

SDCT A School Bond Support Criteria  
July 2002

The following, which are detailed below, must occur before SDCT A will consider supporting school bond measures:

- 1) Clear Evidence of Genuine Need for Bond Measure Projects
- 2) Deferred Maintenance Plan
- 3) Provision for Citizens Oversight Committee
- 4) Limit Use of District's Education Funds
- 5) Joint Use of Facilities
- 6) Opposition to Special Elections

**1) Clear Evidence of Genuine Need for Bond Measure Projects:** Districts must demonstrate that the proposed expansion and major maintenance funding required cannot be addressed with existing revenues and grants.

**2) Deferred Maintenance Plan:** District must have a School Board approved short-term plan to eliminate Deferred Maintenance\*\* using General Fund revenues, and if necessary with a limited reliance on bond revenues; and an approved Major Maintenance\* plan to ensure that both new and renovated facilities do not become maintenance deferred once the backlog has been eliminated. Plan should be incorporated as part of resolution calling for bond election. Oversight Committee shall oversee this plan as part of its responsibilities.

**3) Provision for Citizens Oversight Committee:** Prior to any endorsement by SDCT A, the measure must include a provision within the ballot language for a Citizens' Oversight Committee, to meet at least monthly, and should include construction, finance and other qualified professionals, who should constitute a majority of the committee membership. \*\*\* The Committee shall be constituted so as to review and comment on bond measure expenditure plans, bond measure-related staffing and consultants, and General Fund major maintenance plans, prior to any action by the school board on bond measure-related issues. The committee is intended to be advisory only, and not replace or impede the activity of elected school board members.

**4) Limit Use of District's Education Funds:** The School Board must certify, prior to any endorsement by SDCT A, that once a proposed school bond measure has been placed on a ballot, that with the exception of the educational efforts described below, the school district shall not expend any public funds for "educating the public" on the proposed measure, including direct mail, public opinion polling, paid advertising and pressuring of District staff and teachers to register to vote or participate in the bond campaign. The following activities are appropriate "educational activities" for the district to participate in, even after a bond measure has been placed on the ballot: District personnel may appear before citizen's groups and the media to explain the bond and its impacts. The District may place signs at schools indicating what improvements shall occur upon passage of the measure. The District may send flyers home with employees and students; encouraging parents to register to vote, and explaining the impact of the bond , " on school facilities should the measure pass. Any violation of these criteria subsequent to SDCTA's endorsement will result in revocation ofSDCTA's support.

**5) Joint Use of Facilities:** The following language should be adopted and incorporated into the resolution calling for the bond election:

In order to maximize community benefit and efficiently apply taxpayer dollars, the district should pursue all practical opportunities to expand community joint use facilities in every new or expanded school construction project. In pursuing joint use, the district's goal should be to maximize the use of school district facilities to the broader community, without adversely impacting school operations or finances. Examples of appropriate joint use provisions for incorporation into construction plans include but are not limited to new and expanded library facilities, recreational/physical-education facilities, computer labs, meeting rooms, and childcare and health care facilities.

The Board of Education shall direct staff to implement the following procedure:

- ◆ Prior to the obligation of funds *for* new school or school expansion construction, a joint use implementation certification shall be presented to the Citizens Bond Oversight Committee and approved by the Board of Education.
- ◆ The joint use implementation certification shall include the following minimum information: --
  - Project description
  - List and description of joint use elements that could potentially be incorporated into the project
  - List of agencies and organizations contacted regarding potential joint use elements, including description of how agencies and organizations were contacted
  - For each agency or organization contacted:
    - ◆ Joint use Development Criteria discussed or developed *for* the project
    - ◆ Equity of Contribution considerations discussed or developed for the project
  - Description of joint use elements that will be incorporated into the project

In addition, it is the intention of the Board of Education to make official, policy level contacts with overlapping public jurisdictions, in order to make joint-use and the efficient application of taxpayers dollars a priority of all agencies serving School District boundaries. Agencies contacted should include, but not be limited to: adjacent cities, County of San Diego, Community College Districts, and Transit agencies.

6) Opposition to Special Elections: Except in very extraordinary circumstances, SDCTA opposes special elections due to the added cost to the taxpayers.

*\* Note: Major Maintenance items are capital in nature and would include replacing roofs, boilers, interior ceilings, re-paving parking lots, etc. These projects should be able to be scheduled out over a multi-year period.*

*If the replacement and maintenance schedule of these major items are not met, then they become \*\* "Deferred" Maintenance items. The cost of repairing and replacing major maintenance projects grows significantly if major maintenance schedules are not met (deferred). Districts should be able to quantify its deferred maintenance backlog.*

*General Maintenance items (broken windows, plumbing repairs, etc.) are not covered by SDCTA Criteria. The State of California has a requirement that School Districts fund an amount equal to 3% of its General Fund for "Maintenance."*

*The State's Definitions of "Deferred Maintenance." requiring a 50% school district funding match, is broader and applies to more types of projects than SDCTA's criteria.*

*\*\*\*Potential Citizen's Oversight Committee membership could include: contractors, planning consultants, architects, CPA's, business and finance professionals. Chambers of Commerce. in addition to Bond measure advocates, parent representatives, etc.*

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