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A STUDY OF THE SCHOOL BUILDING AID PROGRAM

STATE OF CALIFORNIA

A STUDY OF THE

SCHOOL BUILDING AID PROGRAM

By the

COMMISSION ON CALIFORNIA STATE GOVERNMENT ORGANIZATION AND ECONOMY

June, 1973

STATE OF CALIFORNIA

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COMMISSION ON CALIFORNIA STATE GOVERNMENT ORGANIZATION AND ECONOMY

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June 4, 1973

Honorable Ronald Reagan
Governor, State of California

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

Honorable Robert Moretti
Speaker, and to Members of the Assembly

Gentlemen:

The Commission has completed the initial phase of its study of the School Building Aid Program. The study was conducted because of the Commission's concern with the magnitude of the program and effectiveness of the administration of the limited resources for school construction and renovation. Declining school enrollments; the existence of 442 unused school sites purchased with state funds with a value at the time of acquisition of over $100 million; and, the contemplated additional expenditure of $250 million state bond funds for renovating or replacing pre-Field Act schools and $100 million extension of the regular School Building Aid Program makes the study both timely and appropriate.

The study was conducted under the general guidance of a Subcommittee of the Commission consisting of Nathan Shapell, Chairman; Howard A. Busby; H. Herbert Jackson; and, Andrew L. Leavitt. The Subcommittee held public hearings in Los Angeles, Anaheim, Sacramento, and San Diego at which times testimony was received from more than 35 witnesses. Many others concerned with the School Building Aid Program were available for discussion. Staff on loan from the Department of Finance, Office of Architecture and Construction, and Office of Local Assistance visited 45 school districts, selected as a representative sample of the 1100 districts, throughout the state. (See Appendix I.) Overall project coordination was provided by the Commission's Executive Officer, L. H. Halcomb.

The next aspect of this study, which will follow the release of this report, will be concerned with proposed legislation affecting the School Building Aid Program and with monitoring the policy and program modifications adopted by the State Allocation Board and by elected school district officials. The Commission recognizes

that significant administrative achievement of an enduring nature is dependent in large part on the policy framework within which it must function.

Respectfully,

Manning J. Post, Chairman

Nathan Shapell, Subcommittee Chairman

H. Herbert Jackson
Senator Alfred E. Alquist
Howard A. Busby
Assemblyman Jack R. Fenton
Harold Furst
Harold C. Henry

James E. Kenney
Andrew L. Leavitt
Walter H. Lohman
Senator Milton Marks
Assemblyman Ernest N. Mobley

AN ANALYSIS OF THE SCHOOL BUILDING AID PROGRAM

TABLE OF CONTENTS

Page

Introductory Statement. 1
Enrollment Projections. 3
Attendance Area Boundaries. 6
Size of School Sites. 8
Use of Relocatable Buildings. 11
Disposal of Unused School Sites 13
School Plan Checking and Construction Inspection. 16
Architect Selection 18
Year-Round Schools. 20
Structural Design Considerations. 22
Administration of State School Building Aid Program 24

APPENDICES

I Subcommittee Public Hearing Participants and School Districts Visited by Commission Staff 28

II Decline in School Enrollments 32

III Business and Professions Code, Section 11525.2, regarding Advance Site Acquisitions 35

IV Advance Site Acquisition Survey Results 37

V Attendance Areas. 38

VI Use of Relocatable Classrooms - San Diego Unified School District 41

VII Unused School Sites 45

VIII Legal Opinion of Legislative Counsel regarding School Plan Checking by Office of Architecture and Construction. . 48

IX Proposed Legislation Permitting Sampling Techniques in Plan Checking 52

X Districts Operating Year-Round Schools. 53

XI The Financial Implications of Year-Round Schools in California. 54

XII Organization Chart for Administration of School Building Aid Program. 60

INTRODUCTORY STATEMENT

During the last quarter century, the voters of California authorized the issuance of $2,240,000,000 in general obligation bonds to fund the School Building Aid Program. The program provides site acquisition, planning and construction loans to school districts which: (1) demonstrate a need for additional facilities based upon enrollment projections; and, (2) are bonded to capacity. It is expected that many of the loans will eventually be cancelled. In June 1972, the Legislative Analyst estimated that the amount to be cancelled will total 53.8 percent of the funds allocated. Based on this analysis, the state's share required to fund the program is $1,143,555,800, plus interest costs.

Several factors make it desirable to examine the administration of the program at this time. These include:

-a statewide decline in school enrollments which is expected to continue throughout this decade. (See Appendix II.)

-a total of 442 unused school sites comprising 6508 acres, with acquisition costs of nearly $100 million, have been acquired by school districts with state funds.

-a marked lack of uniformity, statewide, in determining the formula for attendance areas, the size of school sites, and optimum enrollment.

-procedures in architectural controls, reuse of architectural plans, use of relocatable buildings, and the concept of year-round schools that deserve to be analyzed and evaluated.

-the approval of the voters in June 1972 of $350 million in bonds for extension of the School Building Aid Program and for the replacement or renovation of pre-Field Act school buildings. This action added school districts to the School Building Aid Program.

The Commission has not attempted, nor will it attempt, to make any judgment on the quality of education in this state, and it does not suggest that state funds be diverted from school construction or from education. The basic objective of the members is to see that the maximum benefit is received by the children and taxpayers of the state from every aspect of the program. In our opinion, current trends affecting school operations at both the state and district level will bring about an evolution of the School Building Aid Program from one of emergency and crisis to that of an orderly, efficient, ongoing program of statewide school facilities capital outlay assistance.

ENROLLMENT PROJECTIONS

Funding for site acquisition in advance of actual needs is an important part of the School Building Aid Program. Such advance acquisitions are necessary because of the lead time required to design and construct the school facilities. The State Allocation Board, therefore, had provided for a maximum lead time of five years for an elementary school site and seven years for high school sites. These lead times were reduced in June 1972 to four years and five years, respectively.

Site acquisitions were based on annual projections produced under the direction of the Bureau of School Facilities Planning, Department of Education. For a variety of reasons the projections in the past did not take into account many social, economic, and other considerations. As a result, the districts frequently failed to meet their projected enrollment. An analysis made by the Legislative Analyst in 1968 showed that 60 school districts, out of 73 districts selected at random, had failed to meet their three-year projections on a timely basis. Of these 60 districts, 34 had not reached their enrollment goal after a full four years; 15 had not after five years; 5 had not after six years; and, 3 had not after seven years.

Legislation which took effect in March 1972 transferred responsibility for enrollment projections from the Department of Education to the

Office of Local Assistance, Department of General Services. A revised method for making projections was prescribed which took into account factors not previously utilized. Insufficient time has elapsed to evaluate the newly established projection procedures.

The Business and Professions Code was amended in 1965 to permit cities and counties to pass an ordinance providing for the acquisition of school sites in new subdivisions at the developer's cost. (See Appendix III.) The enabling provision has been amended several times since the original enactment to take into account the varying sized subdivisions and other considerations. The objective of this enabling statute was to permit school districts to make economical advance acquisition of school sites prior to their actual need, but in accord with actual development plans.

In order to determine the effectiveness of this enabling statute, the Commission polled the 58 counties and 402 cities in the state. Of the 375 replies, 14 counties and 24 cities have adopted such an ordinance. (See Appendix IV.) The Commission was informed by a number of the respondents and by participants at the public hearings that the enabling statute and the ordinances adopted thereunder have a basic deficiency in that it is enforceable primarily only against the subdivider of more than 400 units, while it does not apply to smaller developers. Large developers have also devised methods of circumventing the provisions of the ordinance. Perhaps these weaknesses are the

reason that only 11 percent of the cities and counties have availed themselves of its provisions.

To be more effective the enabling statute should establish a uniform statewide procedure which would permit the advance acquisition of elementary school sites to serve a subdivision on a reservation or option basis for a time period related to the maximum lead time approved by the State Allocation Board. Loan funds should be available for the cost of such options.

RECOMMENDATION

THE METHOD OF PROJECTING ENROLLMENTS ADOPTED BY THE LEGISLATURE SHOULD BE EVALUATED AFTER IT HAS BEEN IN OPERATION FOR A FULL YEAR AND AT REGULAR INTERVALS THEREAFTER.

THE BUSINESS AND PROFESSIONS AND THE EDUCATION CODES SHOULD BE AMENDED TO ESTABLISH A STATEWIDE PROCEDURE FOR THE ACQUISITION OF OPTIONS FOR ADVANCE SCHOOL SITES UNDER THE SCHOOL BUILDING AID PROGRAM.

ATTENDANCE AREA BOUNDARIES

The disparity in the size and composition of attendance areas was noted in several districts visited by the Commission staff. Attendance areas are those designated areas from which students attend a specific school.

In the Fresno Unified School District the attendance area is generally one elementary school for each square mile; in the Garden Grove Unified School District two elementary schools are provided for each square mile; and, in the Ocean View Elementary School District in Huntington Beach, four elementary schools are provided in a similar sized area. (See Appendix V.) It is recognized that boundary lines are sometimes mandated by natural or man-made barriers such as a freeway or other structures. A desirable goal, however, would be to provide an area that will produce a maximum number of pupils to permit an economical and academically satisfactory school operation. The Commission was informed at each of the public hearings that there were many elementary schools with enrollments of 700-800 students, and were assured that a student body of that size had little effect on the quality of the educational program. When the number of students exceeds that range, however, it becomes necessary to increase the number of administrative personnel, clerical staff, noon supervisors, and custodians--a point of diminishing returns is reached. In most instances it is difficult

SIZE OF SCHOOL SITES

A great disparity was also noted in the size of school sites. The school sites in some districts were twice or three times as large as those in other districts.

The variation in school site size is traceable to a former policy of the Department of Education which required a 10-acre site for an elementary school of 500-600 students and proportionately larger sites for intermediate and high schools. Although that formula had been abandoned for at least eight years, field representatives of the Department of Education and the Office of Local Assistance continued to espouse its features.

In reply to questions presented by Commission staff, school district personnel continued to express their belief in the prior formula. In many instances, however, they indicated that a smaller site would be satisfactory but went along with 'state requirements.' In one non-aided district the superintendent stated that his sites averaged 6.25 acres per 600 students and he deemed them adequate. Others stated that 6-8 acres would meet all reasonable academic requirements. This same attitude was expressed repeatedly at the public hearings held by the Commission Subcommittee. Generally, school sites acquired with state aid are larger in size than the school sites acquired with local funds.

to justify an attendance area producing as little as 300 students.

RECOMMENDATION

ATTENDANCE AREA BOUNDARIES FOR ELEMENTARY SCHOOLS SHOULD BE ESTABLISHED IN A MANNER THAT WILL YIELD AN OPTIMUM ENROLLMENT OF 700-800 STUDENTS OR A MINIMUM SIZE OF ONE SQUARE MILE, WHICHEVER IS SMALLER. EXCEPTION TO THIS STANDARD SHOULD BE PERMITTED ONLY UPON APPROVAL OF THE STATE ALLOCATION BOARD.

There is no statutory limitation on the size of school sites, although Section 19581 of the Education Code limits the building areas that can be constructed under the School Building Aid Program. Another section of the Education Code stipulates that school building facilities provided by the School Building Aid Program cannot exceed in quality or quantity those provided by typical non-aided school districts. Similar limitations are needed relating to land.

The Commission members were advised that in some school districts public park facilities are located adjacent to school sites. Joint use of such publicly owned land permits a greater utilization of each facility, each of which can be smaller than would be possible if they were located separately. This factor should be a prerequisite considered by school officials when planning the acquisition of new school sites and by the State Allocation Board when funding their acquisitions. Bonds approved by the electorate for school construction or renovation must be used for that purpose and such funds cannot be expended legally for areas to be utilized solely for park and recreation purposes.

RECOMMENDATION

STATUTORY LIMITATION SHOULD BE ESTABLISHED WHICH WOULD LIMIT THE SIZES OF INDIVIDUAL SCHOOL SITES THAT CAN BE ACQUIRED WITH THE SCHOOL BUILDING AID FUNDS. THE TOTAL AMOUNT OF LAND FOR EACH SCHOOL SHOULD BE COMPATIBLE WITH THE PROJECTED ENROLLMENT AND THE TYPE OF PROGRAMS TO BE OFFERED. IN NO INSTANCE SHOULD THE TOTAL AMOUNT OF LAND

RECOMMENDATION (CONTINUED)

ACQUIRED WITH SCHOOL BUILDING AID FUNDS EXCEED 1 ACRE PER 100 STUDENTS AT THE ELEMENTARY LEVEL AND 1 ACRE FOR EACH 75 STUDENTS AT THE SECONDARY LEVEL.

JOINT USE OF PRESENT LARGER SCHOOL SITES WITH LOCAL PARK AND RECREATION DEPARTMENTS SHOULD BE CONSIDERED SERIOUSLY BY SCHOOL OFFICIALS AND SHOULD BE A PREREQUISITE WHEN PLANNING FOR NEW SCHOOL SITES, IN ORDER TO EXPAND OVERALL PHYSICAL EDUCATION AND RECREATION PROGRAMS.

USE OF RELOCATABLE BUILDINGS

The school age population of any given attendance area fluctuates in accordance with a variety of social and economic considerations. The fluctuations of enrollment have a direct bearing on the size of both the attendance area and the school site. Effective utilization of school facilities requires modifications to match these changes. This factor is recognized and the Education Code stipulates that the State Allocation Board shall not make funds available for school districts for the construction of permanent facilities to meet temporary peak enrollments. The efficient use of properly designed relocatable buildings is one answer to this problem.

The San Diego Unified School District has utilized relocatable structures in a most economical and utilitarian manner. Currently, the school district has 1,327 relocatable classrooms--about 25 percent of their total classrooms. The construction costs of these structures are 74 percent of that of permanent classrooms, while providing the required flexibility. In addition, modern features in the new units make them an acceptable teaching facility. The effective use of these relocatable structures at one San Diego school site is portrayed in Appendix VI.

Relocatable classrooms have been used most effectively in large districts.

Because of their size, the smaller districts cannot achieve the flexibility that is demonstrated in the San Diego District. It would be appropriate, therefore, to provide funds to county boards of education for the construction of pools of relocatable classrooms to be assigned on a rental basis to the smaller districts as needs arise.

RECOMMENDATION

RELOCATABLE BUILDINGS TO HOUSE TEMPORARY PEAK ENROLLMENTS AND TO ACCOMMODATE POPULATION SHIFTS WITHIN DISTRICTS SHOULD BE REQUIRED AS A PREREQUISITE TO THE ALLOCATION OF STATE FUNDS. APPROXIMATELY 15-25 PERCENT OF THE TOTAL NUMBER OF CLASSROOMS SHOULD BE OF RELOCATABLE DESIGN.

DISPOSAL OF UNUSED SCHOOL SITES

In April 1971, the Office of Local Assistance compiled an inventory of unused school sites. Officials in each school district were asked about their proposed utilization of the sites. Their replies indicated the following:

Use within 3 years	98
Use within 4 to 5 years	65
No definite plans to use	214
Plan to sell*	11
No reply	55
Total Sites	443

*When reviewed after a lapse of 20 months, only one site had been sold.

The State Allocation Board can direct the sale of any site acquired with state funds which has not yet been repaid, if the site is not used for the purpose for which it was acquired within five years of purchase. To our knowledge, the Board has not exercised this authority. Other 'incentives' will be necessary to expedite the sale of unused sites, purchased with district funds. In these instances, the value of such sites should be included in the calculations of district assets in determining eligibility for future loans. For example, the value of three 10-acre unused school sites retained by the Fresno Unified School District for more than twelve years would have

been taken into account in determining the district's contribution to the school project for which the State Allocation Board allocated $392,942 in August 1972. Additional examples are set forth in Appendix VII. The 'incentives', however, preferably should be related to a school's capital outlay program rather than to its regular average daily attendance apportionment.

The procedure established by the Education Code (Article 2, Section 16051-16071) for the sale or lease of school district real property is awkward and is a deterrent to the expeditious disposal of unneeded school sites. A district is required to call for sealed bids which, after opened, are subject to an oral bid auction. Under such a procedure, no bidder will logically bid more than the minimum since he can always protect himself at the bid opening with an oral bid. The experience of the State Division of Highways, in their successful disposal of millions of dollars worth of highway excess right of way, indicates that either sealed bids with a minimum acceptable bid or oral auction are effective but not in use simultaneously.

The Education Code also effectively negates the assistance of real estate brokers in the sale of real property. The requirement that the real estate broker commission be deducted from the bid in determining the highest bid precludes a broker from spending the time and resources to expedite the early sale of unneeded school property.

RECOMMENDATION

THE STATE ALLOCATION BOARD SHOULD EXERCISE ITS AUTHORITY REQUIRING SCHOOL DISTRICTS TO DISPOSE OF UNNEEDED SCHOOL SITES.

THE SALES PROCEDURE SHOULD BE AMENDED TO PERMIT SEALED BID OR AUCTIONS, AND THE PAYMENT OF REAL ESTATE BROKER COMMISSIONS FROM THE GROSS HIGH BID.

THE CURRENT MARKET VALUE OF UNNEEDED SITES SHOULD BE INCLUDED IN THE FUNDS A DISTRICT IS REQUIRED TO CONTRIBUTE TOWARD ANY STATE-AIDED PROJECT.

SCHOOL PLAN CHECKING AND CONSTRUCTION INSPECTION

Existing law requires all school construction plans, whether state-aided or not, to be prepared by a certified architect holding a valid license. In addition, construction must be supervised by an architect and a full-time, qualified resident inspector, employed by the school district and satisfactory to the architect and the Department of General Services. Despite these stringent requirements, the Office of Architecture and Construction makes a 100 percent check of all plans and construction. In the 1972-73 fiscal year the estimated cost of this checking and inspection, which is passed on to the school districts, is $1,496,328.

Mr. Fred Hummel, State Architect until January 31, 1973, informed the Commission at the Sacramento public hearing held March 22, 1973, that in his opinion it is not necessary to check plans on a 100 percent basis in order to insure that a satisfactory level of professional competence will be achieved. He indicated that a check of all plans on an approximate 25 percent sample basis could be performed without a lessening of the quality of school design and construction. He observed that any variation of the Field Act or false statement on a verified report by an architect is a felony and could result in the revocation of the license of the architect involved. He further stated the proposed sampling approach would be a deterrent since faulty plans would be returned to the architect for correction with

appropriate notification to the contracting school district. This observation was strongly supported by Mr. John C. Worsley, newly appointed State Architect, as well as Mr. Arthur E. Mann, President, California Council of the American Institute of Architects, in testimony presented at the San Diego public hearing held April 12, 1973.

Plan checking conducted at a 25 percent level would result in an estimated annual savings to the school districts of about $400,000, based on the amount budgeted for the 1972-73 fiscal year. It is anticipated that the current inspection fee of one-half of one percent currently paid by the school district for plan checking could be reduced by one-third and the size of the professional staff of the School House Section of the Office of Architecture and Construction reduced accordingly.

The Legislative Counsel has ruled recently however that the Education Code, in effect, mandates 100 percent inspection of all plans as a prerequisite to approval of plans by the Office of Architecture and Construction. (See Appendix VIII.) In view of the persuasive testimony to the effect that sample or audit-type inspection by the Office of Architecture and Construction is adequate guarantee that school plans meet state requirements, it is urged that the Education Code be modified accordingly. (See Appendix IX.)

RECOMMENDATION

THE OFFICE OF ARCHITECTURE AND CONSTRUCTION SHOULD INSPECT ALL SCHOOL PLANS ON AN APPROXIMATE 25 PERCENT SAMPLE BASIS, RATHER THAN CHECKING PLANS COMPLETELY. IN NO INSTANCE, HOWEVER, SHOULD THE DEGREE OF FIELD INSPECTION BE DECREASED.

ARCHITECT SELECTION

A typical elementary school for 600-800 students is a highly specialized building with an average construction cost of more than $1-1/4 million; a high school for 2000-3000 students will cost over $5 million. Perhaps the most important factor in the construction process is the selection of the architect to design and supervise the building project by the board of trustees of the school district. Architectural innovation may produce savings far in excess of the normal fee. On large projects, however, the fee should be the subject of professional negotiation.

Most school board members, as well as district administrative personnel, have had limited experience in the design and construction of school facilities. Discussions with school district personnel, education specialists, and representatives of the California Council of the American Institute of Architects have emphasized the need for a formalized orientation program for school district board and staff personnel to acquaint them with the criteria that should be used in selecting an architect for the design and construction of a school project.

RECOMMENDATION

THE STATE ARCHITECT, WITH THE COOPERATION OF THE TRAINING DIVISION OF THE STATE PERSONNEL BOARD, THE STATE DEPARTMENT

RECOMMENDATION (CONTINUED)

OF EDUCATION, AND REPRESENTATIVES OF THE CALIFORNIA COUNCIL OF THE AMERICAN INSTITUTE OF ARCHITECTS, SHOULD DEVELOP AN ORIENTATION PROGRAM FOR THE BOARD MEMBERS AND ADMINISTRATORS OF SCHOOL DISTRICTS. THE PROGRAM WOULD PRESENT THE QUALITIES AND ATTRIBUTES THAT SHOULD BE CONSIDERED WHEN ENGAGING AN ARCHITECT TO DESIGN A SCHOOL. COMPLETION OF SUCH A PROGRAM BY BOARD AND STAFF MEMBERS WOULD BE A DESIRABLE PREREQUISITE TO THE APPROVAL OF AN ALLOCATION.

YEAR-ROUND SCHOOLS

Eighteen California school districts (Appendix X) are now operating, or have plans to operate, some school facilities on a year-round basis in order to achieve more economical utilization of existing school facilities and thus preclude costly new construction or renovation. This practice, an alternative to the nine month school, is a recognition that the extended summer vacation is no longer a sociological or economic requirement and that the school plant can be used to much greater capacity without a proportionate increase in cost.

The most prevalent form of the year-round school is the '45-15' plan. Under this arrangement the school enrollment and faculty are divided into four groups. At all times three groups are in session, while one group is on vacation. Under this system the students receive the same number of school days (175) and vacation days, but the school plant is utilized at a 25 percent greater capacity (234 days).

The utilization of a school plant on a year-round basis may require certain structural modifications. Air conditioning in some parts of the state is desirable and additional student and teacher locker facilities are necessary as well. Funds for such structural modifications should receive the same priority as that allocated to classroom construction. AB 142 (L. Greene, 1973) would give partial

recognition of this need and authorizes funds for air conditioning systems.

The most comprehensive analysis, to date, of the financial implications of the year-round school is contained in the 1972 doctoral dissertation of Dr. Robert J. Lloyd, Superintendent, Brisbane School District. With the permission of the author, the summary of Dr. Lloyd's findings and conclusions is contained in Appendix XI.

RECOMMENDATION

THE DEPARTMENT OF EDUCATION SHOULD EVALUATE EACH OF THE SEVERAL YEAR-ROUND SCHOOL PROGRAMS IN OPERATION THROUGHOUT THE STATE. BASED UPON THEIR FINDINGS, A UNIFORM STATEWIDE PROGRAM FOR YEAR-ROUND SCHOOLS SHOULD BE DEVELOPED AND USE OF YEAR-ROUND SCHEDULES ENCOURAGED.

THE STATE ALLOCATION BOARD SHOULD MAKE FUNDS AVAILABLE FOR NEW CONSTRUCTION AND FOR CONVERSION OF EXISTING FACILITIES TO FIT THE SPECIAL STRUCTURAL NEEDS OF THE YEAR-ROUND SCHOOL.

STRUCTURAL DESIGN CONSIDERATIONS

Seismic Safety. Studies are currently under way by the Joint Legislative Committee on Seismic Safety to determine, among other things, which areas of the state have potential for earthquakes and the severity of shocks in these areas. The State Architect is maintaining close liaison with the Committee so that his responsibility regarding the Field Act can be guided by their findings if the need for changes is indicated.

Building Code Revision. The Building Standards Commission is responsible for the building codes that regulate the building of schools, (Titles 21 and 24, State Administrative Code). The Commission meets regularly with individuals and established committees from the architectural and engineering professions and the construction industry to consider revisions to the codes. Such a practice insures the timely incorporation of new material and technology in the codes.

Reuse of Plans. Plans for school buildings are required to be on file in the Office of Architecture and Construction. They are then available for use by any other school district. The fee allowed under the School Building Aid Program is appropriately reduced when plans are reused. Mr. Fred Hummel, past State Architect, and Mr. John C. Worsley, present State Architect, have informed the Commission that the reuse of plans was not uncommon and they encouraged such

reuse when the plans were not outmoded.

RECOMMENDATION

THE COMMISSION IS SATISFIED THAT APPROPRIATE ACTION IS BEING TAKEN BY STATE AND PRIVATE AUTHORITIES IN THE AREAS OF SEISMIC SAFETY STUDY AND BUILDING CODE REVISION.

A MORE EXTENSIVE REUSE OF SCHOOL PLANS, HOWEVER, SHOULD BE ENCOURAGED. ALL APPLICATIONS FOR SCHOOL PLAN DESIGN FUNDS, THEREFORE, SHOULD BEAR A CERTIFICATION THAT THE REUSE OF PLANS IS NOT PRACTICAL OR FEASIBLE, IF SUCH IS THE CASE.

ADMINISTRATION OF SCHOOL BUILDING AID PROGRAM

The State Allocation Board, the Office of Local Assistance and Office of Architecture and Construction of the Department of General Services, and the Bureau of School Facilities Planning of the Department of Education are all involved in the administration of the School Building Aid Program. Expenditures for these offices for 1972-73 are estimated at $3,072,246. State and local government organizational relationships involved in the administration of the School Building Aid Program are shown in Appendix XII.

The Bureau of School Facilities Planning approves site and construction plans to assure conformity to minimum educational standards. The Office of Local Assistance reviews sites and construction plans to assure conformity to fiscal regulations. The Office of Architecture and Construction reviews construction plans to assure conformity to the Field Act.

Because of the overlapping state government organization in the administration of the School Building Aid Program, a state of confusion exists at the school district level. In addition, this duplication of governmental services results in a serious time loss, as well as a waste of state and school district funds. With building costs increasing as much as one percent a month, this is a major consideration since the cost of a typical K-6 elementary

school is more than $1-1/4 million with intermediate and high school costs proportionately higher.

The flow chart (Appendix XII) illustrates the extreme overlapping and duplicated jurisdiction involved in securing advance review and approval of plans by the many governmental agencies involved. One school official stated that the bureaucratic demands of a project under this program require more time than that involved in the preparation of structural design plans. The need for a more simplified system, based on the post-audit concept, is clear.

The School Building Aid Program, historically, has been concerned with the funding of school construction in impoverished districts; i.e., fully bonded districts. Construction plans in such districts require Department of Education approval. Construction plans of city districts and unified districts with more than 1500 average daily attendance, containing 65 percent of the students of the state, do not otherwise require approval by the Department of Education. In the Commission's view there is no reason for the Department of Education to be involved merely because the project is state-aided, or not consulted because the district is not in the program. State-aided districts should receive the same assistance and/or regulation from the Department of Education as those districts not in the program. The need for financial assistance in a district's building program

should not be used as a special barometer of need of assistance in school facilities planning. The Department of Education should be removed from the administrative hierarchy but their expertise should be available to all school districts on a consultative basis.

The Office of Local Assistance and Office of Architecture and Construction are organizational units of the Department of General Services. Procedures require that documents be submitted and advance approvals obtained independently from both offices which are represented by different field staffs. The role change of the Department of Education in this program and sample plan checking by the Office of Architecture and Construction will result in a streamlining of the administrative process resulting in substantial savings and convenience without adverse affect on the construction program. The significant savings, however, would be at the district level in their construction program.

The proposed assignment of the educational aspect of the School Building Aid Program to the Department of Education suggests an additional measure which would result in further savings in both time and money in administering the program. The Commission recommends a procedure wherein loans would be made on the basis of: (1) maximum square footage per student; (2) maximum unit cost per foot of building area; and, (3) maximum school site size based upon a given enrollment. These general guidelines should be administered

by the Office of Local Assistance, which should be the central source of administrative contact for program participants, through a post-auditing system, whereby adjustment in future loans or other allocations could be made in cases where errors occur at the local level. Prior approval by many state agencies would not be involved, thus minimizing state and school district administrative costs and time requirements. This concept has been envisaged, in part, several times and most recently by SB 607 (Burgener) in 1972. That measure and its predecessor bills, AB 496 (Veysey, 1970) and AB 109 (L. Greene, 1971), contain many features that would reduce costs and simplify the School Building Aid Program.

RECOMMENDATION

IT IS RECOMMENDED THAT THE OFFICE OF LOCAL ASSISTANCE, DEPARTMENT OF GENERAL SERVICES, BE CHARGED WITH THE RESPONSIBILITY FOR THE ADMINISTRATION OF A MODIFIED SCHOOL BUILDING AID PROGRAM AND THAT ACCOUNTABILITY BY SCHOOL DISTRICTS FOR PRUDENT USE OF LOANED FUNDS BE ATTAINED THROUGH A POST-AUDITING PROCEDURE.

THE BUREAU OF SCHOOL FACILITIES PLANNING OF THE DEPARTMENT OF EDUCATION SHOULD SERVE ALL SCHOOL DISTRICTS IN A CONSULTANT CAPACITY.

SUBCOMMITTEE PUBLIC HEARING PARTICIPANTS AND SCHOOL DISTRICTS VISITED BY THE COMMISSION STAFF

Public Hearings

Los Angeles, March 7, 1973

Palos Verdes Peninsula Unified School District
James E. Crockett, Assistant Superintendent, Business

Beverly Hills Unified School District
Kenneth L. Peters, Superintendent

Walnut Valley Unified School District
George M. Hartnett, Assistant Superintendent, Business

Los Angeles Unified School District
Harry B. Saunders, Director, School Building Planning Division

La Mesa Spring Valley School District
Dale T. Hobson, Assistant Superintendent, Business

Anaheim, March 16, 1973

Anaheim City School District
Harold L. Franzen, Assistant Superintendent, Education-Administration

Anaheim Union High School District
R. Kenton Wines, Superintendent

Ocean View School District
John M. Rajcic, Assistant Superintendent, Business

Huntington Beach City School District
Charles C. Palmer, Deputy Superintendent, Business

Garden Grove Unified School District
Dr. Alton Morse, Assistant Superintendent

Newport-Mesa Unified School District
Raymond R. Schnierer, Business Manager

Savanna School District
Dr. Del Smeltzer, Superintendent

Capistrano Unified School District
Joseph E. Wimer, Director, Administrative Services

SUBCOMMITTEE PUBLIC HEARING PARTICIPANTS AND SCHOOL DISTRICTS VISITED BY THE COMMISSION STAFF

Public Hearings

Anaheim, March 16, 1973 (Continued)

Huntington Beach Union High School District
Robert C. Martin, Assistant Superintendent, Business-Education Services

Irvine Unified School District,
David King, School Planning Consultant

Sacramento, March 22, 1973

Fresno Unified School District
Arnold D. Finch, Superintendent
Robert A. Weber, Assistant Superintendent, Business Services

San Juan Unified School District
Ferd J. Kiesel, Superintendent

Sacramento City Unified School District
Dr. John J. Meyer, Director, Facilities Planning and Construction Services

Mr. Fred Hummel, Immediate Past State Architect

Mr. Don Anderson, Local Assistance Officer, Office of Local Assistance

Mr. Roy M. Bell, Assistant Director, Department of Finance

Mr. Aubrey W. Calvert, Chief, Bureau of School Facilities Planning

Mr. Robert J. Clemo, Assistant Chief, Division of Administrative Services
Department of Education

Mr. Frank Oliver, Deputy Director, Department of General Services

Mr. John C. Worsley, State Architect

San Diego, April 12, 1973

California Council, American Institute of Architects
Arthur E. Mann, President

Mr. John C. Worsley, State Architect

SUBCOMMITTEE PUBLIC HEARING PARTICIPANTS AND SCHOOL DISTRICTS VISITED BY THE COMMISSION STAFF

Public Hearings

San Diego, April 12, 1973 (Continued)

Dr. Robert J. Lloyd, Superintendent, Brisbane School District

Santee School District
Charles E. Skidmore, Superintendent

Poway Unified School District
Fred G. Craig, Superintendent
A. J. Abbott, Director, Facility Planning

Cajon Valley Union School District
Rex T. Dahms, Administrative Assistant

Lakeside Union School District
Dr. Robert D. Muscio, Superintendent
Donovan S. Love, Business Manager

San Diego Unified School District
Dr. Harold W. Culver, Director, Land and Facilities Section
Charles T. Glenn, Assistant Superintendent, Business Services Division

Mr. Aubrey W. Calvert, Chief, Bureau of School Facilities Planning
Department of Education

School Districts Visited By Staff

Fresno County

Fresno City Unified School District

Santa Clara County

San Jose Unified School District

Sacramento County

Sacramento City Unified School District
San Juan Unified School District

SUBCOMMITTEE PUBLIC HEARING PARTICIPANTS AND SCHOOL DISTRICTS VISITED BY THE COMMISSION STAFF

School Districts Visited By Staff

Los Angeles County

- Compton Unified School District
- Covina Valley Unified School District
- Beverly Hills Unified School District
- Hacienda-LaPuente Unified School District
- Palos Verdes Peninsula Unified School District
- San Marino Unified School District
- Santa Monica Unified School District

Orange County

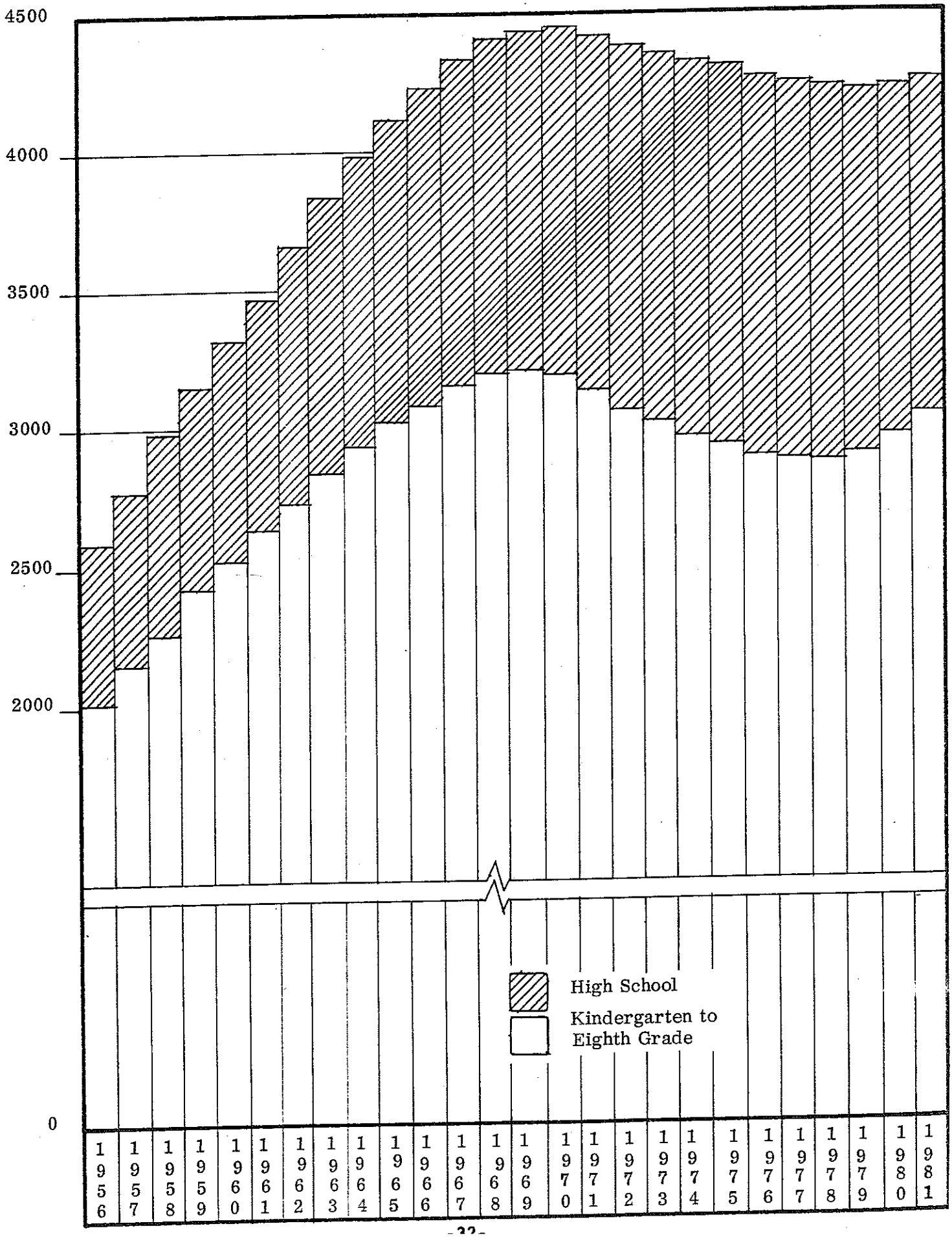
- Anaheim Union High School District
  - Anaheim City School District
  - Centralia School District
  - Cypress School District
  - Los Alamitos School District
  - Magnolia School District
  - Savanna School District
- Garden Grove Unified School District
- Huntington Beach Union High School District
  - Fountain Valley School District
  - Huntington Beach City School District
  - Ocean View School District
  - Seal Beach School District
  - Westminster School District
- Newport-Mesa Unified School District
- Tustin Union High School District
  - San Joaquin School District
  - Tustin School District

San Diego County

- San Diego Unified School District
- San Dieguito Union High School District
  - Cardiff School District
  - Del Mar Union School District
  - Encinitas Union School District
  - Rancho Santa Fe School District
  - Solana Beach School District
- Grossmont Union High School District
  - Alpine Union School District
  - Dehesa School District
  - Cajon Valley Union School District
  - Lemon Grove School District
  - Jamul-Las Flores Union School District
  - Lakeside Union School District
  - La Mesa-Spring Valley School District
  - Santee School District

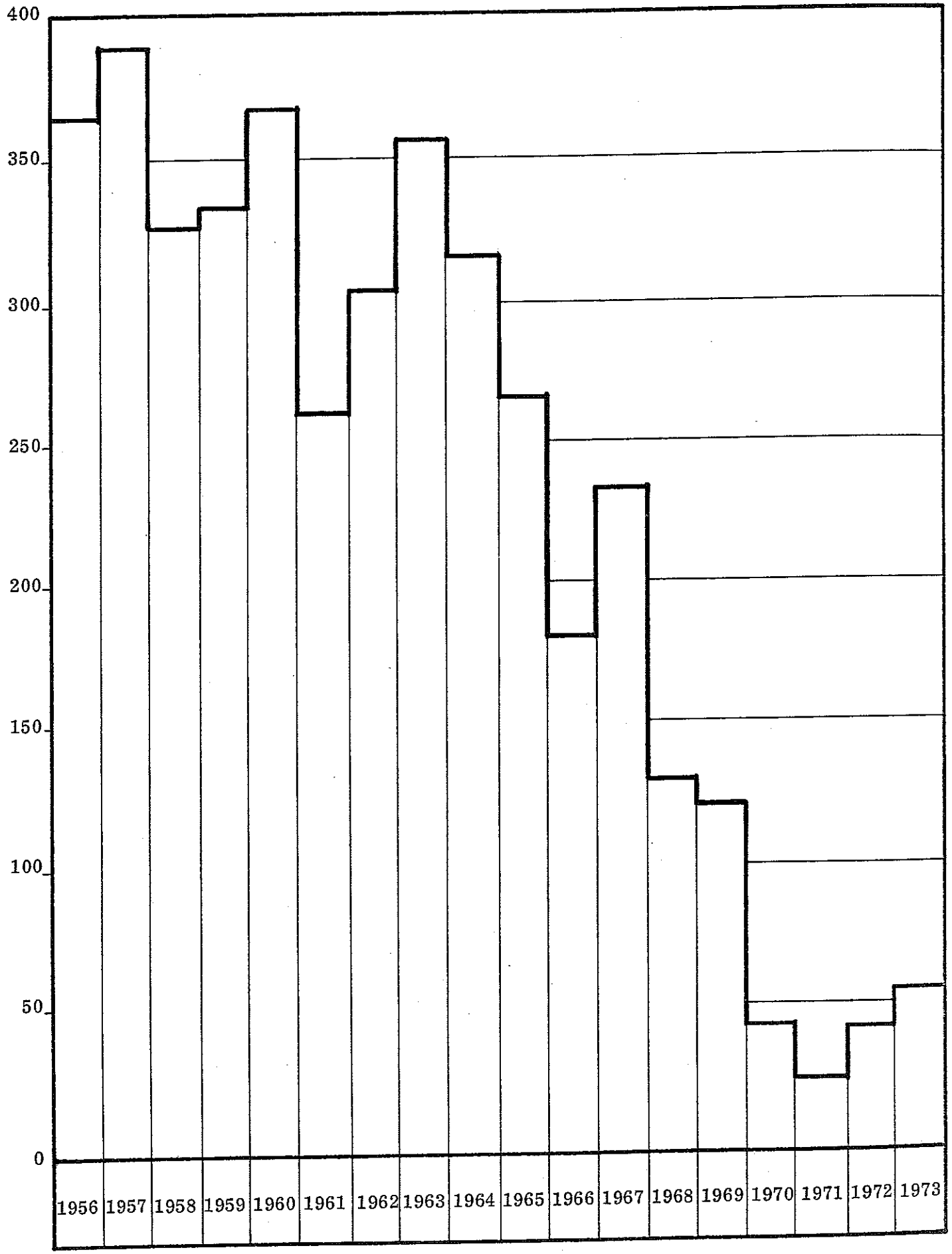
CALIFORNIA PUBLIC SCHOOL ENROLLMENT

Actual 1956 to 1971 - Projected 1972 to 1981



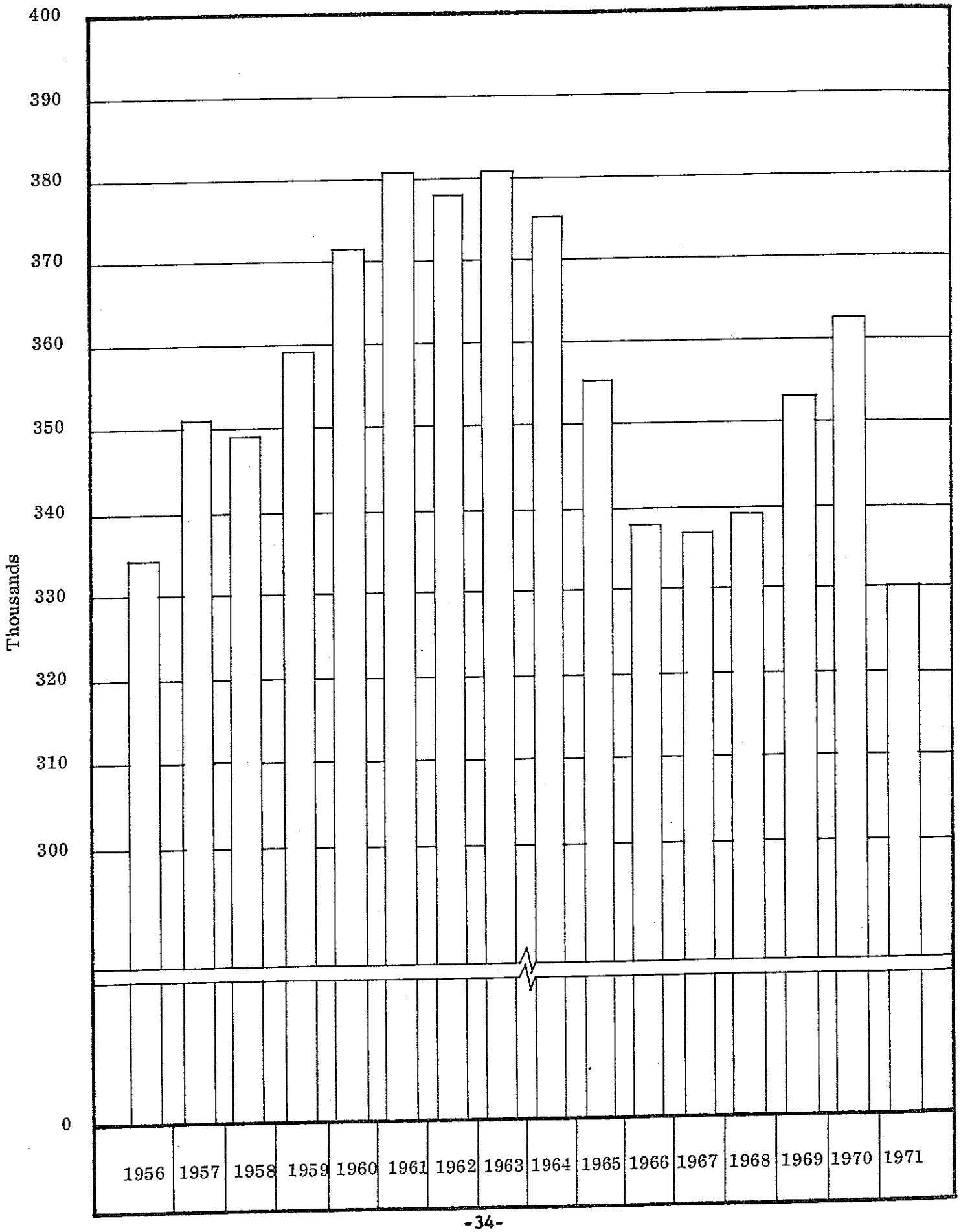
CALIFORNIA NET MIGRATION

1958 - 1973



CALIFORNIA LIVE BIRTHS

1956 - 1971



SECTION 11525.2, BUSINESS AND PROFESSIONS CODE

Section 11525.2. Ordinance requiring dedication of land for schools: Repayment by school district accepting dedication: "Dwelling unit": Judicial review.

Whether by request of a county board of education or otherwise, a city or county may adopt an ordinance requiring any subdivider who within three years, or less, as prescribed by the ordinance, develops or completes the development of one or more subdivisions, comprised of a single parcel or contiguous parcels having more than 400 dwelling units within a single school district, which maintains an elementary school, to dedicate to the school district, within which such subdivisions are to be located, such land as the local governing body shall deem to be necessary for the purpose of constructing thereon schools necessary to assure the residents of the subdivision adequate elementary school service. Whether by request of a county board of education or otherwise a county with a population of less than 30,000 may adopt an ordinance requiring any subdivider who within three years, or less, as prescribed by the ordinance, develops or completes the development of one or more subdivisions, comprised of a single parcel or contiguous parcels having more than 200 dwelling units within a single school district, which maintains an elementary school, to dedicate to the school district, within which such subdivisions are to be located, such land as the local governing body shall deem to be necessary for the purpose of constructing thereon schools necessary to assure the residents of the subdivision adequate elementary school service.

An ordinance adopted pursuant to this section shall not be applicable to a subdivider who has owned the land being subdivided for more than 10 years prior to the filing of the tentative maps in accordance with Article 4 (commencing with Section 11550) of this chapter. The requirement of dedication shall automatically terminate unless the school district offers to enter into a binding commitment with the subdivider to accept the dedication within 30 days after the requirement is imposed by the city of county. The required dedication may be made at any time prior to the construction of the 401st dwelling unit. The school district shall, in the event that it accepts the dedication, repay to the subdivider or his successors the original cost to the subdivider of the dedicated land, plus a sum equal to the total of the following amounts:

(a) The cost of any improvements to the dedicated land since acquisition by the subdivider.

(b) The taxes assessed against the dedicated land from the date demand for dedication is made.

(c) Any other costs incurred by the subdivider in maintenance of such dedicated land, including interest costs incurred on any loan covering such land.

If the land is not used by the school district, as a school site, within 10 years after dedication, the subdivider shall have the option to repurchase the property from the district for the amount paid therefor.

The school district to which the property is dedicated shall record a certificate with the county recorder in the county in which the property is located. The certificate shall contain the following information:

1. The name and address of the subdivider dedicating the property.
2. A legal description of the real property dedicated.
3. A statement that the subdivider dedicating the property has an option to repurchase the property if it is not used by the school district as a school site within 10 years after dedication.

SECTION 11525.2, BUSINESS AND PROFESSIONS CODE

4. Proof of the acceptance of the dedication by the school district and the date of the acceptance. The certificate shall be recorded not more than 10 days after the date of acceptance of the dedication. The subdivider shall have the right to compel the school district to record such certificate, but until such certificate is recorded, any rights acquired by any third party dealing in good faith with the school district shall not be impaired or otherwise affected by the option right of the subdivider.

"Dwelling unit" as used in this section means a place of residence and may be located in either a single or multiple dwelling unit building.

If any subdivider is aggrieved by, or fails to agree to the reasonableness of any requirement imposed pursuant to this section, he may bring a special proceeding in the superior court pursuant to Section 11525.

SURVEY RESULTS
BUSINESS AND PROFESSIONS CODE SECTION 11525.2

Inquiries Circulated:	460	100%
Replies:	375	81%

Replies Indicated:

Did Not Adopt Ordinance -	337	89%
Did Adopt Ordinance -	38	11%

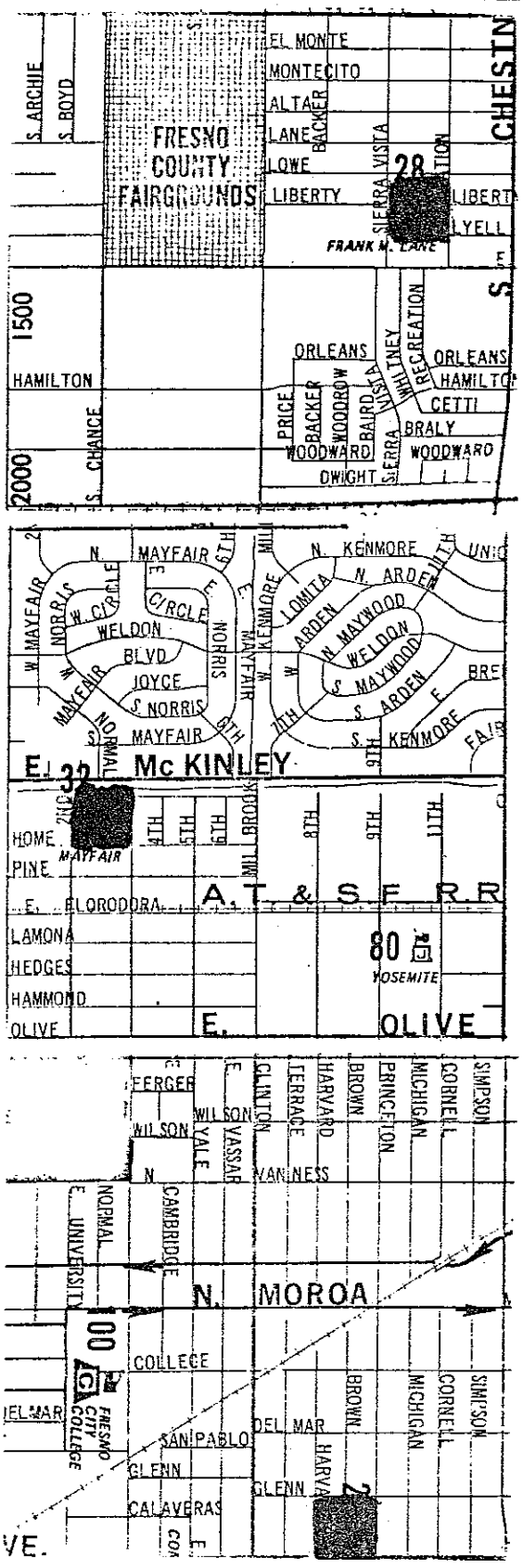
Counties that Adopted Ordinance:

- Alpine
- Calaveras
- Colusa
- Humboldt
- Lake
- Lassen
- Marin
- Monterey
- Placer
- San Benito
- Santa Cruz
- Shasta
- Stanislaus
- Tulare

Cities that Adopted Ordinance:

- Beaumont
- Belmont
- Burbank
- Calistoga
- Chula Vista
- Claremont
- Compton
- Fairfax
- Gilroy
- Larkspur
- Menlo Park
- Monte Sereno
- Monterey
- Novato
- Petaluma
- Oxnard
- Palo Alto
- Porterville
- Roseville
- Santa Cruz
- Santa Maria
- Santa Rosa
- South San Francisco
- Woodlake

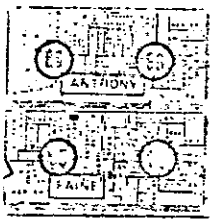
FRESNO
ATTENDANCE AREAS

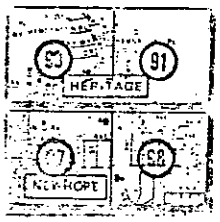


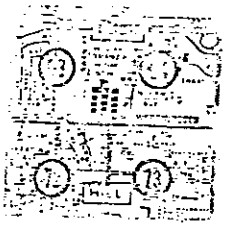
These are typical one square mile sections in Fresno City Unified School District. The attendance areas are approximately one square mile each. Pertinent data for each school follow:

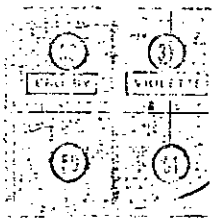
School	Grade	Site Size	Total Students
Lane	K-6	8.4	908
Mayfair	K-6	6.6	563
Lafayette	K-6	5.9	450
Wilson	K-6	10.0	788

GARDEN GROVE
ATTENDANCE AREAS





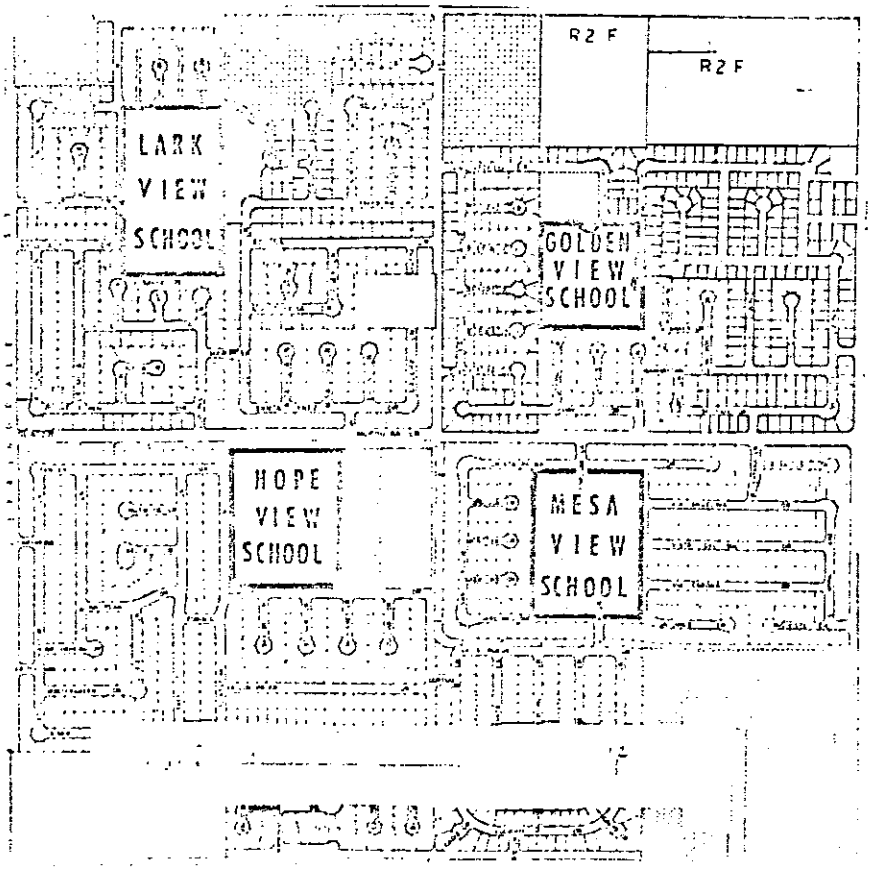


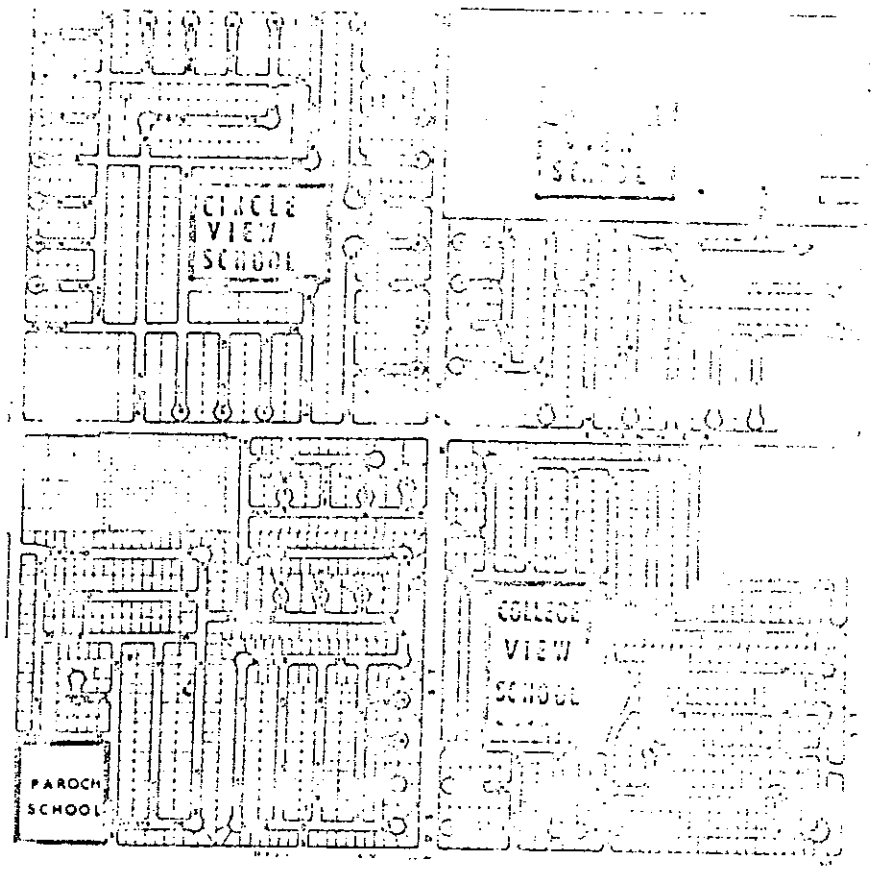


These are typical one square mile sections of the Garden Grove Unified School District. Each attendance area is approximately 1/2 square mile. Pertinent data for each school follow:

School	Site Size	Pupils
Anthony	10.0	617
Paine	9.5	714
Heritage	11.0	653
Newhope	9.7	763
Cook	9.7	387
Hill	8.7	625
Crosby	8.9	451
Violette	8.1	377
Faylane	8.6	540
Simmons	10.0	477

OCEAN VIEW
ATTENDANCE AREAS





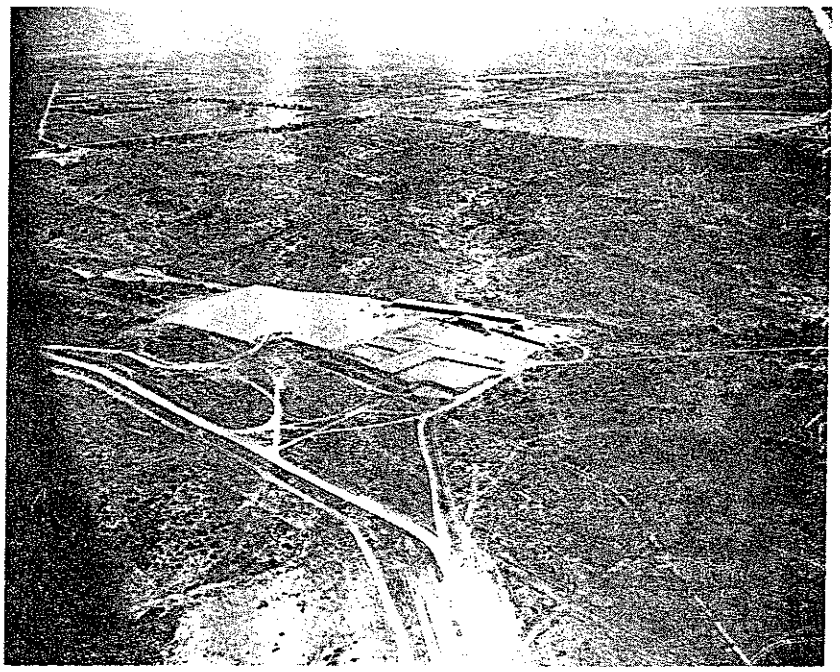
These are typical one square mile sections of the Ocean View School District. Each attendance area is approximately 1/4 square mile. Pertinent data for each school follow:

School	Grade	Site Size	Total Students
Lark View	K-6	13.9	489
Golden View	K-8	10.3	513
Hope View	K-6	13.7	668
Mesa View	K-8	12.1	741
Circle View	K-8	13.6	619
College View	K-6	13.7	767
Glen View	K-6	13.8	243

USE OF RELOCATABLE CLASSROOMS
SAN DIEGO SCHOOL DISTRICT

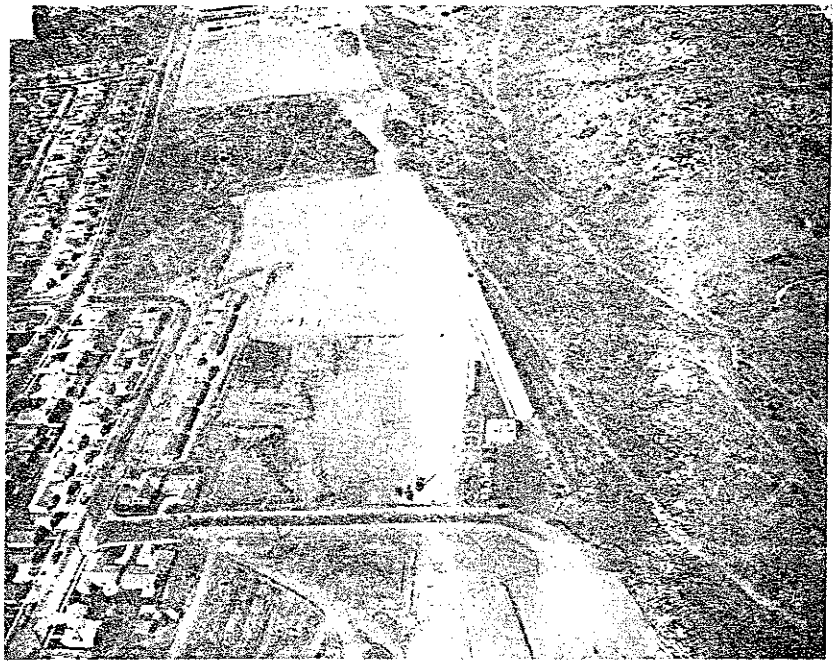
The series of pictures indicates the use of relocatable classrooms in the San Diego Unified School District. It will be noted that the plant grows and shrinks in response to the changes in the neighborhood.

The first picture dated September 1957 shows a school site in the middle of a large undeveloped district. Twelve relocatable classrooms have been installed.

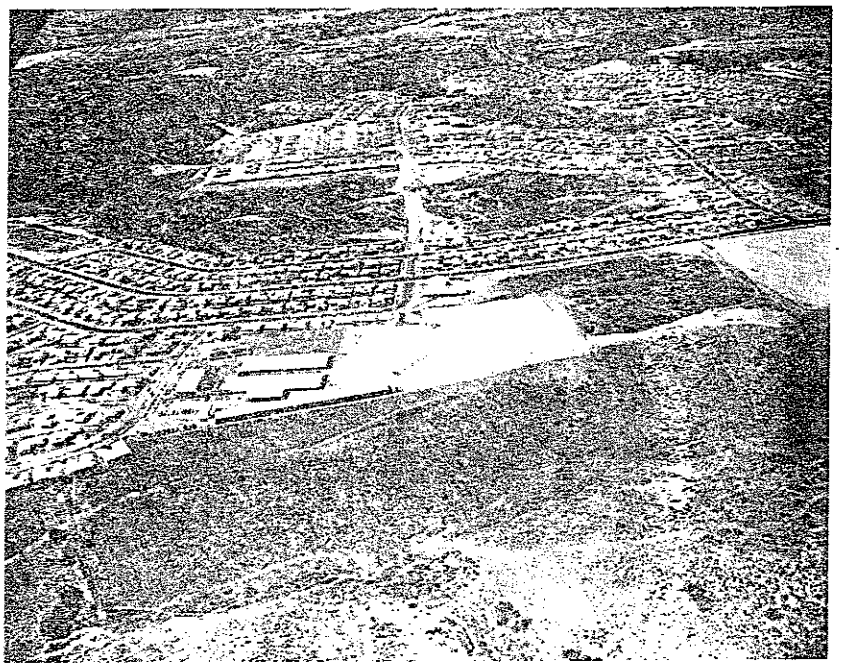


USE OF RELOCATABLE CLASSROOMS - SAN DIEGO SCHOOL DISTRICT

The picture of October 1958 shows that rooms have been built on part of the adjoining district.

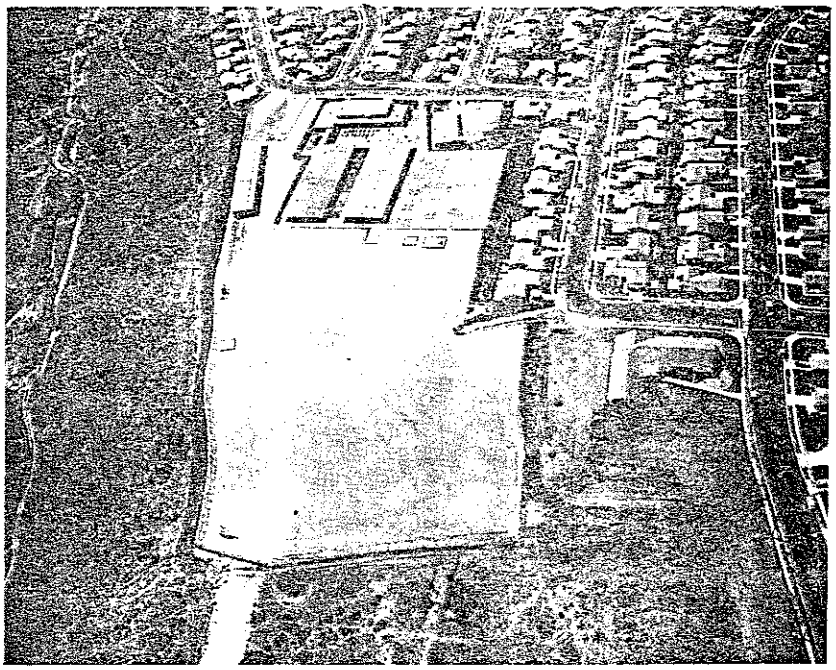


The picture of October 1959 shows that permanent school buildings have been constructed.

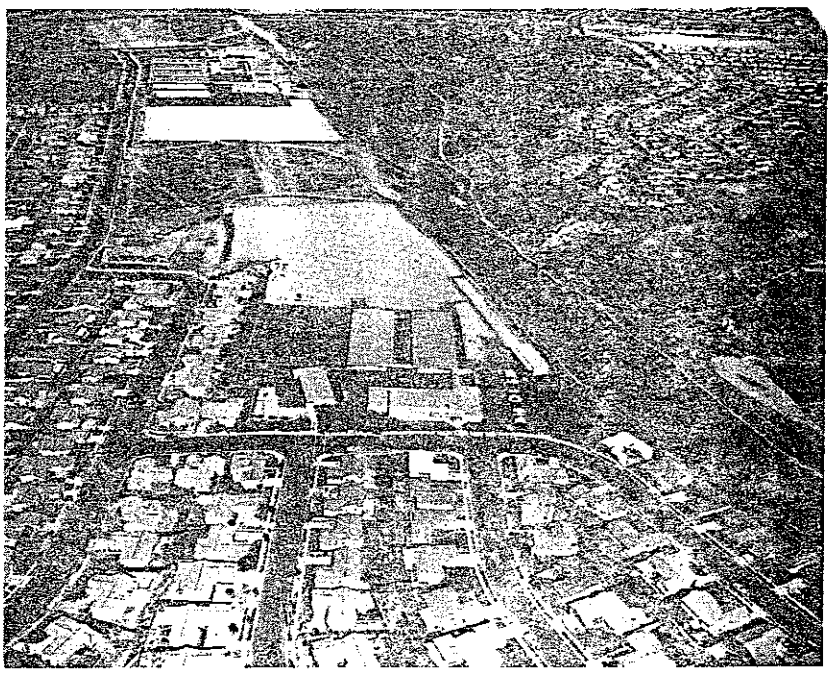


USE OF RELOCATABLE CLASSROOMS - SAN DIEGO SCHOOL DISTRICT

In the picture of August 1960 we can see that seven of the relocatable classrooms have been removed, leaving five.

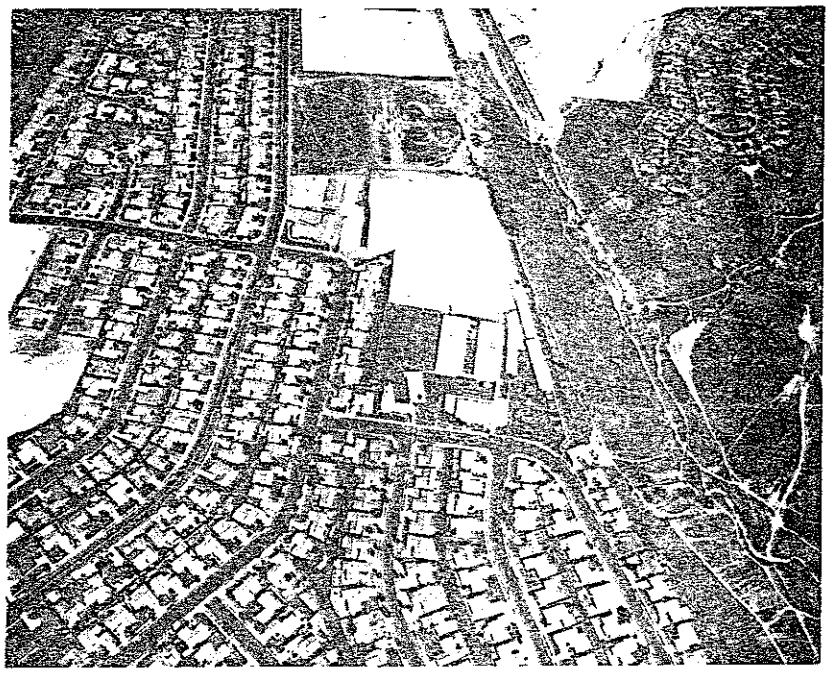


In the picture of November 1962 we note that three more relocatable classrooms have been removed, leaving two.

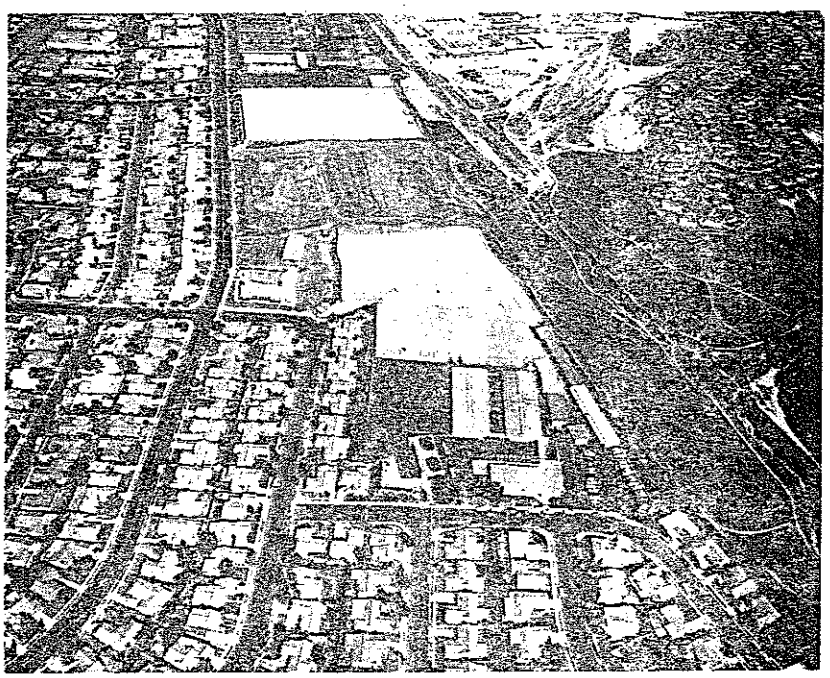


USE OF RELOCATABLE CLASSROOMS - SAN DIEGO SCHOOL DISTRICT

In October 1966 two of the relocatable classrooms are returned.



In November 1969 eight more relocatable classrooms are returned.



UNUSED SCHOOL SITES
ANAHEIM UNION HIGH SCHOOL DISTRICT

Site	Size Acres	Acq. Date	Amount Of Loan	Interest to Date	Amount Owed to State
1	23	1-61	$ 7,627	$ 1,588	$ Ø
2	40	10-61	545,765	93,352	Ø
3	23	9-63	697,549	118,938	Ø
4	20	10-63	500,945	172,798	569,250
5	20	3-64	1,113,934	98,883	Ø
6	20	5-64	361,548	107,469	330,611
TOTAL	146		$ 3,227,368	$ 593,028	$ 899,864*

*It is expected that this balance will be paid before the end of the current fiscal year.

After these allocations are repaid, there will be no way for the State Allocation Board to require the disposal of these unused school sites, under present policy. If Recommendation 4 is implemented, the value of these sites could be applied against the district's next allocation.

UNUSED SCHOOL SITES
PALOS VERDES PENINSULA UNIFIED SCHOOL DISTRICT

Site	Size Acres	Acquisition Date*	Cost	Interest To Date	Amount Owed 1-31-73
1	11	4-64	$ 395,000	$ 3,591	$ Ø
2	30	6-64	1,030,325	195,622	Ø
3	17	1-66	716,728	136,924	157,860
4	19	10-65	1,690,000	411,923	2,105,815
5	35	10-65	1,820,804	443,135	2,267,478
6	18	5-66	950,000	141,487	1,056,042
7	8	5-66	700,000	67,481	778,675
8	11	9-66	200,000	27,751	243,213
TOTAL	149		$ 7,502,157	$ 1,427,914	$ 6,609,083

*Although purchased 7 to 9 years ago, the Commission was informed that some of the sites may not be needed until 10 to 20 years.

UNUSED SCHOOL SITES
SAN JUAN UNIFIED SCHOOL DISTRICT

The San Juan Unified School District in Sacramento County owns 14 unused school sites. Officials of the district announced recently that they will dispose of some of these school sites. A reliable estimate of current value of 6 of these school sites indicates that they have increased an average of 147 percent in value since acquisition.

NUMBER OF ACRES	ACQUISITION YEAR	COST	ESTIMATED CURRENT VALUE	PERCENT INCREASE
10.0	1961	$ 51,800	$ 110,000	112%
8.8	1960	72,000	96,350	34%
10.2	1961	120,700	255,000	111%
10.2	1961	120,700	255,000	111%
10.5	1961	70,600	94,500	39%
10.0	1953	10,500	50,000	426%
		$ 446,300	$ 860,850	147%

COPY

STATE OF CALIFORNIA

OFFICE OF LEGISLATIVE COUNSEL

Sacramento, California

APR 1 1 1973

Honorable Jack R. Fenton
Assembly Chamber

School Building Plans - #6106

Dear Mr. Fenton:

QUESTION

Is the Office of Architecture and Construction required by statute to check all school construction plans on a 100 percent basis or can they check each submitted plan on a sample basis?

OPINION

The statutory law neither specifically mandates the checking of school building construction plans on a 100 percent basis, nor prohibits the checking of such plans on a sample basis. It does, however, require the Office of Architecture and Construction to pass upon and to either approve or reject all plans for school building construction. We do not think, as a practical matter, and in the absence of statutory authority therefor, that plan checking on a sample basis, with the imprecision inherent in such a procedure, could form a basis for the Office of Architecture and Construction to approve a set of plans for school building construction.

ANALYSIS

Structural standards relating to school building construction are set forth in Articles 1 through 47, inclusive, of Group 3 of Title 21, and in Division T21 of Part 6, of Title 24 of the California Administrative Code. These rules and regulations establish reasonable standards and minimum requirements for the structural integrity of public school buildings to resist, insofar as practicable, the forces of gravity, wind, and earthquake for the protection of life and property (see Sec. 2, Title 21, Cal. Adm. C.).

Section 15451 of the Education Code requires the Department of General Services* to supervise the construction of all school buildings.

Before letting any contract for the construction of a school building, the written approval of the plans, as to safety of design and construction, by the Office of Architecture and Construction, must be obtained (Secs. 15455, 15460, Ed. C.). The application for approval of plans must be accompanied by the plans and full, complete, and accurate specifications, and structural design computations, and estimates of cost (Sec. 15456, Ed. C.).

Regulations of the Department of General Services, contained in Sections 1 through 60, inclusive, of Title 21 of the California Administrative Code, set forth various requirements regarding the submission to the Office of Architecture and Construction of plans and specifications for school building construction.

Although neither the regulations nor the statutory law prescribes in detail the method by which the Office of Architecture and Construction is to check school building plans submitted to it for approval, Section 15454 of the Education Code does specifically require the office to

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* All powers, duties, responsibilities and jurisdiction involved in carrying out provisions of the so-called Field Act vested by law in the Department of General Services have been delegated to the State Architect, Office of Architecture and Construction (Secs. 3 and 5, Title 21, Cal. Adm. C.).

COPY

"... pass upon and approve or reject all plans ..." for the construction of school buildings. While this language is somewhat broad, leaving to the discretion of the Office of Architecture and Construction the selection of actual procedures for checking school construction plans, it is our opinion that Section 15454 clearly imposes upon the Office of Architecture and Construction the duty of ensuring that all school building construction plans do in fact comply with applicable structural standards as set forth in Title 21 and Title 24 of the California Administrative Code.

While plan checking on a sample basis could conceivably ensure a high degree of conformity with applicable structural standards, we think it doubtful that such a procedure could produce absolute assurances that a submitted plan complied with applicable standards. The adoption of such a procedure could, therefore, result in the "approval" of a set of plans which did not meet the applicable structural standards.

It is to be noted that the underlying statutory law here involved (Article 4 (commencing with Section 15451) of Chapter 2 of Division 11 of the Education Code (the so-called "Field Act") was enacted in 1933 shortly after the Long Beach earthquake which caused severe damage to many public school buildings. As originally enacted the statute made it clear that the legislative purpose being served was to ensure that public school buildings would henceforth be constructed to withstand earthquakes (see Ch. 59, Stats. 1933). In view of this history, we doubt that a court would hold that checking plans on a sample basis meets the statutory requirements.

In conclusion, then, while the statutory law neither specifically mandates the checking of school construction plans on a 100 percent basis, nor prohibits the checking of such plans on a sample basis, it does require the Office of Architecture and Construction to pass upon and to either approve or reject each submitted plan (Sec. 15454). We do not think, as a practical matter, and in the absence of specific statutory authority therefor, that plan checking

COPY

on a sample basis, with the inherent imprecision involved in such a procedure, could form a basis for the Office of Architecture and Construction to approve a set of plans.

Very truly yours,

George H. Murphy
Legislative Counsel

By
Martin L. Anderson
Deputy Legislative Counsel

MLA:dfb

PROPOSED LEGISLATION PERMITTING SAMPLING TECHNIQUES IN PLAN CHECKING

An act to amend Section 15454 of the Education Code, relating to school building construction.

The people of the State of California do enact as follows:

Section 1. Section 15454 of the Education Code is amended to read:

15454. The Department of General Services shall pass upon and approve or reject all plans for the construction or, if the estimated cost exceeds ten thousand dollars ($10,000), the alteration of any school building. To enable it to do so, the governing board of each school district and any other school authority before adopting any plans for such school building shall submit the plans to the Department of General Services for approval, and shall pay the fees prescribed in this article (commencing at Section 15451).

The department may adopt sampling techniques for checking a submitted plan or set of plans for conformity with applicable standards. Such procedures shall give reasonable assurances that the plan conforms with applicable standards.

DISTRICTS OPERATING YEAR ROUND SCHOOLS

District	County	Total Enrollment	Year-Round Enrollment	Notes
A B C Unified	Los Angeles	20,000	604	One K-6 school
Bear Valley Unified	San Bernardino	1,483	504	One 5-6 school. Entire District to start July 1973
Berryessa Union	Santa Clara	7,000	1,000	One K-6 school since July 1972
Chula Vista City	San Diego	16,981	3,568	Four K-6 schools since July 1971
Corona-Norco Unified	Riverside	16,250	933	Two elementary and two intermediate schools
Elk Grove Unified	Sacramento	9,333		One high school to start '73-'74
Escondido City	San Diego	9,010	2,246	Three K-6 schools
Hayward Unified	Alameda	26,626	969	Two K-6 schools
Hesperia Elem.	San Bernardino	929	929	One K-3 and one 4-6 school
Lakeside Union Elementary	San Diego	3,898	3,898	Entire district
LaMesa-Spring Valley Elem.	San Diego	14,876	2,949	Three K-6 and one 7-8
Milpitas Unified	Santa Clara	10,400		Entire district to start July 1973
Ocean View	Orange	13,773	1,142	Two K-8 schools
Old Adobe Union	Sonoma	2,059	1,558	Two K-6 schools
Pajaro Valley Joint Unified	Santa Cruz	13,078	2,695	Four K-6 and one 7-8
San Diego City Unified	San Diego	126,558	4,509	Six K-6 schools
San Joaquin Elem.	Orange	11,526	900	One K-6 school
Santee Elementary	San Diego	6,934	950	One K-8 school

A YEAR-ROUND SCHOOL SCHEDULE:

THE FINANCIAL IMPLICATIONS IN CALIFORNIA

Robert Jewell Lloyd
Stanford University, 1972

THE PROBLEM

The year-round school concept is one of the most discussed issues in public school education today. The reason for the renewed interest in this relatively old concept is because of the alleged economic potential. Given today's revolt by taxpayers, anything giving the semblance of saving funds has attraction for taxpayers and school officials.

Concern for economy, coupled with innovative schedules such as the 45-15 staggered attendance plan, has prompted a flurry of activity throughout the entire country. In California, the Governor and Superintendent of Public Instruction have publicly advocated the year-round concept and the State Legislature has passed statutes geared to facilitating and encouraging a rescheduled school year. Sixteen school districts have responded by initiating programs in 1972-73 and many others are conducting feasibility studies.

While there are many opinions as to the economic benefits of year-round schooling, there are very little data to substantiate arguments, pro or con. There is a great and immediate need for more and better information relative to year-round plans, their objectives, and their economic as well as educational implications.

PURPOSE

The purpose of this study was to identify the various year-round school plans and their objectives; identify applicable California law; analyze the financial experiences of districts who have conducted year-round programs; and

determine what will predictably happen to school district expenditures under specific programs and conditions.

PROCEDURE

The following procedures were used: (1) the literature was reviewed, (2) applicable California law was researched, (3) several conferences and workshops dealing with year-round schooling were attended, (4) State Department records were scrutinized - particularly the feasibility studies of the sixteen districts conducting pilot programs in 1972-73, (5) fifty-eight County Superintendents were contacted relative to programs and studies in their counties and thirty-six responded, (6) sixteen districts were identified as conducting programs in 1972-73 and an additional thirty-seven districts were identified as "seriously considering" the concept, (7) questionnaires were sent to all districts identified as conducting or "seriously considering" year-round programs, (8) data from the questionnaires were accumulated and tabulated, (9) special reports and data were obtained from select school districts who conducted year-round programs in 1971-72, (10) a personal visitation was made to each of the four California school districts who operated year-round school programs in fiscal 1971-72, and (11) lengthly interviews were conducted with the Administrators in each of these four districts who had prime responsibility for the year-round program.

FINDINGS

Some select findings gleaned from this study of year-round school operation are as follows:

1. The term "Year-Round School" is used to refer to almost any type of program that deviates from the traditional September to June, 175-day school year.

2. The grouping of a multitude of diverse programs under one general heading causes great confusion and difficulty in reconciling program expectations and outcomes.

3. Year-round schedules basically fall into two general categories: (a) those designed to achieve economies by making the school plant accommodate more children, and (b) those designed to enrich curricula.

4. The year-round school concept is not new in the United States. Various programs have been periodically tried and abandoned, since 1904.

5. The present traditional calendar appears to be the vestige of a bygone agrarian society and probably has little justification in an era in which approximately 90 percent of the country is urbanized.

6. There is widespread renewed interest in year-round schooling. The main orientation is to achieve economies by more efficient use of facilities and resources.

7. Most school officials have little understanding of the various year-round programs and their diverse objectives.

8. Various rotating attendance plans have space-saving potential of from 25 to 50 percent, providing attendance is mandated.

9. Sixteen California school districts are operating year-round programs in 1972-73. The predominant reason for initiating programs was to obtain better utilization of facilities.

10. The 45-15 staggered attendance plan is the most utilized plan in California. This plan has a maximum space-saving potential of 33-1/3 percent.

11. Numerous California school districts are presently involved in year-round school feasibility studies.

12. A survey of twenty-seven districts presently considering year-round programs indicates considerable confusion and inconsistency relative to

the expected financial implications of year-round operation.

13. The best apparent means of determining the effect on annual expenditures for a school district which shifts from a traditional calendar to a year-round program is to compare the per A.D.A. (average daily attendance) costs, budget item by budget item.

14. Essential to meaningful cost comparison is the assurance that like things are being compared. Thus, analysis should be made under the following conditions: (a) long-run cost effects are used for comparison, (b) the same statutes and district policies prevail, and (c) the quantity and quality of education remain the same.

15. Year-round plans that entail an extended year schedule (more instructional days per pupil) are more expensive. Basically - more services mean more costs.

16. The costs of adding additional days to the school year are proportionately less per A.D.A. than the regular year costs. Many school operating costs are incurred regardless of whether children are in the building.

17. The financial experiences of three districts on the 45-15 staggerred attendance schedule reveal consistent findings. Under conditions whereby construction of additional facilities is precluded by implementing a mandated staggered attendance schedule, financial savings can be realized.

18. Better utilization of facilities so as to avoid costs of construction, new equipment, and debt service represents the best single potential for economy.

19. Cost savings and cost increases by virtue of a year-round plan will vary from district to district. This variation should be expected on the basis of different priorities, goals and unique conditions.

20. Indications are that operating expenses on a 45-15 staggered

year-round schedule are no more costly than on a traditional schedule. Based on the evidence provided by this limited sampling, it appears that some significant savings can be realized in certain budget categories such as Maintenance, Operation and Capital Outlay. These savings more than offset some minor increases in certain other expenditure items. Thus, the result is some over-all operational savings, as well as the building program savings.

CONCLUSIONS

The conclusions drawn from this study are that certain year-round plans cost more money, but plans which provide for staggered attendance on a mandated basis result in better utilization of facilities and thus can preclude the necessity for costly new plant construction. Hence, in the true sense, there is cost avoidance. The findings furthermore indicate that the over-all operating costs on a year-round staggered attendance schedule are no more than those of the traditional schedule, and indeed appear to be less per A.D.A.

If these findings are substantiated by other studies, there are significant implications for virtually every school district in the state. Taxpayers have been rejecting bond issues and tax increase proposals with an alarming and ever-increasing frequency. There is persistent inquiry as to whether schools are making the best possible use of the resources they now have. By virtue of the findings of this study, this questioning is legitimate.

School districts who should be particularly interested in exploring the possibilities of a year-round schedule can be characterized as follows: (a) districts whose enrollment projection indicate a need for additional facilities, (b) districts required to replace school facilities because of Field Act requirements, (c) districts considering replacing or abandoning facilities that are antiquated and structurally unsound, (d) districts wishing to obtain space for expanding school offerings by the addition of programs such as Early Childhood

Education, etc., (e) districts seeking new ways to improve the quality of education, and (f) districts with a combination of some of the aforementioned.

RECOMMENDATIONS

1. The State Department of Education should establish a separate Bureau which could assemble, compile and disseminate information relative to various year-round programs.

2. The State Department of Education should provide leadership in better delineating and defining the terms affiliated with year-round schooling.

3. The State Department of Education should sponsor research in order to provide better information relative to the economic and instructional implications of the various programs.

4. School districts should be encouraged to conduct their own feasibility studies. Each district is unique and should decide for itself which type of basic plan best suits its needs.

5. Programs of year-round schooling should not be implemented unless there has been extensive study, community involvement and strong indication of community support.

6. School administrators should be prepared to capitalize on the apparent appeal of the year-round concept for the purpose of making other changes, such as non-graded structure and individualized instruction.

7. Further study should be made relative to the effect of year-round operation on other aspects, such as student learning and performance, juvenile delinquency, vandalism, recreation programs and facilities, student employment opportunity, etc.

8. The recommendations relative to State Department responsibilities should be given immediate attention for the year-round school is not a concept that one can any longer allude to as coming -- it is here.