

# Partnerships for Joint Use

## Expanding the Use of Public School Infrastructure to Benefit Students and Communities

### Research Report



September 2010

## **Center for Cities & Schools at the University of California, Berkeley**

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## **Executive Summary**

School facilities and grounds are integral components of public infrastructure that provide students with space to learn, socialize, and exercise. However, once the school day is over, many school grounds and facilities sit empty. As interest grows in addressing pressing social concerns such as childhood obesity, lack of recreation/open space, suburban sprawl, and the need to efficiently use limited public resources, many consider expanding the use of school spaces to include non-school users (commonly referred to as, “joint use”) a strategic approach to help address these issues.

School districts, local municipalities, and/or nonprofit partners throughout the country are countering the common separation of uses and working together to accommodate school and community needs on school property. Using California as a “meta case,” this research report establishes an empirical understanding of the full range of joint use and how specific strategies fit into a larger picture of more efficiently and appropriately utilizing public school spaces for educational and community purposes.

### **Three Main Joint Use Approaches**

There are three distinct, yet interrelated, overarching strategies seen in the literature about joint use: 1) basic joint use (the use of school district controlled, owned, or utilized facilities by a non-district entity); 2) joint development for joint use (a “bricks-and-mortar” strategy to build facilities that will be jointly used); and 3) joint use partnerships (establish ongoing joint use and describe the formal relationship, policies, and procedures agreed upon between a public school district and one or more other entity).

### **Common Joint Use Categories**

Our analysis of more than 100 joint use examples across California finds nine common use categories:

1. Expanded outdoor recreational opportunities
2. Expanded indoor recreational opportunities
3. Shared library services
4. Shared performance arts facilities
5. Expanded student and/or community social services
6. Curriculum enhancement
7. Public or private meetings, events, and activities
8. Broader land development and/or local revitalization
9. Administrative uses or tenant type arrangements

## **Findings: Partnerships Structure Joint Use Strategies**

Our central finding from this research is that successfully expanding the uses of public school facilities and grounds requires a system of supports established through formalized, multiagency partnerships that restructure governmental relationships. Expanding the uses of schools while still adequately prioritizing their core educational use requires a comprehensive set of policies and procedures that frequently do not exist. Joint use partnerships restructure governmental relationships to systematize basic joint use and thereby increase its benefits, efficiencies, and scale. Overall, we find that joint use partnerships are locally driven, and vary significantly in how they are structured and implemented from place to place.

We provide ten key findings for establishing effective joint use partnerships based on our analysis of the findings from the literature, case studies, and our interviews. The findings aim to assist in establishing a partnership-based system of supports for successfully instigating, implementing, and sustaining effective joint use.

**Finding 1:** Silo management in public agency planning and operations is a tremendous contextual obstacle to joint use and joint development

**Finding 2:** Capacity-building and resources for joint use partnerships are needed

**Finding 3:** State policies and/or incentives can play an important role in supporting joint use partnerships

**Finding 4:** Comprehensive school district-level community use policies set an important framework of clarity and aid in establishing a new culture of sharing.

**Finding 5:** A shared vision across stakeholders builds a partnership's foundation

**Finding 6:** Formal agreements structure joint use partnerships

**Finding 7:** School districts tend to highly subsidize the community use of schools

**Finding 8:** Understanding the real costs required to maintain healthy and adequate school facilities is essential to establishing a system of supports for joint use partnerships

**Finding 9:** School site support from principals and teachers is essential

**Finding 10:** Legal concerns for public agency partners can be addressed through formal agreements and adopted policies

## **I. Introduction**

School facilities and grounds are integral components of public infrastructure that provide students with space to learn, socialize, and exercise. However, once the school day is over, many school grounds and facilities sit empty. As interest grows in addressing pressing social concerns such as childhood obesity, lack of recreation/open space, suburban sprawl, and the need to efficiently use limited public resources, many consider expanding the use of school spaces to include non-school users (commonly referred to as, “joint use”) a strategic approach to help address these issues (Cooper and Vincent, 2008; Filardo, Vincent, Allen, and Franklin, 2010). School districts, local municipalities, and/or nonprofit partners throughout the country are countering the common separation of uses and working together to accommodate school *and* community needs on school property.

Broadly defined, joint use is the practice of allowing use of public school buildings and/or grounds by non-school entities (Filardo et al., 2010). Joint use typically occurs through an agreement between a district and another public or private entity that addresses the use of facilities, land, utilities, or other common elements by two or more parties on-site. However, joint use is a flexible term and each locality’s concept of it can vary, a reality illustrated throughout this paper.

The following study was conducted to better understand the sharing of public school buildings and grounds with non-school entities and discern the types of joint use-related strategies school districts employ. The research investigates the much discussed but politically and logistically difficult practice of forming local partnerships between school districts and other local entities to mutually invest in and share the use of school facilities. These joint use partnerships involve complex and nontraditional relationships that cross institutional divides to provide increased services and amenities to students, families, and communities.

This paper is one of the first of its kind, as very little academic or policy research has investigated the joint use of public K-12 schools. Much of the recent focus on joint use schools has come from the public health community, driven by the growing evidence linking place-based factors to health disparities (Saelens, Sallis, and Frank 2003; Sallis and Glanz 2006). Public health advocates and policymakers have looked at increasing access to physical activity spaces (such as schools) in neighborhoods as a mechanism for increasing active living and decreasing childhood obesity. In California, the focus on joint use has largely come through the statewide Convergence Partnership, funded by Kaiser Permanente and The California Endowment and coordinated by the Partnership for the Public’s Health. In June 2008, a California Convergence convening of health providers and advocates from across the state identified two key policy priorities for advancing health in disadvantaged communities, one of which was increasing the joint use of school

facilities and grounds to expand opportunities for physical activity (Convergence Partnership 2009). But there is more to K-12 joint use than physical activity opportunities.

Given this context, the current research aims to understand the full range of joint use and how specific strategies fit into a larger picture of more efficiently and appropriately utilizing public school spaces for educational and community purposes. For this study, we use California as a “meta-case,” investigating individual joint use strategies throughout the state to provide an accessible, detailed discussion of what joint use is and the types of strategies utilized. From there, we discern the challenges and lessons in such partnerships and recommend policies, procedures, and additional research needed to better support the joint use of public schools throughout the country.

## **Project Scope and Methodology**

We conducted dozens of interviews throughout California with representatives of state agencies, school districts, local government, and community organizations to: a) identify the types of information desired to create partnerships that support joint use schools, and b) identify existing joint use partnerships throughout the state. Additionally, we conducted a literature review and compiled reports, newspaper, and other print media sources in California. From all of these sources, we built a database of more than 100 California joint use school case examples. The database allowed us to examine joint use trends across the state. In many cases we conducted more detailed interviews with individuals knowledgeable about particular cases. We also point to recent resources and tools that have been created to support local joint use strategies.

## **Research Questions**

How do school districts and partnering entities instigate, implement, and operationalize joint use school partnerships? Specifically:

- Under what conditions and contexts do school districts and partners enter into joint use partnerships?
  - How, and with whom, are joint use agreements being structured?
  - What are the specific obstacles, constraints, and opportunities for successful joint use partnerships?
  - What factors foster effective and sustainable partnerships among school districts, city, and community agencies?



## II. Current Perspectives and Prior Research on Joint Use

School districts, other local government entities, and communities across the country are actively seeking ways to improve their schools and neighborhoods. Both our interviews across California and analysis of the literature on joint use schools find that sharing the use of school facilities with non-school entities is frequently cited as a way to do both. It is often heralded as an example of smart and efficient public policy. However, while jointly using school facilities and grounds makes intuitive sense, forming the necessary partnerships among school districts, local government agencies, and community-based organizations is a complex task.

Diverse perspectives promote the community and educational benefits of joint use schools. The influential U.S. Department of Education (2000) report, *Schools as Centers of Community: A Citizen's Guide for Planning and Design* (and its revised, 2<sup>nd</sup> edition, Binger 2003), presented joint use partnerships as a key strategy for creating schools that meet six key design principles.<sup>1</sup> The national Building Educational Success Together (BEST) collaborative lists shared use of public school facilities in its model policies that support high performing schools (Building Educational Success Together [BEST], 2006). Community schools (sometimes called full-service schools) use the joint use concept to bring educational, recreational, and health services together under one roof, especially in disadvantaged neighborhoods, and better meet the diverse needs of children and their families (Dryfoos, Quinn, and Barkin, 2005; Blank, Melville, Shah, 2003). Urban planners and community developers have also advocated for joint use schools, particularly those in the “smart growth” movement (Fuller, Vincent, McKoy, & Bierbaum 2009; ICMA, 2008; CEFPI & EPA, 2004; Romeo, 2004; Chung, 2002).

Numerous states have recommended and/or encouraged school districts to employ joint use strategies when possible. California has established special supplemental joint use school facility funds in its recent statewide school construction bonds, and both the California Department of Education and the Division of the State Architect encourage joint use in their state agency documents.<sup>2</sup> The Department of Public Instruction of North Carolina (2000) recommends joint use agreements for reducing the cost of small schools in the state. The Maryland Department of Planning's 2008 document *Smart Growth, Community Planning, and Public School Construction* recommends the shared use of facilities to achieve greater “economies of scale.”

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<sup>1</sup> To meet the nation's needs for the twenty-first century, school learning environments should 1) enhance teaching and learning and accommodate the needs of all learners; 2) serve as a center of the community; 3) result from a planning and design process that involves all community interests; 4) provide for health, safety, and security; 5) make effective use of available resources; and 6) be flexible and adaptable.

<sup>2</sup> For example, the California Department of General Services produced, “New Directions in School Facilities: Section 5: Joint Use of School Facilities” Available online: <http://www.excellence.dgs.ca.gov/NewDirections/default.htm>.

Interestingly, despite this support states have yet to establish robust policy or a financial framework to fully support local joint use efforts.

The above States, as well as others who have reviewed or implemented joint use programs, all identify the same benefits of approaching schools and communities from a joint use perspective – saving money through local partnerships, providing more amenities and services available to both students and community members, and enhancing the efficiency of land and building use. Because schools and local jurisdictions often seek to provide the same resource spaces in communities, the rationale is that instead of providing separate play space, swimming pools, and libraries at public expense, partnerships could be formed to share in the cost. The result, then, in theory is reduced public expenditure while still providing the same level of public services and/or amenities. As the Maryland report notes, “[joint use] is both fiscally responsible public sector decision-making and wise community planning” (2008, p. 39).

However, despite all the benefits joint use partnerships are politically and logistically complex and have been likened to a “forced marriage” (Cox Jones, 2001). At the heart of the problem are the isolated silos of decisionmaking among local schools, district educational facility planning, and the planning work of other agencies such as cities, counties, and redevelopment agencies (McDonald, 2010; McKoy et al. 2008; Center for Cities & Schools, 2007; Vincent, 2006a; Donnelly, 2003; Beaumont with Pianca, 2002). It is extremely rare for a locality to have an institutional framework and a system of policies and procedures in place that allows these multiple entities to work together in the ways necessary to realize effective joint use (Filardo et al., 2010). As one of the leading researchers on school facility issues has consistently found in his 30-plus years of investigation, school district and other government agency coordination on school facilities planning and utilization often suffers from great technical, social, and political difficulties, such as different funding sources and funding cycles, different institutional cultures, and competing political agendas (Earthman, 1976, 2000).

While there are many cogent arguments for the benefits of joint use schools (many of these offered through short cases described in school facility/construction-related trade magazines; see for example Kennedy, 2006; Novitski, 2008; Westlake and Bach, 2008; Schneider, 2008), very little academic or policy-oriented research has focused on joint use of K-12 schools. In particular, only a few studies have sought to better understand joint use strategies and how they have been brokered and structured to inform more effective local practice.<sup>3</sup> Three of these have been dissertation studies in education administration fields and provide valuable information for building a body of knowledge around the subject. Testa’s (2000)

study uses interviews with school district facility managers in California to identify key strategic practices utilized by practitioners to make joint use (in particular, joint development) projects happen: 1) develop cooperative relationships; 2) apply perseverant work ethic; 3) collaborate with stakeholders; 4) identify and pursue mutual-need opportunities; 5) create synergistic benefits; and 6) apply fiscal resourcefulness.<sup>4</sup> Reeve's (2000) study analyzes joint use agreements in California and distills key commonalities, trends, and recommendations found in the legal documents to inform the successful creation of joint use agreements.<sup>5</sup> Cox Jones's study (2000) looking at three joint use capital development projects in three states (Arizona, California, and Colorado), found that partners had "entirely different planning, funding, and facilities approval processes – and no current state policies and procedures to help implement such a cooperative venture" (p. 131). Through the case studies, Cox Jones identified seven specific elements necessary to create and maintain joint use educational centers. Dubbed the "Seven Ps," they are: 1) partners; 2) people; 3) planning; 4) politics; 5) property; 6) pence (funds); and 7) policies/procedures.<sup>6</sup> While the recommendations from these studies provide in-depth information, the studies themselves are not readily accessible to practitioners and policy makers. Furthermore, they have yet to be distilled and repackaged in a form that is both thorough and easily consumable, and they are now a decade old.

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<sup>3</sup> At the time of this publication, there appear to be no studies published on joint use K-12 schools in North American peer-reviewed academic journals.

<sup>4</sup> Additionally, Testa found key "barrier elements" 1) territorialism or turf wars; 2) facility access/use conflicts; 3) limited collaboration; 4) lack of financial support; 5) bureaucratic processes; and 6) lack of top-level/political support) and key "supportive elements;" 1) institutionalized belief in community benefit; 2) productive working relationships; 3) strong reputations; 4) top-level leadership support.

<sup>5</sup> Reeve (2000) recommends that written joint use agreements between a school district and a government entity include the following: 1) a description of ownership; 2) entity who has primary responsibility; 3) an indemnification clause; 4) maintenance and repair of facility; 5) description of the operation of the shared project; 6) authority for signatures and notices; 7) modifications to the agreement; 8) set terms for the use of the shared project; 9) insurance of the shared project; and 10) venue for actions.

<sup>6</sup> More specifically, Cox Jones (2001) found: 1) "Choosing the right partners for such joint use ventures is arguably the most important factor in their success (p. 138);" 2) Individual people are important because they are the partners: "...people made sacrifices in terms of their usual institutional perspective in order to achieve successes from the broader, perhaps more community- and student-focused perspectives (p. 138);" 3) Commitment among partners for a planning process driven by a shared vision was essential to successful implementation; 4) "There is not escaping the importance of politics in ensuring the successful move from the original concept of a cooperative center to implementation and continuation, and the ability of the original partners to achieve commitment from every level of political power – local, regional, statewide and even federal – is intrinsic to the project's success (p. 140-141); 5) "The existence of an available and accessible parcel of land (property) was mentioned as a critical success factor by virtually all of the interviewees (p. 141);" 6) Even with partners, people, planning, politics, and property aligned, funding ("pence") is one of the most important critical success factors. Funding can come in a variety of different configurations of sources; and 7) Policies and procedures "working together are critical for such centers to gain support from segmental boards, to compete successfully for funding, and to encourage such cooperative ventures at both the state and local institutional levels (p. 142)."

A more recent dissertation in the City and Regional Planning field conducted survey research on school facilities planning among California public school districts officials. The survey revealed that school districts in California pursue building new joint use schools for a variety of reasons, including the availability of state-level joint use funding, construction or operational cost savings, and school board philosophy or direction (Vincent, 2006b). Thus, for some, the potential benefits are worth overcoming the challenges.

The most recent study on joint use is *Joint Use School Partnerships in California: Strategies to Enhance Schools and Communities* by the Center for Cities & Schools (CC&S) at the University of California-Berkeley and the nonprofit Public Health Law & Policy (PHLP) (Cooper & Vincent, 2008). Looking at three joint use cases in California, the research revealed key lessons learned and recommended steps for crafting effective joint use partnerships. *Joint Use School Partnerships in California* findings echo many of the themes identified by Testa (2000), Reeve (2000), and Cox Jones (2001) – the need to identify local needs, broker relationships across agencies characterized by silo management, and formalize them into ongoing partnerships.<sup>7</sup> At the time of their study, CC&S and PHLP found that joint use strategies can take many forms and vary greatly from locale to locale, and that there are few existing resources to guide local partners.

In addition to the studies described, two notable “how-to” guides for practitioners have been produced.<sup>8</sup> In 1997, The California Association of School Business Officials (CASBO) released a publication aimed at school district leaders. CASBO provides guidelines for and recommends components of effective joint use agreements. More recently, PHLP released *Opening School Grounds to the Community After Hours* (2009) a toolkit aimed at helping communities and school districts work together to develop joint use agreements that increase community access to existing recreational facilities on school grounds. The toolkit profiles (and provides sample MOUs for) four joint use agreement types: 1) “unlocking the gates;” 2) “indoor and outdoor access;” 3) “nonprofit partnerships;” and 4) “reciprocal access.” Both the CASBO and PHLP reports focus primarily on the legal mechanism of the written joint use agreement as a vehicle to structure increased community access to existing schools.

All of these sources point to the overarching fact that localities lack comprehensive policies and practices to inform effective joint use strategies and maximize

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<sup>7</sup> Three lessons emerged from the research: 1) build trusting and sustainable relationships; 2) liability concerns are surmountable; and 3) leadership must craft joint use partnerships that address explicit local needs.

<sup>8</sup> Additionally, there are a few resources found outside of the U.S. For example, see “Schools as Community Facilities: Policy Framework and Guidelines” by the Department of Education and Training, State of Victoria, Australia (2005). This document in particular provides much policy and operational detail tailored to the Victorian public agency legal context.

operational efficiencies; joint use partnerships are occurring largely in a vacuum of research and best practices information and despite, not because of a state policy framework.

To provide increased instruction to local leaders in overcoming the complex obstacles and institutional inertias working against these types of partnerships, more research on joint use is needed to significantly update and expand on the existing, limited resources.

### **III. Assessing the Joint Use Field: Three Main Joint Use Approaches**

From the limited existing literature described above, we identified a growing interest across the country in the expanded community use of public school facilities and grounds. To many elected leaders, public officials, and community members, jointly using public school infrastructure, paid by taxpayers, makes intuitive sense, but building this into plans, designs, and policies is perceived as a complex and uncertain task. In analyzing the literature, we found that “joint use” is an umbrella term, used to describe many different strategies involving the shared use of public school buildings and/or grounds. Localities use many different joint use approaches to address a specific local need by sharing resources and responsibilities and creating a unique joint use program and/or facility. There are three distinct, yet interrelated, overarching strategies seen in the literature about joint use: 1) basic joint use; 2) joint development for joint use; and 3) joint use partnerships.

#### **Basic Joint Use**

In its simplest sense, the joint use of schools is the use of school district controlled, owned, or utilized facilities by a non-district entity.<sup>9</sup> This “basic joint use” establishes the right to access school spaces and applies broadly to a class of parties, such as individuals, groups, other public agencies, private organizations, and/or nonprofit organizations. This right is usually the result of a policy objective established by state government and/or school district leadership. The basic joint use access is typically for a limited and short term. There is typically no extensive or unique legal documentation, but rather a standard application form outlining fees and including some indemnification of the school district related to liability. The use fees are typically pre-set and apply to all users or to specific categories of users.

#### **Joint Development for Joint Use**

Joint development for joint use is a “bricks-and-mortar” strategy to build facilities that will be jointly used.<sup>10</sup> Joint development and joint use are two terms that were often used interchangeably by those interviewed in California, even though they refer to very different practices. Through joint development, two or more entities partner to plan, site, design, and/or build a new school or renovate an existing school to better

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<sup>9</sup> Adapted from: 21<sup>st</sup> Century School Fund and Center for Cities & Schools. Forthcoming. Joint Use of Public Schools: A Framework for a New Social Contract. Washington, DC: 21csf.

<sup>10</sup> There can also be joint development of schools without the eventual joint use, but we do not look at this type of practice in this paper because our focus is on joint use.

support the joint use of the building and/or land.<sup>11</sup> Many of the specific cases highlighted in the previous section were joint development projects. The non-school district partners in the joint developments we found in California were almost exclusively other public agencies, such as cities, counties, and/or community colleges. In some cases, nonprofit organizations have been development partners with public school districts, such as YMCAs or Boys and Girls Clubs.

## **Joint Use Partnerships**

Joint use partnerships establish ongoing joint use and describe the formal relationship, policies, and procedures agreed upon between a public school district and one or more other entity. Joint use partnerships involve a separately developed contract or formal agreement (often called memoranda of understanding [MOU], master agreements, or joint use agreement [JUA]) that is specific to the school district and other party and binding them both to specific terms for sharing space. Joint use partnerships are most often formed to meet shared goals across the parties. The partnership details are outlined in the formal contract because the terms of the partnership are not possible with existing practice or policy. In other words, the partnership contract sets a new set of binding rules that all parties will abide by.

Next, we present our analysis of the cases compiled from California to further understand the variety in joint use strategies.

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<sup>11</sup> Adapted from: 21<sup>st</sup> Century School Fund and Center for Cities & Schools. Forthcoming. Joint Use of Public Schools: A Framework for a New Social Contract. Washington, DC: 21csf.

## **IV. Joint Use Throughout California: Categorizing the Cases**

Our analysis of more than 100 joint use examples across California finds nine common use categories:

1. expanded outdoor recreational opportunities
2. expanded indoor recreational opportunities
3. shared library services
4. shared performance arts facilities
5. expanded student and/or community social services
6. curriculum enhancement
7. public or private meetings, events, and activities
8. broader land development and/or local revitalization
9. administrative uses or tenant type arrangements

The categories are not mutually exclusive; they can be and often are combined at the same school site. In this section, we describe and provide illustrative examples within each category and point to joint use examples that are both currently operating and ones that are in the planning phases.

### **Expanded Outdoor Recreational Opportunities**

Joint uses that involve outdoor recreation spaces, such as playgrounds, sports fields, and hard court surfaces, appear to be the most common joint use approach. The use of outdoor space often occurs informally, whereby schoolyard gates are open for public access during non-school hours. It can also occur more formally, such as when spaces are reserved for specific users (e.g., sports leagues). Below are a few examples that illustrate common cases across the state.

#### **Happy Valley School District | Anderson, CA**

In this northern California suburb, city and school officials agreed to provide funding for a joint summer recreation program using the school district's outdoor facilities. The schools allow the city to use the spaces while school is not in session, and the city contributes funds for maintenance costs.

#### **John Muir High School | Pasadena, CA**

In 2008, the City of Pasadena apportioned funds to resurface ten tennis courts at John Muir High School, which is in the Pasadena Unified School District. The courts are open to the public on weekends and throughout the



summer. Pasadena City College also uses the courts for their spring and summer tennis lesson programs.

### **Scripps High School | San Diego, CA**

The City of San Diego leased twenty-five acres to San Diego Unified School District for the development of outdoor recreation fields adjoined to Scripps High School. A joint use agreement was established for the two entities to jointly use the area, which includes illuminated softball, soccer, and multipurpose fields.

### **West Contra Costa Unified School District | Richmond, CA**

West Contra Costa Unified School District in the San Francisco Bay Area region has numerous joint use agreements with the many East Bay cities within its boundaries. For example, the district recently signed a new joint use agreement with the City of Richmond for the use of fields at various school sites throughout the city.

### **La Mesa-Spring Valley Unified School District | La Mesa, CA**

In this large San Diego suburb, La Mesa Park and Recreation Foundation provided the funding and the City of La Mesa's Public Works Department handled the design and construction for the expansion of a YMCA sports complex located near several schools. The Junior Seau Athletic Complex features football and soccer fields, basketball courts, tennis courts, a skate park, a tot lot, and picnic areas. Users include the middle school physical education classes, youth sports teams, after-school programs, sports camps, and YMCA camps. The city coordinates scheduling after-school and on weekends, the leagues pay for janitorial services and lights, and the school manages the watering of the fields.

### **Schools as Community Hubs Pilot Project | San Francisco, CA**

Initiated in 2007, the Schools as Community Hubs Pilot Project is a joint use agreement between the City and County of San Francisco and San Francisco Unified School District (SFUSD). The district allows the city to unlock outdoor playground areas for open, unsupervised public use at twelve schools throughout the city (one high school, one middle school, and ten elementary schools) on the weekends and selected school holidays during daylight hours. The partnership is aimed at increasing the amount of publicly available recreational space in a city that lacks space to meet growing demands.

## **Expanded Indoor Recreational Opportunities**

Indoor recreational spaces are also common joint uses. These include gymnasias, multipurpose rooms, and swimming pools. Similar to what we found with outdoor recreation spaces, indoor recreation spaces can also be programmed or available for open community use.

### **Washington Unified School District | West Sacramento, CA**

In this Sacramento suburb, the City of West Sacramento and Washington Unified School District formalized a partnership to share use of and costs for new recreational facilities at multiple schools. In return the city can open the facilities to community members during non-school hours, including weekends and holidays.

### **Los Gatos-Saratoga Union High School District | Los Gatos, CA**

The local recreation department, the school district, and city of this large San Jose suburb agreed to build an indoor swimming pool on the school grounds. The agreement also included expanding related facilities, such as equipment and locker rooms, for community use. The school district owns the facility and the agreement dictates the terms for use by city agencies.

### **Pleasanton Unified School District | Pleasanton, CA**

The City of Pleasanton and Pleasanton Unified School District (PUSD) jointly contributed funds for the construction of three middle school gymnasias in this midsize Bay Area city. PUSD has priority use of the gyms during school and the City operates programs in the gyms during non-school hours and covers maintenance costs.

### **Garvey Unified School District | Rosemead, CA**

Garvey Elementary School District (GESD), located in an older suburban portion of east Los Angeles County, recently constructed new joint use gymnasias at both of its existing middle school campuses. Using state joint use project funds, GESD partnered with the City of Rosemead and entered into a joint use agreement that permits the city to use these gymnasiums at no cost during non-school hours for city-sponsored programs. Currently, the city provides after-school youth athletic programming at both gyms. The two joint use gymnasiums fill recreational gaps for both GESD and the City of Rosemead. Prior to constructing these two gymnasias, there were no indoor physical activity areas at the district's middle schools, and there is little available land for the city to expand its own facilities.

### **Everett Alvarez High School Aquatic Center | Salinas, CA**

In 2006, Salinas Unified School District built a new high school aquatic center to be jointly used with area swim teams and the City of Salinas. The joint use agreement with the city enables community use outside of school hours and outlines the city's shared responsibility for operations and maintenance costs.

## **Shared Library Services**

When school districts and local governments collaborate to jointly build and/or operate libraries for use by students and the public, local governments overcome their struggle to afford services such as libraries and streamline their budgets while taxpayers rest easier that their money is not being wasted on duplicative facilities and services.

### **Twelve Bridges Public Library | Lincoln, CA**

In this small rural city, the City of Lincoln, Western Placer Unified School District, and the local community college, Sierra College, jointly renovated a library located on a school campus for shared use. Initiated in 2000 and opened in 2007, the library was built and is owned and managed by the city while the operating costs are divided among the three partners. The city and school district have worked on multiple additional joint development and joint use projects, including an administrative building (agreement outlines details of construction, use, shared project costs, ownership, and operational responsibilities) and city-funded joint use parks adjacent to new elementary schools.

### **Earl Warren Middle School Library | Solana Beach, CA**

At Earl Warren Middle School, San Dieguito Union High School District (SDUHSD) recently built a new joint use library. Funding partners for the development included SDUHSD, City of Solana Beach, County of San Diego, the Friends of the Solana Beach Library, and the California's School Facilities Program. The project included the new library on a thirty-plus year-old school campus, a relocated entry to the campus, and improved traffic management and bus pickup. The new 11,000 square foot library facility more than triples the previous library spaces available at the old school library (2,000 square feet) and the old community library (3,200 square feet). In the ongoing operational arrangement, SDUHSD owns the facility, the county is the tenant, and the city is an equity partner with diminishing interest over time.

### **Sweetwater Union High School District | Chula Vista, CA**

Sweetwater Union High School District and the City of Chula Vista, a large southern San Diego suburb, partnered to develop a joint use library. Built and maintained on the high school campus by the school district, the city staffs the library on weekday evenings, weekends, and summers for general public use.

### **Ladera Ranch School Library | Orange County, CA**

The Orange County Public Libraries (OCPL), Capistrano Unified School District (CUSD), and Rancho Mission Vieja (a private land developer) partnered to site and build a new joint use library, the county's first of its kind. While OCPL had funds to build a new library, they did not have funds to acquire land, which prompted a joint use discussion with the school district as they were looking to build a new school. The 14,000 square foot facility located on a school site provides much more library and media resources than typical public and school libraries. When school is out, the entire facility is open to the public. The different spaces are located on separate floors and have different entrances to aid in maintaining a distinction between uses during the school day. The developer also set aside land for a community park adjacent to the library.

## **Shared Performance Arts Facilities**

Schools have partnered with other entities to provide performing arts spaces, often involving state of the art stages and lighting and sound systems.

### **Poway Unified School District | Poway, CA**

Poway Unified School District, in a mostly rural area outside San Diego, leased land to the City of Poway for the construction of a performing arts center adjacent to Poway High School. The city and school district shared in the construction funding. A joint use agreement was established outlining the terms of use, maintenance, and operations.

### **City Heights Urban Village | San Diego, CA**

In the densely populated City Heights neighborhood of central San Diego, the school district, the city, the redevelopment agency, and a local foundation collaborated to site a new school in a neighborhood center with numerous shared use goals. The Urban Village includes affordable housing, a retail center, an aquatics center, municipal service providers, and joint use recreation fields. In addition to the fields, school and community users have

shared access to tennis courts, a swimming pool, and a performance annex, which includes a performing arts center and an outdoor amphitheatre.

## **Expanded Student and/or Community Social Services**

The vast majority of schools in California (and likely throughout the country) house academic support services, social services, and/or extra curricular activities run by outside entities. These entities may be city agencies, county agencies, and/or nonprofit community-based organizations (CBOs). Examples include mental health services, after-school tutoring, and physical health services. Funding for these service providers may come from a variety of sources, including the school district, local governments, or foundations. Typically, these services are student (and sometimes family) supports that often occur during “out of school time.” These kinds of student supports are in line with the “community school” and “full-service school” models. Schools view these services as supportive of and complimentary to their core academic goals. While often not thought of as joint use, this strategy involves schools sharing their spaces with non-school users, namely the organizations providing these services and/or programs.

### **Sun Valley Middle School | Los Angeles, CA**

Partnering with the Northeast Valley Health Corporation and the University of California, Los Angeles, the Los Angeles Unified School District provided land while the County of Los Angeles provided funding for the construction of one of the largest school-based health clinics in the country. The health center, which opened in 2008, is located at Sun Valley Middle School and used by the school and the community. The partnership to create the health center was formed to combat the health effects of heavily polluting land uses in the area, including a concentration of landfills, wrecking yards, metal-plating facilities and others. In Sun Valley, the high rates of asthma, obesity, and diabetes are significantly higher than other parts of the county. The free and low-cost services provided include preventive care, chronic diseases management, dental care, mental health, and adult and pediatric medicine.

### **San Francisco Unified School District | San Francisco, CA**

Through its Student Support Services Department, San Francisco Unified School District (SFUSD) coordinates with more than 400 community-based organizations (CBOs) to provide programs and services in nearly all of the district’s schools. SFUSD works to align student needs and programs offered by CBOs, many of whom are funded by the City of San Francisco’s Department of Children, Youth, and Their Families. A wide range of programs are offered,

including before- and after-school activities, tutoring, mental health services, English as a Second Language (ESL) training, and physical activity programs.

### **City of Fresno and Local School Districts | Fresno, CA**

The City of Fresno's Department of Parks, After-School, Recreation, and Community Services (PARCS) provides a host of services and programs to students and community members at seventeen area elementary school sites. As the area's largest after-school program provider, PARCS contracts with local school districts to provide enrichment program elements for schools receiving After-School Education and Safety (ASES) grant funds which support activities such as art concepts, nutritional education, leadership training, sports and fitness.

### **Los Angeles Youth Center | Los Angeles, CA**

Los Angeles Unified School District (LAUSD) and the Watts/Willowbrook Boys & Girls Club partnered to establish a youth center at Markham Middle School that is dedicated to youth development programming. The center hosts after-school programs, creative workshops, and collaborates with other local organizations. Obtaining additional funding from the City Attorney's Office the partnership was formed, in part, to provide a safe supervised place for youth activities. LAUSD is working to expand the center and include a more comprehensive set of services, such as mental health support, job training, after-school enrichment.

### **Claremont Unified School District | Claremont, CA**

The joint use partnership between the City of Claremont and the Claremont Unified School District, along with other partners in this large Los Angeles suburb, has expanded to include numerous youth-oriented programs that take place on school premises when school is not in session. These programs have demonstrated an increase in after-school activity participation and a decrease in teenage drinking, truancy, and youth-related crimes.

## **Curriculum Enhancement**

In some cases, joint uses occur where schools and other entities partner around academic curriculum. These strategies are often connected to the student support services described in the previous category and more likely found in middle and high schools. Examples include vocational education, work-based learning, "linked

learning/multiple pathways,” and other pedagogical orientations where an outside partnering entity contributes to curriculum development.<sup>12</sup>

### **Clovis Unified School District | Clovis, CA**

Working in partnership with State Center Community College District, Clovis Unified School District, located at the edge of the Fresno metropolitan area, obtained state funding for the construction of a childcare center on the community college campus, which is across the street from a high school. Students from both the community college and the adjacent high school can attend classes and observe childcare professionals working.

### **Innovative Learning Center | Riverside, CA**

In collaboration with eight other public and private agencies, Alvord Unified School District (AUSD) and Riverside Community College opened the Innovative Learning Center in 2007. Centered around the Phillip M. Stokoe Elementary School, the partnership created a center of teaching and learning for children aged newborn to 12 years old and for college students pursuing a career in teaching and childcare. The elementary school is divided into six learning “villages” that are based on age and learning themes. Multiple community uses occur on site, including training for college students, a family and community gathering center, a new library and museum in partnership with the Riverside Art Museum and Public Library, public open space and play fields in partnership with the city Department of Parks and Recreation, and a community wellness center serving families and elders in partnership with the county’s Department of Public Health.

### **California Academy of Math and Sciences | Dominguez Hills, CA**

Seeking to increase the success and career opportunities of inner city students in mathematics and science, California State University (CSU) and Long Beach Unified School District (LBUSD) partnered to create the California Academy of Math and Sciences (CAMS), a high school on the CSU Dominguez Hills campus. As a result of the joint use arrangement, CAMS students have access to the college’s facilities while CSU uses CAMS classrooms spaces for evening college courses. Though CAM is clearly an integrated part of the CSU campus, its design, based on five building “pods,” lends it important distinction as a unique high school.

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<sup>12</sup> For a recent state policy report on these types of initiatives in the secondary education context, see: California Department of Education. 2010. Multiple Pathways to Student Success: Envisioning the New California High School. A Report to the Legislature and Governor. Sacramento: CDE.

## **Public or Private Meetings, Events, and Activities**

Most public school districts allow use of their facilities by public or private entities through a facilities use permit or similar method. In these situations, the user entity typically does not seek a formal relationship with the school or district, but instead simply wishes to use an indoor or outdoor school space for a one-time event or perhaps on multiple occasions over a defined period of time. Often the user will pay a use fee based on how much space they use and the amount of time they use it. Every school district in California must allow this type of joint use as mandated by the California Civic Center Act.<sup>13</sup> However, states differ in law on this issue: five states do not address the community use of schools in legislation; thirty-seven states, plus the District of Columbia, permit the use of some or all school property by outside groups; and eight states require that school boards allow use of facilities by the community (NPLAN, 2009). School districts in California vary in their policies, procedures, and fee rates for permitted community uses, but they typically establish policies outlining the spaces that may be utilized, the hours of use, how the spaces are reserved, the amount of insurance coverage required for the users (if any), and the fees users must pay (if any) to access school spaces.

## **Broader Land Development and/or Local Revitalization**

What we found in many cases is that multiple joint use strategies are used simultaneously and often build upon one another. Some of the examples noted above allude to that, such as the Ladera Ranch, Twelve Bridges, and City Heights examples. The cases reviewed below further illustrate combined joint use strategies within a district and/or at an individual school.

### **River City High School | West Sacramento, CA**

In this suburb of Sacramento, Washington Unified School District began looking to build a new high school in 2005. At the same time, the City of West Sacramento had identified in its parks master plan the need for an indoor recreation center. Coming together to explore joint use options, the two entities jointly developed a new high school campus that included a recreation

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<sup>13</sup> In 1917, the California Legislature enacted the California Civic Center Act, which created a policy foundation for joint use schools. The Act establishes California's public schools as "civic centers" where "...the citizens, parent teacher associations, Camp Fire girls, Boy Scout troops, veterans' organizations, farmers' organizations, school-community advisory councils, senior citizens' organizations, clubs, and associations formed for recreational, educational, political, economic, artistic, or moral activities of the public school districts may engage in supervised recreational activities, and where they may meet and discuss, from time to time, as they may desire, any subjects and questions that in their judgment pertain to the educational, political, economic, artistic, and moral interests of the citizens of the communities in which they reside (California Education Code, Section 38131(a)).



center with an aquatic facility and outdoor athletic fields that would be available to both the school and the community. Sited entirely on school district owned land, the city leases the recreation center from the district. Facility management funds come from community membership fees.

### **Hector Godinez High School | Santa Ana, CA**

In 2006, Santa Ana Unified School District (SAUSD) opened a new high school on land assembled by the district, the City of Santa Ana, and a local museum. The twenty-six-acre campus consists of nine buildings and sits adjacent to the existing Centennial Heritage Museum and city-owned open space. The project was seen by the partners as a way to expand an existing school site and keep its central location. For the school district, there is limited land available within its boundaries for new or expanded schools. The city saw the project as an opportunity to expand the resources at the park and increase community services in this underserved area. New facilities include a performing arts center, library and media center, gymnasium, outdoor basketball courts, numerous football, soccer, and ball fields. SAUSD has a joint use agreement with the city for shared use of the indoor and outdoor recreation spaces. The district also has a joint use agreement with the museum, which provides expanded curriculum support for students.

### **Helms Community School | San Pablo, CA**

The newly opened Helms Middle School – a new school building on an existing school site – is just the first phase of what will also include joint use outdoor recreation spaces and a community center. Next, West Contra Costa Unified School District (WCCUSD) will demolish the old structures and develop that space into joint use play / sports fields to share with the City of San Pablo. Additionally, the site houses the Helms Community Project (HCP), a program providing a variety of wraparound support services for students and their families, from healthcare and counseling to after-school tutoring and literacy and parental advocacy classes. HCP is a school-community collaborative comprised of district and school staff, community-based mental health service providers, parents, and community members—and a partnership aimed at supporting the academic successes of the schoolchildren and their families. The city is an active partner, having co-written grants with the school district, matched grant monies, and earmarked city funds for after-school academic enrichment programs. Eventually, the HCP will be housed in a new building on the school site and funded by the city to provide the needed space for community service providers.

### **Newport-Mesa Unified School District | Costa Mesa, CA**

In this midsize city south of Santa Ana, the Newport-Mesa Unified School District and the City of Costa Mesa entered into a joint use agreement that includes community use of all buildings, classrooms, multiuse rooms, auditoriums, kitchens, gymnasias, tennis courts, restrooms, and/or pools, as well as play / sports fields, playgrounds, and parking lots. The agreement covers permitted uses and scheduling, as well as mutual obligations regarding custodial services and maintenance and operational costs.

Additionally, we found numerous cases where joint use was part of a larger multiagency development or redevelopment effort that included a school site and adjacent property. Such cases are characterized by joint capital investment and/or strategically aligned capital investment with the purpose of revitalization and ongoing joint use opportunities. The following are illustrative examples of these types of strategies.

### **Civic Auditorium and Santa Monica High School Campuses | Santa Monica, CA**

In 2007, the City of Santa Monica and the Santa Monica-Malibu Unified School District (SMMUSD) began a planning process exploring joint development and joint use opportunities with the concurrent redevelopment of the city's downtown civic auditorium area (known as the Civic Auditorium Campus) and the school district's adjacent Santa Monica High School campus (known as Samohi). The city, school district, and Santa Monica College formed a working group to explore joint use options. Elements under consideration include: shared parking (possibly under the Samohi football field); outdoor recreational fields; cultural spaces (expanding the connection between the Civic Auditorium and Samohi's Greek Theatre); and educational facilities (which involved studying the optimal location for early childhood facilities on both campuses). The overall plan envisions a complete redevelopment of this large downtown area, maximizing shared use on the dense urban site.

### **Emeryville Center of Community Life | Emeryville, CA**

The City of Emeryville and the Emery Unified School District (EUSD) are currently engaged in the planning process for the joint development and eventual joint use of the Emeryville Center of Community Life (ECCL). The partners aspire to bring many of the educational, recreational, cultural, and social opportunities, as well as services and programs offered by both the city and the school district onto one site in this 1.2 square mile, bustling urban city of about 10,000 residents in the heart of the San Francisco Bay Area. Emerging from a state takeover of fiscal mismanagement, EUSD sees the

project as a way to improve its educational outcomes by becoming a far more integral part of the city revitalization efforts. The ECCL is being jointly conceptualized, planned, developed, funded, and managed by the city and the district.

### **Nystrom United Revitalization Effort (NURVE) | Richmond, CA**

Since 2001, a host of partners, including the City of Richmond, Richmond Housing Authority (RHA), Richmond Children's Foundation (RCF), nonprofit Bay Area Local Initiatives Support Corporation (LISC) West Contra Costa Unified School District (WCCUSD), and local neighborhood councils, have been working on the Nystrom United Revitalization Effort (NURVE). NURVE partners aim to revitalize the economy and improve quality of life in the area surrounding the Nystrom Elementary School and Dr. Martin Luther King, Jr. Community Center and Park (Santa Fe and Coronado neighborhoods) with more than \$15 million in capital building projects, programming, and community partnerships. The partners are exploring the recreational, programming, and cultural joint use opportunities by aligning the planning and design of 210 units of affordable housing, a new recreational park space and rehabilitated community center, and the renovation of the local elementary school.

### **Natomas Town Center | Natomas, CA**

In Sacramento's fast-growing suburbs, Natomas Unified School District partnered with the City of Sacramento, Los Rios Community College, American River Community College, the city/county public library, and private developers to site a new joint use high school within the new Natomas Town Center development. In addition to retail outlets/services, the Town Center includes Indurkum High School; a community college; a joint use public library for the school, college, and community; and a regional park. The public aspects of the project were financed through a privately financed leased facilities arrangement.

### **Village at Indian Hill | Pomona, CA**

Pomona Unified School District purchased a depressed shopping mall and turned it into the Village at Indian Hill, a community center facility that includes two schools, a performing arts theater, a local history museum, and space for service-oriented businesses and community organizations such as Head Start, all under one roof. The former mall was redesigned as a flexible space and the service-oriented retail entities in the building provide supporting services to the schools. High technology conference spaces were also built into the redesign, which generate revenue for the school district.

Students in the high school have worked in conference support, gaining valuable skills. A nonprofit foundation was established to manage the leasing of both the commercial and conference spaces.

In the cases above, joint use is one key part of a much broader and multifaceted effort. What these cases reveal are cross-sector partnerships aimed at community revitalization, with joint use being a tool within the broader strategy of place-based efforts.

### **Administrative Uses or Tenant Type Arrangements**

While our focus in this study was on joint uses on school sites that directly resulted in serving communities and/or students, we found evidence of additional joint use strategies falling outside that realm. For example, some school districts have negotiated shared administrative spaces, mainly with other local public agencies. In a few cases, school districts have also allowed use of school roofs for things like cell phone towers or emergency alarms. Still other districts share storage or warehouse space with non-district and non-school entities. Regional school transportation services often share sites within local school districts and/or other entities. Schools have also been known to share and/or rent their parking areas for non-school events or to other entities during non-school hours. In some of these cases, the arrangement may be governed by a joint use agreement (or similar) while in others, the terms may be described as more of an owner-tenant type arrangement.

## **V. Findings: Partnerships Structure Joint Use Strategies**

Our central finding from this research is that successfully expanding the uses of public school facilities and grounds requires a system of supports established through formalized, multiagency partnerships that restructure governmental relationships. Expanding the uses of schools while still adequately prioritizing their core educational use requires a comprehensive set of policies and procedures that frequently do not exist. Developing and sustaining the necessary joint use agreements and/or partnerships to offer additional programs, services, and other uses on school property – and in some cases construct new facilities to house them – is complex and challenging because it goes against the grain of business as usual. We focus in particular on joint use partnerships because they often involve joint development and then move towards systematizing basic joint use to increase its benefits, efficiencies, and scale.

As we have seen, partners join together to collectively meet the needs of students and their communities through joint use. As numerous individuals interviewed noted, “We are coming together to do more with less, realizing that we are serving the same public.” In doing so, joint use partnerships are a unique example of the kinds of partnership-driven problem-solving efforts that have been examined in public policy and community development-related academic literatures. The joint use cases from California presented in this paper resemble the nationwide rise in cross-sector partnerships of public, private, and nonprofit entities aimed at social and/or economic outcomes (see Innes, Di Vittorio, and Booher, 2009; Briggs, 2003; Innes & Booher, 1999; Chaskin, 2001; Stoker, 1998). These partnerships are largely driven by the complexity of the local issues that must be addressed (elements of which often are divided and dealt with by separate public agencies) and increasing fiscal limitations. Indeed, these multiagency, cross-sector partnerships prove to be immensely challenging; in many cases, agencies are coming together that at best have little history of collaboration and at worst have adversarial relationships. This is certainly how relationships between school districts and other local government agencies are often described (Vincent, 2006a).

The joint use partnerships we have observed in California share a number of attributes:

- While small-scale partnerships for joint use may be seen at local school sites, true joint use partnerships are contracts with a school district, not an individual school. However, the partnership may target joint use at only one school, a defined set of schools, or all schools in the district.
- They are long term – maybe even in perpetuity.

- They restructure governmental relationships – either between public agencies and/or with private entities (often nonprofits).
- They often begin with a joint development project that facilitates and supports the ongoing joint use partnership. Joint development and joint use partnerships often go hand in hand, but not always; ongoing joint use agreements are necessarily part of joint development, but joint use can also happen in existing schools with little-to-no joint development work.

Joint use partnerships restructure governmental relationships to systematize basic joint use and thereby increase its benefits, efficiencies, and scale. The policies, procedures, and responsibilities of the partnering entities are uniquely negotiated when formalizing the partnership. Overall, we find that joint use partnerships are locally driven, and vary significantly in how they are structured and implemented from place to place. But we also find that the ill-developed and disparate nomenclature around the issue of joint use poses challenges. As a result, many of those interviewed felt that stakeholders, including schools, state policy leaders, municipalities, nonprofits, and community members, often have trouble holding focused conversations about joint use. Because joint use partnerships bring together various entities and/or agencies – who often have very different organizational cultures – establishing better definitions for the elements of joint use strategies will likely aid in partnerships. The three joint use approaches defined in this paper – basic joint use, joint development for joint use, and joint use partnerships – begin to provide a typology for cross-sector collaborations.

Next, we provide ten key findings for establishing effective joint use partnerships based on our analysis of the findings from the literature, case studies, and our interviews. The findings aim to assist in establishing a partnership-based system of supports for successfully instigating, implementing, and sustaining effective joint use. We present the findings in order from general to specific: starting with broad conceptual issues, moving to the role of state policy, and then delving into elements of local policy and procedures.

**Finding 1:** Silo management in public agency planning and operations is a tremendous contextual obstacle to joint use and joint development

Most often, school district planning for facilities and municipal planning for city and neighborhood development occurs separately. The result is a missed opportunity to deliberately leverage joint use, particularly joint development opportunities or siting separate facilities close to one another to increase future joint use. Most states lack

policies that require or offer incentives for school districts and local governments to work together to plan school infrastructure as part of the larger urban development plan. Indeed, in California, as in most other states, school districts work with a unique autonomy from other local government agencies, including real estate and land use decisions. For example, when a California school district is looking for a location for a new school, it is not required to obtain approval from the local government planning agency. Developing mechanisms for increasing joint planning will likely aid in more joint development and joint use possibilities.

**Finding 2: Capacity-building and resources for joint use partnerships are needed**

While the concept of joint use schools is increasingly popular among policy makers and practitioners alike, very little information on successful joint use school partnerships is actually available to local leaders wanting to develop and structure effective partnerships, nor is their much information to assist state leaders in state policymaking. Given the increasingly prevalence of the practice and the complexity involved, the lack of research and information available is a significant void. Fortunately, there has been some recent progress in this area, especially within the public health research and advocacy community. Numerous fact sheets, tools, and resources have been created to promote joint use of schools (see resource list at the end of this report). However, the focus of many of these resources has been limited to increasing community use of physical activity spaces. Although such spaces are an important and prevalent aspect of joint use, they are not the only way school districts should see the joint use issue. Our findings in this research show that there is a much greater spectrum of possibility in sharing use of school. Hence, these emerging physical activity-oriented joint use resources should be “scaled out” to inform broader joint use partnerships.

**Finding 3: State policies and/or incentives can play an important role in supporting joint use partnerships**

Few state or local policies establish the structure needed to make joint use the norm, rather than an exception. Past research finds – and our interviews confirm – that local joint use occurs in the absence of state policies supporting and/or incentivizing the projects. In some cases, stakeholders felt state policies were obstacles. To remedy this, states need to develop legislation and/or policies that facilitate and

encourage partnerships for public-private, intergovernmental and/or interagency use of school facilities and grounds and that support joint development among public agencies. The national BEST (Building Educational Success Together) collaborative recommends the following three policy elements for establishing a state policy framework that supports and incentivizes (and eliminates barriers to) joint use at the local level:

- *School Facilities for Community Use.* States should develop legislation and/or policies that facilitate and encourage the sharing of school facilities for community use through appropriate policies, procedures, and financial incentives.
- *Public and Private Partnerships for Joint Use and Joint Development.* States should develop legislation and/or policies to encourage partnerships that implement public-private, intergovernmental and/or interagency use of school facilities and grounds.
- *Joint Development of Public School Buildings and Grounds.* States should establish a process to support joint development between school districts and other public entities, such as libraries, parks, senior centers, health clinics and public charter schools, and that supports the planning, design and construction or modification of buildings for the ongoing shared use of public school facilities with other public government entities.<sup>14</sup>

A key obstacle to joint use is that many localities lack a culture of sharing or cooperation across agencies. State legislation can help establish a different, more supportive context.

**Finding 4:** Comprehensive school district-level community use policies set an important framework of clarity and aid in establishing a new culture of sharing.

Comprehensive school district policies on all aspects of joint use aid in appropriately maximizing use across schools and doing so efficiently and effectively. School districts can take strategic initiative to establish a robust space management infrastructure to facilitate joint use and be good partners in the partnership. Doing so provides clarity and assistance to individual school sites on their roles while also ensuring greater access to school spaces across an entire district. Key to this work is

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<sup>14</sup> These three broad state policy recommendations have been adapted from: Building Educational Success Together. 2006. Model Policies in Support of High Performance School Buildings for All Children. Washington, DC: BEST.



establishing a set of overarching policies documenting the school board’s intent as it relates to community use of its facilities and grounds. From there, a more specific set of procedures can be established to operationalize district policies and establish a system of supports. Particularly in large school districts, joint use is aided by having staff dedicated to coordination among the partners, users, and school site hosts. Most fundamental for district-level joint use strategies is to establish a well-structured system of space and use scheduling that is clear, consistent, and understood by all. These policies and practices aid in establishing a new culture of sharing.

**Finding 5: A shared vision across stakeholders builds a partnership’s foundation**

Local leaders, elected officials, educators, advocates, and others across California are pointing to expanding the uses of public school spaces as a strategy that will support a variety of positive outcomes, including:

- establishing schools as centers of community
- increasing opportunities for physical activity
- more efficiently using limited public funds
- broadening services and amenities for students, families, and communities.

At the local level, partners need to establish a shared vision for what the joint use partnership seeks to achieve so that partners are working toward shared goals and a collective future. This is particularly important when bringing entities together that individually focus on different (or even competing) goals. A shared vision, then, brings the partnerships goals into clear focus among the stakeholders and also aids in establishing a “culture of sharing” that is often missing among staff.

**Finding 6: Formal agreements structure joint use partnerships**

While many local officials understand that joint development and joint use may provide a host of benefits, both require public agencies to work together in new and different ways. Partnerships, by nature, can be particularly volatile. Written agreements formalize partnerships, providing clarity on roles and responsibilities for partners. Formal written agreements become the vehicle to sustain the vision, ideas, and rules crafted among partners amidst multiple leadership or change. As

partnerships evolve, agreements can be updated over time to met new needs and issues. Common formalizing tools seen in joint use partnerships are memoranda of understanding (MOU), joint use agreement (JUA), joint development agreement (JDA), and joint powers authority (JPA). As the interviews and case studies revealed, formalizing mechanisms are needed because the outcome is something that existing policy and/or agency relationships do not adequately facilitate. Thus, the joint use partnership restructures governmental relationships.

Through formalizing joint use partnerships, the involved parties negotiate a wide variety of issues related to liability, custodial, calendaring, staffing, funding, and other details. Three fundamental concepts ultimately establish the parameters for the partnership specifics:

- *Space and Use.* Specifically, this refers to the spaces that will be shared and when and how they may be used. While this may seem like an obvious observation, pinpointing these details is a fundamental starting point for partnerships. It is important to distinguish between these two concepts, particularly because spaces can be used in many different ways for many different activities. Each may have different furniture/equipment needs, clean up time required, and/or wear and tear effects on the space; however, facilities are “fixed” while the uses can change from day to day or hour to hour.
- *Shared Use vs. Dedicated Use.* Spaces within schools can be shared (made available to multiple users) or dedicated (reserved for use only by one user). With dedicated space, the user has exclusive access. For example, even in schools with lots of community use activity, the schools’ administration offices are usually dedicated to the school’s exclusive use at all times. Shared spaces are made available to multiple users, either one at a time (e.g., sequentially) or simultaneously.
- *Open Use vs. Programmed Use.* The cases reveal that uses of school space by non-school entities can be “open” or “programmed.” Open, or informal, use, typically occurs when a school space is available for community drop-in use; that is, the gate is unlocked and anyone can enter and use the fields or courts, or, similarly, the door is unlocked for drop-in use of a gym. In many of these cases, either the school district or a partner (often a municipal agency) is responsible for unlocking the gates or opening the doors. Formal, or programmed, use occurs when the user is allowed access because he or she is participating in an organized program or event run by a non-school entity that has been granted access. Examples include before- and/or after-school programs for students run by nonprofits or city sports leagues. The distinction is important because the two scenarios mean different access rights to community members. For example, a school whose calendar is booked entirely with programmed joint use leaves little

opportunities for drop-in community use. Joint use partnerships can be structured to provide both types of uses.

**Finding 7:** School districts tend to highly subsidize the community use of schools

Our interviews with school district representatives across California found one important and often overlooked obstacle to the expansion of joint use: school districts tend to receive little revenue from joint use and often end up largely subsidizing the community use of their schools. Some viewed this as “just the way it is” while others pointed to a real missed opportunity to recoup some costs associated with intensifying use, particularly with basic joint use.<sup>15</sup> Given that any use of a building has costs associated with it (in terms of utilities, custodial, wear and tear, etc.) and that so many public school districts do not have enough capital funds to make the needed upgrades to their school facilities,<sup>16</sup> the possibility that many school districts are subsidizing the joint use of their school is an important contextual factor in understanding why there may be resistance to joint use among some school districts. Joint use partnerships provide an opportunity to more appropriately structure financing supports among partners that look realistically at the facility and grounds-related expenses that school districts are responsible for.

**Finding 8:** Understanding the real costs required to maintain healthy and adequate school facilities is essential to establishing a system of supports for joint use partnerships

Establishing a system of supports for joint use means also supporting the capital investments needed to keep school facilities and grounds safe and adequate for users. Joint use partners need to pay close attention to funding needs, particularly related to school facilities upkeep and repair. A school district that does not continually raise the funds needed to invest in its facilities will likely erode its joint

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<sup>15</sup> School districts in California tend to vary greatly in how much they charge non-school entities to use their spaces under basic joint use. In some cases, local school boards have adopted use rental rates. In some cases, there are different rates applied to different users. For example, other public agencies or nonprofits are often charged less than other formal users. Still many individuals interviewed felt that these fees did not cover the actual cost of allowing the use. Some pointed to a political resistance among leaders to entertain the idea of charging very much for the use of public school spaces.

<sup>16</sup> Building Educational Success Together. 2006. Growth & Disparity: A Decade of Public School Construction. Washington, DC: BEST.

use opportunities over time; either their spaces will not be seen as desirable or safe by partners or the school or district may decide that it can no longer subsidize community use. School districts should know all of the costs associated with their facilities so that they can then make informed negotiations with partners on the resources needed to sustain intensified use. The school district and partner can then both understand the resources that need to be leveraged to maintain safe and adequate facilities.

**Finding 9:** School site support from principals and teachers is essential

Many of our interviews revealed that because many school districts do not have a robust system of supports for basic joint use, there often is not a culture of support for sharing spaces among key staff, particularly at the school site level. Often, basic joint use occurs in an ad hoc basis and can differ greatly from school to school. Joint use tends to occur more often at school sites where principals and/or teachers are supportive of it. If school district leaders wish to expand joint use in all of their schools, it appears that having the superintendent and/or school board clearly state the districts intent with regard to community use of facilities and grounds is an important step. More formalized joint use partnerships have had successes in establishing a culture of shared use and the operational supports to make it work, thus increasing site level buy-in.

**Finding 10:** Legal concerns for public agency partners can be addressed through formal agreements and adopted policies

Legal concerns – especially liability – are often pointed to as a reason that basic joint use and joint use partnerships remain limited. Understandably, school districts do not wish to expose themselves to risk; nor do the other public agency partners. However, the California case examples show that legal issues are being effectively covered through formal agreements and official policies. Different arrangements that address issues such as liability and union labor, among others, can be put into place and are largely spelled out in the formal agreements. Many examples of model and actual joint use agreements can be found through entities such as the National Clearinghouse for Educational Facilities and Public Health Law & Policy (refer to the Joint Uses Resources section at the end of this report). These sources provide legal language from which to craft formal agreements for joint use partnership details.

## VI. Conclusion: Research Recommendations

Public schools in California and across the country are increasingly being called upon to help sustain vibrant, active, and healthy communities. Expanding the uses of public school spaces through joint use is seen as a promising way to do so. Meeting these new demands must be met with a system of supports that structures effective joint use partnerships.

We conclude by recommending three key issues that research should address to better inform joint use partnerships. The opportunities for research on joint use and joint development are wide open; very little research currently exists to inform the field. Whatever aspects of joint use and/or joint development researchers investigate, studies should pay particular attention to aspects of policy (both local and state), planning processes, financing strategies (both for joint development and ongoing joint use), and any aspects of school design that were used to physically aid in the intensifying of use.

- **Joint Use Partnerships:** Research should analyze the many joint use partnerships involving schools that exist across California and the country. What are the best practices of successful, long-term joint use partnerships? How have these partnerships been structured? What roles have different agencies played? How have their outcomes been measured? What partnership models are most effective? How have partnerships restructured intergovernmental relationships? Answers to these questions will also assist in capacity building among stakeholders for more effective partnerships.

Research should be used to comprehensively frame and empirically test the benefits associated with joint use, many of which we have mentioned in this paper. Having evidence on the benefits of these strategies can better inform priority setting for public policies and joint use partnerships.

- **Joint Development:** What are the best practices in joint development efforts? Very little research has looked at joint development strategies, particularly those involving public schools. Case studies of these kinds of projects are needed to investigate public-public partnerships, public-private partnerships, and creative financing mechanisms used.
- **State Policies:** What state policies are needed to support joint use, joint development, and joint use partnerships? Policies that both support and/or hinder these strategies should be investigated. For example, what are the differing state policies with regard to joint development involving public school districts? It appears, however, that many states do not have many policies relating to joint use and/or joint development of public schools. In which case,

research should look at what would be the appropriate policies states need in place if they do wish to encourage or incentivize joint use and joint development.

Joint use is a flexible, ever-evolving strategy for increasing the benefits from the public investment in school facilities and grounds. As public agencies increasingly look to do more with less, joint use will likely attract more interest. So too will joint development, as communities look to make bricks-and-mortar investments to both improve existing neighborhoods and shape entirely new ones. However, too often, school districts are not governed, managed, or funded to navigate the complexities and opportunities inherent in joint use, joint development, and entering into joint use partnerships. Increased research on these issues is needed to guide school districts and their partners to most efficiently and effectively use public resources for the widest benefit.

## **Joint Use Resources**

### **21<sup>st</sup> Century School Fund**

Founded in 1994, the 21<sup>st</sup> Century School Fund (21CSF) has worked for the last fifteen years in Washington, DC, and around the country to improve the quality and equity of our public school infrastructure. It is a leading voice for increased investment in our public school infrastructure; a pioneer in innovative approaches to community engagement in school capital planning, creative financing and public-private partnership strategies; and a respected source for technical assistance and research on school facility planning, management, oversight, financing, and impacts.

<http://www.21csf.org>

### **BEST (Building Educational Success Together)**

Led by the 21<sup>st</sup> Century School Fund, the national BEST (Building Educational Success Together) collaborative consists of organizations across the country working to improve urban school facilities through the development of a joint research, constituency building, and communications agenda. The BEST partners are a diverse group of local and national leaders with experience in educational reform, community development, social justice advocacy, historic preservation, community engagement, academic research, and philanthropy.

<http://www.bestfacilities.org>

### **Center for Cities & Schools**

The University of California, Berkeley's Center for Cities & Schools (CC&S) is an action-oriented think tank promoting high quality education as an essential component of urban and metropolitan vitality to create equitable, healthy, and sustainable cities and schools for all. CC&S provides research and resources for leveraging simultaneous improvements in schools and communities, including innovative policies and practices linking housing, school facilities, transportation, and land use. CC&S's *Joint Use Initiative* has produced numerous resources and tools on the topic.

<http://citiesandschools.berkeley.edu>

### **Joint Use.org**

Created by the Prevention Institute and the Berkeley Media Studies Group, JointUse.org was created as an online site for the California joint use statewide task force. Prevention Institute (PI) is a nonprofit national center dedicated to improving

community health and well-being by building momentum for effective primary prevention. Berkeley Media Studies Group (BMSG) was founded in 1993 to help public health advocates make their voices heard in a powerful public forum – the news – and increase their participation in the democratic process.

<http://www.jointuse.org>

### **National Clearinghouse for Educational Facilities**

Created in 1997 by the U.S. Department of Education and managed by the National Institute of Building Sciences, the National Clearinghouse for Educational Facilities (NCEF) provides information and research on planning, designing, financing, constructing, improving, operating, and maintaining safe, healthy, high performance public nursery, pre-kindergarten, kindergarten-through-grade-12 schools, and higher education facilities. NCEF's Resource Lists cull resources on school facilities from across the globe and contain a large volume of pieces related to joint use.

<http://www.edfacilities.org>

### **Public Health Law & Policy**

A nonprofit research and advocacy organization, Public Health & Law Policy (PHLP) partners with government staff, advocates, and other community leaders to provide practical solutions to a wide range of public health problems. PHLP staff include attorneys, city planners, and policy analysts who clarify and demystify the law, develop ready-to-go model policies, and "train the trainers" to equip community leaders with the confidence and capacity to improve public health outcomes. PHLP has produced a number of resources on joint use, including *Opening School Grounds to the Community After Hours: A Toolkit for Increasing Physical Activity Through Joint Use Agreements*.

<http://www.phlpnet.org>



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