. Please see the attached draft of the revised workplan and send us any feedback you have.
- April Meeting: CC&S presents best practices research.

## Stakeholder Group Meeting #2 Summary (May 27, 2009)

### San Francisco's Public School Facilities as Public Assets

### Stakeholder Group Meeting, 5/27/09

### Meeting Notes (Prepared by Center for Cities & Schools)

#### Attendees

Rachel Antrobus, TAYSF

Chris Armentrout, SFUSD

Trish Bascom, SFUSD

Margaret Brodtkin, New Day for Learning  
Dave George, SFUSD  
Dave Goldin, SFUSD  
Claudia Jasin, Jamestown Community Center  
Anna Kelleher, SFPTA  
Myong Leigh, SFUSD  
Asha Mehta, SF Beacon Initiative  
Hydra Mendoza, SFUSD & Mayor's Office  
Aileen Murphy, Wallenberg HS/SFUSD  
Sandra Naughton, DCYF  
Ellie Rossiter, Parents for Public Schools  
Terry Schwartz, SFRPD  
Philip Smith, SFUSD  
Maria Su, DCYF  
John Updike, SF Office of Real Estate

### *Center for Cities & Schools*

Deb McKoy, Jeff Vincent, Ariel Bierbaum, Jordan Klein, Meghan Sharp

### **Goals**

- Discuss CC&S analysis of current SFUSD facility use policies
- Discuss CC&S “best practices” findings to date
- Begin building vision on the role of school facilities in meeting broad community needs

### **A. Welcome and Introductions**

Myong Leigh, SFUSD

- This group has been brought together to expand and improve on the joint use of school facilities that is already occurring on an ad-hoc basis across the city. We had a productive meeting in February, are here for our second meeting, and have plans for another meeting in August.
- From this work, SFUSD hopes to:
  - Gain clarity on how we approach and conduct day-to-day arrangements by which non-school entities and individuals have access to school spaces
  - Think creatively and learn about facilities use models we can borrow from
  - Cut out the “who’s on first?” and tail-chasing that we all have muddled through over the years around this issue

Maria Su, DCYF

- We want to figure out an equitable, transparent, and standardized process for CBOs to access facilities citywide. There are already quite a few CBOs that utilize SFUSD facilities; we want to increase and expand that programming. Hopefully we will be able to use this process as a model for partnering with SFUSD and expanding CBO use of other, non-school facilities throughout the city.

Jeff Vincent and Deborah McKoy, CC&S –*Project Overview and Recap of 2/10/09 Meeting*

- Since our first meeting in February, CC&S has compiled information on current use of school facilities in the district and practices from other districts that can serve as models for SFUSD. For review today is the memo presenting this research, which will be incorporated into the final report.

- CC&S' PLUS Leadership Initiative, which SFUSD is a part of, works on specific, tangible ways that cities and schools can better support each other. There's been a lot of interest in the joint use issue nationwide. It's exciting to think how the cutting-edge work happening here, with this stakeholder group, can inform the region, state, and even nation.

## **B. Analysis of Current SFUSD Facilities Use Policy and Practice**

Jordan Klein and Jeff Vincent, CC&S, provided a summary of the analysis of current SFUSD facilities use policy and procedures as described in the memo presented to the group. Topics of analysis include:

- SFUSD Facilities: A Snapshot
- CA's Civic Center Act (CCCA)
- Two Formal Methods of SFUSD Facility Use
- SFUSD Use Permit Process
- Analysis of Use in SFUSD: Volume, Characteristics, and Geography

### **Discussion Summary**

PTA use of facilities. Technically, the fee structure applies to PTA's. However, it was noted that schools often prefer not to charge PTAs in order to encourage PTA involvement. This may vary from school to school. Similarly, other "informal" uses do occur (i.e., uses occurring without going through the formal permit process).

Role of risk management. SFUSD's Risk Management office only gets involved if there is an insurance question associated with the specific use/user. Following SFUSD's permit procedures, proof of insurance coverage of \$1 million is required by the user.

Custodial fee calculation: Participants asked clarifying questions about when the custodial fee is charged.

- Nonprofit organizations that charge fees to users of their programs can be subject to higher use rates (i.e., considered a "private use"), per the CCCA rules.
- Custodial overtime fees are typically not charged when a janitor stays overtime to clean up after a group, provided the group leaves within the regular custodial hours. If the group stays past the regular custodial hours, overtime fees are charged for that time. Often, only an hour of overtime is charged, which typically does not cover all of the time that the janitor is in the building.

District directive to school sites regarding community use. School site participants noted that they did not feel there was a directive from the district to maximize or encourage community use or to not do so.

MOUs: CC&S was not able to obtain and assess the existing MOUs throughout the district. The number of MOUs and the variety of processes, paperwork, and terms that exist in relation to MOU agreements between SFUSD and nonprofit providers of school-based services remains unknown. SFUSD staff noted that MOUs were at one point in time processed by the Real Estate Office and are now handled by the Student Support Services Department. CC&S will follow up with Trish Bascom, Chris Armentrout, and other relevant SFUSD staff to analyze current MOUs in the context of making policy recommendations for a variety of community uses/users. The two key issues with regard to MOUs are: fees charged and how the services/programs of the MOU partner align with school program/goals. In addition to MOUs, contracts and site agreements for facilities use may also be utilized. Participants requested that CC&S provide a flow chart in the final report to illustrate the existing process for securing school facilities space.

## **C. Lessons from Other Communities**

Jordan Klein, CC&S, presented findings to date on facilities use policy in selected case districts:

- Oakland USD
- West Contra Costa USD
- Los Angeles USD
- San Diego USD

- San Jose USD
- Montgomery County, Maryland

Policy Elements Analyzed:

- Communications policy and procedure
- Application processes
- Scheduling
- Use fees
- Liability and insurance

**Discussion Summary**

Current use fee calculation. SFUSD facility use fees were set by the School Board many years ago. Precisely how these fees were calculated is unknown. SFUSD said based on an analysis completed several years ago, the current fee structure represents a significant discount against market value. The discount of SFUSD rates can be determined by comparing with rental rates of Class C facilities.

Assessing SFUSD’s real cost of community use of facilities. An assessment was attempted in response to Proposition 39; staff believes that it came to 88 cents per square foot. In subsequent years, the cost has been adjusted by the Consumer Price Index (CPI). Currently, it is around 92 cents per square foot. However, because SFUSD’s facilities vary in age and condition figuring cost is difficult because some buildings are past having a depreciation value. SFUSD will need to decide whether or not they wish to investigate in more detail the full costs associated with community use of their facilities.

Adjusting SFUSD’s facilities use fees. SFUSD will need to determine whether or not they are interested in exploring adjusting the use fees.

Leverage demand for SFUSD facilities. Assessment of demand for access to SFUSD facilities is needed in order to investigate how that demand might be leveraged to provide free (or reduced fee) access to CBO users while making this cost-neutral to the district. Look how other entities do this, including the city’s Recreation and Parks department and Mercy Housing.

Add SFUSD policies to district comparisons. CC&S will include current SFUSD policies/procedures in the case district comparison matrices in the final report.

**D. Creating a Shared Philosophy**

Deb McKoy, CC&S

- Several stakeholder group members provided email responses to the following sentence, “For San Francisco’s public school facilities to serve as public assets means that....” See attached handout for these responses, of which three key points emerged:
  - School buildings are safe and inviting spaces for community use
  - Recognize that stakeholders share responsibility in fostering effective joint use
  - Make the educational value of, and connection to, joint use explicit

**Discussion Summary**

Definition of “community”. This is very much related to the district’s upcoming changes in student assignment policy. The new student assignment policy will be announced in late fall 2009 and will take effect for the 2011-12 school year. What is needed is further engagement of community, supporting “school as community hub.”

Reciprocity and accountability. These need to be made explicit; clearly articulate how community use of SFUSD facilities benefits everyone. For example, with the community hubs/playgrounds project, there was one clear group that felt they benefitted – the neighborhood users – while the school site leaders may not have necessarily shared this feeling. While CBOs are providing a needed service, there is a cost to the district associated with the use of facilities that must be addressed.

Extended learning opportunities, resources. There is currently no mechanism to calculate the benefits CBOs provide to schools and/or students or to identify the CBOs whose programs are most effective so that their services can be prioritized over others that are not as effective. Also, there is occasionally a conflict between having “children and youth” at the center versus having “academic outcomes” at the center. Look at the way SPUR offers their facility for use; how could SFUSD host/make possible those uses in a way that is aligned with or at least not at odds with what takes place in those spaces during the day? The priority should be to align programs such that everyone is effectively sharing space to the end of improved academic outcomes for students.

Cost-neutral and/or revenue-generating facilities. To get to cost-neutral place would be phenomenal. But the elephant in the room is, there are not enough resources. Perhaps SFUSD can take a business approach and figure out the revenue part, and then go backward from there? To do so, understanding the real cost of opening up SFUSD facilities for community/CBO use is needed.

Setting use priorities. Prioritizing uses/users is important in ensuring programs occurring in SFUSD facilities support students as much as possible. There needs to be a balance between private users that help us generate revenue and CBOs; we do not want to hurt the CBOs by allowing private users more use just because they are paying higher fees.

#### **E. Timeline and Next Steps**

- Next Stakeholder Group meeting: August 2009. CC&S will send out draft report for review prior to the meeting. Draft will include policy options and draft recommendations for review.
- June-August: CC&S completes research, including: remaining interviews with stakeholders, case studies, and cost/benefit analysis.

## **2. Schools as Community Hubs Pilot Project**

The Schools as Community Hubs Pilot Project is a joint use partnership between the City and County of San Francisco and SFUSD. The District allows the City to unlock outdoor playground areas for open, unsupervised use at twelve public schools throughout the city (one middle school and ten elementary schools) on the weekends and selected school holidays during daylight hours. This project, now in its second year, is meant to help increase the amount of recreational space available to the public. A list of participating schools can be found here:

[http://www.sfgov.org/site/mayor\\_page.asp?id=98076](http://www.sfgov.org/site/mayor_page.asp?id=98076). The MOU is appended to this report.

**Responsibilities.** While the bulk of the responsibilities associated with implementing this project reside with the City of San Francisco, SFUSD also takes on a number of responsibilities.

The City is responsible for:

- Unlocking, locking up facility gates (Recreation and Parks Department),
- Inspecting facilities for damage and litter (Recreation and Parks Department),
- Posting signs at each facility (Department of Public Works), and
- Replacing, repairing or remediating any damage or graffiti occurring during program hours (Department of Public Works).

SFUSD is responsible for:

- Providing the city with access and keys to project sites,
- Inspecting project sites the day before the school week begins (usually Sundays, excepting holiday weekends) and reporting damage to the City, and
- Bearing the cost of overtime incurred by District personnel related to the project.

The MOU establishes a protocol that requires regular inspection and immediate remediation of any damage to the school sites as a result of the project use. Both the District and the City inspect the site before the beginning of the school week. This overlap is built in to the project to ensure that the facilities are properly inspected and maintained, and for reporting project-related damage. District staff members responsible for reporting damage have multiple City government contacts that they can reach to report project-related damage. The aggressive oversight and reporting system is meant to fix anticipated problems quickly, with minimal impact on school district resources.

### 3. Facilities Use Permit and MOU

Figure 15: SFUSD Community Use of Facilities Process Flowchart

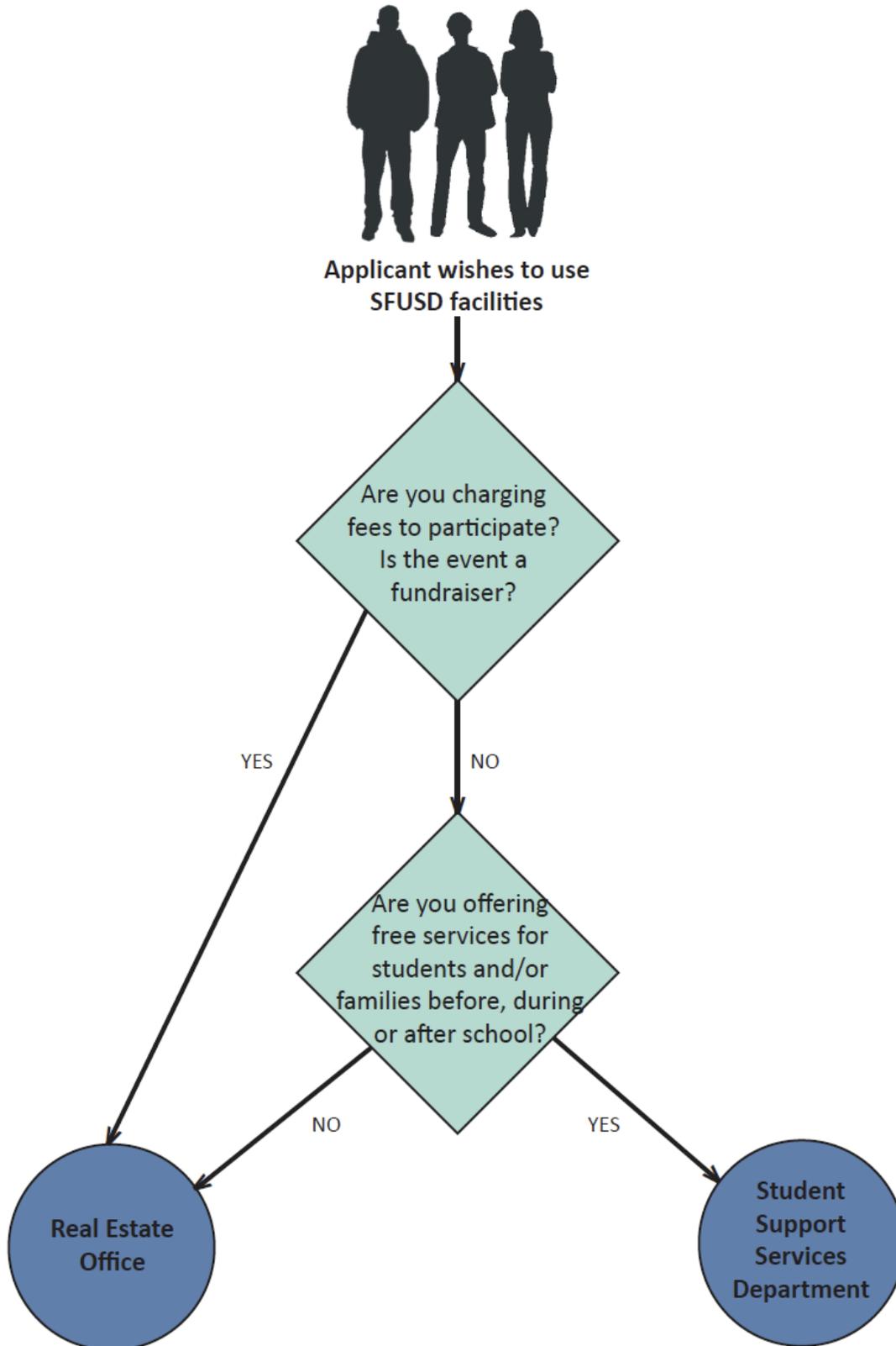
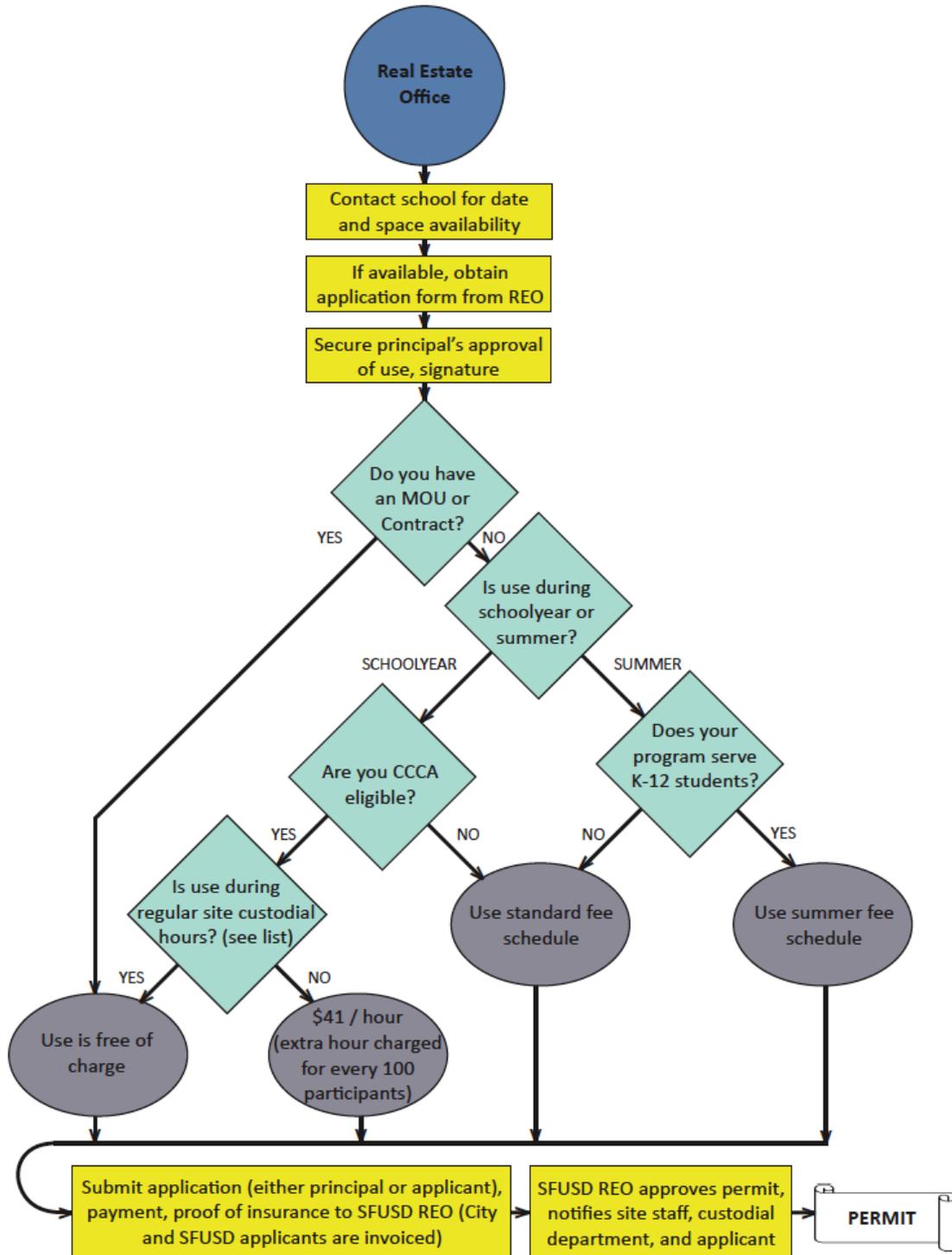
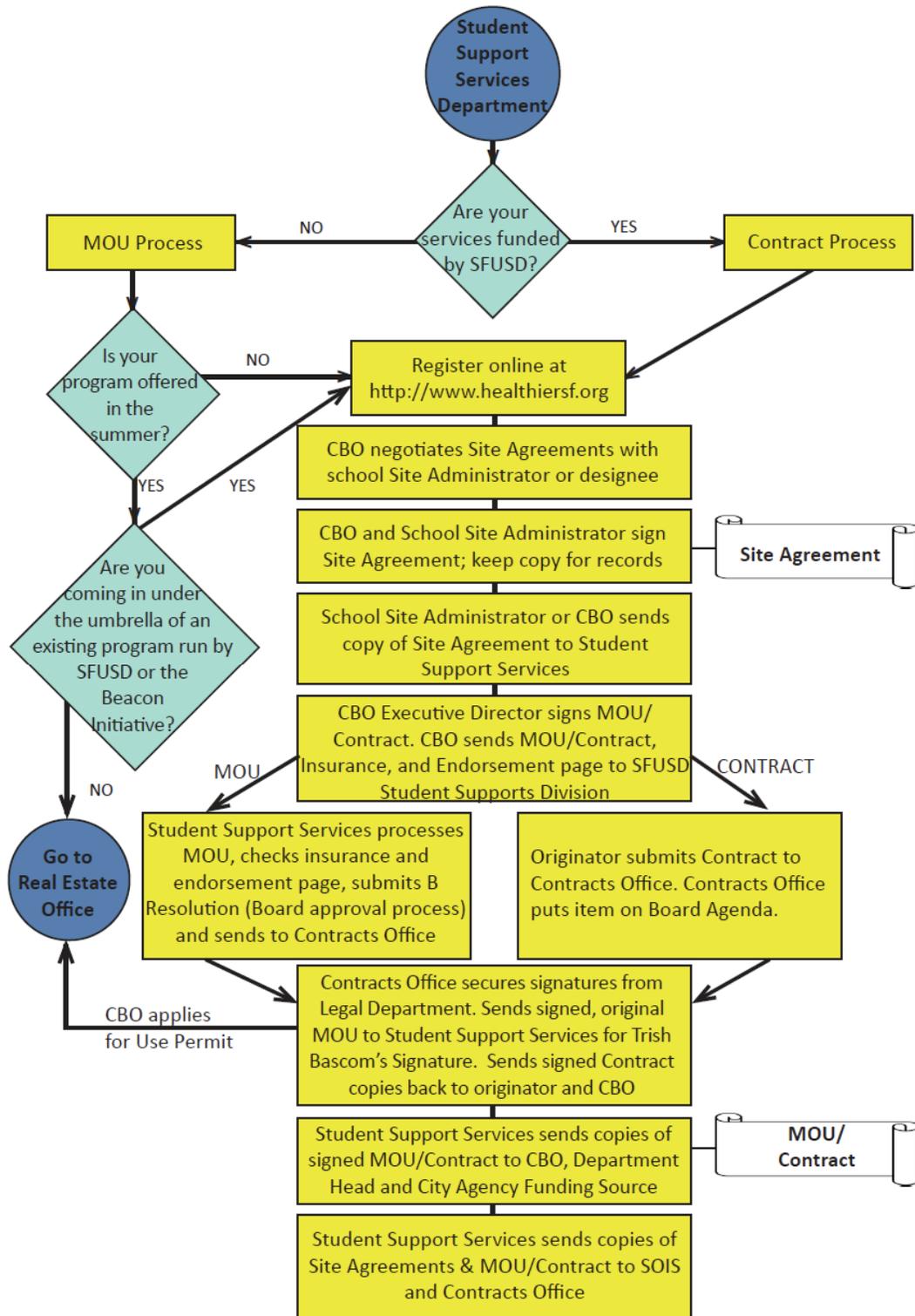


Figure 16: SFUSD Community Use of Facilities Process Flowchart – Real Estate Office



**Figure 17: SFUSD Community Use of Facilities Process Flowchart – Student Support Services Department**



## Use Permits Through the Real Estate Office

**Use Permit Application Process.** All facility use permit applicants, regardless of type or desired use, follow the same application process, as shown in Figure 3:

1. Applicant obtains copy of the permit form from the REO. The form (see appendix) can be picked up in person or faxed to the applicant.
2. Applicant obtains signature approval from the principal at the desired school site.
3. Applicant submits to the REO the permit form, payment of use fees, and proof of insurance of up to \$1 million, naming SFUSD as co-insured.
4. The REO sends copies of the permit to the principal, custodian, and applicant. Principals are instructed to notify the custodian to be on duty to open and close the school for use.

**Use Permit Rules.** The following rules apply to all use permits.

- All permits expire on June 30. All permits are revocable.
- Principals may deny permits if the applicant has damaged property or been dishonest about services in the past. Principals are given little instruction from the district on their decisions to approve or deny use permit requests.

**Use Permit Fees.** The SFUSD Board of Education's Resolution 56-14A10, passed in 2005, directed the school district to create a use fee schedule that "will allow organizations that work directly with SFUSD students to pay some level of reduced permit fees to the District." As such, any Civic Center Act eligible user has access to public school facilities free of charge during regularly scheduled janitorial shifts (which vary by school site). For use of facilities during hours outside of normal custodial coverage, Civic Center Act eligible users must cover only the cost of janitorial staff overtime hours at a rate of \$41 per hour. This rate is established through negotiations between the janitors' union and the school district. Civic Center Act eligible users are not required to cover the other costs associated with community use of facilities, such as utilities or maintenance; those costs are incurred by the school district.

A summer fee schedule lists daily rates for different types of school facilities available for rent by organizations providing summer programs. These rates are valid from 7:30am to 6:00pm, Monday through Friday, from the first or second Monday after the last day of instruction in June until the first day of August. Most school facilities undergo extensive maintenance during the first two weeks of August in preparation for the school year, and are therefore unavailable. The summer fee schedule (see appendix) was first created several years ago by Superintendent Ackerman and has since been adjusted annually by the Real Estate Office using the consumer price index (CPI).

A separate use fee schedule for private users includes two sets of rates: one applies during custodian on-duty hours, and the other during custodian overtime hours (see appendix). This fee schedule (see appendix) was first determined more than a decade ago, and has been adjusted three times in the past ten years in accordance with the CPI. Rates vary based on the number of hours and the amount and type of space desired by the applicant.

Principals may require the presence of security as a condition of their approval of facilities use. In those cases, the user (whether Civic Center Act eligible or private) will hire an independent security service, or, if available, contract with SFUSD for the use of district personnel at the cost of \$27 per hour. SFUSD does not have a written policy to determine whether security guards are needed for use permitted activities; the decision to require security guards is at the discretion of the principal.

According to use permit procedures, any SFUSD school that wants to use the school outside of regular school hours is required to obtain a use permit. If the use is outside regular janitorial hours for that school, the user school must pay the janitorial fees. Each school is given eight hours of credited use per year that is covered by the REO.

## **Memoranda of Understanding and Contracts Through the Student Support Services**

### **Department**

The use of SFUSD facility space can also be secured through a Memorandum of Understanding (MOU) or a Contract between the district and a community-based organization (CBO) that provides services and/or programs to students. Organizations entering into an MOU or Contract are ones that are seen as addressing the educational and programmatic objectives of the school district, reflecting a more defined relationship between a school and the service providing organization. Contracts are used when a CBO is funded by SFUSD to run its program, whereas an MOU is used when the CBO is not funded by SFUSD.

MOUs and Contracts are administered by the Community-Based Organization Program (CBO Program) within the Student Support Services Department (SSSD). SSSD's mission is "to ensure a coordinated system of supports and resources that, in partnership with family and communities, foster safe and caring learning environments where all students flourish."<sup>17</sup> As noted on the SSSD website,

*SSSD collaborates with community based organizations, agencies, private and public institutions, as well as local city departments to [...] assist school sites in building their capacity to develop, implement and coordinate programs and services to meet the needs of the whole child.*

The CBO Program seeks to create procedures that optimize the working relationship between school sites and community based organizations, and strives for an equal distribution of service provider resources throughout SFUSD.

The CBO Program is, in part, supported by the work of the Curriculum and Materials Review Task Force (CMRTF). Composed of teachers, parents, administrators, and community members, the CMRTF meets a minimum of twice yearly to review CBO in-class materials. The Task Force reviews materials for age and developmental appropriateness, cultural inclusion, relevance to curriculum and consistency with community norms. Following approval, the CBO is added to the Health Education Human Sexuality Related Approved Speakers list, which is disseminated to all school sites.

**MOU and Contract Application Process.** In general, the process for securing an MOU or Contract with the school district to become a CBO Partner is as follows, as shown in Figure 4:

1. Applicant completes the online registration, found here: <http://www.healthiersf.org/News/springExpo/index.cfm>
2. Applicant attends a CBO Service Provider and Classroom Speaker Orientation. Conducted twice annually, the CBO Orientation covers SFUSD policies and guidelines, service provider responsibilities, provides an overview of "school culture" and presents strategies for successfully interfacing with school sites. Orientations also cover procedures for successful presentations, tips on how to support students and teachers in the classroom presentation setting, strategies for overcoming barriers and stumbling blocks, and a review process related to materials/presenters dealing with sexuality.
3. Applicant completes and submits the Site Agreement: Scope of Duties for Service Provider at School Site signed by the School Site Administrator (principal) and the Memorandum of Understanding for Service Provider Offering Services to San Francisco Unified School District (MOU) or the Contract concurrently. All forms can be found here: <http://www.healthiersf.org/News/springExpo/index.cfm>

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<sup>17</sup> <http://www.healthiersf.org/About/index.html>

4. Applicant obtains an Originating Agency Identifier (ORI) number from the U.S. Department of Justice. Assigned by the FBI, an ORI Number serves as a CBO identifier.
5. Applicant awaits MOU/Contract approval from the SFUSD Board of Education.

**MOU and Contract Rules.** Specific responsibilities of partnering CBOs are described in the Site Agreement that accompanies the MOU or Contract. CBO insurance requirements are similar to those of the Use Permit. One MOU is required per CBO for each school year when services are provided. The terms of each MOU are determined by the CBO and the SSSD. CBOs must also obtain a Use Permit from the Real Estate Office if they are not coming in under the umbrella of an existing program run by SFUSD or the Beacon Initiative.

**MOU and Contract Fees.** CBOs securing MOUs are not charged fees for their use of SFUSD spaces during the school year. If the use is during the summer, the Real Estate Office's summer fee schedule applies. CBOs with Contracts do NOT pay use permit fees. See Appendix X for copies of the Site Agreement, MOU, and Contract forms.

## 4. Joint Use Calculator

To ensure that public school buildings and grounds are healthy, safe, well maintained and designed for optimal education and community use, adequate budget and revenue support is needed. Unfortunately, most school districts do not have the ability to measure costs associated with expanded facilities use. Created by Center for Cities & Schools and the 21<sup>st</sup> Century School Fund, The Joint Use Calculator is a tool to assist public school districts and others in assessing the real costs associated with the use of school buildings and grounds by non-school users.<sup>18</sup>

### Background

The San Francisco Unified School District (SFUSD) and the City and County of San Francisco hope to adopt an official policy for the joint use of public school facilities. The policy will dictate the terms of use of public school facilities by community-based organizations, city agencies, private entities, and the general public. Prior to the adoption of any policy, however, a stakeholder group of leaders from city agencies, the school district, nonprofits, and other interested parties would like to achieve a better understanding of the costs and benefits associated with joint use.

### What the Calculator Accomplishes

First, To secure adequate revenue to support more intensive community use, SFUSD needs to know the fully loaded cost associated with operating and maintaining its facilities and the level of subsidy for approved community uses or net gain from non-school users who pay use permit fees. As shown in the findings, the Joint Use Calculator is a tool that:

- a) provides absolute clarity on the cost to use facilities and how use fees are calculated,
- b) enables SFUSD to continue to offer reduced-rate or free use for users and programs the District wishes to incentivize, and
- c) establishes a mechanism to charge "private users" a fee that is clear, fair, and aids the district in recovering expenses associated with community use.

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<sup>18</sup> Piloted in San Francisco, the Calculator was developed with the support of the Healthy Eating Active Living Convergence Partnership, a collaboration of funders organized with the shared goal of changing policies and environments to better achieve the vision of healthy people living in healthy places. The steering committee includes representatives from The California Endowment, Kaiser Permanente, Kresge Foundation, Nemours, the Robert Wood Johnson Foundation, and the W.K. Kellogg Foundation. The Centers for Disease Control and Prevention serve as critical technical advisors on the committee. PolicyLink, a national research and action institute devoted to advancing economic and social equity, serves as program directors for the partnership

## How the Calculator Works

The idea behind the calculator is that if a school district knows its total costs associated with its buildings and grounds, it can then know *the precise costs for any user to use any space for any amount of time.*

Detailed data were collected to calculate SFUSD's total annual facilities-related expenses. Expenses were divided into four categories: Asset Costs (the value of SFUSD real estate), Capital Costs (building construction), Operating Costs (utilities, maintenance, etc.), and Administrative Costs (central SFUSD staff). Estimates of "Building Replacement Costs" are also used for cost calculations, but only done so for comparison purposes. To determine capital costs, the District's actual annual capital spending was used (referred to as "Capital Costs.")

Costs were divided by total square footage and total hours of availability to determine the cost of facilities operation per square foot per hour. In order to determine the actual cost to the district of making public school facilities available for community use, we use this formula:

Joint Use Cost = (Cost per square foot per hour) X (Total square feet used) X (Total hours of use)

By creating multiple cost levels (referred to as "tiers") that each included only certain categories of costs, we created a model for a tiered fee system. Subsequently, we applied this model to examples of community use of public school facilities.

## The Calculator in Action: Walking Through the Tool

The Calculator is an Excel file with four tabs. Each tab builds upon the previous tab.

### Tab 1: Basic Data and Assumption

This tab collects the basic data and assumptions that form the basis of the Calculator's output. Some of these data can be collected from school district or municipal sources (in purple). Others are key assumptions that local stakeholders should come to agreement on as a basis for the Calculator (in green).

- Some data points are somewhat subjective (e.g., building depreciation schedule) or variable (e.g., building replacement value estimate); altering these estimates would result in changes to the model.
- One key number is 'Total Usable Hours Per Year', reflecting the general opinion of how available school facilities should be to the community (which is debatable). We chose 3000, which has been recognized as a reasonable compromise and still reflects relatively high intensity of community use of school facilities.

<b>JOINT USE CALCULATOR</b>		<b>Developed by Center for Cities &amp; Schools and 21st Century School Fund</b>	
<b>Basic Data and Assumptions</b>			
<b>San Francisco Unified School District</b>			
<b>Data</b>	<b>Amount</b>	<b>Unit</b>	<b>Source</b>
Total Site Square Footage (SF)	16,786,888	SF	2008 SFUSD Property List
Total Facility GSF	9,317,862	SF	2008 SFUSD Property List
Total 2009 replacement value estimate	\$ 500	\$/SF	Estimate from findings in "The Complex and Multi-Faceted Nature of School Construction Costs: Factors Affecting California," by Jeffrey M. Vincent and Deborah L. McKoy, Center for Cities & Schools, University of California-Berkeley
Current land value estimate	\$ 110	\$/SF	SF Assessor/Recorder, based on assessment of 180,000 parcels
Average Annual Capital Expenditures	\$ 126,000,000		Expenditure Extraction Summary Report, 9/25/09, SFUSD
Class C Rental Cost for comparison	\$ 27.41	\$/SF	Colliers SF
Building Depreciation Schedule	30	years	Assumption based on common industry standard
Land Amortization Schedule	30	years	Assumption based on common industry standard
Fair Market Rate of Return	5%		Assumption based on low-end of industry standard
Total Usable Hours per Year	3000		Assumption: Estimate (10 hrs/day x 6 days/week x 50 weeks/year)

## Tab 2: Annual, per SF, and SF/HR costs

This tab lists all expenses by the four cost category. The expenses are then divided by the total SFUSD square footage (9,317,862 sf) and total usable hours per year (3,000 hours) to determine cost per square foot per hour. Actual total expense for SFUSD to maintain and operate its buildings is \$27.66 sf/year or \$0.0092 sf/hour.

### Annual, per SF, and SF/HR costs

	Total Cost	% of Total for Facilities	Annualized Cost	Annual Cost/SF	Cost/Hr/SF	Source
<b>Asset Value</b>						
Estimated Land Value	\$ 1,846,557,680		\$ 61,551,923	\$ 6.61	\$ 0.0022	
<b>Total Asset Value</b>			<b>\$ 61,551,923</b>	<b>\$ 6.61</b>	<b>\$ 0.0022</b>	
<b>Estimated Building Replacement Costs</b>						
Estimated Building Replacement Costs	\$ 4,658,931,000		\$ 155,297,700	\$ 16.67	\$ 0.0056	
<b>Total Estimated Building Replacement Costs</b>			<b>\$ 155,297,700</b>	<b>\$ 16.67</b>	<b>\$ 0.0056</b>	
<b>Capital Costs</b>						
Capital Expenditures			\$ 126,000,000	\$ 13.52	\$ 0.0045	Expenditure Extraction Summary Report, 9/25/09, SFUSD
Financing Costs			\$ 1,324,426	\$ 0.14	\$ 0.0000	FY0910 Budget p 56
Capital Management Costs			\$ 10,607,109	\$ 1.14	\$ 0.0004	FY0910 Budget p 147
<b>Total Capital Costs</b>			<b>\$ 137,931,535</b>	<b>\$ 14.80</b>	<b>\$ 0.0049</b>	
<b>Facilities Operating Costs</b>						
Utilities			\$ 6,600,000	\$ 0.71	\$ 0.0002	FY0910 Budget p 48, 159
Maintenance and repairs			\$ 13,027,519	\$ 1.40	\$ 0.0005	FY0910 Budget p 49, 153
Custodial Services			\$ 2,638,637	\$ 2.83	\$ 0.0009	FY0910 Budget p 48, 154
Security			\$ 6,238,555	\$ 0.67	\$ 0.0002	FY0910 Budget p 48, 161
Real Estate Permitting (Custodial and Security Overtime)			\$ 410,220	\$ 0.04	\$ 0.0000	FY0910 Budget p 48, 152
<b>Total Facilities Operating Costs</b>			<b>\$ 52,662,681</b>	<b>\$ 5.65</b>	<b>\$ 0.0019</b>	
<b>Facilities Administrative Costs</b>						
District Facility Office			\$ 324,794	\$ 0.03	\$ 0.0000	FY0910 Budget p 48, 146
Real Estate Office			\$ 495,269	\$ 0.05	\$ 0.0000	FY0910 Budget p 48, 150
Environmental Health Office			\$ 1,246,696	\$ 0.13	\$ 0.0000	FY0910 Budget p 48, 155
School-Level Administration (Principal)		20%	\$ 1,620,000	\$ 0.17	\$ 0.0001	20% principal's time on facilities * \$60k avg salary * 135 principals
Student Support Services			\$ 264,499	\$ 0.03	\$ 0.0000	FY0910 Budget p 47, 67
Human Resources Administration	\$ 3,728,837	10%	\$ 372,884	\$ 0.04	\$ 0.0000	FY0910 Budget p 47, 138
Superintendent's Office	\$ 1,202,080	10%	\$ 120,208	\$ 0.01	\$ 0.0000	FY0910 Budget p 48, 63
Payroll	\$ 2,246,089	10%	\$ 224,609	\$ 0.02	\$ 0.0000	FY0910 Budget p 47, 129
Office of Emergency Planning	\$ 190,052	50%	\$ 95,026	\$ 0.01	\$ 0.0000	FY0910 Budget p 47, 160
Purchasing Department	\$ 2,056,328	5%	\$ 102,816	\$ 0.01	\$ 0.0000	FY0910 Budget p 47, 130
District's Insurance cost			\$ -	\$ -		Self-Insured = 0, otherwise based on expenses
Pensions & Benefits	\$ 7,616,920	10%	\$ 761,692	\$ 0.08	\$ 0.0000	FY0910 Budget p 47, 136
<b>Total Facilities Administrative Costs</b>			<b>\$ 5,628,493</b>	<b>\$ 0.60</b>	<b>\$ 0.0002</b>	
<b>Total Cost (using Estimated Building Replacement Costs)</b>			<b>\$ 275,140,797</b>	<b>\$ 29.53</b>	<b>\$ 0.0098</b>	
<b>Total Cost (using Capital Costs)</b>			<b>\$ 257,774,632</b>	<b>\$ 27.66</b>	<b>\$ 0.0092</b>	

### Tab 3: Rent Calculations by Level, Costs/SF

This tab presents the basis for creating a tiered fee system. Here we show the facilities use cost calculation for four levels, each on adding in an additional layer of cost in calculating the fee. Rental costs per year and per hour are calculated for the four levels. In Level 4, a 5 percent fair market rate of return on value of the school district property assets is used. This is seen as an “opportunity cost” for the district and used to understand the “fully loaded” expenses related to facilities.

### Rent Calculations by Level, Costs/SF

Level Basis of Calculation	Level 1 (Civic Center Rate)	Level 2 (Partners Rate)	Level 3 (Community Use Rate)	Level 4 (Market Rate)
<b>Asset Value</b>				
Estimated Land Value	\$ -	\$ -	\$ -	\$ 6.61
<b>Total Asset Value</b>	\$ -	\$ -	\$ -	\$ 6.61
<b>Estimated Building Replacement Costs</b>				
Estimated Building Replacement Value	\$ -	\$ -	\$ 16.67	\$ 16.67
<b>Total Estimated Building Replacement Costs</b>	\$ -	\$ -	\$ 16.67	\$ 16.67
<b>Capital Costs</b>				
Capital Expenditures	\$ -	\$ -	\$ 13.52	\$ 13.52
Financing Costs	\$ -	\$ -	\$ 0.14	\$ 0.14
Capital Management Costs	\$ -	\$ -	\$ 1.14	\$ 1.14
<b>Total Annual Capital Cost</b>	\$ -	\$ -	\$ 14.80	\$ 14.80
<b>Facilities Operating Costs</b>				
Utilities	\$ 0.71	\$ 0.71	\$ 0.71	\$ 0.71
Maintenance and repairs	\$ 1.40	\$ 1.40	\$ 1.40	\$ 1.40
Custodial Services	\$ 2.83	\$ 2.83	\$ 2.83	\$ 2.83
Security	\$ 0.67	\$ 0.67	\$ 0.67	\$ 0.67
Real Estate Permitting (Custodial and Security Overtime)	\$ 0.04	\$ 0.04	\$ 0.04	\$ 0.04
<b>Total Facilities Operating Costs</b>	\$ 5.65	\$ 5.65	\$ 5.65	\$ 5.65
<b>Facilities Administrative Costs</b>				
District Facility Office	\$ -	\$ 0.03	\$ 0.03	\$ 0.03
Real Estate Office	\$ -	\$ 0.05	\$ 0.05	\$ 0.05
Environmental Health Office	\$ -	\$ 0.13	\$ 0.13	\$ 0.13
School-Level Administration (Principal)	\$ -	\$ 0.17	\$ 0.17	\$ 0.17
Student Support Services	\$ -	\$ 0.03	\$ 0.03	\$ 0.03
Human Resources Administration	\$ -	\$ 0.04	\$ 0.04	\$ 0.04
Superintendent's Office	\$ -	\$ 0.01	\$ 0.01	\$ 0.01
Payroll	\$ -	\$ 0.02	\$ 0.02	\$ 0.02
Office of Emergency Planning	\$ -	\$ 0.01	\$ 0.01	\$ 0.01
Purchasing Department	\$ -	\$ 0.01	\$ 0.01	\$ 0.01
District's Insurance cost	\$ -	\$ -	\$ -	\$ -
Pensions & Benefits	\$ -	\$ 0.08	\$ 0.08	\$ 0.08
<b>Total Facilities Administrative Costs</b>	\$ -	\$ 0.60	\$ 0.60	\$ 0.60
<b>Fair Market Rate of Return (using Land + Replacement Value)</b>	\$ -	\$ -	\$ -	\$ 1.16
<b>Fair Market Rate of Return (using Land + Capital Cost)</b>	\$ -	\$ -	\$ -	\$ 1.07
<b>Total Rental Cost/SF per Year (using Replacement Value)</b>	\$ 5.65	\$ 6.26	\$ 22.92	\$ 30.69
<b>Total Rental Cost/SF per Year (using Capital Cost)</b>	\$ 5.65	\$ 6.26	\$ 21.06	\$ 28.74
<b>Total Rental Cost/SF per Hour (using Replacement Value)</b>	\$ 0.0019	\$ 0.0021	\$ 0.0076	\$ 0.0102
<b>Total Rental Cost/SF per Hour (using Capital Cost)</b>	\$ 0.0019	\$ 0.0021	\$ 0.0070	\$ 0.0096

**Tab 4: Sample Space Rental Costs**

This tab calculates examples of community use fees associated with the 4 levels. Three common uses are illustrated: a classroom, a gymnasium, and a multipurpose room. Space rental cost are calculated by total annual cost and total cost per hour.

## Sample Space Rental Costs

Type of Space	Asset Value Basis	Classroom	Gymnasium	Cafeteria/ Multipurpose Room
Total Square Footage		1,000	7,500	2,500
<b>Total Annual Cost</b>				
Level 1 (Civic Center Rate)		\$ 5,652	\$ 42,388	\$ 14,129
Level 2 (Partners Rate)		\$ 6,256	\$ 46,919	\$ 15,640
Level 3 (Community Use Rate)	Replacement Capital	\$ 22,923	\$ 171,919	\$ 57,306
		\$ 21,059	\$ 157,941	\$ 52,647
Level 4 (Market Rate)	Replacement Capital	\$ 30,692	\$ 230,190	\$ 76,730
		\$ 28,735	\$ 215,513	\$ 71,838
<b>Total Cost/Hr</b>				
Level 1 (Civic Center Rate)		\$ 1.88	\$ 14.13	\$ 4.71
Level 2 (Partners Rate)		\$ 2.09	\$ 15.64	\$ 5.21
Level 3 (Community Use Rate)	Replacement Capital	\$ 7.64	\$ 57.31	\$ 19.10
		\$ 7.02	\$ 52.65	\$ 17.55
Level 4 (Market Rate)	Replacement Capital	\$ 10.23	\$ 76.73	\$ 25.58
		\$ 9.58	\$ 71.84	\$ 23.95

**Tab 5: Facility Costs Comparison**

This tab presents eight examples of CBO programs and their use of public school facilities. For each example, we calculate the rent amounts that the CBOs would owe the District under the current fee system, the actual cost to the District to make the space available for joint use, and the rent amounts that the CBOs would owe the district in the various levels of our tiered fee system model.

**Facility and Program Costs Comparison**

Program Description	CBO example 1	CBO example 2	CBO example 3	CBO example 4	CBO example 5	CBO example 6
Use Permit						
Program Type	After-School Tutoring	summer program	weekend fundraiser	Saturday youth program	Licensed After-School Program	Job Readiness Training
School Level	MS	ES		HS	ES	HS
Number of people served	12	80		25	56	45
Who is served	Grades 7-8			Grades 11-12	Grades K-2	Grades 9-10
<b>Usage Estimate</b>						
Spaces Used						
Classroom	1	4	0	2	2	3
Gymnasium	0	1	1	1	1	0
Cafeteria/Multipurpose Room	0	1	0	0	0	0
SF Used	1,000	14,000	7,500	9,500	9,500	3,000
Hours per Week	5	40	6	8	15	10
Weeks per Year	42	10	1	42	42	42
Annual Hours	210	400	6	336	630	420
Weekend or Summer Use?		x	x	x		x
SF Hours	210,000	5,600,000	45,000	3,192,000	5,985,000	1,260,000
<b>Permit Agreement</b>						
Annual rent paid to District	\$ -	\$ 12,860	\$ 246	\$ 14,104	\$ 6,150	\$ 2,952
Rent/SF	\$ -	\$ 0.92	\$ 0.03	\$ 1.48	\$ 0.65	\$ 0.98
Rent/SF/HR	\$ -	\$ 0.00	\$ 0.01	\$ 0.00	\$ 0.00	\$ 0.00
<b>Cost Comparison</b>						
Total Cost to District	\$ 2,066.98	\$ 55,119.53	\$ 442.92	\$ 31,418.13	\$ 58,909.00	\$ 12,401.89
Estimated Rent by Level						
Level 1 (Civic Center Rate)	\$ 395.63	\$ 10,550.02	\$ 84.78	\$ 6,013.51	\$ 11,275.34	\$ 2,373.76
Level 2 (Partners Rate)	\$ 437.91	\$ 11,677.59	\$ 93.84	\$ 6,656.23	\$ 12,480.43	\$ 2,627.46
Level 3 (Community Use Rate)						
Replacement	\$ 1,604.58	\$ 42,788.70	\$ 343.84	\$ 24,389.56	\$ 45,730.43	\$ 9,627.46
Capital	\$ 1,474.11	\$ 39,309.70	\$ 315.88	\$ 22,406.53	\$ 42,012.25	\$ 8,844.68
Level 4 (Market Rate)						
Replacement	\$ 2,148.44	\$ 57,291.62	\$ 460.38	\$ 32,656.23	\$ 61,230.42	\$ 12,890.62
Capital	\$ 2,011.45	\$ 53,638.67	\$ 431.03	\$ 30,574.04	\$ 57,326.33	\$ 12,068.70

### **A Note on Current Calculator Limitations**

As a new tool, the Joint Use Calculator is under ongoing refinement and improvement. Currently, there are two important limitations that should be addressed in future versions of the Calculator:

- The Calculator does not separate the expenses or cost differences between the use of indoor or outdoor space. In part, this is due to the expense data limitations. The Calculator only covers the use of indoor facilities.
- The Calculator does not separate schools and district administrative facilities. Again, this is a data limitation; it's almost impossible to separate expenditures on SFUSD administrative facilities from expenditures on public school facilities. But administrative facilities are typically a very small percentage of overall school districts square feet.