

August 7, 2024



2024 BOND PROPOSAL

3 important points of consensus as we start tonight's presentation:



SF kids deserve great schools



Bond projects deliver big impacts



A new bond keeps us moving forward



**2024 BOND :
WHY NOW?**



Tule Elk Park EES



Mission Bay School



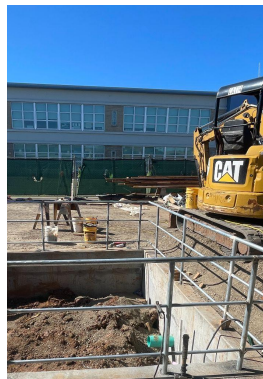
West Portal ES



T. Marshall HS



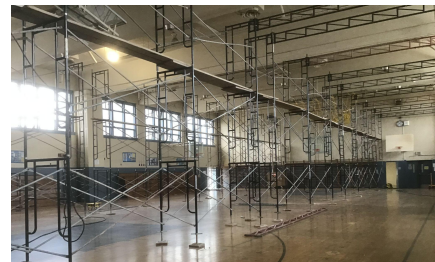
Charles Drew ES



Hillcrest ES



Webster ES



A.P. Giannini MS



Everett MS



Marina MS



BVHM K-8

BOND IMPACT | BEFORE + AFTER



Garfield Elementary

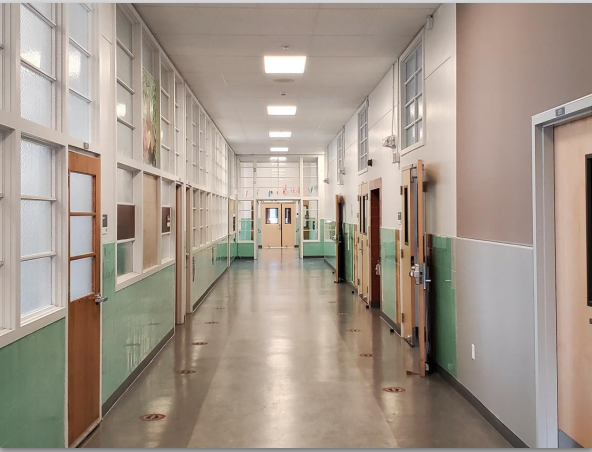


Clarendon Elementary



Thurgood Marshall High

BOND IMPACT | BEFORE + AFTER

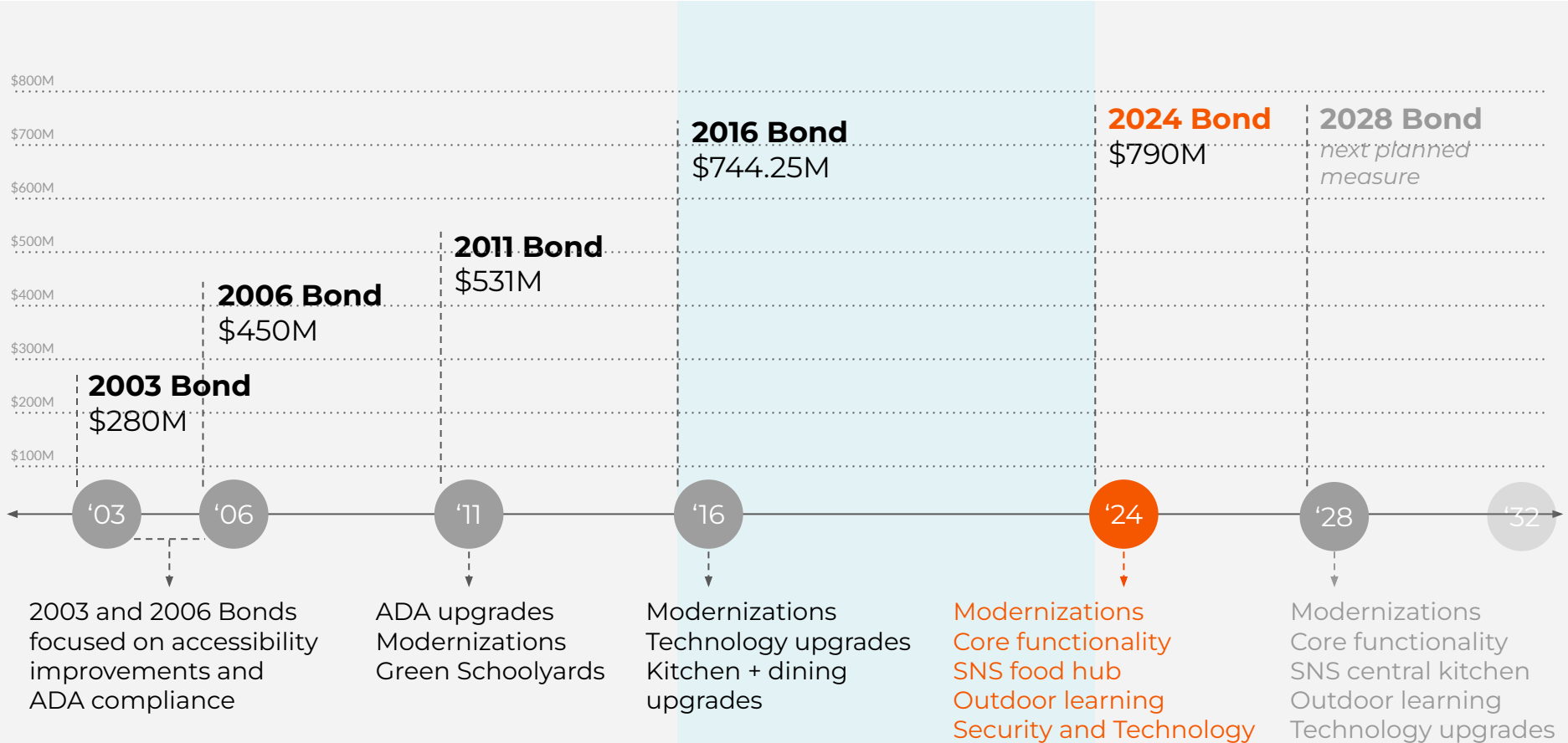


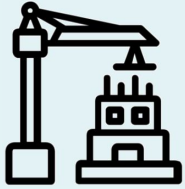
Hillcrest Elementary

McAteer Culinary Center

Lafayette Elementary

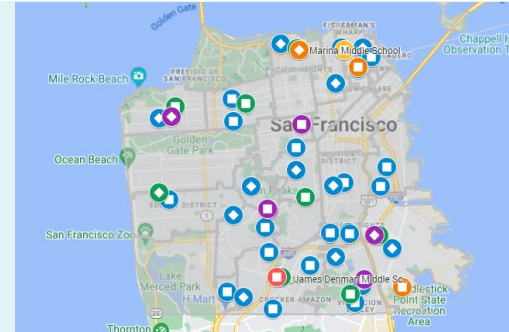
BOND TIMING | AN EIGHT-YEAR GAP





2011 + 2016 BOND SCHOOL MODERNIZATIONS

■ 44 completed ■ 4 in progress



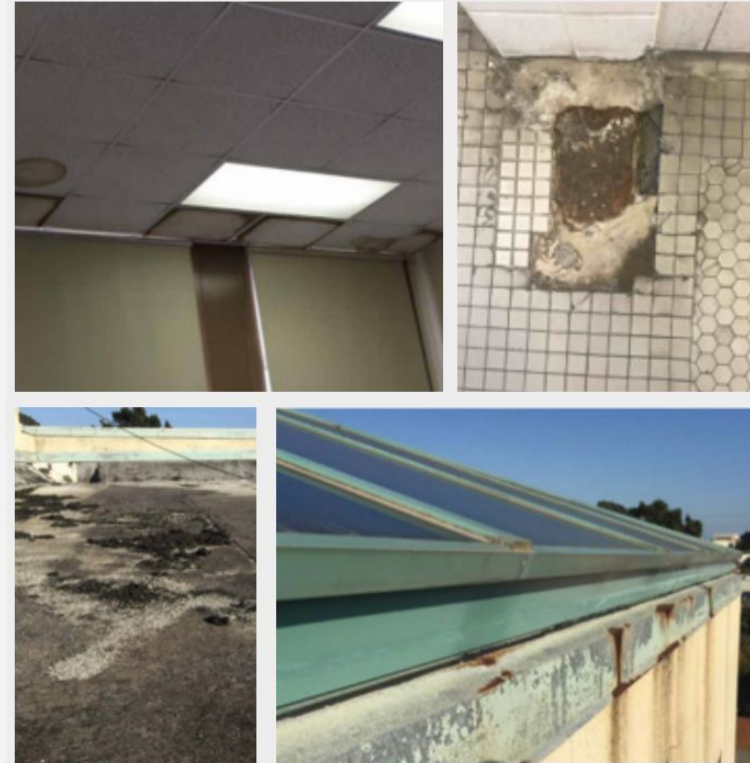
- Cesar Chavez ES
- Daniel Webster ES
- El Dorado ES
- Frank McCoppin ES
- George Peabody ES
- Gordon J. Lau ES
- J.Y. Chin ES
- Jose Ortega ES
- Junipero Serra ES
- Longfellow ES
- McKinley ES
- Miraloma ES

- Monroe ES
- Paul Revere K-8
- Stevenson ES
- Starr King ES
- Sunnyside ES
- Visitacion Valley ES
- Yick Wo ES
- James Lick MS
- Presidio MS
- Roosevelt MS
- Visitacion Valley MS
- Willie Brown Jr. MS

- Ida B. Wells HS
- Burton HS
- Ruth Asawa SOTA
- The Academy HS
- Bret Harte EES
- C. Stockton EES
- C. Lilienthal 3-8
- Clarendon ES
- Charles Drew ES
- Garfield ES
- Harvey Milk ES
- Hillcrest ES

- Lafayette ES
- Redding ES
- Sheridan ES
- A.P. Giannini MS
- Marina MS
- G. Washington HS
- T. Marshall HS
- Tule Elk Park EES
- Mission Bay School
- BVHM K-8
- Denman MS
- West Portal ES

- SFUSD facilities desperately need maintenance and improvements
- School bonds are the only way to pay for this critical work
- Without a bond, SFUSD would have to budget operating funds for facilities improvements, which takes resources from classrooms
- A 2022 bond sale exhausted the District's existing authorization
- Ongoing and consistent investment will always be necessary
- SFUSD manages debt responsibly, so this Bond would not raise taxes





BOND RESOLUTION REQUIREMENTS

- **What is required to place a new bond measure on the ballot?**
 - Two-thirds approval of the Board of Education (*Cal. Educ. Code §15266*)
 - Called at least 88 days in advance of general election (*Cal. Elec. Code §9401*)
 - **Approval of this Resolution would place the bond measure before voters on November 5, 2024**

- **How can bond funds be used?**
 - Proceeds from the sale of the bonds can only be used for **construction, reconstruction, rehabilitation, or replacement of school facilities, including the furnishing and equipping of school facilities, or the acquisition of real property for school facilities**, and not for any other purpose, including teacher and administrator salaries and other school operating expenses (*Cal. Const. Art. XIII A, § 1(b)(3)(A)-(D)*)

- **What accountability measures does the law require?** (*Cal. Const. Art. XIII A, § 1(b)(3)(A)-(D)*)
 - A list of the school facilities projects expected to be funded
 - A certification that the board has evaluated safety, class size reduction, and information technology needs in developing that list
 - Annual, independent financial and performance audits
 - **Exhibit A to the Resolution Calling Bond Election addresses each of these accountability provisions**



- In May 2023, the Board adopted the 2023 **Facilities Master Plan (FMP)**
- The FMP identifies **Emerging Priorities** and assigns pacing
- In April 2024, Facilities staff updated the Board on the FMP progress
- The 2024 Bond continues SFUSD’s commitment in the FMP towards the “**schools we want**”
- **Alignment with SFUSD Guardrails:**
 - **Guardrail 1: Effective decision-making:** major decisions made with meaningful consultation with the community
 - **Guardrail 2: Serving the whole child:** addressing physical environment in service of the whole child philosophy
 - **Guardrail 4: Resource allocation:** transparently communicating how resources are allocated
 - **Guardrail 5: Strategic Partnerships:** collaborating with agencies and organizations to leverage funds



**BOND PROPOSAL
+ IMPACT VISION**



Transparent Project Site Selection



Every SF Neighborhood Benefits



Data-Driven Approach When Selecting School Sites



Tightly Coordinated with Resource Alignment Initiative



WHAT'S IN THE PROPOSAL? | INVESTMENT CATEGORIES



Modernization

Large construction projects at existing school sites, including one large high school, focused on safe, long-lasting buildings, modern classrooms, upgraded restrooms, and brightened corridors.

\$410 M



Core Functionality

Targeted investments to fix basic needs like restrooms, water leaks, lighting, and electrical outlets, and to improve user comfort and how school sites feel to students.

\$95 M



Student Nutrition Services

A new central food hub for Student Nutrition Services to ensure food security and healthy meals for all SFUSD students. Also, improved school kitchens and dining spaces.

\$225 M



Technology Upgrades

Reliable network coverage and access at school sites both for student learning and to support modern building systems, continuing the pace of investment from the 2016 bond program.

\$35 M



Schoolyard Outdoor Learning

Comprehensive, student-centered improvements to schoolyards, including play, physical education, athletics, outdoor learning, access to nature, and shade.

\$10 M



Security

Completing school site security systems improvements at 100% of school sites begin in 2016 bond program, focusing on building communication systems and keyless entry.

\$15 M

Next bond in 2028 → **\$790 M**



- 1** large high school modernization
- 3** major modernizations (>\$30M)
- 4** mid-size modernizations (\$10M-\$30M)
- 5** modernization designs for future bond



- SNS** food hub and new shops
- 7** new production kitchens
- 20** dining space redesigns
- 10** redesigned schoolyards



- 2** major building electrification projects
- 4** roofing or window projects
- 15** water quality projects
- 8** sites with new network wiring
- 100%** complete security suite at all sites



Buena Vista Horace Mann K-8 Modernization

- **SFUSD is the largest provider of food security for children in San Francisco, and serves 40,000 daily meals.** The 2024 Bond will construct a Food Hub for Student Nutrition Services to improve food security, source fresher products locally, and offer a wider range of healthy meals for ALL students.



FROM THIS MEAL



TO THIS MEAL

- **The 2024 Bond will address one large high school site with a comprehensive modernization.** There are 4 high schools within the top 30 Facility Condition Index (FCI) list. Staff will transparently communicate when a school site is selected.





SCOPE COMMITMENTS + ACCOUNTABILITY MEASURES

When implementing bond-funded modernization and core functionality projects, SFUSD commits to the following in any school buildings where SFUSD does work:



School Site Safety and Accessibility. All SFUSD students can enjoy equitable experiences in safe buildings because school sites are ADA accessible and structurally sound with up-to-date fire/life safety systems.



School Site Security. School sites can communicate effectively and be better prepared during an emergency because security features are installed at 100% of school sites: door locks, building communication systems, remote door access, and security cameras.



High-Performance Exterior Building Features. Student learning is not impacted by water leaks or spaces that are too hot or cold because building roofs, walls, doors, and windows are water-tight, energy-efficient, and durable.



Classroom Comfort. Students are comfortable in class because the mechanical system can be kept at a comfortable temperature for student learning. New buildings are equipped with all-electric heating and ventilation systems. Core systems are selected to reduce ongoing maintenance burden and costs. Students can better focus on learning when they are comfortable.



Safe Drinking Water. Students and staff have easy access to safe and clean water, and know where to find it. Clear signage guides users. All new plumbing features low-water use fixtures.



Modern Learning Environments. School campus layouts that make sense and fit the academic program appropriately, including libraries, cafeterias, dining spaces, and administrative areas, and move toward the “schools we want,” including technology upgrades to ensure access and connectivity. This includes a commitment to a modernize at least one high school site.



Athletic Facility Life-Cycle Replacement. Student athletes can compete on quality surfaces and schools can host competitive events on regulation-size fields and courts. Implement replacement of high school athletic facilities that have been scheduled for replacement over the next six years.













School Kitchens and Dining Spaces. SFUSD’s kitchens and dining spaces offer fresh food in welcoming dining spaces. SFUSD has warehousing and storage capacity to ensure 48-hour resiliency in the event of a food delivery gap. Kitchen equipment and appliances are all-electric whenever possible.

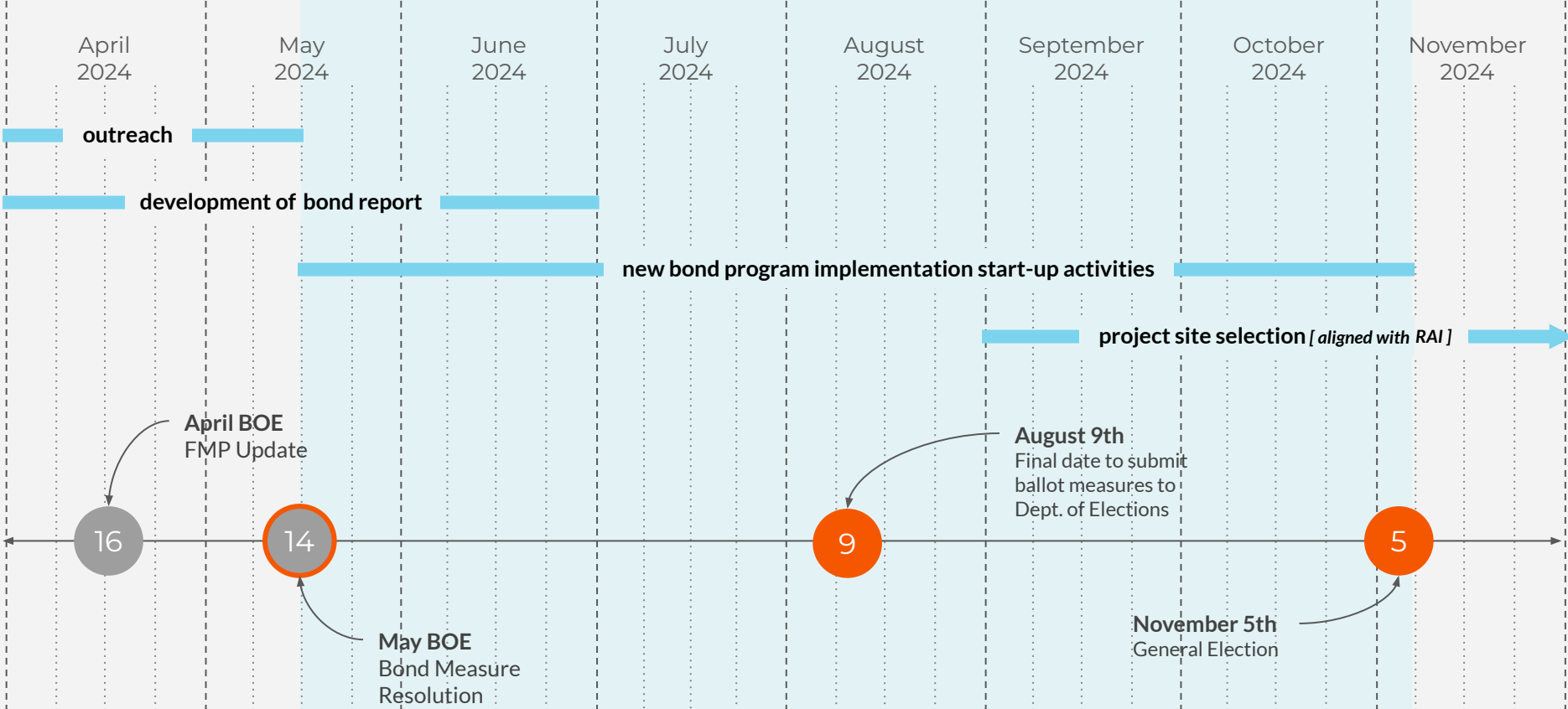


Climate-Friendly Building Features. Students and staff can see SFUSD’s commitment to resource efficiency and carbon footprint reduction through energy-efficient lighting equipped with occupancy sensors and solar panels on all new buildings. Materials are durable, lead- and PVC-free, and meet low emissions standards.

To follow through on a commitment to transparency, the points below outline the reporting and oversight practices that SFUSD will maintain in the 2024 Bond Program:

-  **1 Bond Report.** Within three months of passage, complete a report outlining the 2024 Bond goals, investment categories, prioritization principles, accountability, and commitments.
-  **2 Board of Education (BOE) Reporting.** Report quarterly and provide an annual workshop to the BOE on Program status and finances, and alignment with the 2023 FMP.
-  **3 Citizens' Bond Oversight Committee (CBOC) Management.** Report quarterly, at a minimum, to the CBOC on Program progress and expenditures, and present annual audits and financial reports. CBOC reports will include a financial recap of all active Bond Programs, including budget information and variance.
-  **4 Annual Bond Program Independent Performance and Financial Audits.** Diligently work with an independent auditor to complete annual financial and performance audits, as required by the CA Education Code, by March following each fiscal year close.
-  **5 Annual Bond Staff Financial Report.** Annually and timed to coincide with required independent audits (not later than March after fiscal year close), produce a financial report summarizing bond expenditures and investments for the preceding fiscal year.
-  **6 City/County of SF Collaboration.** Present annually, or as set by the CCSF Capital Planning Committee, to contextually align SFUSD's capital needs with broader City needs.
-  **7 Accelerated Bond Debt Repayment.** Subject to BOE approval at each bond issuance, continue SFUSD Bond Program's historical practice to save taxpayer money by paying off bond debt within 20 years, rather than the 30 years that is typical of many major bonding entities.
-  **8 Post-Project Feedback From Users.** Implement a Post-Occupancy Evaluation program to measure student, family, and staff satisfaction with modernization projects.
-  **9 Third-Party Expertise to Ensure We're Implementing a Great Program.** Maintain professional program management consultants to ensure that we are up to date on the latest in education industry standards and rigorous in cost estimating to manage our budgets effectively, which means we can do more projects.
-  **10 Continually Seek Improvement in Our Program Delivery.** In Fall of 2024, work with the 2016 Bond Program design and construction partners to review prior Bond Program performance to benchmark the 2016 Program and include lessons learned into the implementation procedures for the 2024 Program.

2024 BOND MEASURE | SCHEDULE MILESTONES



2024 BOND PROPOSAL





APPENDIX: Stakeholder Engagement

ACKNOWLEDGMENTS

- Excitement and anticipation for continued school improvements
- Confidence in Bond Program capacity and project delivery
- Acknowledgement of constraints of the Bond Program
- Community engagement, including with labor partners, is a priority moving forward
- Alignment with the 2023 Facilities Master Plan, especially when it comes to outreach, is paramount

ASPIRATIONS

- Build a stronger story on the need and opportunity of the 2024 Bond
- Clear, transparent principles for how sites will be selected
- Specific principles around high school selection
- Desire to understand what went well in prior programs and what is different in this proposal
- Interested in greater investment amount
- Interested in larger, more comprehensive scopes
- Utilize City partnerships
- Clear accountability metrics and descriptions of success



Help shape the 2024 School Bond!



**SAFE
MODERN
COMFORTABLE**

“Schools We Have” vs. “Schools We Want”

Classrooms We Have

- A one-size-fits-all classroom model.
- Desks arranged with students facing the front of the room, offering limited opportunities for collaboration.
- Inflexible, traditional classroom seating.

Classrooms We Want

- Up-to-date internet connectivity allowing for fast, reliable access.
- Modern, flexible classroom furniture that supports peer collaboration.
- Culturally responsive learning spaces.
- Durable, attractive wall coverings, tile, flooring, and paint.



GENERAL PERCEPTION OF SCHOOL FACILITIES (select quotes)

- “Our building is very old and quite literally crumbling in places. We want working toilets and not having it be too hot or cold for our children to learn.”
- “We need a new, safe play area, including adaptive play equipment for our special day classes.”
- “The school site has not been updated in years, it definitely has an effect on the atmosphere of the school. In order for students to be willing to learn, their environment needs to feel safe and inviting.”

PRIORITIZATION

- Clear and transparent process for site selection and projects
- Prioritize schools that have not received investment in recent bonds
- More urgency to make improvements and not delay for years
- Make sure that bond funds are spent on schools that will stay open

ACCOUNTABILITY

- Commit to maintaining oversight and improving communication
- Align ongoing maintenance with Bond capital investments
- Ensure every SF neighborhood benefits, with an equity emphasis

BOND PLANNING + PRIORITIZATION

- Need for a comprehensive capital strategy that plans infrastructure improvements over several bond cycles
- Use data driven approach for project site selection, including FCA and equity data

ACCOUNTABILITY

- Regular meetings with labor stakeholders
- Accessible website offered in multiple languages with an email signup
- Draft a public implementation plan and provide comprehensive status reports to the Board, CBOC, and the public via the website

SCOPE COMMITMENTS

- Keep classrooms at comfortable temperatures for learning
- Invest in core systems with lower lifetime maintenance costs
- Use sustainable best practices for all building system upgrades
- Require high labor standards and maintain a Project Labor Agreement





- Deliver performance and financial audits of all open bonds to CBOC on a consistent and published schedule following the close of each fiscal year.
- Provide to CBOC a consistently formatted quarterly report that includes a financial recap of all active bonds; an active project list status that includes budget, expenditure, and variance information; and new projects planned to start the next quarter
- Provide deeper information on the published SFUSD 10-Year Master Facilities Plan by providing 1-year, 3-year (rolling) plan and 5-year (rolling) plans that define projects, their timeline and budget allocations and include plans to address deferred maintenance.
- Provide to CBOC an annual facilities plan defining the projects and expenditures at the beginning of the academic year with designation if the project was listed in the original bond resolution and updated each quarter.
- Create a process for CBOC to make information requests to bond staff and establish response time expectations.
- Include a “management letter” or “MD&A” for each audit report.
- Provide CBOC with a list of school projects at the beginning of the school year with projected project phases during each quarter so CBOC can schedule visits by members to various sites.

Stakeholder Feedback Informs Our



Guiding Principles

for project site selection and scopes of work



Accountability Measures

to ensure that we deliver on voters' expectations



Scope Commitments

at all sites where the bond program does work

Using what he heard from the prior slides, the following slides incorporate color coding to demonstrate where stakeholder engagement has been woven into the:



Guiding Principles



Accountability Measures



Scope Commitments

■ **PARENTS + FAMILIES FEEDBACK**

■ **BOARD OF EDUCATION FEEDBACK**

■ **LABOR PARTNERS FEEDBACK**

■ **CBOC FEEDBACK**





Guiding Principles



Transparent Project Site Selection

The Bond Program will select school sites where projects will occur based on these principles, and then will **COMMUNICATE PUBLICLY ABOUT THE SELECTIONS**



Every SF Neighborhood Benefits

In a range of small, medium, and large scale projects, **EACH NEIGHBORHOOD IN SF WILL BENEFIT**



Data-Driven Approach When Selecting School Sites

Use **DATA FROM THE 2022 FCA**, **PRIOR INVESTMENTS**, and **SOCIO-ECONOMIC STATUS [SES] DATA**




Tightly Coordinated With Resource Alignment Initiative

SFUSD will continue to move forward with 3 previously committed projects, and will launch new projects after BOE acts on Resource Alignment proposals in spring 2024 to **ENSURE DURABLE INVESTMENTS**



Accountability Measures

ACCOUNTABILITY MEASURES | TO ENSURE WE DELIVER




Bond Report. **WITHIN 3 MONTHS OF PASSAGE**, complete a report outlining the 2024 Bond goals, investment categories, prioritization principles, accountability, and commitments.



Board of Education Reporting. **REPORT QUARTERLY** and provide an **ANNUAL WORKSHOP TO THE BOE** on Program status and finances, and alignment with the 2023 FMP.



Citizens' Bond Oversight Committee (CBOC) Management. **REPORT QUARTERLY, AT A MINIMUM, TO THE CBOC** on Program progress and expenditures, and present annual audits and financial reports. **CBOC REPORTS WILL INCLUDE A FINANCIAL RECAP OF ALL ACTIVE BOND PROGRAMS INCLUDING BUDGET INFORMATION AND VARIANCE.**



Annual Bond Program Independent Performance and Financial Audits. Diligently work with an independent auditor to complete **ANNUAL FINANCIAL AND PERFORMANCE AUDITS**, as required by the CA Ed. Code, by March following each fiscal year close.



Annual Bond Staff Financial Report. Annually and timed to coincide with required independent audits (not later than March after FY close), **PRODUCE A FINANCIAL REPORT SUMMARIZING BOND EXPENDITURES AND INVESTMENTS** for the preceding fiscal year.



ACCOUNTABILITY MEASURES | TO ENSURE WE DELIVER



City/County of SF Collaboration. Present annually, or as set by the CCSF Capital Planning Committee, to contextually **ALIGN SFUSD'S CAPITAL NEEDS WITH BROADER CITY NEEDS.**



Accelerated Bond Debt Repayment. Subject to BOE approval at each bond issuance, continue SFUSD Bond Program's historical practice to **SAVE TAXPAYER MONEY** by paying off bond debt within 20 years, rather than the 30 years that is typical of many major bonding entities.



Post-Project Feedback From Users. **IMPLEMENT A POST-OCCUPANCY EVALUATION** program to **MEASURE STUDENT, FAMILY, AND STAFF SATISFACTION** with modernization projects.



Third Party Expertise to Ensure We're Implementing a Great Program. Maintain professional program management consultants to ensure that we are up to date on **THE LATEST IN EDUCATION INDUSTRY STANDARDS** and **RIGOROUS IN COST ESTIMATING TO MANAGE OUR BUDGETS EFFECTIVELY**, which means we can **DO MORE PROJECTS.**



Continually Seek Improvement in Our Program Delivery. In Fall of 2024, work with 2016 Bond Program design and construction partners to review prior bond program performance to **BENCHMARK THE 2016 PROGRAM AND INCLUDE LESSONS LEARNED INTO THE IMPLEMENTATION PROCEDURES FOR THE 2024 PROGRAM.**





Scope Commitments

SCOPE COMMITMENTS | AT ALL SITES WHERE WE DO WORK

When implementing Bond-funded modernization and core functionality projects, SFUSD commits to the following in any school buildings where we do work:



School Site Safety and Accessibility. All SFUSD students can enjoy **EQUITABLE EXPERIENCES IN SAFE BUILDINGS** because school sites are **ADA ACCESSIBLE AND STRUCTURALLY SOUND** with up-to-date fire/life safety systems.



School Site Security. **SCHOOL SITES CAN COMMUNICATE EFFECTIVELY** and be better prepared during an emergency because security features are **INSTALLED AT 100% OF SCHOOLS**: door locks, building communication systems, remote door access, and security cameras.



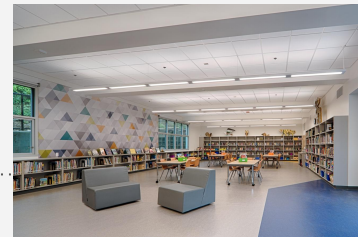
High-Performance Exterior Building Features. Student learning is not impacted by water leaks or spaces that are too hot or cold because building **ROOFS, WALLS, DOORS, AND WINDOWS ARE WATER-TIGHT, ENERGY-EFFICIENT, AND DURABLE.**



Classroom Comfort. Students are comfortable in class because the mechanical system can be kept at a comfortable temperature for student learning. New buildings are equipped with **ALL-ELECTRIC HEATING AND VENTILATION SYSTEMS**. Core systems are selected to **REDUCE ONGOING MAINTENANCE BURDEN AND COSTS**. **STUDENTS CAN BETTER FOCUS ON LEARNING WHEN THEY ARE COMFORTABLE.**



Safe Drinking Water. **STUDENTS AND STAFF HAVE EASY ACCESS TO SAFE AND CLEAN WATER**, and know where to find it. Clear signage guides users. All new plumbing features **LOW WATER USE FIXTURES**.





Modern Learning Environments. School campus layouts make sense and fit the academic program appropriately, including libraries, dining spaces, and administrative areas. Classrooms move towards the “**SCHOOLS WE WANT**” including **TECHNOLOGY UPGRADES TO ENDURE ACCESS AND CONNECTIVITY**. **THIS INCLUDES A COMMITMENT TO MODERNIZE AT LEAST ONE HIGH SCHOOL SITE.**



Athletic Facility Life-Cycle Replacement. **STUDENT ATHLETES CAN COMPETE ON QUALITY SURFACES** and schools can host competitive events on regulation-size fields and courts. Implement replacement of **HIGH SCHOOL ATHLETIC FACILITIES** that have been scheduled for replacement over the next six years.



School Kitchens and Dining Spaces. SFUSD’s **KITCHENS AND DINING SPACES SHOULD OFFER FRESH FOOD IN WELCOMING DINING SPACES**. SFUSD has warehousing and storage capacity to ensure 48-hour **RESILIENCY IN THE EVENT OF A FOOD DELIVERY GAP**. Kitchen equipment and appliances are **ALL-ELECTRIC** whenever possible.



Climate-Friendly Building Features. Students and staff can see SFUSD’s commitment to resource efficiency and **CARBON FOOTPRINT REDUCTION** through **ENERGY-EFFICIENT LIGHTING** equipped with occupancy sensors and **SOLAR PANELS ON ALL NEW BUILDINGS**. Materials are durable, lead- and PVC-free, and meet low emissions standards.

