

1 LOIS D. THOMPSON, Cal. Bar No. 093245 (Admitted Pro Hac Vice)  
lthompson@proskauer.com  
2 JENNIFER L. ROCHE, Cal. Bar No. 254538 (Admitted Pro Hac Vice)  
jroche@proskauer.com  
3 PROSKAUER ROSE LLP  
2049 Century Park East, 32nd Floor  
4 Los Angeles, California 90067-3206  
Telephone: (310) 557-2900  
5 Facsimile: (310) 557-2193

6 JUAN RODRIGUEZ, Cal. Bar No. 282081 (Admitted Pro Hac Vice)  
jrodriguez@maldef.org  
7 THOMAS A. SAENZ, Cal. Bar No. 159430 (Admitted Pro Hac Vice)  
tsaenz@maldef.org  
8 MEXICAN AMERICAN LEGAL DEFENSE AND  
EDUCATIONAL FUND (MALDEF)  
9 634 S. Spring St.  
11th Floor  
10 Telephone: (213) 629-2512 ext. 121  
Facsimile: (213) 629-0266

11 Attorneys for Mendoza Plaintiffs  
12

13 **UNITED STATES DISTRICT COURT**

14 **DISTRICT OF ARIZONA**

15  
16 Roy and Josie Fisher, et al.,

17 Plaintiffs,

18 v.

19 United States of America,

20 Plaintiff-Intervenors,

21 v.

22 Anita Lohr, et al.,

23 Defendants,

24 Sidney L. Sutton, et al.,

25 Defendant-Intervenors,  
26  
27  
28

Case No. 4:74-CV-00090-DCB

**MENDOZA PLAINTIFFS'  
OBJECTIONS TO THE SPECIAL  
MASTER'S 2015-16 ANNUAL REPORT  
AND REQUEST THAT HE BE  
DIRECTED TO SUPPLEMENT AND  
REVISE PORTIONS THEREOF**

Hon. David C. Bury

1 Maria Mendoza, et al.,  
2 Plaintiffs,  
3 United States of America,  
4 Plaintiff-Intervenor,  
5 v.  
6 Tucson United School District No. One, et  
7 al.,  
8 Defendants.

Case No. CV 74-204 TUC DCB

9  
10 **INTRODUCTION**

11 Mendoza Plaintiffs submit the within Objections to the Special Master’s 2015-16  
12 Annual Report (“SMAR”) pursuant to Section V, 4 of the Order Appointing Special  
13 Master which states *inter alia* that the parties shall have the right to object to findings of  
14 fact and recommendations in the Special Master’s reports.  
15

16 **ARGUMENT**

17  
18 **OBJECTION NO. 1**

19 **THE SMAR FAILS TO FULLY ADDRESS INSTANCES OF NON-COMPLIANCE**  
20 **WITH THE USP REVEALED IN THE DISTRICT’S ANNUAL REPORT**

21 On October 28, 2016, Mendoza Plaintiffs submitted a request to the Special Master  
22 that pursuant to USP Section X, E, 6 he bring to the Court’s attention multiple instances of  
23 the District’s failures to comply with the USP and TUSD undertakings related to the  
24 implementation of the USP that were revealed in the District’s 2015-16 Annual Report  
25 (“DAR”). On December 12, 2016, after the District had responded to that request and the  
26 Mendoza Plaintiffs had replied, the Special Master requested further information from the  
27 District and stated that “rather than ask the Court to find the District in non-compliance  
28

1 when the facts fit, I will include the relevant information in my Annual Report.” (Memo  
2 dated December 12, 2016 to Parties from Bill Hawley Re: Mendoza and Fisher Plaintiffs  
3 Request that the District be Reported as Noncompliant (“SM Dec. 12 Memo”) at 6  
4 [The SM Dec. 12 Memo is attached as Exhibit 1. The Mendoza Plaintiffs’ request, District  
5 response, and Mendoza Plaintiffs’ reply are attached as Exhibits 2, 3, and 4, respectively.]

7 In the SMAR, the Special Master states (at 4:18) that he agrees with the Mendoza  
8 Plaintiffs that the District failed to comply with the requirements of USP Section I, D, 1  
9 when it made changes to certain specified plans and policies governed by the USP but with  
10 the exception of one such change (to the Facility Condition Index), he fails to discuss the  
11 substance of the improper change or the effect it has had on implementation of the USP.  
12 Mendoza Plaintiffs object to this omission and therefore address the substance of those  
13 changes and their effect on USP implementation below.

16 *Improper Grant of Special Consideration to Children of District Employees*  
17 *in the Lottery Process Regardless of Whether Such Consideration (a/k/a Priority) Would*  
18 *Help the Receiving School Meet Integration Targets*

19 The selection process for oversubscribed schools is of great importance under the  
20 USP because it is one of the few tools available to the District to further the integration of  
21 its schools. It therefore was the subject of significant negotiation between the parties.  
22 Ultimately, the plaintiffs agreed that children of District employees could have priority  
23 over (1) students who live in the attendance zone of racially concentrated schools and  
24 whose attendance at the receiving school would help that school meet integration targets  
25 and (2) other students whose attendance at the receiving school would help that school  
26 meet integration targets **IF** the enrollment of the employee’s child at that receiving school  
27  
28

1 would help that school meet integration targets. (*See* discussion in Exhibit 2 at 1-2.)<sup>1</sup>  
2 Appendix II-18 (Regulation JFB-R4) to the DAR revealed that in 2015-16, the  
3 District eliminated the integration condition for the placement of children of District  
4 employees. Although the Special Master found that the District had failed to comply with  
5 the USP Section I, D, 1 process (SM Dec. 12 Memo at 6 and SMAR at 4:17-16), he failed  
6 to address the larger substantive issue: not only did the District’s action violate the  
7 agreement between the parties; it also undermined TUSD’s obligation under the USP to  
8 further the integration of its schools<sup>2</sup>. TUSD’s actions with respect to the process of  
9 selecting students to attend oversubscribed schools therefore should have been called out  
10 expressly in the SMAR discussion of integration. Mendoza Plaintiffs therefore object to  
11 the omission of this action by TUSD in the SMAR listing at pages 6-7 of the SMAR of  
12 actions that reveal that it “would be difficult to build a case that the District has worked to  
13 integrate its schools.” They also object to the failure of the SMAR to call this act of non-  
14 compliance to the Court’s attention and to request that the District be directed to comply  
15  
16  
17  
18  
19

---

20 <sup>1</sup> Rather than add to the length of these Objections by repeating what is set forth in the  
21 portions of Exhibits 2, 3, and 4 relating to this issue, Mendoza Plaintiffs respectfully invite  
22 the Court to review those Exhibits should it seek greater detail on this issue.

23 <sup>2</sup> Under the parties’ agreement, TUSD was to have provided data specifically disclosing  
24 the race/ethnicity of the District employee children placed in each school under the lottery  
25 process as well as their resident/non-resident status. Exhibit 3, Attachment C. Instead it  
26 provided the far less complete Exhibit D (which also is confusing/ambiguous in its use of  
27 the term “balanced placement”). What Exhibit D does reveal is that in only eight of 16  
28 schools did the enrollment of children of District employees have a “positive” effect on  
integration while in four cases the impact was admittedly “negative”. Without the  
underlying data on race/ethnicity it is difficult to fully assess what is meant in the four  
reported instances of “no impact” (eliminating the one reported school [Gridley] for which  
no number placed is provided) particularly in the absence of information to indicate  
whether the placement of a “no impact” District employee child foreclosed the opportunity  
under the lottery process to place a student from a racially concentrated school or another  
District student whose enrollment would have had a positive effect on integration.

1 with its agreement concerning how the process for assigning children of District  
2 employees to oversubscribed schools is to be implemented.

3  
4 *Departure from the Definition of “Exclusionary” Discipline in a Manner*  
5 *that Conflicts with the USP Definition of the Term, Resulting in the Curtailing of Due*  
6 *Process Rights and Limitations on Such Discipline, Each of Which Also Violates the USP*

7 In the entirety of the SMAR, the Special Master twice briefly and generally  
8 references issues that arose with regard to “exclusionary” discipline (or “suspensions”) and  
9 due process rights, and frames those issues as involving a disagreement on the definition of  
10 the term and whether USP Section I, D, 1 applied to related TUSD action. (*See* SMAR at  
11 4:17-19, 5:1-3, 23:15-22.) However, the issues that arose additionally implicate actual or  
12 potential noncompliance with USP Sections VI, B, 2, b. (addressing TUSD regulations that  
13 are to provide an opportunity to appeal exclusionary discipline), VI, F, 2 and Appendix A  
14 to the USP (defining “exclusionary discipline”), and VI, B, 2, a, i (limiting use of  
15 exclusionary discipline to “ongoing and escalating” misbehavior).  
16

17 When the Mendoza Plaintiffs raised the issues of the District’s unilaterally revised  
18 discipline due process policies (discussed below) and what appeared to be improper  
19 recoding of student placements in the District’s Alternative Education Program  
20 (“DAEP”)<sup>3</sup>, as reported in the DAR, at the November 29-30, 2016 meeting among the  
21 parties and Special Master in Tucson, the District for the first time explained its recent  
22 position that “exclusionary” discipline did not include in-school intervention (“ISI”) or  
23 DAEP because each includes some instruction (notwithstanding that each removes  
24  
25

26  
27 <sup>3</sup> While this issue relates to the dispute concerning what constitutes “exclusionary”  
28 discipline, because it raises concerns regarding the reliability and consistency of the  
District’s discipline data, it is addressed below with other issues that relate to discipline  
data.

1 students from their regular classrooms), and that they therefore were not subject to USP  
 2 limitations on “exclusionary” practices. (*See* TUSD’s subsequent December 23, 2016  
 3 memo re “exclusionary” discipline (“TUSD Suspension Memo”), attached as Exhibit 5, at  
 4 4.)<sup>4</sup>

6 The District’s recent position directly conflicts with the USP definition of  
 7 “exclusionary” discipline, that is, “any disciplinary consequence that removes a student  
 8 from classroom instruction, including, but not limited to, *in-school suspension, out-of-*  
 9 *school suspension, placement in an alternative setting or program,* and expulsion.” (*See*  
 10 USP (Doc. 1713) at Appendix A, #17; *see also* USP Section VI, F, 2.) Plainly, ISI and  
 11 DAEP are “placement[s] in an alternative setting or program.” Thus, the new definition of  
 12 “exclusionary” discipline first implemented in the 2015-16 school year violates the USP.  
 13

14  
 15 Further, without following USP Section I, D, 1 procedures,<sup>5</sup> the District revised its  
 16 TUSD regulations JK-R1 and JK-R2 (concerning short- and long-term suspensions,  
 17 respectively) to include new sections that define ISI and DAEP as “alternatives to

18  
 19 <sup>4</sup> As is discussed in Mendoza Plaintiffs’ January 9, 2017 Response to TUSD’s Suspension  
 20 Memo (“Mendoza Plaintiffs’ Suspension Memo”) (attached as Exhibit 6), which they  
 21 respectfully invite the Court to review should it seek additional information, the District’s  
 22 recent position concerning what is “exclusionary” conflicts with the District’s previous  
 23 position as described in its ISI Manual shared with the Plaintiffs and Special Master  
 24 (Appendix VI-29 to the DAR (ISI “still count[s] as an exclusionary consequence”)),  
 25 training to TUSD staff in August 2015 (Appendix VI-30 at 3) and February 2016  
 26 (Appendix VI-31 at 3), and November 5, 2014 representations that caused Mendoza  
 27 Plaintiffs to defer their request for an R&R relating to the GSRR (*see* Mendoza Plaintiffs’  
 28 Suspension Memo at 2-3). Notably, the DOJ too deferred action based on explicit  
 statements concerning “exclusionary discipline.” (*See* DOJ’s January 6, 2017 email,  
 attached as Exhibit 7 (“[T]he United States did not object to [the DAEP] program because  
 of its explicit understanding that DAEP would be considered a form of Exclusionary  
 Discipline under the USP’s definition...”).) The Special Master agrees with the Mendoza  
 Plaintiffs and DOJ with regard to “exclusionary” discipline. (*See* SM Dec. 12 Memo at 4  
 (“Frankly, it seems absurd to argue that students who participate in DAEP are not involved  
 in exclusionary discipline.”).) Yet, this issue was not squarely addressed in the SMAR.

<sup>5</sup> The District’s revisions occurred on July 9, 2015 (Exhibit 3, Attachment E), about a year  
 and a half before this Court issued its December, 27, 2016 Order (Doc. 1981) in which it  
 addressed USP Section I, D, 1 review and comment procedures.

1 suspension” and that then state that student appeal processes apply only to “suspensions.”  
2 (See Exhibit 3, Attachment E (TUSD redlined revised policies).) Thus, the District  
3 eliminated students’ ability to appeal ISI placements or referrals to DAEP,  
4 notwithstanding that the USP mandates under Section VI, B, 2, b., with express reference  
5 to regulations JK-R1 and JK-R2, that “an opportunity to appeal” be provided for all  
6 exclusionary discipline. Indeed, in the SM Dec. 12 Memo, the Special Master asked that  
7 the District “abide by the processes specified in Section VI.B.2.b. of the USP and by the  
8 policies in place before the District made its changes to these policies that it describes as  
9 minor in its annual report... .” Mendoza Plaintiffs are aware of no District response to the  
10 Special Master’s request following the SM Dec. 12 Memo, and no District express  
11 commitment following that Memo to abide by USP Section VI, B, 2, b and the policies  
12 that existed before the District’s unilateral revisions. (And as of the date of this writing,  
13 the improper July 2015 versions of JK-R1 and JK-R2 remain on the TUSD web site.)

14  
15  
16  
17       Additionally, that the District now takes the position that neither ISI nor DAEP are  
18 “exclusionary” calls into question whether and to what extent the District has, in  
19 administering that discipline, complied with USP Section VI, B, 2, a, I, which limits the  
20 use of exclusionary discipline to “ongoing and escalating” misbehavior (suggesting that it  
21 may be referring students to ISI and DAEP even when their behavior is not ongoing and  
22 not escalating). Indeed, the District asserts that those limitations do not apply to ISI and  
23 DAEP, and has presumably therefore not applied them. (See, e.g., TUSD’s Suspension  
24 Memo at 4 (asserting that ISI and DAEP should not be “subject to the USP limits on  
25 exclusionary discipline”).)  
26  
27  
28

1 Thus, because TUSD’s actions with respect to “exclusionary” discipline implicate  
2 noncompliance with USP Section I, D, 1, Section VI, B, 2, b, Section VI, F, 2 (and  
3 Appendix A to the USP), and Section VI, B, 2, a, I, Mendoza Plaintiffs object to the failure  
4 of the SMAR to have fully addressed these issues and called those acts of noncompliance  
5 to the Court’s attention.

7 Further, because the parties’ disagreement concerning what constitutes  
8 “exclusionary” discipline remains unresolved and has significant implications concerning  
9 the implementation of multiple USP sections, Mendoza Plaintiffs had expected the Special  
10 Master to prepare an R&R addressing this issue. They therefore request that the Special  
11 Master be directed to file such an R&R so that the issue can be addressed by all parties  
12 and, if then required, resolved by this Court.

14  
15 *Changes to “Ethnicity Coding” and Coding of Referrals to DAEP and ISI*  
16 *Has Resulted in Changes in How TUSD Collects and Reports Discipline Data, Raises*  
17 *Further Questions about Compliance, and Makes Analysis Across Years Difficult*

18 Notwithstanding that USP Section VI, G, 1, b requires that suspension data be  
19 reported “substantially in the form of [the USP’s]Appendix I for the school year of the  
20 Annual Report together with comparable data for every year after the 2011-2012 school  
21 year,” the corresponding DAR data “differs from prior USP Reporting because this report  
22 uses updated USP ethnicity coding. Prior USP reports used federal ethnicity coding... the  
23 distribution across ethnicities has changed.”<sup>6</sup> (DAR, Appendix VI – 54.) The data

24  
25  
26 <sup>6</sup> In this regard, notwithstanding that the Mendoza Plaintiffs have stated that they do not  
27 understand what exactly the District means by “updated USP ethnicity coding” or whether  
28 the District changes reflect extremely belated reporting per a party agreement  
memorialized in a June 2012 Special Master memo concerning USP reporting (*see* Exhibit  
4 at 6-7), the District has not explained the reasons for its changes or what exactly those  
changes are. Instead, it has provided conflicting statements concerning whether there



1 reported in Appendix VI-54 for the years 2012-13 to 2014-15 now significantly conflicts  
2 with data previously provided for the same years and makes meaningful comparison to the  
3 USP baseline year of 2011-12 impossible. (*Compare* Appendix VI-54 with TUSD Annual  
4 Report for 2014-15, Appendix VI-1 (Doc. 1851-1).)

5  
6 Notwithstanding that the Special Master agreed that it “would be very difficult to  
7 know whether the District has achieved many goals of the USP if the definition of  
8 ethnicity has changed” (SM Dec. 12 Memo at 5), the Special Master omitted discussion in  
9 the SMAR of this issue and its consequences for assessing District progress toward unitary  
10 status. Mendoza Plaintiffs object to this omission and therefore request that the Special  
11 Master be directed to supplement the SMAR to include a discussion and analysis of why  
12 the District changed how it reported data broken down by ethnicity, the extent of such  
13 changes in reporting, and whether and what action now is needed to revise the reporting of  
14 data to make year-to-year comparison possible.<sup>7</sup>

15  
16  
17 Further complicating the question of whether the District reported DAR discipline  
18 data in a manner consistent with the USP and past annual report data is the fact that, as  
19 discussed in the section above, the District modified what it considers to be “exclusionary  
20 discipline” or “suspension,” and it therefore is not clear whether Appendix VI-54 data for  
21 the 2015-16 school year reflects the collection of data based on the new position the  
22

23  
24 indeed have been changes in how ethnicity is reported. *Compare* Exhibit 3 (stating that its  
25 DAR reporting methodology is the same as that “used for the last three years”) with  
26 Response to RFIs #843-46, attached as Exhibit 8 (“USP ethnic reporting criteria was used  
27 for the 2016-15 discipline summary reports in Appendix VI-54 whereas in prior years,  
28 federal ethnic reporting was used...”).

<sup>7</sup> Mendoza Plaintiffs specifically requested that the Special Master undertake to investigate the matter and determine the answer to these questions to ensure the accuracy and reliability of TUSD’s discipline data. (*See* Exhibit 4 at 7.)

1 District has taken. However, the District’s statements in its DAEP program evaluation for  
2 the 2015-16 school year that if “a student enrolls in DAEP and successfully completes the  
3 program, the suspension status will be reassigned **from long-term to short-term** and the  
4 student’s time in DAEP will be **recoded as a ‘reassignment to another school’** . . . .”  
5 suggests that the District improperly reported student assignments to DAEP in the DAR.<sup>8</sup>  
6 (Appendix VI-36 to DAR, at 2; see also Appendix VI-33 to DAR.) Similarly, the District  
7 recodes ISI discipline as “[r]eassignment to another class.” (Appendix VI-33 and  
8 Appendix VI-31 to DAR.) It thus appears that neither ISI nor DAEP placements were  
9 included in the data on “exclusionary discipline” or “suspension” for the 2015-16 school  
10 year.  
11

12  
13 In the SMAR, the Special Master notes drops in four categories of discipline in the  
14 2015-16 school year (SMAR at 23:4-12), yet the SMAR entirely omits any discussion,  
15 analysis or report of whether and to what extent such reported drops in actuality reflect the  
16 District’s various changes in how it reported data in the 2015-16 school year rather than  
17 true changes in disciplinary outcomes and behavior warranting the imposition of  
18 discipline. Mendoza Plaintiffs therefore object to the SMAR’s omission of any discussion,  
19 analysis, or recommendations relating to the changes in the manner the District reported  
20 data as described above.  
21

22  
23 In addition, the Mendoza Plaintiffs respectfully request that this Court direct the  
24 Special Master, pursuant to the oversight, monitoring, and reporting responsibilities  
25 assigned to the Special Master in Section X, E of the USP and the Order Appointing  
26

27  
28 <sup>8</sup> Plainly, nothing about a temporary long-term placement in an alternate program suggests that a “short-term” suspension or “reassignment to another school” has occurred.

1 Special Master, to investigate and report whether and to what extent TUSD DAR data  
2 reflects changes or inaccuracies in how ethnicity and ISI/DAEP referrals were reported,  
3 what the nature of any such changes/inaccuracies were, and what actions need to be taken,  
4 if any, to provide for the type of consistency in TUSD Annual Report data that would  
5 allow for accurate year-to-year comparisons and analysis.  
6

7 *Changes to the District's Marketing, Outreach, and Recruitment Plan and to*  
8 *the Dropout Prevention and Graduation Plan*

9  
10 The DAR states that “[i]n 2015, the *District updated* the [Marketing, Outreach, and  
11 Recruitment] plan [(“MOR Plan”)] with an eye toward continuing what had worked and  
12 finding new ways to reach its target audience, including African American and Hispanic  
13 students. *The revised plan* focused on increasing the use of videos and other platforms as  
14 tools... .”<sup>9</sup> (DAR at II-35; emphasis added.) The Mendoza Plaintiffs therefore had  
15 requested that the Special Master “follow up with the District to determine what exactly  
16 occurred with the MOR Plan during the 2015-16 school year and whether the District did  
17 indeed revise the Plan without following the USP Section I, D, 1 procedure... .” (Exhibit  
18 4 at 3.)  
19  
20

21 Similarly, the District stated that “[a]t the end of SY 2015-16, District staff met to  
22 analyze the... [Dropout Prevention and Graduation plan (“DPG Plan”)] and revise its  
23  
24  
25

26 <sup>9</sup> After the Mendoza Plaintiffs stated that the unilaterally “revised plan” apparently was  
27 done in violation of USP Section I, D, 1 procedures (Exhibit 2 at 2), the District  
28 contradictorily asserted that “it did not revise the [MOR plan] during the 15-16 school  
year. The [MOR Plan] in effect throughout the 15-16 school year is the same plan in effect  
at the end of the 14-15 school year...” (Exhibit 3 at 2).

1 strategies for the 2016-17 school year” and that the “revised DPG plan will be provided in  
2 the 2016-17 Annual Report.”<sup>10</sup> (DAR at V-195.)

3  
4 In his Dec. 12 Memo, the Special Master suggested that what the District had  
5 described in the DAR with respect to the MOR Plan appeared to be the adoption of new  
6 strategies rather than the sort of revision that triggered USP Section I,D,1 review. (SM  
7 Dec. 12 Memo at 3.) However, he also called on the District to share its revisions to the  
8 DGP Plan so that the Plaintiffs and he could assess whether the changes had warranted  
9 USP Section I, D, 1 review. (*Id.*) To date, the District has not done so. (Neither has it  
10 posted the revised MOR and DPG Plans on its website notwithstanding the USP Section  
11 X, D requirement that the TUSD website provide up-to-date “current information related  
12 to the various elements of the Plan.”)

13  
14  
15 Mendoza Plaintiffs object to the failure of the SMAR to have included the  
16 foregoing in its discussion of Section I,D,1 issues in the SMAR and the omission to  
17 specifically address the District’s failure to provide the revised DPG Plan.

## 18 **OBJECTION NO. 2**

19  
20 **THE SMAR FAILS TO CALL OUT THE FAILURE OF THE DISTRICT IN ITS**  
21 **DISCUSSION OF THE “IMPLEMENTATION, MONITORING, EVALUATION,**  
22 **AND CONTINUOUS IMPROVEMENT” OF MAGNET SCHOOLS (OR**  
23 **ANYWHERE ELSE IN THE DAR) TO INCLUDE ANY INFORMATION TO**  
24 **SUGGEST THAT THE MAGNET SCHOOLS ARE ASSESSING, AND THAT**  
**THESE SCHOOLS ARE BEING EVALUATED BASED ON, THE ACADEMIC**  
**PERFORMANCE OF THEIR STUDENTS**

25  
26 <sup>10</sup> Notwithstanding the Special Master’s direction that the “District should provide the  
27 plaintiffs and the Special Master with the revisions it (inexplicably) says it will provide in  
28 the next annual report” (SM Dec. 12 Memo at 3), the District did not provide its revised  
DPG Plan; instead it indicated that “no revisions or changes [to the plan] resulted *during*  
*the 15-16 school year*” (Exhibit 3 at 2). However, that response sidesteps the District’s  
USP Section I, D, 1 obligations as it fails to address that the DAR describes the DPG Plan  
revisions as having occurred after “the end of SY 2015-16.” (DAR at V-195.)

1 This Court has repeatedly stated that the magnet schools are subject to two “equally  
2 important” standards: integration and student achievement. (Order dated 11/19/15, Doc.  
3 1870 at 3, n.1; emphasis in the original; *see also*, Order dated 1/16/15, Doc. 1753, at 9:3-6:  
4 “The Revised CMP adopts two goals as measurements for assessing the effectiveness of a  
5 magnet school. In other words, a school must show progress towards achieving the USP  
6 definition of an integrated school and towards enhancing the educational quality of its  
7 magnet programs.”)

8  
9  
10 The DAR is silent on the subject of the educational achievement of students in its  
11 magnet schools and on the related subject of whether they are succeeding in reducing the  
12 achievement gap. Mendoza Plaintiffs object to the failure of the SMAR to call out this  
13 omission and of the SMAR to explicitly address the issue of magnet school educational  
14 outcomes. In this regard they specifically note that the Order Appointing Special Master  
15 directs that he include “[e]valuation of the effectiveness of programs” in his annual reports.  
16 (Order Appointing Special Master at III, 2, c. ) Given the emphasis on increasing  
17 academic achievement in the magnet school plans and the Court’s focus on that issue,  
18 failure of the SMAR to address this issue is of particular concern to the Mendoza  
19 Plaintiffs.  
20  
21

### 22 **OBJECTION NO. 3**

#### 23 **THE RECORD DOES NOT SUPPORT THE SPECIAL MASTER’S FINDING** 24 **THAT THE DISRICT IS IMPLEMENTING THE TRANSPORTATION** 25 **PROVISIONS OF THE USP SATISFACTORILY**

26 Mendoza Plaintiffs acknowledge that they did not object to a similar finding by the  
27 Special Master in his 2014-15 Annual Report. However, review of data in the appendices  
28 to the District’s 2015-16 Annual Report and assertions relating to the transportation

1 component of the USP in the District’s motion for partial unitary status indicate that the  
2 District has yet to demonstrate that it “is implementing the transportation provisions of the  
3 USP satisfactorily.” (SMAR at 7.)  
4

5 That most of the District’s magnet schools are not integrated (indeed that a majority  
6 of them are racially concentrated) is well known and was the subject of express comment  
7 in the Special Master’s 2014-15 Annual Report.<sup>11</sup> In order to further the integration goals  
8 of the USP, the USP expressly provides that “District transportation administrators shall be  
9 included in planning and monitoring activities related to student assignment and  
10 integration.” (USP Section III, A, 2.) Yet, absent from the DAR – and unaddressed by the  
11 Special Master in the 2015-16 SMAR -- is any showing that TUSD took any actions to  
12 determine what if anything in the area of transportation, including, for example, the  
13 revision of existing bus routes, could be done to increase white ridership to magnet  
14 schools. What the data the District has provided in the 2015-16 DAR does reveal is that a  
15 far larger proportion of white students are eligible for and offered transportation to GATE  
16 schools and UHS than is true for African American and Latino students.<sup>12</sup> Further,  
17  
18  
19

---

20 <sup>11</sup> In that Report, the Special Master wrote: “The purpose of magnet [schools] and  
21 programs is to facilitate integration. Of the 20 magnet schools and programs operating in  
22 the 2014-15 school year, fourteen are racially concentrated. Ironically, a greater  
23 proportion of magnet schools were racially concentrated [than] is true for all of the other  
24 District schools.” (Special Master’s Annual Report (“SMAR”) for 2014-15, Doc. 1890, at  
25 6:21-24.)

26 <sup>12</sup> According to Appendix III-7, in 2015-16, 596 white students and 594 Latino students  
27 were eligible for and offered transportation to GATE schools and UHS. According to that  
28 same chart, these numbers represented 35.8% of the white students eligible for  
transportation and 6% of the total enrollment of white students in the District as compared  
to 11% of the Latino students eligible for transportation and 2% of the total enrollment of  
Latino students in the District. Further, as noted above, Appendix III-7 shows that white  
students disproportionately (as compared to the total number of white students eligible for  
transportation under current assignment patterns) use such transportation to attend UHS or  
GATE programs while Latino students disproportionately (again as compared to the total  
number of Latino students eligible for transportation under current assignment patterns)  
use such transportation to attend magnet schools and programs. Mendoza Plaintiffs object

1 notwithstanding the decline in the absolute number of white students enrolled in the  
2 District between 2012-13 and 2015-16, the number of white students eligible for and  
3 offered transportation for GATE schools **increased** even as the number of Latino students  
4 eligible for and offered transportation for GATE schools declined.<sup>13</sup>

5  
6 Also missing from the Annual Reports and unaddressed by the Special Master in  
7 the SMAR is information detailing bus routes<sup>14</sup> or providing any information as to the  
8 race/ethnicity of the ridership on each bus route. The significance of this omission is  
9 underscored by the cases cited by the District in its motion for partial unitary status. For  
10 example, in *United States v. Morehouse Parish School Board*, 2013 WL 791578 (W.D.  
11 La., Mar. 3, 2013), the Court noted that of the eighty-six bus routes in the school district at  
12 issue in that case, six transported students of only one race. Before ruling on the motion  
13 for partial unitary status, it therefore undertook to satisfy itself that those routes were based  
14 only on the demographic living patterns of the students and the feasibility of  
15 transportation, not discriminatory purposes. (2013 WL 791578 at \*3.) Similarly, in

16  
17  
18  
19 to a finding that the District has met its obligations under the transportation section of the  
20 USP until it can demonstrate that it has looked at this and similar data to determine  
21 whether it appeared reasonable in relation to the District's efforts to (1) increase African  
22 American and Latino attendance at UHS and participation in GATE and (2) increase white  
23 attendance at magnet schools and programs, or whether any transportation routes needed to  
24 be adjusted to further facilitate such attendance.

25  
26 <sup>13</sup> Mendoza Plaintiffs reach this conclusion by comparing the entries for GATE on  
27 Appendix III-7 in the 2015-16 DAR with the comparable chart in the 2012-13 DAR  
28 (Appendix 25) which show 283 white students eligible for and offered transportation for  
GATE in 2012-13 v. 289 in 2015-16 and 375 Latino students eligible for and offered  
transportation for GATE in 2012-13 v. 365 in 2015-16. The number of African American  
students eligible for and offered transportation did increase: from 20 (plus an undisclosed  
number under 10) in 2012-13 to 33 in 2015-16.

<sup>14</sup> The closest the District has come to providing such information is a series of maps  
included in the 2014-15 Annual Report (but no other annual report) and assertions in its  
Annual Report that although there are some majority one-race routes, those routes exist as  
a result of residential housing patterns. (*See, e.g.*, 2015-16 DAR at III-55.) However, it  
has failed to provide any data or other evidence to identify those routes or to support its  
bald assertion as to why one-race routes exist.

1 *Andrews v. Monroe Co. School Bd.*, 2015 WL 5675862 (W.D. La. Sept. 25, 2015), the  
2 Court remarked on the existence of one-race or predominately one-race routes in the  
3 school district and ruled in the area of transportation only after hearing testimony from the  
4 Transportation Manager and receiving other evidence to establish that the routes were  
5 based solely on geographical concerns and not the race of the riders. In *United States v.*  
6 *Franklin Parish School Bd.*, 2013 WL 4017093 (W.D. La., Aug. 6, 2013), the Court also  
7 addressed the existence of one-race and predominately one-race bus routes, examined map  
8 routes that were available at the hearing, and, based on testimony and evidence, then  
9 concluded that those routes were not based on race. It may well be that TUSD can make a  
10 similar showing but it does not appear that the necessary documentation yet has been  
11 tendered by the District or considered by the Special Master.<sup>15</sup>

12  
13  
14  
15 As a separate but related matter, some TUSD students do not ride District buses but  
16 instead receive SunTrans bus passes to ride public transportation to school. According to  
17 the TUSD website, approximately 3500 students receive such passes each year. No  
18 information is contained in the DAR or its appendices that would permit the parties or the  
19 Special Master to determine whether there are any issues of impermissible  
20 disproportionality based on race and/or ethnicity as to which students are directed to use  
21 public transportation rather than ride one of the District's buses. Mendoza Plaintiffs  
22 therefore object to a finding that the District has satisfactorily implemented the

23  
24  
25 <sup>15</sup> The SMAR indicates that it draws on information in the DAR when feasible and  
26 appropriate but also references otherwise unspecified information provided by the District  
27 and/or available to the Implementation Committee ("IC"). (SMAR at 2:3-10.) As noted  
28 above, no data concerning the ethnicity and race of the riders on individual bus routes is  
provided in the DAR. If the Special Master had access to and considered such  
information, Mendoza Plaintiffs ask that it be made available as an addendum to the  
SMAR.



1 transportation provisions of the USP until the referenced data has been provided to the  
2 Plaintiffs and the Special Master and reviewed by them.<sup>16</sup>

3  
4 **OBJECTION NO. 4**

5 **THE SMAR FAILS TO ADDRESS THE FAILURE OF THE DISTRICT TO**  
6 **APPLY THE METHOD FOR CALCULATING DIVERSITY EXPRESSLY**  
7 **AGREED TO IN THE TEACHER DIVERSITY PLAN AND, WHILE IT REJECTS**  
8 **THE NUMBER OF “DIVERSE” SCHOOLS REPORTED BY THE DISTRICT**  
9 **BASED ON THE SUPERCEDED METHOD, APPEARS TO OVERSTATE THE**  
10 **NUMBER OF SCHOOLS THAT DO QUALIFY AS “DIVERSE” UNDER THE**  
11 **TEACHER DIVERSITY PLAN METHODOLOGY**

12 *The SMAR Omits Needed Discussion of the Parties’ Agreement on How In-*  
13 *School Diversity Under This Court’s March 28, 2016 Order is to be Measured*

14 In this Court’s March 28, 2016 Order, the Court directed TUSD to “act immediately  
15 to address the racial disparities among faculty in TUSD schools...” under USP Section  
16 IV, E, 2. (Doc. 1914 at 2:4-5.)

17 USP Section IV, E, 2 requires that the District identify schools with significant  
18 disparities (“more than a 15 percentage point variance”) between African American and  
19 Latino staff at individual schools when compared to the district-wide percentage across  
20 TUSD schools at comparable grade levels (*e.g.*, elementary schools, K-8 schools), and that  
21 it address those disparities. The USP makes reference only to the percentages of African  
22 American and Latino staff (and not white staff) in addressing significant racial disparities  
23 among in-school staff. (USP Section IV, E, 2.) Following the issuance of the Court’s  
24 March 28, 2016 Order, the parties agreed to the Special Master’s proposal that to “achieve  
25 the objectives of the USP more productively than would rigid adherence to the 15% rule  
26

27 <sup>16</sup> Again, as noted above with respect to the race and ethnicity of bus route ridership, if that  
28 data has been provided to the Special Master, Mendoza Plaintiffs ask that it be made an  
addendum to the SMAR.

1 [in USP Section IV, E, 2],” the parties would “consider **only the numbers and**  
2 **percentages of Anglo and Latino teachers**” in measuring in-school diversity – something  
3 reflected in the Teacher Diversity Plan (“TDP”) that subsequently was developed. (See the  
4 Special Master’s May 17, 2016 memo re: Request for Agreement Among the Parties  
5 Regarding Guidelines for Achieving School Site Teacher Diversity attached as Exhibit 9  
6 (emphasis added).) Although the District agreed to the Special Master’s proposal as  
7 reflected in the TDP, and in doing so, reduced the number of schools subject to  
8 diversification requirements from 37 to 26, it subsequently asserted that it achieved  
9 required diversification at 17 schools based on the USP Section IV, E, 2 measures, rather  
10 than the measures in the very TDP agreement that reduced the number of schools subject  
11 to diversification requirements.<sup>17</sup> (See Special Master’s August 15, 2016 memo re: Report  
12 on Teacher Diversity Plan attached as Exhibit 10.)

13  
14  
15  
16 On September 6, 2016, the Special Master provided a memo (that references the  
17 TDP as Exhibit 1) (cover email and memo attached as Exhibit 11), the cover email of  
18 which indicates that the Special Master would file the memo “tomorrow,” and that “the  
19 District has agreed to use th [sic] TDP as it was approved by the plaintiffs.” However, the  
20 Special Master did not subsequently file that memo along with the TDP, which would have  
21 placed in the record the parties’ agreement to measure diversity under the TDP by applying  
22 the 15% variance measure to white and Latino teaching staff.  
23  
24

25  
26 <sup>17</sup> As Mendoza Plaintiffs on August 22, 2016 stated to the parties and Special Master, the  
27 “District is trying to have the best of two worlds: to have a reduced number of schools on  
28 which to focus its attention (as a consequence of the agreement on how disparity would be  
assessed for the purpose of determining that number) and then claiming success by using  
the assessment of disparity that, if applied to all TUSD schools, would require it to be  
focusing on a much larger number of schools.”

1 As noted above, the issues that would have been addressed and made matters of  
2 record with the proposed September filing also are omitted in the SMAR. (*See* SMAR at  
3 8.) Underscoring the need for such discussion in the SMAR is the fact that, in the DAR  
4 filed subsequent to the Special Master’s September 6 memo indicating the District agreed  
5 to assess “diversity” by looking at the percentages of white and Latino staff (per the TDP),  
6 the District ignores the agreed approach to measuring disparity memorialized in the TDP.  
7 (*See* DAR at IV-79-IV-80 (“The District calculates disparity by comparing district-wide  
8 percentages and grade level comparisons for both *African American and Hispanic staff*  
9 *placements* to determine whether there is more than a 15 percent gap between the number  
10 of *African American or Hispanic teachers* at a school site compared to the applicable  
11 school level” (emphasis added). The Mendoza Plaintiffs therefore object to this omission  
12 in the SMAR and respectfully request that this Court direct the Special Master to revise his  
13 2015-16 SMAR to specifically address the development of the TDP and the parties’  
14 agreement concerning how diversity is to be measured under that plan.  
15  
16  
17  
18

19 *The SMAR Errs in Stating that 11 Schools Diversified Their Staff Under the*  
20 *Teacher Diversity Plan*

21 While the Special Master did not accept the District’s assertion that it achieved  
22 “diversity” at 17 schools (as discussed above) and instead appears to apply the measure of  
23 “diversity” reflected in the agreed-upon TDP, he errs in applying that measure. On page 8  
24 of the SMAR, the Special Master indicates that “the District was ordered by the Court [in  
25 its March 28, 2016 Order (Doc. 1914)] to implement th[e in-school staff diversity]  
26 provision of the USP no later than 2017-18 in 26 schools that did not meet the diversity  
27  
28

1 criteria. [(Doc. 1914.)] The District was able to ‘integrate’ the faculty at 11 of these  
2 schools in 2016-17.” (SMAR at 8:17-20.)

3  
4 As far as Mendoza Plaintiffs can tell, the last data report the District provided to  
5 the Plaintiffs and Special Master concerning teacher diversity at the subject TUSD schools  
6 was on September 9, 2016, and is dated August 12, 2016 (attached as Exhibit12).

7 Mendoza Plaintiffs reviewed the teacher diversity data under the “Current Percentage”  
8 heading and determined that 10 rather than 11 schools achieved diversity under the teacher  
9 diversity plan. (*See Id.*) Mendoza Plaintiffs therefore object to the portion of the SMAR  
10 (at 8:19-20) that states that the District “was able to ‘integrate’ the faculty at 11 of these  
11 schools in 2016-17.”  
12

13  
14 **OBJECTION NO. 5**

15 **THE RECORD, INCLUDING FACTUAL FINDINGS IN THE SMAR, DOES NOT**  
16 **SUPPORT THE SPECIAL MASTER’S FINDING THAT IT APPEARS THE**  
17 **DISTRICT IS SATISFYING THE PROVISIONS OF THE USP RELATING TO**  
18 **PROFESSIONAL DEVELOPMENT**

19 The USP requires that professional development related to multiple facets of the  
20 District’s operations be delivered to TUSD’s certificated and administrative staff (*see, e.g.*,  
21 USP Sections II, J (student assignment), VI, E (discipline), V, E, 5 (supportive and  
22 inclusive environments)).<sup>18</sup> A review of the data in the DAR, the record, the Special  
23 Master’s findings in the SMAR, and the Special Master’s Annual Report for the 2014-15  
24 school year (Doc. 1890) “Recommendations to the District,” indicate that it does not yet  
25 “appear[] that the District satisfies the letter of the [professional development] provisions  
26

27  
28 <sup>18</sup> USP Section IV, J, 3 a.–c. (in the Administrator and Certificated staff section), requires the District to provide all professional development described in the USP to its administrators and certificated staff.

1 of the USP” (SMAR at 14:17). Indeed, there are significant inadequacies across many  
2 areas of professional development and in the District’s ongoing failure to conduct  
3 meaningful assessments on the adequacy of that professional development.  
4

5 Notwithstanding that “the importance of CRP [Culturally Responsive Pedagogy] is  
6 emphasized in the USP” (*id.* at 17:5-6), an assertion with which the Mendoza Plaintiffs  
7 agree, the Special Master seems to not consider the District’s inadequate delivery of CRP  
8 in the 2015-16 school year in stating that the District appears to satisfy USP professional  
9 development provisions. Indeed, the Special Master finds that the “District has treated  
10 CRP as a set of practices that are distinct from subject matter content...” and that it  
11 “provides no evidence about how proficient teachers are with respect to CRP.” (SMAR at  
12 12:5-6, 12:13-14.) Further, with respect to administrators, “CRP (and instruction in  
13 general) get relatively little attention” in “training sessions,” and “like [the training]  
14 experienced by teachers... is poorly aligned.” (*Id.* at 17:8-11.)<sup>19</sup>  
15  
16

17 In fact, the SMAR details a large number of additional areas of the USP for which  
18 the District’s professional development efforts were inadequate in the 2015-16 school year.  
19 (See SMAR at 10:20-11:6 (re mentoring for beginning teachers: “the District  
20 acknowledges that in 2015-16 it did not have enough mentors to support beginning  
21

---

22 <sup>19</sup> In addition, the Special Master finds that CRP-related consultants inadequately  
23 implement CRP. (See SMAR at 17 n.6 (“a consultant whose training was entitled,  
24 ‘leadership for culturally responsive teaching...’ provided no examples of CRP or  
25 culturally responsive teaching.”) Moreover, *even in the current school year*, the District’s  
26 delivery of CRP training has a considerable way to go as there seems to be no cohesive  
27 governing CRP “canon” employed, and the CRP consultant hired by the District meets and  
28 trains with individuals rather than groups, thereby reflecting significant ongoing issues in  
the delivery of CRP training. (See Special Master’s April 19, 2017 memo re:Comments on  
Version 3 of 910g Budget, attached as Exhibit 13 (“...many of the consultants used do not  
align their advice to ongoing approaches being promoted by the District. This is  
abundantly clear with respect to culturally responsive pedagogy... when consultants come  
in to provide workshops for 1-3 days (and the like) they often provide their own take on  
the topic and there are no opportunities for follow-up.”).

1 teachers to the extent called for by its own plan... almost one-third of first and second year  
2 teachers did not attend professional learning opportunities facilitated by mentors”), at  
3 25:17-22 (re PBIS and restorative practices: “it was not until the fall term of 2016 [after  
4 the 2015-16 school year] that the District developed a protocol or set of guidelines that  
5 spelled out the essential elements of PBIS... The[] number [of hours of restorative  
6 practices and PBIS training offered in 2015-16] raise[s] questions about the adequacy of  
7 training for PBIS and about the strategies being used”), at 25:8-15 (re discipline training  
8 for teachers identified as needing support: the District identifies “an extraordinarily low  
9 number of teachers who are in need of additional specific support, the professional  
10 development [to] these teachers was performed over one day tellingly by the ‘Showing and  
11 Telling’ Consultants”), at 32:18-21 (re technology training: “it is hard to imagine that an  
12 average of one hour per teacher will serve the needs of teachers to develop proficiency in  
13 the use of technology, especially with respect to more complex courseware”), at 21:11-13  
14 (re Culturally Relevant Courses: “A problematic issue... is whether teachers who are  
15 beginning to offer such courses are receiving sufficient training and mentoring to  
16 effectively implement these courses and modules”).

21 Tellingly, the issues the Special Master identified in his Annual Report for the  
22 2014-15 school year (Doc. 1890) concerning teacher evaluations (the basis of which is to  
23 determine whether additional teacher support and training is appropriate) and evaluation of  
24 effectiveness of professional development persist and do not support a finding that the  
25 District has met even the “letter” (SMAR at 14;17) of its USP professional development  
26 obligations.  
27  
28

1 For example, based on a review of the small sample of teacher evaluations that he  
2 had been provided, the Special Master observed: “Only a small percentage of the feedback  
3 that teachers were given had anything to do with instruction, much less culturally  
4 responsive pedagogy.” (SMAR at 13:1-2.) Further, with respect to the 2014-15 school  
5 year, the Special Master noted that there apparently existed “no systematic assessment of  
6 the relative effectiveness of different approaches to professional development,” and  
7 therefore , in a “Recommendation[] to the District,” asked that the District “[a]ssess the  
8 extent to which various approaches to professional development meet the District’s own  
9 statement of principles for the design of effective professional development.” (Id. at 18:9-  
10 10, 20:5-7.) The SMAR includes no reference to the District having acted on this  
11 recommendation. Instead, in the SMAR (for the 2015-16 school year), the Special Master  
12 again details that there are “no systematic studies undertaken by the District to determine  
13 whether these [professional development for administrators] experiences result in  
14 improved leadership.” (SMAR at 17:15-16.) With respect to teachers, before noting that  
15 the District continues to employ what are now perceived to be “traditional” (and less  
16 effective) approaches to professional development than “personalized, job-embedded  
17 professional learning” (SMAR at 13:20-26), the Special Master states that, “[j]ust as it is  
18 difficult to know how effective the District is in preparing teachers to engage in culturally  
19 responsive pedagogy, it is *difficult to know whether professional development in general is*  
20 *changing teacher practices, much less improving student achievement.*” (Id. at 13:9-12;  
21 emphasis added.) Additionally, in the Special Master’s Annual Report for the 2014-15  
22 school year, the Special Master addressed teacher evaluations and the tailoring of  
23 professional development to teacher needs. In another “Recommendation to the District,”  
24  
25  
26  
27  
28

1 the Special Master wrote: “The District should undertake a systematic analysis of the  
2 extent to which ratings of teacher effectiveness correlate with student performance and  
3 whether principals provide sufficiently detailed feedback to teachers so as to facilitate the  
4 targeting of professional development.”<sup>20</sup> (Doc. 1890 at 20:1-4.) The SMAR reveals that  
5 in this regard, little changed in 2015-16: “less than 2% of teachers are rated as in need of  
6 improvement... Only a small percentage of the feedback that teachers were given had  
7 anything to do with instruction... it is not likely that the District’s teacher evaluation  
8 instrument can provide the information necessary to effectively target professional  
9 development on teachers [sic] learning needs.” (SMAR at 12:22-23, 12:1-2, 14:3-5.)

10  
11 For the reasons stated above, the Mendoza Plaintiffs object to the Special Master’s  
12 finding that it “appears that the District satisfies the letter of the [professional  
13 development] provisions of the USP” (SMAR at 14:17).

#### 14 15 16 **OBJECTION NO. 6**

17 **THE SMAR FAILS TO INCLUDE THE COMPREHENSIVE ASSESSMENT OF**  
18 **THE ORIGINAL ALE PLAN OF ACTION AND SUPPLEMENT THAT IS**  
19 **CALLED FOR BY THE COURT’S ORDERS OF JANUARY 17, 2016 (DOC. 1895)**  
20 **AND MAY 17, 2017 (DOC. 2023) AND THAT, BASED ON THE SPECIAL**  
21 **MASTER’S PREPARATION AND CIRCULATION OF A DRAFT R&R,**  
22 **MENDOZA PLAINTIFFS HAD ANTICIPATED WOULD BE PART OF THE**  
23 **SMAR**

24  
25  
26  
27  
28

---

<sup>20</sup> In this regard, it should be noted that the District concedes it did not follow the Special Master’s recommendation in the 2015-16 school year. (DAR at IV-98 (“[t]he District recognizes the need to assess the effectiveness of these teacher support plans and originally planned to rely upon the teacher classification based upon the final evaluation for that teacher. However, as a result of some changes to the classification measurements in the 2015-2016 school year, the District determined that that analysis would not accurately reflect the effectiveness of the plans. *In the future*, the District *intends to consider* changes to the Danielson Framework assessments to determine whether the plans were effective in improving teacher performance” (emphasis added).



1           In January, 2016, the Court, after reviewing the Mendoza Plaintiffs’ objections to  
2 TUSD’s Supplemental ALE Action Plan, ordered the Special Master to prepare an R&R  
3 that “should be a comprehensive assessment of the original ALE Plan of Action and the  
4 Supplement, and include UHS and ELLs, to determine whether TUSD is on a projectory to  
5 meet the requirements set out in the USP ALE provisions. If not, the Special Master’s  
6 report should include recommendations for specific measures which could practicably be  
7 undertaken by TUSD, acting in good faith, to implement the provisions of the USP which  
8 require TUSD to improve minority student access to ALEs and improve the completion  
9 rate of minority students in these programs.” (Doc. 1895 at 4:22-5:1.) In its May 17, 2017  
10 Order, the Court noted that it was “awaiting information and details related to several  
11 [USP] components”. (Doc. 2023 at 2:6-7.) It then specifically referenced the ALE  
12 programs and its order of January 2016. (*Id.* at 2:6.)

13           On February 12, 2017, the Special Master circulated a draft R&R to the parties,  
14 inviting them to identify factual errors or omissions and to identify any additional areas  
15 they believed the R&R should address. Both the District and the Mendoza Plaintiffs  
16 responded. Thereafter, the Special Master requested certain additional information from  
17 the District, which was provided in early March. However, the R&R was never finalized  
18 and much of its discussion, particularly of goals, including for individual schools,  
19 participation of ELL students in ALE courses, differences in enrollment by race and  
20 ethnicity among the different GATE programs, differences in participation in AP courses  
21 at different high schools and the significant role of UHS in contributing to the District’s  
22 reported overall gain in AP enrollment as well as specific recommendations for “moving  
23 forward” all are omitted from the SMAR.  
24  
25  
26  
27  
28

1           Mendoza Plaintiffs object to the omission from the SMAR of the comprehensive  
2 assessment that was ordered by the Court in January, 2016. They request that the Special  
3 Master be directed to file a supplement to the SMAR that finalizes his draft R&R re: ALE  
4 dated February 12, 2017 so that the parties may (through the R&R process) address  
5 significant open issues concerning the District’s ALE obligations under the USP and  
6 matters omitted in the SMAR.<sup>21</sup>

7  
8           Of particular concern to the Mendoza Plaintiffs is the issue of goals and how they  
9 are to be used to assess the District’s success in implementing the ALE portion of the USP.  
10

11           *The SMAR Omits Essential Discussion and Specification of ALE Goals (and*  
12 *Analysis of TUDS Progress As Measured Against Those Specific Goals)*

13           As the Court will recall, the disagreement on goals -- or against what standard the  
14 District’s success in fulfilling its USP obligation to “improve the academic achievement of  
15 African American and Latino students in the District and to ensure that African American  
16 and Latino students have equal access to the District’s Advanced Learning Experiences  
17 (USP Section V, A, 1) would be measured -- was the major reason it ordered the Special  
18 Master to prepare an R&R.<sup>22</sup>

19  
20  
21           However, rather than address the parties’ disagreement on appropriate goals and  
22 how they should be measured, the Special Master in his SMAR references without any  
23

---

24 <sup>21</sup> Mendoza Plaintiffs believe that this also will further the “robust discussion, comment,  
25 and probably objections” (Doc. 2023 at 2:14) that this Court anticipated would be part of  
26 the SMAR process this year so as to provide further understanding of how the District is  
27 progressing toward unitary status.

28 <sup>22</sup> *See, e.g.*, Doc. 1895 at 4:1-6: “The Mendoza Plaintiffs complain that they were not  
consulted about the new goal and first learned of it upon reviewing the Supplement....As a  
result, the Supplement offers nothing more than the original ALE Action Plan, a disputed  
standard for measuring the efficacy of the ALE Action Plan to increase access in ALEs  
and improve minority students’ successful completion of ALE programs.”

1 further detail or discussion goals that he recites **have been “agreed upon by the District**  
2 **and the Special Master.”** (SMAR at 19:23-24; emphasis added.) Mendoza Plaintiffs  
3 strenuously object to a process that has led to an agreement on goals between the District  
4 and the Special Master that apparently side-stepped both the USP Section I, D, 1 process  
5 and the R&R process that this Court ordered (since the filing of the ALE R&R would have  
6 carried with it an opportunity for the Mendoza Plaintiffs to object to ALE goals recited in  
7 that R&R and Court resolution of any dispute on the issue).  
8  
9

10 Moreover, there now is a complete absence of clarity as to what the “agreed to”  
11 goals are. Again, without specification or further discussion, the SMAR recites in a  
12 footnote that the “goals pursued by the District were more ambitious than those  
13 recommended by a nationally prominent consultant.” (SMAR at 19, n. 7.) But the 2015-16  
14 DAR (which is the document that the SMAR states it draws on for information [SMAR at  
15 2:9-10]) says no such thing. To the contrary, the District not only asserts that it is  
16 measuring its progress using the so-called less than 20% Rule developed by its consultant  
17 (and not some more ambitious goal as the SMAR suggests); it also wrongly states that this  
18 Court approved the use of the less than 20% Rule for the setting of goals. (DAR at V-131  
19 and n. 52.) As the Court made clear in its Order of January 27, 2016:

22 Plaintiffs and the Special Master challenged TUSD’s proposal  
23 for a “less-than” 20% Rule, which set the goal for minority  
24 access at NOT less than 20% of the minority group’s  
25 enrollment rate District-wide....The Court found that the  
26 “less-than 20% Rule” was an imprecise standard:  
27 merely a rule-of-thumb, which might red-flag the  
28 existence of discrimination depending on a multitude  
of other variables. (Order (Doc. 1771) at n. 8) The  
Court ordered TUSD to “begin consulting with the  
Plaintiffs and the Special Master” regarding how to  
comprehensively measure the effectiveness of the

1 ALE Action Plan to determine whether TUSD has  
2 attained unitary status in regard to its obligation  
3 to increase access for minority students in ALEs....

4 The Court rejected the notion of an aggregate rule  
5 for measuring the efficacy of the ALE Action Plan,  
6 and ordered TUSD to develop goals for increasing  
7 participation of minority students, including ELLs,  
8 in the individual ALE programs to the extent  
9 practicable for each ALE.

10 Doc. 1895 at 2:17-3: 10; some citations omitted.

11 In light of the foregoing, the Mendoza Plaintiffs respectfully request that the Court  
12 direct the Special Master to revise his 2015-16 SMAR to specifically address appropriate  
13 goals to be applied to assess the successful implementation of the USP provisions relating  
14 to ALEs, as the Special Master in fact undertook to do in his draft R&R on ALEs.

15 *The SMAR Omits Discussion of UHS Goals and Goals for the Participation of ELLs*  
*in ALEs*

16 The Court Order of January 27, 2016 expressly directed the Special Master to  
17 “include UHS and ELL goals” in his comprehensive review of the original ALE Action  
18 Plan and Supplement (Doc. 1895 at 9). However, the SMAR is silent on the subject of  
19 ELL goals (in fact lacking any discussion of ELL participation in ALEs) and states only  
20 that UHS has “the goal of increasing admission of African American and Latino students”  
21 (SMAR at 20:6-7) but fails to state what the goal(s) are or should be or how the District is  
22 faring in reaching such goals except to observe that after an initial increase “the number of  
23 African American students has stabilized while the number of Latino students enrolled in  
24 UHS has increased.” (SMAR at 20.)

25 The Mendoza Plaintiffs therefore respectfully request that the Court direct the  
26 Special Master to revise his 2015-16 SMAR to specifically address appropriate goals to be

1 applied to assess the successful implementation of the USP provisions relating to UHS  
2 admissions and the participation of ELL students in ALEs.

3  
4 *The SMAR Fails to Address the Participation Rate of African American and Latino*  
5 *Students in ALEs in the Context of the USP's Requirement that the District "Ensure that*  
*African American and Latino Students Have Equal Access to the District's" ALEs*

6 The USP expressly requires that the District "ensure that African American and  
7 Latino students have equal access to the District's" ALEs. (USP Section V, A, 1.)  
8 Mendoza Plaintiffs believe that the SMAR's focus (consistent with that of the DAR) on  
9 the achievement of goals that are based exclusively on percentages of African American  
10 and Latino student enrollment without any comparison to the relative participation of white  
11 students in ALEs fails to provide data and analysis sufficient to "ensure" that African  
12 American and Latino students have equal access to the District's ALEs.  
13

14  
15 For example: Mendoza Plaintiffs compared data on GATE enrollment as reported  
16 in Appendix F to the USP for the 2011-12 school year and in "Appendix F" provided by  
17 the District for 2015-16. (This data is attached as Exhibits 14 and 15, respectively.) It  
18 reveals that when the percentage of the "total group pop[ulation] of the District" (or what  
19 is more recently referred to as "% District Ethnic Total") is considered during the period  
20 from 2011-12 to 2015-16, the percentage of white students enrolled in the District who  
21 also are enrolled in GATE programs has increased (from 12.4% to 13.3%) while that of  
22 Latino students has decreased (or given the small decrease [from 6.4% to 6.3%], at best,  
23 held constant). In other words, notwithstanding the efforts to increase Latino participation  
24 in GATE, the participation "gap" between white and Latino students has expanded.  
25 (Mendoza Plaintiffs note that the same does not appear to be true for African American  
26 participation but believe that the Latino/white gap nonetheless must be acknowledged and  
27  
28

1 addressed and that the SMAR should focus on data that demonstrates the outcome of  
2 efforts to “ensure” equal access.)<sup>23</sup>

3  
4 The Mendoza Plaintiffs therefore respectfully request that the Court direct the  
5 Special Master to revise his 2015-16 SMAR to specifically address the relative  
6 participation of white, Latino, and African American students in ALEs.

7 *The SMAR Fails to Address Completion Rates/Outcomes*

8  
9 The SMAR fails to discuss data relating to the completion rates or outcomes for  
10 African American and Latino students participating in ALEs (including by way of  
11 example, continued participation in GATE programs after initial entry, those earning a “C”  
12 or better in their ALE classes, percentage scoring a “3” or higher on their AP exams, etc.).  
13 Yet, much of this sort of data was included as base line information to be monitored in the  
14 USP. (See, USP Appendix E at 2 “AAC Achievement, Retention, Teachers SY 2010-11  
15 and SY 2011-12.) Further, when the Court directed the Special Master to prepare an  
16 R&R on ALEs it expressly stated that the Special Master should focus on measures to  
17 “improve the completion of minority students in these programs.” (Doc. 1895 at 4:28-5:1.)  
18  
19

20 The Mendoza Plaintiffs therefore respectfully request that the Court direct the  
21 Special Master to revise his 2015-16 SMAR to specifically address the completion rates  
22 and outcomes of African American and Latino students (including ELLs) in ALEs and any  
23

---

24 <sup>23</sup> The DAR includes a table (Table 5.26 at V-165) that shows the number of 8<sup>th</sup> grade  
25 students meeting UHS Admissions Test Criteria. It indicates that the percentage of  
26 African American and Latino students meeting these criteria declined from 2014-15 to  
27 2016-17 (from 47.7% of those qualified in 2014-15 to 45.8% in 2016-17 for Latinos and  
28 from 3.6% to 3.5% for African Americans in that same period). This suggests that efforts  
to close achievement gaps and provide advanced learning experiences for Latino and  
African American students are not yet where they should be. Mendoza Plaintiffs therefore  
believe that this, too, is a topic that should have been addressed in the SMAR.

1 measures that could practicably be undertaken by TUSD, acting in good faith, to improve  
2 completion rates and outcomes.

3  
4 **OBJECTION NO. 7**

5 **THE SMAR FAILS TO ADDRESS THE DISTRICT'S INAPPROPRIATE USE OF**  
6 **THE "20% RULE" IN CONNECTION WITH GOALS FOR PARTICIPATION IN**  
7 **DUAL LANGUAGE PROGRAMS.**

8 As noted above, there has been no agreement to or Court approval of the use of the  
9 "20% Rule" to set goals and/or assess successful integration of the District's ALE efforts.  
10 Yet, the District, in the DAR, does just that with respect to its dual language programs.  
11 (See DAR at V-180.) Mendoza Plaintiffs object to the failure of the Special Master in the  
12 SMAR to address this issue. They are particularly concerned because, as the Special  
13 Master and the parties have recognized, the issue for many of the dual language programs  
14 is not whether "Hispanic enrollment far surpasses 20 percent" (*id.*) but, rather, efforts to  
15 increase the participation of white students. Mendoza Plaintiffs note the District's report  
16 of an increase in the number of white students in its dual language programs (*id.* at V-179)  
17 and agree that that is positive information but nonetheless believe that it is essential for the  
18 Special Master to clarify that assessment of the District's implementation of its USP  
19 obligations relating to the dual language program will not turn on the application of the  
20 "20% Rule" to Latino enrollment.  
21  
22

23 //

24 //

25 //

26 //

27 //

28

**OBJECTION NO. 8**

**IN ITS DISCUSSION OF SUPPORT FOR STRUGGLING STUDENTS THE SMAR FAILS TO ADDRESS THE ISSUES THAT LED THE DISTRICT TO SIGNIFICANTLY REDUCE THE NUMBER OF STUDENT SUCCESS SPECIALISTS AND REDEFINE THEIR ROLE, THE EVALUATION OF THE TUSD STUDENT SERVICE EQUITY PROGRAMS, AND THE TUSD DECISION TO REDUCE THE SIZE OF AND SUBSTANTIALLY REVAMP THE MEXICAN AMERICAN AND AFRICAN AMERICAN STUDENT SUPPORT DEPARTMENTS. IT ALSO FAILS TO ADEQUATELY ADDRESS ISSUES RELATING TO TUTORING SERVICES PROVIDED BY THESE DEPARTMENTS.**

The SMAR contains a very short discussion of “support for struggling students”. (SMAR at 20.) Mendoza Plaintiffs object to its failure to address the extensive discussion of Student Success Specialists and Student Service Departments in the DAR (at DAR V-228 *et seq.*) which suggests that the work being described is successful and on-going when in fact, based in part on the District’s own January 2016 evaluation of those Departments and the Student Success Specialist position (an evaluation the DAR barely addresses<sup>24</sup>), by the time of the SMAR, the District had decided to substantially reduce the number of Student Success Specialist positions and revise the role, eliminate a number of the Student Service Departments, and substantially reduce the sizes of the Mexican American and African American Student Services Departments (“AASS” and “MASS”, respectively.)<sup>25</sup> Mendoza Plaintiffs believe it was incumbent on the Special Master to address these issues in his SMAR and object to the SMAR’s silence on this topic.

---

<sup>24</sup> The only reference the Mendoza Plaintiffs have found to the evaluation (Appendix V-159) in the DAR is a statement in its discussion of data to track students in need of support that in January 2016 the Assessment and Program Evaluation Department reviewed data for various months and reviewed student equity data for the Mexican American and African American Student Services Departments. (DAR at V-230.)

<sup>25</sup> *See, e.g.*, Budget Draft #2 Cover Letter, 2017-18 USP Budget dated March 13, 2017 at 2, 4. (Doc. 2028-3 at 147, 149.)





1 Master to revise the above-cited sections of his SMAR if he finds that it is necessary to do  
2 so to ensure consistent and accurate data reporting following the investigation and  
3 reporting Mendoza Plaintiffs request the Court to direct the Special Master to conduct  
4 under Objection No. 1.  
5

6 **OBJECTION NO. 10**

7 **THE SPECIAL MASTER’S LIMITED DISCUSSION OF THE GSRR**  
8 **INCORRECTLY OMITTS ACTIONS THAT THE DISTRICT TOOK WITH**  
9 **RESPECT TO THE GSRR IN 2015-16 THAT VIOLATED USP PROVISIONS**

10 The SMAR contains a very limited discussion of the GSRR. It states only that “[a]t  
11 the beginning of the 2015-16 school year, the District recognized the need to revise the  
12 GSRR – the document that defines violations and appropriate responses to these offenses.  
13 As of **May 2017**, no changes in the GSRR had been approved by the Governing Board.”  
14 (SMAR at 27:10-13; emphasis in original.) The implication of the Special Master’s  
15 SMAR statement is that the District did not change the GSRR from the version that was  
16 operative at the beginning of the 2015-16 school year as of “**May 2017.**” While the  
17 Governing Board may have taken no action as of May 2017, it is inaccurate to state that  
18 the GSRR was not changed.  
19

20  
21 District administration did in fact revise the GSRR prior to the commencement of  
22 the 2016-17 school year<sup>26</sup> to include a new “Frequently Asked Questions Regarding  
23 Discipline” (“FAQ”) section that articulated the following zero-tolerance policy for student  
24 fights: “This coming school year, students who violate the Code of Conduct by fighting  
25

26  
27 <sup>26</sup> While Mendoza Plaintiffs discovered the version of the GSRR containing the FAQ  
28 section in mid-August 2016, they understood the District to have posted it before  
commencement of the 2016-17 school year because the FAQ references the 2016-17  
school year as “the coming school year.”

1 will be suspended short term out of school, followed by a two day in school intervention,  
2 and each will be counseled. Students who fight a second time during the school year are  
3 subject to being assigned to our District Alternative to Education Program for a period of  
4 time.” (See Mendoza Plaintiffs ‘August 17, 2016 email re TUSD’s 2016-17 GSRR Issues  
5 attached as Exhibit 16. The GSRR containing the new FAQ section and referenced in this  
6 email is attached as Exhibit 17.) The District did not submit the GSRR with the FAQ  
7 section to the Plaintiffs and Special Master for USP Section I, D, 1 review and comment,  
8 and the fighting policy contained in that GSRR violates USP Section VI, B, 2, a.  
9 (concerning limitations relating to exclusionary disciplinary consequences).<sup>27</sup>

12 Given the significance of the this issue, including the fact that the District  
13 made the version of that GSRR with the FAQ available to its employees and parents by  
14 posting it on its website (see Exhibit 16), Mendoza Plaintiffs object to the misleading  
15 statement that “[a]s of **May 2017**, no changes in the GSRR has been approved by the  
16 Governing Board.” Rather than request that the Special Master be directed to fully report  
17 on this issue in the SMAR (given that the FAQ fighting policy was intended to be  
18 implemented in the 2016-17 school year, and that efforts to correct the matter occurred  
19 throughout the 2016-17 school year), they respectfully request that this Court direct the  
20 Special Master to revise the statement cited above to indicate that no changes were made  
21 to the GSRR for the 2015-16 school year.<sup>28</sup>

---

25 <sup>27</sup> The Mendoza Plaintiffs subsequently requested that the Special Master bring this  
26 instance of USP non-compliance to the attention of the Court under USP Section X, E, 6,  
27 but per subsequent discussions with the parties and Special Master, agreed to defer that  
request.

28 <sup>28</sup> Mendoza Plaintiffs note that they do however anticipate and expect that the Special  
Master will fully address this issue in his Annual Report for the 2016-17 school year.

**OBJECTION NO. 11**

**THE SMAR OMITTS NEEDED DISCUSSION OF FAMILY ENGAGEMENT PLAN OBLIGATIONS AND RECOMMENDATIONS RELATING TO USE OF FAMILY CENTERS TO INTEGRATE MAGNETS, “TWO WAY” FAMILY ENGAGEMENT, AND DATA TRACKING WHICH INVOLVE PROBLEM AREAS TUSD IDENTIFIED LONG AGO, AND/OR THAT WOULD PROVIDE CONTEXT FOR SMAR STATEMENTS THAT SUGGEST THE EXISTENCE OF BROADER BUT UNADDRESSED ISSUES**

As discussed below, there are multiple areas of the SMAR in which the Special Master does not provide discussion or any analysis of District efforts to meet its obligations under the USP relating to family engagement or the Family and Community Engagement Plan (“FACE”) developed to implement those provisions. (TUSD Annual Report for the 2014-15 School Year, Appendix VII-1 (Doc. 1852-1)). That there may be an absence of evidence concerning the District’s efforts in this area is not a reason to have omitted full discussion of this aspect of the USP in the SMAR. Of particular concern to the Mendoza Plaintiffs are, omissions to address the use of Family Centers to integrate magnet schools and programs, the District’s failure to meaningfully engage families in a “two way” approach, and the District’s failure to track family engagement data. Discussions of these topics are necessary to provide a complete picture of the District’s efforts, would implicate long-outstanding obligations and recommendations, and would provide needed context for SMAR statements and findings.

*Efforts to Use Family Centers to Integrate Magnet Schools and Programs*

The USP expressly requires that the “District, through its Family Center(s) and other recruitment strategies set forth in [the USP], shall recruit a racially and ethnically diverse student body to its magnet schools and programs to ensure that the schools are

1 integrated to the greatest extent practicable.”<sup>29</sup> (USP, II, E, 2.) (The FACE Plan  
2 references the need for the District to use its Family Centers to market magnet schools and  
3 programs. (*See. e.g.*, FACE Plan at 25.))

4 Notwithstanding such USP obligations, and that the Special Master, under the  
5 “Integration” section of the SMAR, asserts that “[i]t would be difficult to build a case that  
6 the District has worked to integrate its schools” (SMAR at 6:9), the Special Master does  
7 not address the District’s efforts in the 2015-16 school year in this regard beyond the  
8 indirect statement that TUSD marketing materials failed during that year to mention  
9 research concerning learning opportunities provided by integrated student bodies (*id.* at  
10 6:15-19). Indeed, given the Special Master’s integration findings (at pages five through  
11 seven of the SMAR) and that the USP contemplates the use of family centers as a tool for  
12 integrating magnet schools, discussion of District efforts in this regard should have been  
13 included both to assess its implementation of its express USP obligation and to provide  
14 better context to the Special Master’s findings. Further, Mendoza Plaintiffs believe that  
15 inclusion of such discussion in the SMAR would have better informed the District on what  
16 problems it may need to address in this regard and how it can better market magnet schools  
17 through its family centers.<sup>30</sup>

18  
19  
20 <sup>29</sup> As part of that effort, the District is to “creat[e] or amend[] an informational guide  
21 describing offerings at each school site... distributed via mail and email to all District  
22 families; posted on the website in all major languages; and available in hard copy at all  
23 school sites, the Family Center(s) and the District office.” (USP, II, C.) The Mendoza  
24 Plaintiffs note that the District’s 2015-16 Annual Report makes no mention of whether it  
25 distributed its Catalog of Schools to parents via mail and email.

26 <sup>30</sup> In this regard, the Mendoza Plaintiffs note that greater discussion of the District’s use of  
27 family centers to integrate magnets could call attention to the following issues: the DAR  
28 provided evidence of but a single one hour “open enrollment” workshop held at family  
engagement centers in November 2015 in support of its obligation to use these centers and  
the family engagement initiative more generally to integrate magnet schools. (DAR,  
Appendix II-12). Further, the District apparently conducts no data collection concerning  
the submission of magnet and open enrollment applications at its family centers or gathers  
any other information that would allow it to evaluate the effectiveness of its efforts at  
increasing integration through its family centers. (*See* TUSD Response to RFI #863,  
attached as Exhibit 18: “There is no disclosure or tracking mechanism to differentiate from  
where it [magnet and open enrollment applications] was submission [sic].”)

1 Meaningful “Two Way” Family Engagement as Part of a District-wide Strategy  
 2 Recognized as Valuable in its FACE Plan Recommendations

3 As part of the District’s compliance with USP Section VII, C, a, b, TUSD  
 4 conducted an initial assessment of its existing family engagement and support programs  
 5 and developed recommendations for improvement that it then addressed in the FACE Plan.  
 6 (See FACE Plan at 14.) Although the SMAR states generally that the “District’s approach  
 7 to family engagement is what is called a one-way bridge and current thinking calls for a  
 8 two-way approach” (SMAR at 28:3-4), the SMAR fails to note that the favored two-way  
 9 approach is in fact embraced by the District’s own FACE Plan (although it is yet to be  
 10 implemented). Further, given such lack of progress and the long-outstanding FACE Plan  
 11 recommendations, further discussion of this matter is warranted in the SMAR, particularly  
 12 given that, as Mendoza Plaintiffs understand the “two way” approach, a meaningful shift  
 13 to that approach provides the most promising strategy to genuinely engage families.<sup>31</sup>

14 The SMAR-referenced “two way” approach to family engagement directly relates  
 15 to the District’s first FACE Plan recommendation to “Create District-Wide Strategies”  
 16 because its family engagement “efforts were not connected to one another as part of a  
 17 comprehensive scheme, and often were focused on parental involvement rather than  
 18 informing parents about student learning and the parents’ role in their student’s success.”<sup>32</sup>  
 19 (FACE Plan at 14.) However, the TUSD’s 2015-16 Annual Report data<sup>33</sup> reveals that little

20 <sup>31</sup> The FACE Plan section concerning recommendations (commencing on page 14)  
 21 explains that the “District assessed the internal data obtained from various reviews in light  
 22 of the research-based best practices for family engagement to develop recommendations  
 23 for reorganizing family resources.” (The District, under USP Section VII, C, d, is to  
 “implement [that] plan to reorganize or increase family engagement resources... to ensure  
 equitable access to programs and services and to concentrate resources on school site(s)  
 and in areas where data indicates greatest need.”)

24 <sup>32</sup> The FACE Plan describes “open houses, student concerts, recognition awards, and social  
 25 events” as the referenced less favored “parental involvement.” (*Id.* at 8.) Under the  
 26 recommendation concerning “Engaging Families” the District further explained that  
 27 “[b]ased on the Review and Assessment [under USP Section VII, C, 1, b] of the District,  
 the majority of the family engagement efforts provided historically by the District have  
 been focused primarily on family involvement in student activities rather than learning-  
 centric family learning. The Harvard Family Research Project found family engagement  
 practices linked to learning have greater positive effect on student outcomes.” (*Id.* at 19.)

28 <sup>33</sup> The District describes site-level family engagement activities in appendices VII-1 (titled  
 “Curricular Focus Training”) and VII-6 (titled “Staff Trainings and Family Opportunities

1 progress has been made as individual schools participated in an unconnected series of  
 2 activities that demonstrate the absence of a District-wide family engagement strategy, a  
 3 heavy amount of “parent involvement” activities (instead of family engagement activities  
 4 to empower parents and to learn from them how to best meet their children’s needs), and  
 5 telling inconsistencies concerning the amount and quality of family engagement activities  
 6 across sites.<sup>34</sup> They also fail to manifest a “family engagement vision” (FACE Plan at 14.)

7 Mendoza Plaintiffs object to the omission of any discussion of the District’s own  
 8 recognition of the value of the “two-way” approach and its failure to follow its own  
 9 counsel and recommendations in the SMAR.

10 *The District’s Data Collection Efforts and Inability to Conduct Meaningful*  
 11 *Evaluations of Effectiveness of Family Engagement Efforts With Collected Data*

12  
 13 While the Special Master notes that “[f]urther information is needed” with regard to  
 14 Community Liaison communications with teachers about students, that “better evidence...  
 15 is needed” to determine trends in racial demographics of schools using more “robust”  
 16 family engagement strategies versus those that do not, and that “[m]ore information on the

17  
 18 to Value Parents as Partners”) of the 2015-16 Annual Report– as the titles and appendices  
 19 suggest, the listed activities appear to be an indiscriminate mixing of staff training and  
 20 family engagement events. As discussed in the section below, these appendices omit data  
 21 for a significant number of schools and therefore is unreliable as the basis for forming  
 22 conclusions about trends in site-level family engagement efforts.

23 <sup>34</sup> In this regard, some schools’ activities for the 2015-16 school year consisted entirely of  
 24 the less favored and less effective “parental involvement” (e.g., open houses, social  
 25 events). For example, other than a single “Title One parent meeting” at Cragin (DAR,  
 26 Appendix VII-6 at 2), Cragin held only what appear to be events at which stories were read  
 27 to children and families. These events consisted of “Family Library Night,” “Spooky  
 28 Reading Night,” and “Literacy Night.” (DAR, Appendix VII-1 at 3.) Another example,  
 Mary Meredith, held only the following social events: Healthy Social Family Fun, Annual  
 Harvest Luncheon, Rodeo Bar-B-Q, and Celebration and Promotion. (*Id.* at 9) These are  
 not unique examples; indeed, this Court need only conduct a cursory review of the  
 activities reflected in DAR Appendices VII-1 and VII-6 to see that site-level activities are  
 dominated by “parent involvement” events (delivered inconsistently across schools) which  
 do not reflect the family engagement goals of the USP, the acknowledged importance of  
 focusing on learning-centric activities, or a District-wide family engagement strategy and  
 “vision”. As detailed below, there is no data relating to many schools’ family engagement  
 efforts in DAR Appendices VII-1 and VII-6.

1 functions and the results of these [District] partnerships [with Tucson organizations] would  
2 be useful” (SMAR at 27:23-24, 28:14-15, 28:24-25), the Special Master does not address  
3 the underlying issue of the adequacy District’s data collection efforts in the area of family  
4 and community engagement. This is of particular importance given that, recognizing the  
5 centrality of data collection efforts to the success of the District’s engagement efforts, the  
6 District’s FACE Plan made express data collection recommendations (FACE Plan at 21) –  
7 aligning with the USP Section VII, C, 1, c requirement that the District “develop and  
8 implement a plan to track data on family engagement.”<sup>35</sup>

9         The FACE Plan recognized that there “is no system to provide consistent access to  
10 programs or a way of evaluating the effectiveness of programs. Currently the District’s  
11 major method for tracking family engagement is through sign-in sheets... Research  
12 supports data collection systems as a necessary component of ongoing evaluation, planning  
13 and improvement.” (*Id.*) Yet, the District reported that for the 2015-16 school year, the  
14 District continued to gather family engagement data through sign-in sheets (DAR at VII-  
15 328), even though USP Section VII, C, 1, c envisioned that by October 1, 2013, the  
16 District would make necessary revisions to its electronic data system to track family  
17 engagement. (While that date was pushed back by agreement of the parties, Mendoza  
18 Plaintiffs believe that the SMAR should nonetheless have addressed the 2015-16 reliance  
19 on sign-in sheets and absence of more informative information.)

20         Further, Mendoza Plaintiffs expected these issues to be addressed in the SMAR as  
21 needed follow up to the Special Master’s 2014-15 Annual Report “Recommendation to the  
22 District” that it “should improve its reporting of family and community engagement  
23 activities organizing these by types of activities, reporting how many families of different  
24 racial backgrounds were served and what the purposes of these services were.” (Doc. 1890

25 \_\_\_\_\_  
26 <sup>35</sup> The USP-required assessment is part of a USP provision that also mandates that there be  
27 “data systems in place to provide information on outreach to and engagement with families  
28 and communities.” (USP Section VII, C, 1, b.) The USP further required that the District  
“By October 1, 2013... develop and implement a plan to track data on family engagement,  
and the District shall make necessary revisions to Mojave to allow such data to be tracked  
by student.” (USP Section VII, C, 1, c.)



1 at 30.) In this regard, as far as Mendoza Plaintiffs can tell from past TUSD Annual  
2 Reports, the District has made no effort to track family engagement data by race/ethnicity  
3 and/or to evaluate the effectiveness of its family engagement efforts with Latino and  
4 African American families.<sup>36</sup>

5 Moreover, the SMAR additionally fails to address the District's evidence  
6 concerning its USP Section VII, E, 1, d obligation to "[a]naly[ze]...the scope and  
7 effectiveness of services provided by the Family Center(s)." In this regard, the District's  
8 2015-16 "Analysis of the scope and effectiveness of services provided by the Family  
9 Center(s)" is based entirely on "customer satisfaction surveys" (in connection with  
10 unspecified provided services) and a mere 89 needs surveys collected over a five-month  
11 period. (DAR, Appendix VII-28.)<sup>37</sup>

12 Plainly, a large part of the reason the Special Master is constrained to note the need  
13 for additional information in the SMAR is the District's inadequate data collection efforts  
14 concerning family engagement, notwithstanding the USP and FACE Plan obligations and  
15 recommendations for improved data collection. Given the significance of data collection in  
16 measuring District compliance with related obligations, and to assessing outcomes in  
17 measuring District's progress in implementing the USP's family and community  
18 engagement provisions, the Mendoza Plaintiffs object to the omission of this discussion in  
19 the SMAR.

20  
21  
22 <sup>36</sup> Indeed, with respect to efforts at the site-level, the District has conceded that for the  
23 2015-16 school year "[t]here was no process to review or assess school site family  
24 engagement activities in place during the school year for SY2015-16." (TUSD Response  
25 to RFI #857, attached as Exhibit 19.) Such lack of a process for review and assessment  
26 seem to be exemplified by the fact that the District did not track participation at quarterly  
27 informational events at seven, 14 and 17 racially concentrated schools in each of the  
28 second, third and fourth quarters of 2015-16 school year, respectively. (DAR, Appendix  
V-214.)

<sup>37</sup> Notably, the 2015-16 "evaluation" does not take into account the number of and reasons  
for visits to family centers (beyond simply noting a total of approximately 7,000 visits), or  
whether the services and information concerning, for example, Advanced Learning  
Experiences or open enrollment and magnet schools, provided at centers are effective in  
recruiting students.

1 For the reasons stated above, the Mendoza Plaintiffs respectfully request that the  
2 Special Master be directed to supplement the SMAR to include discussion of the use of  
3 Family Centers to integrate magnet schools and programs, the District’s lack of family  
4 engagement in a “two way” approach, and the state of the District’s efforts to collect  
5 family engagement data and conduct assessments of family engagement efforts.  
6

7 **OBJECTION NO. 12**

8 **THE SMAR FAILS TO PROVIDE THE BASIS FOR THE SPECIAL MASTER’S**  
9 **FINDING THAT IT DOES NOT APPEAR RACIAL COMPOSITION DIFFERS**  
10 **SIGNIFICANTLY BETWEEN SCHOOLS PROVIDING ROBUST FAMILY**  
11 **ENGAGEMENT AND THOSE THAT DO NOT, AND SUCH SUPPORT CANNOT**  
12 **BE FOUND IN THE DAR BECAUSE IT PROVIDES NO FAMILY**  
13 **ENGAGEMENT DATA FOR MANY SCHOOLS**

13 In the SMAR, the Special Master fails to discuss or identify any data he relied on in  
14 making his finding that “it does not appear that the racial composition of the schools where  
15 family engagement is more robust is significantly different than the racial composition of  
16 schools with less assertive family involvement.” (SMAR at 28:13-16.) Further, the  
17 SMAR does not address or analyze what constitutes “robust” family engagement and  
18 Mendoza Plaintiffs found no such analysis with respect to racially concentrated and non-  
19 racially concentrated schools in the DAR on which the SMAR statement may have been  
20 based. Indeed, with respect to school-level family engagement efforts, the data in the  
21 DAR appears to do no more than to catalog family engagement activities. (*See, e.g.*, DAR,  
22 Appendices VII-1 (titled “Curricular Focus Training”) and VII-6 (list of family  
23 engagement events by school).)

26 Moreover, Mendoza Plaintiffs do not believe the SMAR statement concerning site-  
27 level family engagement could properly be based on DAR data as there are a significant  
28

1 number of TUSD schools for which no such data is provided. By way of example, there  
2 were no “Curricular Focus Trainings” nor any family engagement events listed for the  
3 following racially concentrated schools: Banks, Ochoa, Oyama, Warren, Rose, Morgan  
4 Maxwell, Safford, Valencia, and Pueblo.<sup>38</sup> (See DAR Appendices VII-1 and VII-6.) Thus,  
5 because the site-level family engagement data in the DAR is so incomplete, they do not  
6 understand that it could form the basis for the Special Master’s finding that “it does not  
7 appear that the racial composition of the schools where family engagement is more robust  
8 is significantly different than the racial composition of schools with less assertive family  
9 involvement.” Mendoza Plaintiffs therefore object to this SMAR statement and  
10 respectfully request that this Court direct the Special Master to supplement his SMAR to  
11 set forth the factual basis for his finding.

### 12 **OBJECTION NO. 13**

#### 13 **THE RECORD DOES NOT SUPPORT THE SPECIAL MASTER’S FINDING** 14 **THAT THE DISTRICT IS IMPLEMENTING THE PROVISIONS OF THE USP** 15 **WITH RESPECT TO EXTRACURRICULAR ACTIVITIES IN A SATISFACTORY** 16 **WAY.**

##### 17 *Inequities in Participation Rates*

18 Based on their understanding of the record, Mendoza Plaintiffs object to the Special  
19 Master’s finding that the District is implementing the provisions of the USP with respect to  
20 extracurricular activities in a satisfactory way. (SMAR at 29.) In support of his finding,  
21 the Special Master references data provided by the District after the submission of the  
22 DAR and states that “[i]n general [from 2013-14 to 2015-16] , total percentages of  
23 participation across ethnicities remained relatively constant.” (Id. at 29-30.) The SMAR

24  
25  
26  
27  
28 <sup>38</sup> Significantly, each of Ochoa, Safford, and Cholla was a magnet school that recently lost its magnet status. (See Doc. 1984-1 at 1.)

1 does not further identify the information provided or any analysis that led to the stated  
2 conclusion. Mendoza Plaintiffs reviewed data provided in the DAR and reached a  
3 different conclusion – that is, that the participation “gap” between white students as  
4 compared to Latino and African American students widened in that period<sup>39</sup>. If the  
5 Special Master has data that show a different result, Mendoza Plaintiffs ask that he  
6 supplement his SMAR to provide that information together with an explanation from the  
7 District as to why the data set forth in the DAR appears to lead to a different result.  
8

9  
10 Even if the Mendoza Plaintiffs’ finding after their review of the DAR can be  
11 addressed with additional data, their review of information provided by the District in  
12 response to their information requests indicates that there also is a serious question as to  
13 whether extracurricular activities are being provided on an equitable basis . Until that  
14 issue is addressed and resolved, Mendoza Plaintiffs object to the SMAR finding of  
15 satisfactory implementation of the provisions of the USP relating to extracurricular  
16 activities.  
17

18  
19 On March 15, 2017, the District provided information on participation in  
20 extracurricular activities broken down by school. A copy is attached as Exhibit 20.  
21

---

22 <sup>39</sup> Mendoza Plaintiffs compared the participation numbers provided in Table 8.1 of the  
23 DAR (at VIII-337) to the overall enrollment numbers for TUSD white, Latino, and African  
24 American students in 2013-14 and 2015-16, using TUSD reported 40<sup>th</sup> day enrollment  
25 figures for those years. That comparison revealed that the participation of white students  
26 in TUSD extracurricular activities increased by 10% (from 20% of their total enrollment in  
27 2013-14 to 30.2% of their total enrollment in 2015-16). By contrast, notwithstanding the  
28 emphasis in the USP on equitable participation by Latino and African American students,  
the participation rate of Latino students increased by 7.1% (from 14.6% of their total  
enrollment in 2013-14 to 21.7% of their total enrollment in 2015-16) and the participation  
rate of African-American students increased by 4% (from 20.6% of their total enrollment  
in 2013-14 to 24.6% of their total enrollment in 2015-16). Thus the participation “gap”  
appears to have widened rather than narrowed.

1 Mendoza Plaintiffs then used that data and information on 2015-16 school enrollment, as  
2 set forth in the chart they prepared and have attached as Exhibit 21, to compare relative  
3 participation in extracurricular activities by students in racially concentrated K-8 schools  
4 and in K-8 schools that have 25% or more white enrollment (inclusive of elementary, K-8,  
5 and middle schools). They then performed the same analysis looking at racially  
6 concentrated high schools and high schools that have 25% or more white enrollment.  
7 They found significant disparity.  
8

9  
10 At the K-8 level, there is a 19.8% participation rate in extracurricular activities by  
11 students attending racially concentrated schools as compared to a 27.6% participation rate  
12 by students attending schools in which the white student population constitutes 25% or  
13 more of the total enrollment. That disparity increases significantly at the high school level.  
14 There is a 31.4% participation rate among students attending racially concentrated schools  
15 as compared to a 45 % participation rate among students attending high schools in which  
16 the white student population constitutes 25 % or more of total enrollment. Mendoza  
17 Plaintiffs believe that this data fails to evidence that the District has satisfactorily complied  
18 with the USP mandate that it “provide students equitable access to extracurricular  
19 activities.” (USP Section VII, A, 1.)  
20  
21

22 *Inadequate Showing of Interracial Contact in Positive Settings*

23 Mendoza Plaintiffs further object to the finding of the SMAR because it fails to  
24 address the USP requirement that the District “ensure that extracurricular activities provide  
25 opportunities for interracial contact in positive settings of shared interest....” (*Id.* at VIII, A,  
26 2.) The DAR is virtually silent on this topic. The only place in which the racial and ethnic  
27 breakdown of participants in specific extracurricular activities is discussed is in the  
28

1 subsection of the DAR relating to leadership training. There reference is made to a  
2 leadership program involving just over 500 participants, a Captain's Academy with 45  
3 participants, and a Harbor Experience with almost 350 participants. (DAR at VIII-342-  
4 344.) But, according to that same DAR, approximately 11,250 students participated in at  
5 least one extracurricular activity in 2015-16 (*Id.* at VIII-337, Table 8.1.). No breakdown  
6 concerning the race and ethnicity of the particular programs (e.g., sports teams, clubs, etc.)  
7 in which the vast majority of District students participated is included in the USP. Yet, it  
8 is clear that such an analysis must occur before the District can be found to have  
9 satisfactorily implemented the USP.

12 In this regard, the case of *In United States v. Bd. of Public Instruc. of St. Lucie Co.*,  
13 977 F. Supp. 1202, 1221 (S.D. Fla., 1977), is instructive. In that case, when considering  
14 whether the school district before it had attained unitary status with respect to  
15 extracurricular activities, the Court expressly noted evidence that “[i]f it is determined that,  
16 over a period of time, a particular extracurricular activity (*e.g.*, cheerleading) is  
17 participated in primarily by students of one race, then ‘the Principal is asked why is that  
18 occurring, and what needs to happen in order to change that...[A]s they occur you ask the  
19 question as to why, and then you provide the remedy.’ ” Nothing before the Special  
20 Master or in the DAR establishes that TUSD has provided a comparable degree of  
21 oversight and follow up with respect to this central obligation in the extracurricular section  
22 of the USP.

26 *Insufficient Data*

27 There is yet one other reason why the Mendoza Plaintiffs object to the Special  
28 Master's finding: the District has failed to provide sufficient and consistent information

1 relating to extracurricular activities thereby making it extremely difficult, if not  
2 impossible, to accurately assess its performance of its USP obligations.

3  
4 In the DAR, the District asserted that participation in K-8 extracurricular activities  
5 increased in 2015-16 but also stated that “[i]ncluded in these numbers for the first time are  
6 students who participated in extracurricular fine arts.” (DAR at VIII-337.) Thereafter, in  
7 response to a Mendoza Plaintiff inquiry, the District stated that in earlier years  
8 participation in fine arts had been included in a K-8 “club” category. Whether and to what  
9 extent this new category in the report affects the ability to make “apples to apples”  
10 comparisons with extracurricular participation data provided for prior years is compounded  
11 by the fact that the District additionally asserted in the DAR that the improvement in  
12 participation numbers also “reflected...improvements in the collection and reporting of the  
13 data through better office staff training.” (*Id.* at VIII-338.)

14  
15  
16 When it explained these improvements in response to a Mendoza Plaintiff inquiry,  
17 the District expanded on its DAR statement as follows. There were “increased efforts on  
18 the part of the extracurricular department to inform school administrators of the necessity  
19 to correctly submit this information and then to monitor submission.” The District  
20 provided as an example that only “23 Elementary, K-8 and Middle Schools reported  
21 athletic data in 2014-15, whereas 49 schools reported athletic data in 2015-16.” (*Id.*)<sup>40</sup>

22  
23  
24 \_\_\_\_\_  
25 <sup>40</sup> This statement is of some concern given that the District made a similar claim about  
26 having improved its data collection efforts in 2014-15. In the 2014-15 Annual Report, it  
27 wrote: “In the 2014-15 school year, the District also developed training for administration  
28 and office staffs at the elementary and K-8 schools to learn how to correctly input data into  
the Mojave Interscholastic module to track participation” in extracurricular activities.  
(2014-15 Annual Report, Doc. 1918-1, at VIII-283.) It should also be noted that issues  
relating to data collection appear to have continued into the 2015-16 school year. The  
school participation report for 2015-16 that the District provided in March 2017 fails to  
provide information for all schools. Mendoza Plaintiffs have identified the following as  
among the schools whose extracurricular participation data has not been provided: Banks,





1 inconsistent with school FCI scores or revised FCI scores pursuant to the District’s Master  
2 Facilities Plan (“DMFP”) (not addressed in the SMAR) have made that facilities data  
3 unreliable. Therefore, because his SMAR statement that “it does not appear that the  
4 quality of school facilities varies significantly by the proportion of students of different  
5 races in a school” (SMAR at 30:11-12) is based on such data, it ,too, may be unreliable.  
6

7       Beyond issues concerning FCI and ESS weights, reallocation requests with  
8 explanations that conflict with FCI and ESS data call into question the accuracy of that  
9 data. In connection with March 8, 2016 reallocation request for repairs to Utterback  
10 Middle School’s auditorium, the District asserted the existence of significant disrepair,  
11 including no working speakers, sound boards, microphones (sound system), no projection  
12 system, and limited lighting as a result of it “hav[ing] had no upgrades or systemic repairs  
13 since its inception in 1989.” (See email chain re: Reallocations – Tully and Carrillo,  
14 attached as Exhibit 22.) However, its ESS score indicated that Utterback’s “Performing  
15 Arts” space received a 4.0 rating out of a possible total of 5.0, indicating that it was in  
16 “good condition.”<sup>42</sup> (See *id.*) Thus, the significant disparities between TUSD reallocation  
17 requests and facilities data warranted investigation to determine the extent to which such  
18 data does not accurately reflect school facilities condition before the Special Master drew  
19 any conclusions about USP compliance in this area.  
20  
21  
22  
23

---

24 <sup>42</sup> Indeed, issues with reallocation requests inconsistent with TUSD facilities condition  
25 assessments appear to have persisted past the 2015-16 school year. In connection with its  
26 March 2, 2017 reallocation requests, the District states Safford’s computer lab has “two  
27 ‘holes’ in the floor. Plywood has been secured to make sure no one falls through.  
28 However, there is a noticeable dip when stepping on the plywood... this is an unsafe  
condition that needs to be addressed.” (See TUSD April 3, 2017 email attached as Exhibit  
23.) Mendoza Plaintiffs presume that the development of “holes” big enough for children  
to “fall[] through” reflects disrepair that developed over time, and note that with regard to  
Safford’s ESS scores (which covers computer labs), the District apparently had “no data”  
whatsoever for the 2015-16 school year. (See DAR, Appendix IX-18.)

1 Further, during the 2015-16 school year, the District developed a “District Master  
2 Facilities Plan” (“DMFP”) (attached as Exhibit 24) which it says involved assessments of  
3 “HVAC, Roofing and Special Systems... at every school between September 2015 and  
4 February 2016” and that it took “advantage of the assessments that were completed as part  
5 of that project to make sure the conditions were reflected in the FCI as well.” (*See* TUSD  
6 RFI response attached as Exhibit 25.) Although the District purports to have revised the  
7 FCI in light of the DMFP assessments, it asserts that the “MYFP is not related to the  
8 DMFP in any way.” (*Id.*) Contrary to the District’s assertion, the DMFP contains a  
9 section devoted to the “Multi-Year Facilities Plan Background and Summary” and sets out  
10 the assessment process that formed the basis of the DMFP. (Exhibit 24, at 3.0-1 *et seq.*)  
11 Significantly, it describes only the creation of the FCI and the ESS and no additional  
12 assessment work, and so far as Mendoza Plaintiffs have been able to determine, does not  
13 refer to or incorporate any new assessment of “HVAC, Roofing, and Special Systems” as  
14 referenced in the District’s response to their inquiry. Further, it makes no reference that  
15 Mendoza Plaintiffs have been able to locate to any changes to the FCI to reflect such an  
16 assessment. Thus, the nature and extent of changes to the FCI are opaque at best and  
17 further complicate analysis concerning whether there exists a disparity in facilities  
18 condition based on the racial composition of students at TUSD schools.

19  
20  
21  
22  
23 Therefore, the Special Master’s assertion that “it does not appear that the quality of  
24 school facilities varies significantly by the proportion of students of different races in a  
25 school” may be based on inaccurate and unreliable data. Mendoza Plaintiffs therefore  
26 respectfully request that the Court direct the Special Master to investigate and report  
27 whether and to what extent TUSD’s unilateral revisions to the FCI and adjustments to  
28

1 facilities scores in connection with the DMFP have resulted in inaccurate or unreliable  
2 TUSD data, and what actions need to be taken beyond the District “return[ing] to the  
3 originally agreed-upon FCI formula delineations”, if any, to provide for the type of  
4 consistency in TUSD Annual Report data that would allow for accurate year-to-year  
5 comparisons and analysis, and to revise the SMAR to the extent necessary once these data  
6 issues have been addressed.  
7

8 **OBJECTION NO. 15**

9  
10 **THE SPECIAL MASTER’S LIMITED DISCUSSION OF THE DISTRICT’S**  
11 **ACTIONS RELATING TO FACILITIES IN THE 2015-16 SCHOOL YEAR**  
12 **INCORRECTLY OMITTS DISCUSSION OF THE DEVELOPMENT OF THE**  
13 **DMFP, WHICH CONTAINS NO USP-MANDATED PRIORITIES, FUNDING FOR**  
14 **WHICH THE DISTRICT NOW IS CONSIDERING WITH DRAFT BOND**  
15 **ELECTION LANGUAGE FOR THE NOVEMBER 2017 ELECTION BALLOT**

16 The District’s DMFP, which do not contain USP-mandated priorities for facilities  
17 projects, suggests the District intends to no longer comply with those provisions and bears  
18 on the District’s good faith desegregation efforts as they relate to facilities and therefore  
19 should have been addressed in the SMAR.

20 The District presented the DMFP it developed in 2015-16 (discussed above) to its  
21 Governing Board on June 14, 2016. (See Jun 14, 2016 Agenda Items document attached  
22 as Exhibit 26.) That DMFP sets a list of general “TOP PRIORITIES/OBJECTIVES” that  
23 are unconnected to the priorities articulated in USP Section IX, A, 3. (Exhibit 24 at 4.0-1)  
24 Notably missing is any weighting of priorities to address the needs of the District’s racially  
25 concentrated schools. Significantly, while the DMFP does acknowledge that the MYFP  
26 “assures Racially Concentrated Schools are not overlooked and are given a higher level of  
27 consideration” (Id., at 3.0-4), there is no statement in the DMPF about how its “top  
28

1 priorities” and those of the MYFP are to be reconciled and, as noted above, the District has  
2 asserted that “the MYFP is not related to the DMFP in any way.” (TUSD Response to RFI  
3 884 attached as Exhibit 27.)  
4

5 While the DMFP “top priorities”<sup>43</sup> may be logical, they not only fail to  
6 include the priority of focusing on racially concentrated schools; so far as Mendoza  
7 Plaintiffs can discern they make no effort to reconcile the achievement of priorities like  
8 achieving “optimum school size” or the expansion of teaching areas for successful  
9 programs with the District’s desegregation obligations under the USP.  
10

11 The significance of the omission of any discussion of this issue in the SMAR is  
12 underscored by the fact that the District confirms its intent to proceed with implementation  
13 of the DMFP by now considering November 2017 election ballot draft language for a bond  
14 to implement the DMFP. (*See* May 23 Agenda Item document attached as Exhibit 28.)  
15 Given the significant implications this issue has on future District implementation of USP-  
16 mandated facilities project priority and on whether the District is in good faith  
17 implementing USP facilities provisions, Mendoza Plaintiffs object to the omission of this  
18 discussion in the SMAR. The Mendoza Plaintiffs further respectfully request that this  
19 Court direct the Special Master to revise the SMAR to specifically address the  
20 development of the DMFP and the implications of that plan and progress in preparing a  
21 bond to fund it on the District’s implementation of the USP’s facilities provisions.  
22  
23  
24  
25

26  
27 <sup>43</sup> The priorities listed on page ii of the DMFP are: repairs, key facility improvements to  
28 enhance learning, technology, school renovations for 21<sup>st</sup> Century Learning and optimum  
school size, support expansions of successful programs, reduce the number of active  
portable classrooms, and “transportation”.

1 **CONCLUSION**

2 Based on the foregoing and the record herein, Mendoza Plaintiffs respectfully  
3 request that the Court sustain their objections to the 2015-16 SMAR and direct that the  
4 Special Master supplement and/or revise that SMAR in the following respects pursuant to  
5 the oversight, monitoring, and reporting responsibilities assigned to the Special Master in  
6 Section X,E of the USP and the Order Appointing Special Master:  
7

8 (1) By preparing an R&R addressing the parties' dispute concerning whether ISI  
9 and DAEP constitute "exclusionary discipline" and whether the District has amended  
10 Regulations JK-R1 and JK-R2 in a manner that deprives students of their rights to due  
11 process and/or hearing rights under the USP when referred to ISI and/or DAEP.  
12

13 (2) By investigating and reporting whether and to what extent TUSD DAR data  
14 reflect changes or inaccuracies in how ethnicity and ISI/DAEP referrals were reported,  
15 what the nature of any such changes/inaccuracies were, and what actions need to be taken,  
16 if any, to provide for the type of consistency in TUSD Annual Report data that would  
17 allow for accurate year-to-year comparisons and analysis, and to revise the SMAR to the  
18 extent necessary once these data issues have been addressed.  
19

20 (3) By supplementing the DAR to include any data relating to (a) the racial/ethnic  
21 breakdown of ridership on individual buses providing transportation to District schools and  
22 (b) the racial/ethnic breakdown of students issued SunTrans passes for public  
23 transportation to District schools that was considered by the Special Master in preparing  
24 the SMAR that has not already been provided to the Plaintiffs.  
25

26 (4) By revising the SMAR to specifically address the development of the Teacher  
27 Diversity Plan and the parties' agreement concerning how diversity is to be measured  
28

1 under that Plan and to report on the District's progress in achieving diversity under the  
2 definitions and approach set forth in that Plan.

3  
4 (5) By revising the SMAR to include the comprehensive assessment of the original  
5 ALE Plan of Action and the Supplement, including UHS and ELLs, directed by the Court  
6 in its Order of January 27, 2016 (Doc. 1895), including, finalization of the Special  
7 Master's February 12, 2017 draft R&R concerning ALEs to *inter alia*, address goals to be  
8 applied to assess the successful implementation of the USP provisions relating to access to  
9 ALEs (inclusive of UHS and for ELLs and in the dual language programs), the relative  
10 participation of white, African American and Latino (including ELL) students in ALEs and  
11 their completion rates/outcomes, and any measures that could practicably be undertaken by  
12 TUSD, acting in good faith, to improve participation and completion rates and outcomes.  
13

14  
15 (6) By revising the discussion of the GSRR in the SMAR to omit references to the  
16 GSRR as it affected the 2016-17 school year.

17  
18 (7) By supplementing the SMAR to include discussion of the use of Family Centers  
19 to integrate magnet schools and programs, the District's failure to implement the "two  
20 way" approach to family engagement set forth in its FACE Plan, and the state of the  
21 District's efforts to collect family engagement data and conduct assessments of family  
22 engagement efforts.

23  
24 (8) By revising the his SMAR to address what the basis is for his finding that "it  
25 does not appear that the racial composition of the schools where family engagement is  
26 more robust is significantly different than the racial composition of schools with less  
27 assertive family involvement."  
28

1 (9) By supplementing the SMAR to include any data relating to the participation  
2 rates by race/ethnicity of TUSD students in extracurricular activities that was considered  
3 by the Special Master in preparing the SMAR that has not already been provided to the  
4 Plaintiffs and any explanation received from the District as to why such data leads to a  
5 different conclusion from that set forth in the DAR.  
6

7 (8) By investigating and reporting whether and to what extent TUSD's unilateral  
8 revisions to the FCI and adjustments to facilities scores in connection with the DMFP have  
9 resulted in inaccurate or unreliable TUSD data, and what actions need to be taken beyond  
10 the District "return[ing] to the originally agreed-upon FCI formula delineations," if any, to  
11 provide for the type of consistency in TUSD Annual Report data that would allow for  
12 accurate year-to-year comparisons and analysis, and to revise the SMAR to the extent  
13 necessary once these data issues have been addressed.  
14  
15

16 (9) By revising the SMAR to specifically address the development of the DMFP  
17 and the implications of that plan and progress in preparing a bond to fund it on the  
18 District's implementation of the USP's facilities provisions.  
19

20  
21 //

22 //

23 //

24 //

25 //

26 //

27 //

28

1 Dated: July 17, 2017

2

3

MALDEF  
JUAN RODRIGUEZ  
THOMAS A. SAENZ

4

5

/s/ Juan Rodriguez  
Attorney for Mendoza Plaintiffs

6

7

8

PROSKAUER ROSE LLP  
LOIS D. THOMPSON  
JENNIFER L. ROCHE

9

10

11

/s/ Lois D. Thompson  
Attorney for Mendoza Plaintiffs

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28



1  
2  
3  
4  
5  
6  
7  
8  
9  
10  
11  
12  
13  
14  
15  
16  
17  
18  
19  
20  
21  
22  
23  
24  
25  
26  
27  
28

**CERTIFICATE OF SERVICE**

I hereby certify that on I electronically submitted the foregoing MENDOZA PLAINTIFFS’ OBJECTIONS TO THE SPECIAL MASTER’S 2015-16 ANNUAL REPORT AND REQUEST THAT HE BE DIRECTED TO SUPPLEMENT AND REVISE PORTIONS THEREOF to the Office of the Clerk of the United States District Court for the District of Arizona for filing and transmittal of a Notice of Electronic Filing to the following CM/ECF registrants:

P. Bruce Converse  
bconverse@steptoe.com

Paul K. Charlton  
pcharlton@steptoe.com

Samuel Brown  
samuel.brown@tusd1.org

Todd A. Jaeger  
todd.jaeger@tusd1.org

Rubin Salter, Jr.  
rsjr@aol.com

Kristian H. Salter  
kristian.salter@azbar.org

James Eichner  
james.eichner@usdoj.gov

Shaheena Simons  
shaheena.simons@usdoj.gov

Peter Beauchamp  
peter.beauchamp@usdoj.gov

Special Master Dr. Willis D. Hawley  
wdh@umd.edu

Dated: July 17, 2017

/s/ Juan Rodriguez  
Juan Rodriguez

# **EXHIBIT 1**

**December 12, 2016**

**To: Parties**

**From: Bill Hawley**

**Re: Mendoza and Fisher Plaintiffs Request that the District be Reported as Noncompliant**

**Reasons for this Report**

On October 28, 2016, the Mendoza plaintiffs requested that the Special Master report to the Court that the District is in noncompliance with respect to several issues and is asks the Special Master direct the District to remedy other concerns that it has related to the District's Annual Report. On November 28, 2016, the District responded to the Mendoza plaintiffs who, in turn, responded to the District on December 6, 2016. Many of the issues raised by the Mendoza plaintiffs deal with whether the District has consulted appropriately with the plaintiffs and the Special Master pursuant to Section I.D,1 of the USP. For some of these issues, the Mendoza plaintiffs implicitly object to actions taken by the District. The Mendoza plaintiffs also (1) raise concerns about ethnic classification and (2) request that the Special Master report to the Court that the District is in noncompliance with respect to its appointment of first year teachers as provided for in the USP. On December 8, 2016, the Fisher plaintiffs joined the Mendoza plaintiffs with respect to actions they wish the Special Master to take.

Before taking these matters to the Court, I am seeking additional information requesting the District to take certain actions in the hope that this will resolve at least some of the concerns. This report identifies the information I believe is needed and also provides an overview of my thinking about the issues at this stage of my consideration.

**I.D.1 Issues**

Overview

Complaints by the Special Master and the plaintiffs about adequate opportunities to review and comment on particular actions proposed or taken by the District are a continuing reality. Likewise, the District complains that requests for information the plaintiffs and the Special Master believe are needed for appropriate comment are too often

burdensome and inappropriate. In some cases, the District asserts that particular actions it proposes to undertake are not covered by Section I.D.1 of the USP.

The relevant wording of I.D.1 is:

*... for all new or amended plans, policies, procedures, or other significant changes contemplated pursuant to this order, the District shall solicit the input of the Special Master and the plaintiffs and submit such items for review before they are put into practice or use.*

How the District and the plaintiffs and the Special Master interpret this provision hangs on the meaning of the word significant.

Effective organizations constantly change in response to experiences, new insights and changing events. If the District needed to consult with the plaintiffs and the Special Master with respect to any changes it makes in plans policies and procedures, its ability to improve as it moves forward to implement the provisions of the USP would be seriously hindered. So, how might one determine whether a proposed or current action is “significant”?

I propose to define issues as significant in the context of I.D.1 that:

1. Change the intent of agreed-upon plans, policies and procedures.
2. Are likely to undermine the effectiveness of agreed-upon plans policies and procedures.
3. Have a substantial effect on the allocation of financial or human resources to the extent that this would affect the availability of resources to implement other elements of the USP.

I apply these tests of significance as I comment on each of the issues raised by the Mendoza plaintiffs related to I.D.1.

### Application and Selection Process for Oversubscribed Schools

The Mendoza plaintiffs are concerned that the prior agreement that a child of a District employee would be accorded priority only if the enrollment of that child at the requested school will help that school achieve its integration target has been amended so that the condition of improving integration of the selected school is no longer used as a criterion. The District denies that it changed the policy that conditions the priority ranking of employee students. But the policy in Appendix II-18 has no

condition relating to effects on integration. It appears that the District's response to the Mendoza concerns is non-responsive—at best. If the priority in the selection of a given school by the families of District employees is determined independent of whether the selection enhances integration, this changes the intent of the original agreement approved by the parties and should, therefore, have been reviewed and commented upon by the plaintiffs and the Special Master. Until the I.D.1 process is applied to this issue, priority in the admission of students of District employees to oversubscribed schools should be limited only to those students whose attendance at the school involved will increase integration.

It is unclear how integration targets should be set. Arguably, the District's current policy in this respect is too limiting.

#### Marketing Outreach and Recruitment Plan

Had the District described its actions that the Mendoza and Fisher plaintiffs feel represent a revision of the plan as strategies to more effectively implement the plan--which I believe that the actions represent--there would be no justification for arguing that the plan was revised. Surely, if the District discovers ways to better implement plans and provisions of the USP that do not change the intent will significantly alter resources, the District should be credited with improvements rather than charged with noncompliance.

#### Dropout Prevention and Graduation Plan

Since the District has not shared the revisions it says it made to the DPGP, it is not possible to know whether the changes warrant review under I.D.1. The District should provide the plaintiffs and the Special Master with the revisions it (inexplicably) says it will provide in the next annual report. When the revisions are provided, the tests of whether they should be subject to I.D.1 that I outlined above can be applied.

#### Policy Regulations Related to Discipline

The issues here are quite substantive and should be reviewed under the I.D.1 provisions of the USP. These issues have been discussed at length in the context of revisions to the GSRR/Code of Conduct. It is clear that the plaintiffs the Special Master on the one hand and the District on the other have significant disagreements about what "exclusionary discipline" means,

when students have the right to appeal, and what the requirements for considering alternatives with respect to suspension should be. Frankly, it seems absurd to argue that students who participate in DAEP are not involved in exclusionary discipline.

I note that the debates that underlie this issue will not be resolved by continuing to postpone submission to the Board. Positions have not changed and the issues will not be resolved by “minor” revisions posing as clarifications. Should the District decide to take the proposed Code of Conduct to the Board without once again sending it to the P/SM, that might be the most expeditious approach.

Until revisions to the Code of Conduct are approved by the Court, the District should abide by processes specified Section VI.B.2.b. of the USP and by the policies in place before the District made its changes to these policies that it describes as minor in its annual report and which it presumably clarified, at least in part, in its October letter to principals.

It seems critically important that the District report actions in particular categories—such as in-school, out-of-school, etc.) rather than grouping such actions together as exclusionary or non-exclusionary.

#### Facilities Condition Index Component Weights

Altering agreed-upon weights of different components of the FCI is substantive, especially given that these changes made by the District deal with two unrelated dimensions of the FCI. Moreover, reducing the weight given to technology/communications when significant investments have been made in the District to increase the capacity of the District to utilize technology to enhance student learning appears inappropriate. The District argues that the Technology Condition Index covers the technology readiness of the District and this warrants the changes in the FCI. However, the FCI and the TCI were developed at roughly the same time. The redundancy issue was not raised then. And, if the TCI covers the technology issues initially covered in the FCI, why is any weight accorded to technology in the FCI?

The District should submit the proposed changes in the elements of the FCI for review and comment by the plaintiffs and the special District explaining the justification for this change.

## **Other Issues**

### **Certificated Staff**

The Mendoza plaintiffs have withdrawn their request that the Special Master bring the issue of the District's aggregation of different certified staff in reported ethnicity to the attention of the Court. I believe this is a mistake and that the District should disaggregate certified staff so that comparisons can be made over time as to the extent to which staff had been diversified. This is critically important to assess the effectiveness of the District in meeting the goals of the USP. In the USP the percentage of different racial and ethnic groups of teachers and principals is presented in appendix D. I request that the District present the plaintiffs and the Special Master with the ethnic breakdown of the following categories of certified personnel: teachers, principals, central office administrators and other certified personnel. Such information should be provided for the current year and at least the past three years.

### **Ethnic Classification of Students and Staff**

It would be very difficult to know whether the District has achieved many goals of the USP if the definition of ethnicity has changed. The District should clarify when it began to use the current definitions of different ethnic groups for reporting purposes.

### **Assignment of First Year Teachers**

The clear intent of the USP is to minimize the number of first year teachers serving in schools where students are achieving below the District average. Among the reasons for this provision is that beginning teachers are invariably less effective than more experienced teachers so that when they are deployed in schools serving students who are struggling, the achievement of these students is undermined. Further, deploying beginning teachers and schools where students are under-achieving almost certainly increases the likelihood that these teachers will leave the District.

In its defense, the District argues that the provision of the USP at issue says that the District must make efforts to avoid assigning first year teachers to underperforming schools and that it has done made such efforts. Clearly, those efforts have not been successful because 80 percent of beginning teachers are teaching in low performing schools in the current year.

It may be that the District did all it could reasonably do to avoid placing first year teachers in schools where students are performing below the District average. But, the District does not describe what efforts it made. The District should describe what it did to minimize the number beginning teachers in low performing schools. The point here is that whether the District is in compliance with the provision of the USP can only be known if we know the extent of the District's efforts.

### **Summary**

Should the District maintain that it need not submit for review and comment on its recent activities related to oversubscribed schools, market outreach and recruitment dropout prevention and graduation, identified discipline policies, and the weights of components in the FCI, I will ask the Court require the District to submit these issues to the plaintiffs and the special master pursuant to the provisions of Section I.D.1 of the USP.

With respect to other issues, I am asking the District to:

1. Report the racial composition of certified staff as indicated above (or in equivalent groupings) for at least the last four years.
2. Clarify when it began to use the current ethnic definitions in reporting the racial composition of students and staff.
3. Identify special efforts made to avoid assigning first year teachers to schools where students are performing below the district average.

I think that rather than ask the Court to find the District in non-compliance when the facts fit, I will include the relevant information in my Annual Report.



# **EXHIBIT 2**

MENDOZA PLAINTIFFS' REQUEST THAT THE SPECIAL MASTER BRING MULTIPLE INSTANCES OF THE DISTRICT'S NONCOMPLIANCE WITH THE USP AND WITH ITS UNDERTAKINGS RELATED THERETO TO THE COURT'S ATTENTION

October 28, 2016

During the course of their review of TUSD's 2015-16 Annual Report, the Mendoza Plaintiffs have encountered numerous instances in which TUSD has failed to comply with the USP and with its undertakings related to the implementation of the USP. We write now to request that, pursuant to USP Section X, E, 6, you bring the instances discussed below to the Court's attention.

***Failures to Comply with USP Section I,D,1 and with the District's Express Agreements Concerning Its USP Mandated Policies and Procedures***

It appears that in the last year, on at least four occasions, the District has unilaterally revised/amended/changed plans and/or policies subject to the review and comment (and ultimate court review if warranted) process mandated by Section I,D,1 of the USP.

*Changes to the application and selection process for oversubscribed schools*

TUSD states at page II-41 of the Annual Report that it made "revisions" to the application and selection process for oversubscribed schools "giving children of District employees **special consideration** in the lottery process and ... giving current students and their siblings consideration as continuing resident students." (Emphasis added.)

Apart from the fact that these changes were made unilaterally and without TUSD having followed the Section I,D,1 process, they violate TUSD's express agreement with the parties and the Special Master.

As the Special Master will no doubt recall, the priorities to be assigned in the lottery process were the subject of extensive discussion among the parties because they are so important to the creation of a process that has the greatest likelihood of enhancing the integration of the District's schools.

Attached is a copy of the Governing Board Policy relating to oversubscribed schools in the form that was agreed to by the parties in 2015. Also attached is a copy of what the District asserts is its current policy which was attached to the Annual Report as Appendix II-18. The document that appears as Appendix II-18 is substantially different from that agreed to by the parties.

Failure to consult with respect to changes to a policy governed by the USP is itself a serious instance of noncompliance. But what makes this particular instance of noncompliance so serious is that the District knowingly abandoned the extensively negotiated condition that must be applied when the child of a District employee participates in the lottery process: priority is to be accorded **ONLY** if the District employee's child enrollment at the requested school "will help that school meet integration targets."

This provision and the negotiated provision that gave other children of District employees priority before the remainder of District children in the lottery process but AFTER children living in the attendance zone of a racially concentrated school whose enrollment at the requested school would enhance integration and children, more generally, whose attendance at the requested school would help the receiving school meet integration targets was of great concern to the Plaintiffs because it potentially would weaken the lottery process's goal of enhancing integration. As part of the agreement permitting the District to revise the lottery process to give some precedence to the children of District employees, the District agreed to study the effects of the provisions after two years and sunset them if they were found to hinder integration. Instead, as admitted by the District in its Annual Report, it simply ignored that agreement and made a revision that is even more likely to hinder integration than what the Plaintiffs ultimately agreed to accept.

This act of noncompliance not only violates the USP. It also manifests lack of good faith in the District's implementation of its desegregation obligations.

*Changes to the Marketing, Outreach, and Recruitment Plan*

TUSD states at page II-35 of the Annual Report that in 2015, it "updated" the Marketing, Outreach, and Recruitment Plan. However, it never presented the revised "updated" Plan to the Plaintiffs and the Special Master for review and comment as required by USP Section I,D,1. Nor has it provided it as an Appendix to its Annual Report. Therefore, we remain unable to determine if the "updated" Plan does indeed provide increased strategies to recruit African American and Latino students as the Annual Report asserts.

We also note that the version of the Marketing, Outreach, and Recruitment Plan on the TUSD website is the November 3, 2014 plan, revised for school year 2014-15. That posted plan therefore provides limited guidance to the public and the parties concerning the marketing, outreach, and recruitment efforts the District currently is pursuing. Yet, USP Section X,D requires the posting "of current information related to the various elements of [the USP]."<sup>1</sup>

---

<sup>1</sup> In noting this failure to follow the requirements of the USP, Mendoza Plaintiffs do not mean to suggest that the District should rush to post a revised policy that was not taken through the USP

*Changes to the Dropout Prevention and Graduation Plan*

TUSD states at page V-195 of the Annual Report that it has modified the Dropout Prevention and Graduation Plan to “revise its strategies for the 2016-17 year.” Not only did the District fail to solicit comment from the Plaintiffs and the Special Master concerning any proposed “revised strategies” and changes to the plan as required by USP Section I,D,1 ; the District states (also on page V-195) that it will not even provide a copy of the revised plan to the Plaintiffs and the Special Master **until it files its 2016-17 Annual Report** – that is, after that revised plan will have been in place for the entire school year.

We also note that this means that the version of the plan available to the public on the TUSD website (stated to be the version “re-revised March 13, 2015”) is not the current version of the plan that the District has represented it is following. Once again, the plan on the website therefore provides limited guidance to the public and the parties. Yet, USP Section X,D requires the posting of “current information related to the various elements of [the USP].”<sup>2</sup>

*Changes to Policy Regulations JI-R, JK-R1, JK-R2, and JK-R2-E3*

On page VI-317 of the Annual Report, the District describes and attaches (as Appendices VI-64 through VI-69) the above-cited TUSD Policy Regulations that it says reflect “Governing Board policy changes for the 2015-16 school year.” While Mendoza Plaintiffs were given an opportunity to review and comment on changes to the 2015-16 GSRR, they have no record of ever having received the above-cited revised policies for review and comment under USP Section I, D, 1. Significantly, the revised policy regulations include those governing short-term suspensions (JK-R1) and long-term suspensions (JK-R2), topics also covered in the GSRR that the District knows have been of concern to all Plaintiffs and the Special Master and that have led to extensive discussion among the parties as they have reviewed District changes to the GSRR and the new proposed Code of Conduct.

Changes in the referenced Governing Board policies implicate the GSRR and USP Sections VI, B, 2, a and c. Further, other of the revised Governing Board policies are covered by USP Section VI, B, 2, b which addresses “due process protections for student discipline” and expressly states as included in such policies Governing Board policy JK-R1 among others, which the District acknowledges it changed in 2015-16. Mendoza Plaintiffs are unable to tell what changes are reflected in the discipline-related policy changes as the appendices comprising them do not contain redlined edits, and Mendoza Plaintiffs were unable to locate copies of the governing policy regulations that existed before the changes made in 2015-16 either in earlier

---

Section I,D,1 process. Rather, they cite this violation as an added instance both of noncompliance by the District and a failure to provide the transparency mandated by the USP.

<sup>2</sup> See footnote 1, above.

Annual Reports or on the District website. In their Requests for Information, they have asked the District to identify the specific changes. However, regardless of the nature and extent of the changes, it is apparent that they were made without the District having first followed the USP Section I,D,1 process.

*Changes to Facilities Condition Index Component Weights*

The District states on page IX-350 of the Annual Report that in order to account for the existence of the Technology Condition Index (“TCI”), it “reduced the weight given to the communication category [in the Facilities Condition Index (“FCI”)] from 15 to 5 percent, with the 5 percent reflecting the facility-related responsibilities rather than the technology infrastructure. The team then increased the Grounds category, which includes playgrounds and athletic fields, from 5 percent to 10 percent.”

Mendoza Plaintiffs, and as far as they know, no other Plaintiff nor the Special Master, were consulted or provided an opportunity to comment on the decision to revise the FCI because of the existence of the TCI or the revised weights accorded to the components of the FCI as is required under USP Section I, D, 1.

***Misleading Failure to Provide Information Consistent with the Categories and Definitions Set Forth in the USP***

*“Certificated Staff”*

TUSD purports to present information concerning the race and ethnicity of its “certificated staff”; however it has improperly employed its own self-serving definition of “certificated staff” and failed to use the definition expressly set forth in the USP.

The USP states in Appendix A, Definition 5 that “Certificated Staff” “refers to all personnel employed by the Tucson Unified School District who, at a minimum, hold a professional certificate issued by a state licensing entity and are employed in a position for which such certificate is required by statute, rule of the professional educator standards board, or written policy or practice of the District.” By contrast, the District states that for purposes of reporting its statistics on the racial and ethnic composition of its “certificated staff” it is defining that term to include “not only classroom teachers but site administrators and other positions such as counselors, learning support coordinators, library media staff, **etc.** who support student learning at the school sites.” (Annual Report at IV-76, footnote 41; emphasis added.) Apart from the fact that who is included in the District’s new unilateral and vague definition of “certificated staff” is unclear, the District’s newly created category likely includes a larger proportion of African American and Latino personnel than would be included in the USP definition of that category --- and therefore distorts the results being reported by the District --

given that it is more likely, given the demographics of the District, that relatively more African American and Latino personnel will be found among the ranks of learning support coordinators, library media staff, teaching assistants, and student success specialists than among those personnel who fall within the USP definition of “certificated staff.”

Mendoza Plaintiffs not only believe that the District must be required to revise the portions of the Annual Report relating to “certificated staff.” They also believe that the District’s noncompliance in failing to employ the definition of “certificated staff” expressly set forth in the USP should be reported to the Court.

*“USP Ethnicity Coding”*

With respect to the reporting of disciplinary outcomes, the USP very expressly states that data is to be presented “substantially in the form of Appendix I for the school year of the Annual Report together with comparable data for every year after the 2011-2012 school year. (USP, Section VI, G, 1, b.)

However, Appendix VI-54 to the 2015-16 Annual Report which the District states is intended to address this requirement (Annual Report at VI-316) fails to do so. To the contrary, the appendix states: “This discipline **data differs from prior USP reporting** because this report uses updated USP ethnicity coding. Prior USP reports used federal ethnicity coding. The total N sizes remain the same. Only distribution across ethnicities has changed.” (Emphasis added.) The data reported in Appendix VI-54 for the years 2012-13 to 2014-15 now significantly conflicts with data previously provided for the same years (with slight changes in total N size) and makes meaningful comparison to the USP baseline year of 2011-12 impossible. (*Compare* Appendix VI-54 *with* the Annual Report for 2014-15, Appendix VI-1.) The change in ethnicity coding has created data that is not “substantially in the form of Appendix I” to the USP and data that is not useful in meaningfully assessing District success in implementing the USP.

Further, there has been no agreement by the Plaintiffs to substitute something the District now calls “updated USP ethnicity coding” for the “federal ethnicity coding” previously used in USP reporting. Not only should this instance of noncompliance with the USP be brought to the Court’s attention. The District also should be directed to revise Appendix VI-54 and all other USP related reports and appendices that use “updated USP ethnicity coding” to substitute “federal ethnicity coding”, and the District should be directed to use “federal ethnicity coding” for all future USP reporting.

***Failure to Comply with USP Section IV,E,5 Requiring the District to Reduce the Number of New Teachers and New Principals Assigned to Racially Concentrated Schools And/Or Schools Performing Below the District Average***

As detailed in Mendoza Plaintiff's RFIs concerning Section IV of the USP, notwithstanding the provisions of the USP, 50% of first year principals (three of six) and 80% of first year teachers (102 of 127) were assigned to racially concentrated schools and/or schools performing below the District average in the 2015-16 school year.

The Plaintiffs and the Special Master have repeatedly flagged this issue but the problem persists. Therefore, Mendoza Plaintiffs request that this instance of noncompliance with the USP be brought to the Court's attention.

In addition, given that the District has, for another year, treated the placement of first year teachers and first year principals at racially concentrated schools and/or at schools at which students are performing below the District average as the rule (and not as an exception), Mendoza Plaintiffs request that the Implementation Committee monitor the District's assignment of first-year teachers and principals for the balance of this school year and through the hiring process for next year in an effort to actively manage the District into compliance with USP Section IV, E, 5.

# **EXHIBIT 3**



**TUSD RESPONSE TO MENDOZA PLAINTIFFS’  
OCTOBER 28, 2016 REQUEST RE ALLEGED NONCOMPLIANCE  
November 28, 2016**

On October 28, 2016, the Mendoza Plaintiffs submitted a request to the Special Master that he find the District in “non-compliance” with the Unitary Status Plan in certain respects, based on the District’s 2015-16 Annual Report. The District responds to each alleged instance below.

**A. USP Mandated Policies and Procedures**

**1. Application and selection process for oversubscribed schools**

The Mendoza Plaintiffs claim that the District made changes to the application and selection process for oversubscribed schools during the 15-16 school year, without following the I.D.1 process.

**District Response:**

The only changes to the wording of the application and selection process during the 15-16 school year were minor, ministerial changes which had no impact on that process, and did not require the invocation of the I.D.1 process, as shown in the chart below.

June 2015 Version, approved by SM and Plaintiffs	November 2015 Version	Reason for Revision
Applications from eligible students for magnet schools will be accepted pursuant to the same rank-ordered priorities shown in Open Enrollment below.	Eligible students <b>will be placed</b> in magnet schools pursuant to the same rank-ordered priorities shown in Open Enrollment below.	The lottery determines placement priorities, not application acceptance priorities. This change merely provides clarity.
Applications for open enrollment will be accepted pursuant to the following rank-ordered priorities.	<b>Students applying</b> for open enrollment will be <b>placed</b> pursuant to the following rank-ordered priorities.	The lottery determines placement priorities, not application acceptance priorities. This change merely provides clarity.
Nonresident students, who are already enrolled in a TUSD school or program or who have a sibling so enrolled, are considered, in the lottery as District resident students.	Nonresident students, who are already enrolled in a TUSD school or program or who have a sibling so enrolled, are considered, <b>for the purposes of school choice placement</b> , as District resident students.	This simply replaces the undefined term “lottery” with “school choice placement.”
District resident students who are siblings of students currently enrolled at the requested school.	Students who are siblings of students currently enrolled at the requested school.	See above. Because these students are already considered resident students for purposes of placement, the words “District resident” were redundant and unnecessary.

See Attachment A, JFB Revised 6.3.15 and Attachment B, JFB Revisions 11.10.15.

The District did not “abandon” the condition that children of employees would receive priority at level 2 only if their child’s placement improved integration at the receiving school. The language at issue is included in **both** the approved June and November versions of the policy at level 2 of the priority list:

*“2. Any student, including any non-resident student, who is the child of an employee as defined above and whose enrollment at the receiving school will help that school meet integration targets.”*

No change in policy or practice relating to priority for children of employees has been made from the approved June, 2015 version.

The District has fulfilled its agreement to review the impact of the “children of employee” provision *after one year*, at the start of the 2016-17 school year, and provide data to the Special Master and Plaintiffs. District staff began meeting in August to review and analyze preliminary impact data, and to develop strategies to further assess the impact of the provision. See Attachment C, Sunset Email. The District finalized its review in October. A summary of the results is attached in Attachment D, “Children of Employee Placement Impacts.”

## **2. Marketing, Outreach, and Recruitment Plan**

The Mendoza Plaintiffs assert that the District revised the Marketing, Outreach, and Recruitment Plan during the 15-16 school year, without following the I.D.1 process.

### **District Response:**

The District did not revise the Marketing, Outreach, and Recruitment Plan during the 15-16 school year. The Marketing, Outreach and Recruitment Plan in effect throughout the 15-16 school year is the same plan in effect at the end of the 14-15 school year, which was attached to the 14-15 Annual Report.<sup>1</sup>

## **3. Dropout Prevention and Graduation Plan**

The Mendoza Plaintiffs assert that the District revised the Dropout Prevention and Graduation (“DPG”) Plan during the 15-16 school year, without following the I.D.1 process.

### **District Response:**

No revisions or changes were made to the DPG Plan during the 15 -16 school year. At the end of that year, District staff met to analyze the plan and strategies for the next school year, as part of its ongoing commitment to the continuous and recurring cycle of monitoring, assessment and adjustment, but no revisions or changes resulted during the 15-16 school year.

---

<sup>1</sup> During the preparation of this response, the District discovered that the wrong document was included in an Appendix to its 15-16 Report. The District will file an amended report and appendix correcting this.

#### **4. Policy Regulations JI-R, JK-R1, JK-R2, and JK-R2-E3**

The Mendoza Plaintiffs assert that the District revised certain policies without soliciting Special Master and Plaintiff comments.

##### **District Response:**

The District did not make any revisions to Policy JK or JI during the 15-16 school year. The District did make certain minor revisions to regulations implementing these policies. Policy changes must be approved by the Governing Board; regulation changes are approved by the Superintendent to ensure alignment with the policy objectives but also to outline operational details. Accordingly, a regulation may be revised as often as once or twice each year to clarify operational details necessary to accomplish the objectives. As evident in Attachment E, the revisions reflect minor word changes and updates to outdated organizational references. None of the revisions represent a “significant change contemplated pursuant to the [USP]” that would trigger a I(D)(1) review.

#### **5. Changes to Facilities Condition Index Component Weights**

The Mendoza Plaintiffs assert that District revised two of the weights in the FCI without soliciting feedback from the Plaintiffs and Special Master.

##### **District Response:**

When the District created the Facilities Condition Index (FCI) the District did not have a Technology Condition Index (TCI) so communications systems were added as a category to be evaluated. When the District developed the TCI, it included a category titled “technology communications systems” to evaluate communications systems. The communication category in the FCI was duplicative of the newly-created category evaluated in the TCI. Thus, the District reduced the FCI weight for the communication category from 15% to 5% (the remaining 5% reflects the facilities-related facets of communication rather than those related to technology infrastructure). The District then increased the grounds category from 5% to 10% (playgrounds, parking lots, etc), and special systems from 5% to 10% (fire alarms, security, intercoms, etc). These changes were non-material, necessary to avoid duplication, and did not significantly impact any school’s FCI score or TCI score.

### **B. Categories and Definitions Set Forth in the USP**

#### **1. Certificated Staff**

The Mendoza Plaintiffs assert that the District is has not used the definition of “certificated staff” set forth in the USP in reporting data in certain sections of the Annual Report.

##### **District Response:**

The positions listed in the referenced section of the annual report (classroom teachers, site administrators, counselors, learning support coordinators, and library media staff) all require certifications, and thus are certificated staff. Nothing in the USP or related order prohibits the District from presenting information in the manner best designed to inform the reader – including further defining the term “certificated staff” for those readers who may not know which employees “hold a professional certificate issued by a state licensing entity and are employed in a position for which such certificate is required by statute, rule of the professional educator standards board, or written policy or practice of the District.” See USP Appendix A. Providing such clarification is not an instance of non-compliance, it is an example of transparency.

## **2. Ethnic Classification**

The Mendoza Plaintiffs assert that the District reported data that is not substantially in the form of Appendix I in the USP, in the manner in which ethnicity is reported.

### **District Response:**

Early in the history of the USP, the parties spent considerable effort developing a classification methodology to ensure that ethnic classifications were used which met the specific needs of the USP. This resulted in an agreed-upon departure from the federal approach to ethnicity classification. The Mendoza Plaintiffs now apparently wish to abrogate that agreement, used for the last three years, and request a return to the classification methodology used by the federal government. This issue has nothing to do with non-compliance.

## **C. Assignment of New Teachers**

The Mendoza Plaintiffs assert the District has assigned more new teachers and principals to racially concentrated or underachieving schools than permitted under the USP.

### **District Response:**


The District has not violated the USP. The relevant section – (IV)(E)(5) – provides as follows:

*Through the human resources department coordinator identified in Section (IV)(B)(1) above, the District **shall make efforts** to increase the number of experienced teachers and reduce the number of beginning teachers hired by Racially Concentrated schools or schools in which students are achieving at or below the District average in scores on state tests or other relevant measures of academic performance, and to avoid assigning first-year principals to Racially Concentrated schools or schools serving students who are achieving below the District average in scores on state tests or other relevant measures of academic performance. Exceptions to this provision may be permitted by the Superintendent on a case-by-case basis. (Emphasis added)*

The USP only requires the District to “make efforts” in these areas. Nowhere in the USP, any action plan, or any other agreement are there specific limits related to assignment of

teachers and principals. The District has clearly “made efforts” in these areas as set forth in its annual reports, and that is all the USP requires.

# ATTACHMENT A

 <b>Tucson, Arizona</b>  <b>GOVERNING BOARD POLICY</b>	POLICY TITLE: Open Enrollment and School Choice
	POLICY CODE: JFB

The District has an open-enrollment program as set forth in A.R.S. 15-816 et seq. In addition to the open-enrollment program, the District has a magnet program; together they form the District's School Choice Program. The ~~open-enrollmentschool choice~~ program described in this policy shall be placed on the District website and made available to the public on request.

No tuition shall be charged for open enrollment, except as authorized by applicable provisions of A.R.S. 15-764, 15-797, 15-823, 15-824, and 15-825.

### Definitions

*District resident ~~pupil~~pupil-student* means all ~~students~~ who resides within the school district boundaries.

*Resident transfer ~~pupil~~pupil-student* means a resident ~~pupil~~pupil-student who is enrolled in or seeking enrollment in a school that is within the school district but outside the attendance area of the ~~pupil~~pupil-student's residence.

*Nonresident ~~pupil~~pupil-student* means a ~~pupil~~pupil-student who resides in this state and who is seeking enrollment in a school district other than the school district in which the ~~pupil~~pupil-student resides

*Child of Employee means a child or ward of an employee, including non-resident employees.*

### Enrollment Options

District resident ~~pupil~~pupil-students may enroll in another school district or in another school within this District. Resident transfer ~~pupil~~pupil-students and nonresident ~~pupil~~pupil-students may enroll in schools within this District, subject to the procedures that follow

### Information and Application

The Superintendent shall prepare a written information packet concerning the District's application process, standards for acceptance or rejection, and policies, regulations, and procedures for open enrollment. The packet will be made available to everyone who requests it.

The information packet shall include the enrollment application form and shall advise applicants by what date they must submit enrollment applications to be considered for priority enrollment for the following school year.

## Capacity

The Superintendent shall annually estimate how much excess capacity may exist to accept transfer ~~pupils~~students. The estimate of excess capacity shall be made for each school and grade level.

## Assignment

Each student shall be assigned to an attendance zone school based on the student's legal address. If a student does not file an open enrollment/magnet application, the student will automatically be assigned to his or her attendance zone school.

A student wishing to enroll at a school other than his or her attendance zone school may apply to one of the following school choices:

- **Magnet Schools/Programs**

Magnet Schools/Programs offer a specialized curriculum to a student body representing a cross section of the community and reflecting its diversity. The District may establish entrance criteria for Magnet Schools/Programs, and only those students who meet the criteria shall be eligible to attend these schools or programs. Applications from eligible students for magnet schools will be accepted pursuant to the same rank-ordered priorities shown in Open Enrollment below.

- **Pipeline Schools**

Pipeline Schools are K – 12<sup>th</sup> grade schools designed to enable students to continue a theme or magnet program throughout their educational career. Students enrolled in an elementary or middle school identified ~~on JFB – E 2, Identified as~~ Pipeline Schools, will be automatically eligible to attend the associated pipeline middle or high school upon promotion from the student's current school and will be placed in that school if the student, parent or guardian accepts that placement.

- **Open Enrollment**

If a student wants to attend a TUSD school other than that student's attendance zone school, but not a magnet school/program, the student may apply to that school through open enrollment. Applications for open enrollment will be accepted pursuant to ~~these the following~~ rank-ordered priorities. Nonresident students, who are already enrolled in a TUSD school or program or who have a sibling so enrolled, are considered, in the lottery, as District resident students.

1. District resident ~~pupils~~students who are siblings of students currently enrolled at the requested school.

2. Any student, including any non-resident student, who is the child of an employee as defined above and whose enrollment at the receiving school will help that school meet integration targets.



23. District resident ~~pupil~~students who live in the attendance zone of a racially concentrated school and whose enrollment at the receiving school will help that school meet integration targets.

34. District resident ~~pupil~~students whose enrollment at the receiving school will help that school meet integration targets.

~~5. Any student, including any non-resident student, who is the child of an employee as defined above.~~

46. All other District resident ~~pupil~~students.

~~5. Non-resident pupils who are siblings of students currently enrolled at the requested school.~~

67. Non-resident ~~pupil~~students whose enrollment at the receiving school will help that school meet integration targets.

78. All other non-resident ~~pupil~~students.

Students who are not accepted into magnet schools, magnet programs, or open enrollment will be placed in a waiting pool and considered for acceptance when space becomes available. Placement will be made according to the priorities listed above.

### Admission Standards

A ~~pupil~~student who has been expelled, or is in the process of being expelled, by any school district in this state or who is not in compliance with a condition of disciplinary action imposed by any other school or school district or with a condition imposed by the juvenile court shall not be admitted. Acceptance for enrollment may be revoked upon finding the existence of any of these conditions.

### Notification

The District shall notify the emancipated ~~pupil~~student, parent, or legal guardian in writing whether the applicant has been accepted, placed on a waiting list pending the availability of capacity, or rejected.

As provided by A.R.S. 15-816.07, the District and its employees are immune from civil liability for decisions relative to the acceptance or rejection of the enrollment of a nonresident ~~pupil~~student when the decisions are based on good faith application of this policy and the applicable statutory requirements and standards


Adopted: August 4, 2010 (corrected wording)  
Revised: October 18, 2012 (updated legal ref only)  
Revised: May 27, 2014

LEGAL REF.: A.R.S. §15-341  
§15-816

§15-816.01  
§15-823  
§15-824  
§15-825

**CROSS REF:** Policy AC – Non-Discrimination; Policy JB – Equal Educational Opportunities and Anti-Harassment; Policy JC – Student Attendance Boundaries; Policy JE - Student Attendance

# ATTACHMENT B

 <p><b>TUSD</b> Tucson, Arizona</p> <p><b>GOVERNING BOARD POLICY</b></p>	POLICY TITLE: Open Enrollment and School Choice
	POLICY CODE: JFB

The District has an open-enrollment program as set forth in A.R.S. 15-816 et seq. In addition to the open-enrollment program, the District has a magnet program; together they form the District’s School Choice Program. The school choice program described in this policy shall be placed on the District website and made available to the public on request.

No tuition shall be charged for open enrollment, except as authorized by applicable provisions of A.R.S. 15-764, 15-797, 15-823, 15-824, and 15-825.

**Definitions**

District resident student means a student who resides within the school district boundaries.

Resident transfer student means a resident student who is enrolled in or seeking enrollment in a school that is within the school district but outside the attendance area of the student’s residence.

Nonresident student means a student who resides in this state and who is seeking enrollment in a school district other than the school district in which the student resides

Child of Employee means a child or ward of an employee, including non-resident employees.

**Enrollment Options**

District resident students may enroll in another school district or in another school within this District. Resident transfer students and nonresident students may enroll in schools within this District, subject to the procedures that follow

**Information and Application**

The Superintendent shall prepare a written information packet concerning the District’s application process, standards for acceptance or rejection, and policies, regulations, and procedures for open enrollment. The packet will be made available to everyone who requests it.

The information packet shall include the enrollment application form and shall advise applicants by what date they must submit enrollment applications to be considered for priority enrollment for the following school year.

## Capacity

The Superintendent shall annually estimate how much excess capacity may exist to accept transfer students. The estimate of excess capacity shall be made for each school and grade level.

## Assignment

Each student shall be assigned to an attendance zone school based on the student's legal address. If a student does not file an open enrollment/magnet application, the student will automatically be assigned to his or her attendance zone school.

A student wishing to enroll at a school other than his or her attendance zone school may apply to one of the following school choices:

- **Magnet Schools/Programs**

Magnet Schools/Programs offer a specialized curriculum to a student body representing a cross section of the community and reflecting its diversity. The District may establish entrance criteria for Magnet Schools/Programs, and only those students who meet the criteria shall be eligible to attend these schools or programs. ~~Applications from e~~Eligible students ~~for magnet schools~~ will be accepted-placed in magnet schools pursuant to the same rank-ordered priorities shown in Open Enrollment below.

- **Pipeline Schools**

Pipeline Schools are K – 12<sup>th</sup> grade schools designed to enable students to continue a theme or magnet program throughout their educational career. Students enrolled in an elementary or middle school identified as Pipeline Schools will be eligible to attend the associated pipeline middle or high school upon promotion from the student's current school and will be placed in that school if the student, parent or guardian accepts that placement.

- **Open Enrollment**

If a student wants to attend a TUSD school other than that student's attendance zone school, but not a magnet school/program, the student may apply to that school through open enrollment. ~~Applications-Students applying~~ for open enrollment will be accepted-placed pursuant to the following rank-ordered priorities. Nonresident students, who are already enrolled in a TUSD school or program or who have a sibling so enrolled, are considered, ~~in the lottery for the purposes of school choice placement~~, as District resident students.

1. ~~District resident s~~Students who are siblings of students currently enrolled at the requested school.
2. Any student, including any non-resident student, who is the child of an employee as defined above and whose enrollment at the receiving school will help that school meet integration targets.
3. District resident students who live in the attendance zone of a racially concentrated school and whose enrollment at the receiving school will help that school meet integration targets.

4. District resident students whose enrollment at the receiving school will help that school meet integration targets.
5. Any student, including any non-resident student, who is the child of an employee as defined above.
6. All other District resident students.
7. Non-resident students whose enrollment at the receiving school will help that school meet integration targets.
8. All other non-resident students.

Students who are not accepted into magnet schools, magnet programs, or open enrollment will be placed in a waiting pool and considered for acceptance when space becomes available. Placement will be made according to the priorities listed above.

### **Admission Standards**

A student who has been expelled, or is in the process of being expelled, by any school district in this state or who is not in compliance with a condition of disciplinary action imposed by any other school or school district or with a condition imposed by the juvenile court shall not be admitted. Acceptance for enrollment may be revoked upon finding the existence of any of these conditions.

### **Notification**

The District shall notify the emancipated student, parent, or legal guardian in writing whether the applicant has been accepted, placed on a waiting list pending the availability of capacity, or rejected.

As provided by A.R.S. 15-816.07, the District and its employees are immune from civil liability for decisions relative to the acceptance or rejection of the enrollment of a nonresident student when the decisions are based on good faith application of this policy and the applicable statutory requirements and standards.

Adopted: August 4, 2010 (corrected wording)  
Revised: October 18, 2012 (updated legal ref only)  
Revised: May 27, 2014  
Revised: July 14, 2015

**LEGAL REF.:**           A.R.S.   §15-341  
  §15-816  
  §15-816.01  
  §15-823  
  §15-824  
  §15-825

**CROSS REF:** Policy AC – Non-Discrimination; Policy JB – Equal Educational Opportunities and Anti-Harassment; Policy JC – Student Attendance Boundaries; Policy JE - Student Attendance

# ATTACHMENT C



## Brown, Samuel

---

**From:** Brown, Samuel  
**Sent:** Tuesday, August 16, 2016 11:07 AM  
**To:** Taylor, Martha; Nodine, Bryant  
**Cc:** Jaeger, Todd; Bruce Converse (BConverse@steptoe.com)  
**Subject:** FW: Policy JFB - Lottery Priorities

Martha/Bryant: here is the 6.8.15 email in which we agreed to modify the "sunset" provision and we committed to providing the SMP with certain information by the 10<sup>th</sup> day of this school year. Bryant, please schedule a time with Martha and I next week to review this data and prepare it for the SMP.

[REDACTED]

---

**From:** Brown, Samuel  
**Sent:** Monday, June 8, 2015 10:26 AM  
**To:** 'Thompson, Lois D.' <lthompson@proskauer.com>  
**Cc:** wdh@umd.edu; Juan Rodriguez (jrodriguez@MALDEF.org) <jrodriguez@MALDEF.org>; Anurima Bhargava <anurima.bhargava@usdoj.gov>; Zoe Savitsky <zoe.savitsky@usdoj.gov>; Eichner, James (CRT) (James.Eichner@usdoj.gov) <James.Eichner@usdoj.gov>; rsjr3@aol.com; Taylor, Martha <Martha.Taylor@tusd1.org>; Desegregation <deseg@tusd1.org>; TUSD (TUSD@rllaz.com) <TUSD@rllaz.com>  
**Subject:** RE: Policy JFB - Lottery Priorities

Lois/All: Pursuant to further discussions with the Mendoza plaintiffs we agree to modify the sunset agreement as follows:

In school year 2016-17, based on 10<sup>th</sup> day enrollment data, the District will provide the following information to the Special Master and Plaintiffs: the number of children placed into schools through lottery Priorities 2 or 5 (including their race/ethnicity, resident/non-resident status, and school of attendance). Such information will be provide for review only, and shall not be used to change or eliminate Policy JFB prior to the agreed-upon second-year evaluation.

In two years, but no later than September 30, 2017, the District will evaluate whether Priorities 2 and 5 hinder integration at TUSD schools. If the evaluation reveals that Priority 2, Priority 5, or both priorities are operating to hinder integration at TUSD schools, then one (or both) shall be removed from Policy JFB by October 31, 2017.

Please let us know promptly if this proposal is acceptable to everyone.

---

**From:** Thompson, Lois D. [<mailto:lthompson@proskauer.com>]  
**Sent:** Wednesday, June 3, 2015 6:06 PM  
**To:** Brown, Samuel  
**Cc:** [wdh@umd.edu](mailto:wdh@umd.edu); Juan Rodriguez ([jrodriguez@MALDEF.org](mailto:jrodriguez@MALDEF.org)); Anurima Bhargava; Zoe Savitsky; Eichner, James (CRT) ([James.Eichner@usdoj.gov](mailto:James.Eichner@usdoj.gov)); [rsjr3@aol.com](mailto:rsjr3@aol.com); Tolleson, Julie; Taylor, Martha; Desegregation; TUSD ([TUSD@rllaz.com](mailto:TUSD@rllaz.com))  
**Subject:** Policy JFB - Lottery Priorities

Sam,

# ATTACHMENT D


## Children of Employee Placement Impacts

This is an analysis of the impacts of the preferential placement of children of employees. The table below shows the impacts of these placements on oversubscribed schools.

## Oversubscribed Schools (based on available seats)

School	Number Placed	Effect	Summary of Student Placement
Carrillo	3	Positive	All improved the composition
Davis	3	Positive	2 out of 3 improved the composition
Gale	2	Positive	Balanced placement
Hughes	2	No impact	Balanced placement
Miles ELC	7	No impact	Balanced placement
Rose	1	Negative	1 Hispanic student
Soleng Tom	1	Negative	1 Anglo student
Booth-Fickett	2	Positive	All improved the composition
Dodge	19	No impact	Placement matched integrated enrollment
Gridley	0	No impact	
McCorkle	4	Positive	Balanced placement
Pistor	3	Positive	Placement of 1 Anglo student improved the composition
Roskruge	6	Positive	Placement of 2 Anglo students improved the composition
Cholla*	1	Negative	1 Hispanic student
Rincon	3	No impact	Balanced placement
Sahuaro	5	Negative	5 Anglo students placed
Tucson	20	Positive	Composition of placements is integrated.

# ATTACHMENT E

 <p><b>Tucson, Arizona</b></p> <p><b>POLICY REGULATION</b></p>	REGULATION TITLE: <del>Rights and Responsibilities</del> —Student Transfer to Safe School
	CODE: JI – R
	LEAD DEPARTMENT: Academic Leadership

A student who is a victim or immediate family member of the victim of a violent crime, or of sexual harassment with contact, on school grounds ~~is allowed~~ shall be permitted to transfer to another school in the district. Administrators shall inform the victim of this option within 14 days of finding the student to be a victim of a violent crime. Violent crimes include either a misdemeanor or a felony in any of the following crimes:


Negligent homicide  
Manslaughter  
Second degree murder  
First degree murder  
Endangerment (with deadly weapon of dangerous instrument)  
Assault with physical injury  
Aggravated assault  
Unlawfully administering intoxicating liquors, narcotic drug or dangerous drug (with physical injury)  
Drive-by shooting  
Kidnapping  
Sexual assault  
Arson of an occupied structure  
Robbery  
Aggravated robbery  
Armed robbery  
Disorderly conduct (involving a deadly weapon or dangerous instrument)  
Misconduct involving weapons  
Depositing explosives  
Misconduct involving simulated explosive devices  
Adding poison or other harmful substance to food, drink or medicine

Reviewed: January 12, 2007 (Friday Report)

Revised: June 9, 2015

**LEGAL REF.:** No Child Left Behind Act, Section 9532

**CROSS REF.:**

 <b>Tucson, Arizona</b>  <b>POLICY REGULATION</b>	<u>POLICY REGULATION</u> TITLE: Student Discipline – Short-Term Suspension
	<u>POLICY</u> CODE: JK – R1
	<u>LEAD DEPARTMENT: Academic Leadership</u>

### Short-Term Suspension

#### **Definitions**

Most terms used in this document are defined in context. Since certain terms are not necessarily contextually defined, they are given immediately below.

“Abeyance Contract” is a contract between the parent, student and the school that sets forth the conditions under which the school agrees to not impose a suspension. If the student violates the agreement, the suspension will automatically be reinstated at that time without further process.

“Violation” is conduct which is prohibited at the District and which is identified as a violation in the “Guidelines for Student Rights and Responsibilities.”

"Parent" refers to a single parent, both parents, or to the person or persons with legal custody of the student.

"School Official" refers to any person granted the power to suspend students by the Governing Board.

“Short-Term Suspension” is the removal of a student from school and school activities for a period of time from a fraction of one (1) day through ten (10) school days' duration.

“Short-Term Pending Long-Term Suspension” is the initial removal of a student from school pending the formal due process proceedings required for long-term suspensions.

#### Alternatives to Suspension

Prior to any determination to suspend a student, the administrator shall first consider the use of appropriate alternatives to suspension, including, but not limited to: restorative conference, abeyance contract, or In-School Intervention.

## Short-Term Suspension Procedures:

### 1. Required Rudimentary Due Process

- a. As soon as possible following an alleged violation, the student ~~will~~shall be given oral or written notice of the alleged misconduct.
- b. If the student denies the allegation, the school official ~~will~~shall explain the evidence of the misconduct to the student.
- c. The school official ~~will~~shall give the student the opportunity to present the student's own version of the situation.
- d. The three elements given above constitute the "rudimentary due process" required before any disciplinary action may be taken whether it results in in-class/school discipline or short-term suspension.
  - i. ~~This~~Such due process ~~procedure~~ may be accomplished in a matter of minutes. Its purpose is to ensure that the facts of the situation are as clear as possible to the people concerned before any action is taken.
  - ii. The school official implementing the procedure is a fact finder. That school official must be satisfied that the student in fact did what the student was accused of doing.
  - ~~iii. This due process procedure shall be used in any disciplinary action whether it results in in-class/school discipline or short-term suspension.~~
  - iii. A student may be immediately removed from school without prior use of the due process procedures described ~~for the~~ above if the student's presence in school poses a continuing clear and present danger to persons or property or an ongoing threat of disrupting the academic process. However, due process ~~will~~shall be afforded as soon as possible and prior to the imposition of discipline. Only under emergency conditions, such as, when the student is not available for interview, may due process be provided following the application of discipline.
  - ~~iv. The due process procedures described above must be provided as soon as practicable following the removal of a student under emergency conditions. Only under emergency conditions, such as, when the student is not available for interview, may due process be provided following the application of discipline.~~

2. Decision

- a. Following the informal process described above and, if the facts warrant, the student may be suspended from school for a fraction of a day through ten ~~(10)~~ school days.
- b. The effective date of the suspension is the first ~~date~~ day the student is out of school for half of the day (or more).
- c. If the student must be released during the normal school day, an effort shall be made to contact the parent immediately. If the parent cannot be contacted, the student shall be kept at school until the end of the normal school day.

3. Written Notification: The Suspension Notice (See JK-R1-E1)

- a. The suspension notice (JK-R1-E1), giving notice of the short-term suspension must be delivered to the student whenever possible. A copy must be mailed to the parent through first class mail no later than the first day of the suspension and the school shall retain a copy in the student's cumulative record folder.
- b. Meaningful Access: The notice ~~must~~ shall be written in the home language. If the notice cannot be translated on the first day of suspension, the parent ~~must~~ shall be informed in their home language by telephone or in person.
- c. Notification of the short-term suspension ~~must~~ shall be sent to The Office of Student Equity,      within three days of the effective date of the suspension.

4. Parent Conference

If at all possible, a parent conference ~~should~~ shall be held at the time of the imposition of a short-term suspension.

- a. The purpose of the parental conference is to reach a satisfactory and workable solution to the problem the student is experiencing.
- b. As a result of this conference, the school official may opt to offer the student and parent the opportunity to have the suspension held in abeyance through the use of an abeyance contract. (See Policy Regulation JK-R4)



- c. A short-term suspension may be shortened as a consequence of a parental conference, but under no circumstances may it exceed ten (10) school days. The short-term suspension imposed may not be lengthened as a means of getting the parent to come to the school.
  - d. If the student's home language is other than English, an interpreter may be required at this conference.
5. The student is allowed access to class assignments. Homework ~~must~~ shall be made available for the parent to pick up at the school office. Additional assignments will be provided only after the student has completed and returned previous assignments.
6. Limitations upon the use of the short-term suspension
- a. Successive short-term suspensions ~~must~~ shall not be applied to avoid or postpone the formal due process procedures of ~~the~~ long-term suspension.
  - b. If it is necessary to remove a student from school for more than ten ~~(10)~~ days because of a ~~given incident or set of circumstances~~ particular violation, the procedure for the long-term suspension must be used. See Policy Regulation JK-R2
  - c. There is no limitation on the application of successive short-term suspensions for successive, discrete distinct incidents if the circumstances warrant. For example, if a student was suspended for three school days for punching another student, and on the day of his return did it again, a suspension of eight days could be imposed. As long as there is a second informal hearing before the second suspension, this total of eleven days (8 + 3) does not in itself violate the ten-day limit upon a single short-term suspension. The example illustrates an instance of two suspensions for two different violations and the suspensions occurred so close in time.
7. Appeal of a Short-Term Suspension
- a. A student or parent(s)/guardian(s) disagreeing with the decision to suspend may request a review of the school official's decision by the school official's immediate supervisor. Such request shall be made within three school days following the imposition of the suspension. The supervisor shall consider only the following grounds in reviewing the decision:
    - i. alleged denial of a right available to the student that resulted in an unfair hearing
    - ii. new evidence

- iii. allegation of insufficient evidence
  - iv. allegation of excessive punishment
  - b. The supervisory administrator may affirm the decision or reduce the discipline imposed. **The decision of the supervisor, upon review of the decision and the relevant facts available to him or her, is final.**
8. Student's Return to School Following a Short-Term Suspension
- a. On the day of the student's return to school, an administrator must-shall meet with the student and the student's parent for a re-entry conference.
  - b. The purpose of this conference is to review the expectations for student conduct and to review the supports that will be provided by the school to assist the student in a successful return to school.


~~**TUCSON UNIFIED SCHOOL DISTRICT**~~  
~~**TUCSON, ARIZONA**~~

Reviewed by Board: July 11, 1989  
Reviewed by Board: July 9, 1991  
Reviewed by Board: June 9, 1992  
Reviewed by Board: May 25, 1995  
Reviewed by Board: March 24, 2009  
Revised: June 18, 2009 [Added replaced policy only]  
Revised: July 9, 2015

**LEGAL REF.:** A.R.S. § 15-341  
A.R.S. §§15-840 – 15-844

**CROSS REF.:** JFCL – Anti-Harassment Policy – Student  
JI – Rights and Responsibilities  
JICA – Student Dress  
JICFA – Hazing  
JICG – Tobacco Use by Students  
JICH – Drug and Alcohol Use by Students  
JICI – Weapons in School  
JICJ – Use of Cell Phones and Other Electronic Signaling Devices  
JICL – Bully Prohibition and Prevention  
JKA – Discipline of, and Alternative Interim Placements for Special Education Students  
JKAA – Discipline, Suspension, Expulsion for 504 Handicapped Students

Replaces TUSD Policy # 5060

 Tucson, Arizona <b>POLICY REGULATION</b>	<u>POLICY REGULATION</u> TITLE: Long-Term Suspension
	<u>POLICY CODE</u> : JK – R2
	<u>LEAD DEPARTMENT</u> : <u>Academic Leadership</u>

## Long-Term Suspension

A Long-Term Suspension is the temporary withdrawal of the privilege of attending a school by a student for a period of time not less than eleven ~~(11)~~ and not more than one hundred eighty ~~(180)~~ consecutive school days. *Long-Term Suspensions of more than ~~forty-five (45)~~ thirty (30) days shall not be imposed except for violations assigned to Level 5.*

## Short-Term Suspension Pending a Long-Term Suspension

If a school official is considering a long-term suspension, the school official shall initially impose a “short-term pending long-term suspension” (See Governing Board Policy Regulation JK-R1 and Exhibit JK-R1-E2)

## Alternatives to Suspension

Prior to any determination to suspend a student, the administrator shall first consider the use of appropriate alternatives to suspension, including, but not limited to: restorative conference, abeyance contract, In-School Intervention, or Alternative Education Placement.

## Due Process Required for Long-Term Suspension

More formal process is required for suspensions longer than ten 10 school days. The elements of due process listed below must be made available for all long-term suspensions. Once fully apprised that these procedural elements are available, the parent and student may avail themselves of all of them, or they may knowingly, intelligently, and voluntarily waive them in whole or in part. School officials, and particularly those involved in the matter at hand, may not give any legal advice whatsoever (even if specifically requested to do so) to the parent or student regarding the exercising of these rights.

The procedural due process rights available throughout the process to all students who may be subject to a long-term suspension are listed below. The student is entitled to:

1. The right to representation by the parent, or legal counsel, ~~or some other adult representative authorized in writing by the parent~~
2. The right of the parent to be present at all proceedings involving their child

3. The right of the student, parent, or representative to reasonable access to non-privileged evidence and the student's records at least two days prior to the long term suspension hearing. (This right may be exercised at any reasonable time during regular school hours after first making arrangements with the principal or designee)
4. The right to be free from any requirements to present evidence against himself or herself
5. The right to present favorable evidence and witnesses
6. The right to question adverse evidence and witnesses presented at the proceeding
7. The right to have the testimony presented preserved at the student's own expense
8. The right to have an interpreter present, if one is necessary
- ~~9. The right to have a non-lawyer advocate to assist the parent in advocating for his or her child (non-lawyer advocates cannot advocate on behalf of the student or parent)~~

### Written Notification

After an initial investigation, the school official may decide that a long-term suspension is appropriate. If so, the school official making that decision will then send written notice by first class mail or hand delivered to the student and/or to the parent. (See Exhibit JK-R2-E2) A copy of JK-R2 Long-Term Suspension shall be enclosed with the written notice of suspension. As with all documents pertinent to this process, a copy of this notice will be retained in the student's cumulative record file.

1. The notice must be sent no later than three ~~(3)~~ school days following the imposition of a short-term suspension pending long-term suspension.
2. Meaningful Access: The notice must be written in the home language. If translation services are not available, the notice may be given orally through an interpreter. Documentation of the interpretation event must be maintained.
3. On or before the day the notice is delivered or mailed, the principal or designee shall make a reasonable effort to communicate verbally to the parent and the student the information contained in the written notice.
4. The formal Long-Term Suspension Hearing ~~must~~ shall be held within ten ~~(10)~~ school days of the date the short-term suspension became effective.
  - a. This is to keep the student out of school until it has been finally determined whether or not a long-term suspension will be imposed. A formal hearing is required before this determination can be made.

- b. The formal Long-Term Suspension Hearing may be held later than ten ~~(10)~~ school days only if the following rescheduling procedures are first followed:
  - i. ~~A hearing may be rescheduled by a parent~~The parent or student's representative submits by submitting a written or an oral request for a rescheduled hearing, which request demonstrates good cause. showing good cause to a school official. ~~A~~ The request must propose a new date and time and must be received at least two ~~(2)~~ school days prior to the date of the hearing as originally scheduled.
  - ii. If the circumstances require the hearing to be rescheduled beyond the ten ~~(10)~~ days for short-term suspension, the student shall be readmitted pending the hearing on the long-term suspension. If a long-term suspension is imposed, the time spent on the applicable short-term suspension shall be included in calculating the ~~45~~ 30 day maximum. Failure to appear without previously requesting a continuance and without prior notification shall not constitute good cause.
  - iii. ~~An expulsion hearing should be held within the term of the long-term suspension. Within that limitation, an expulsion hearing may be rescheduled by the student or parent if a request showing good cause is received by the Superintendent or designee at least five (5) school days prior to the date of the hearing as originally scheduled.~~

### The Formal Long-Term Suspension Hearing

1. The hearing will be closed to the public.
2. The suspending administrator shall provide a long-term suspension hearing folder containing all documents related to the case to the school official assigned to hold the hearing, otherwise known as the hearing officer. (Exhibit JK-R2-E3)
3. The hearing officer must be an impartial fact finder. This means the hearing officer was not directly involved in the incident or its investigation and will not be a witness in the formal hearing. Additionally the suspending administrator should not discuss the case with the hearing officer prior to the hearing and should have no discussions with the hearing officer outside the hearing prior to the publication of the hearing officer's decision.
4. The student shall be afforded the due process rights as described above.
5. The hearing officer has the right to insist that all parties conduct themselves appropriately and to enforce this right in any reasonable manner.
6. The Long-Term Suspension Hearing Process

- a. The hearing officer shall first announce the appearances of all persons present.
  - i. If, on the day and at the time scheduled for hearing, neither the student nor anyone on the student's behalf appears, the school officials shall attempt to contact the parent prior to the start of the hearing. If unsuccessful or if the parent refuses to attend the hearing, the school official shall review all applicable evidence with respect to the student.
  - ii. The fact that neither the student nor anyone on behalf of the student appeared must be recorded in the written findings and recommendations to be compiled following the review.
  - iii. Due notification of the decision reached will be provided within the time which would have been required had the ~~conference~~ hearing been held with all parties present. The information contained in ~~this notice~~ the decision notice is the same as that required in ~~the regular notice cases in which the parties were present at the hearing~~.
- b. Attorneys at Hearings
  - i. No school official ~~may~~ shall give advice of any sort to anyone on the question of whether or not an attorney should represent the student. As with all other due process rights, no advice with respect to the exercise of this right ~~may~~ shall be given by school officials, even if such advice is solicited by the student, parent, or both.
  - ii. The school official may always request that the parent or student give notice before the hearing if they intend to be represented by an attorney. But, even if such notice is not given and an attorney appears unannounced, the attorney ~~should never~~ shall not be excluded; ~~nor~~ should the presence of the District's legal counsel be ~~considered an absolute requirement~~ required in order for before the hearing ~~can to~~ proceed. ~~An attempt to conduct the hearing according to procedure should be made even if the student has an attorney and the District does not.~~
  - iii. Either before or during the hearing, it may appear to the ~~school official conducting the hearing~~ hearing officer that there is good cause to secure the presence of the District's lawyer. The hearing may then be adjourned and rescheduled by the school official if good cause develops during the hearing. It is incumbent upon the school official holding the hearing to ensure that the reason for adjournment is understood by those present.
  - ~~iv. Contact the Legal Department to request the presence of the District's legal counsel.~~

- c. The hearing officer shall then ensure that the parent(s) and student have received notice of the hearing as provided in Board Policy Regulation JK-R2. Defects in notice may be waived by stipulation of both parties. Appearance by the parent(s) and student at the hearing without protest ~~will~~ shall be deemed a waiver of any defect in notice.
- d. The hearing officer shall then read the violation(s) alleged to have been violated into the record. The hearing officer shall inquire as to whether the student and parent understand the alleged violations.
- e. The hearing officer shall inquire whether the parent and student received a copy of this Regulation JK-R2 and the Guidelines for Student Rights and Responsibilities with their notice. An affirmative response to this question is necessary before the formal hearing may proceed.
- f. The hearing officer is not required to enforce the rules of evidence. However, certain guidelines are appropriate.
  - i. The scope of the formal hearing is to be strictly confined to the charges as they were specified in the written notice except that evidence of repeated violations may be admitted if relevant. However, the student may wish to present evidence of extenuating circumstances. In that case, it is within the discretion of the ~~school official holding the hearing~~ hearing officer to consider such evidence, if offered, ~~to the contrary~~.
  - ii. When considering statements (oral or written) ~~for or against the student~~ made by persons not present at the hearing, the hearing officer is obliged to consider the reliability of such statements before giving them any weight. An opportunity to rebut such statements ~~is to be given at the hearing~~ shall be provided.
  - iii. If the student raises the issue of self defense, defense of others or defense of property, the hearing officer shall consider the defense raised and whether the physical force threatened or used by the student was justified as being the action of a reasonable person of similar age and experience under the factual circumstances in evidence.
- g. Presentation of School Case
  - i. An appropriate school official (other than the hearing officer) shall be allowed to submit evidence, present witnesses, and testify against the student. The burden to prove the alleged violation of the Guidelines for Student Rights and Responsibilities rests at all times with school officials.

- ii. The student, or the student's representative, has the right to question all witnesses.

h. Presentation of Student's Case

- i. The student or the student's representative shall be allowed to submit evidence and present witnesses. At the discretion of the hearing officer, if witnesses are providing repetitious testimony, the hearing officer may limit the number of witnesses. The student may testify on the student's own behalf.
- ii. An appropriate school official shall be allowed to question the student and all witnesses, unless, of course, the student chooses not to testify, in which case the student is exempt from questioning.

i. Findings:

- i. ~~At the conclusion of the formal hearing, or not~~ Not later than two ~~(2)~~ school days after the hearing, the hearing officer shall make written findings as to whether the student engaged in the conduct alleged in the notice of suspension, and determine within the limits defined in that notice what disciplinary action will be taken.

- ii. If the decision is to suspend the student for longer than ~~ten~~ 10 days, within two ~~(2)~~ days of the completion of hearing, the hearing officer shall notify the student and the parent of the findings and of the decision to suspend by hand-delivered or first class mail. (See Exhibit JK-R2-E1)

- iii. Copies of the letter of suspension ~~must~~ shall also be delivered to the ~~Department of Student Services Office of Student Equity~~ within three ~~(3)~~ days of the decision. The ~~Department of Student Services Office of Student Equity~~ will report the outcome of the hearing to the Governing Board.

- iv. Long-Term Suspensions of more than ~~forty-five (45)~~ thirty (30) days shall not be imposed except for violations assigned to Level 5. ~~The Department of Student Services The Office of Student Equity~~ will review all suspensions of more than ~~forty-five~~ thirty days, and report to Elementary or Secondary School Leadership if the suspension is believed to be inappropriate. The long-term suspension will commence immediately while this review is being conducted. The Department of Elementary or Secondary Leadership may modify a long term suspension pursuant to the report from the Department of Student Services. ~~The Office of Student Equity may modify such a long-term suspension as he or she may determine in the exercise of discretion.~~ Nothing in this subsection shall



eliminate the right of appeal from any determination to impose a long-term suspension.

v. The hearing officer's findings must also include notice of the student and parents' right to appeal the Hearing Officer's findings.

vi. If the hearing officer's decision is not to impose a long-term suspension, the student shall be readmitted to the school as soon as possible.

a. Verbal and written notification is made to the student and the parent as soon as possible.

b. The reasons for readmission are to be made a matter of record.

~~c. The hearing officer's findings must also include notice of the student and parents' right to appeal the Hearing Officer's findings.~~

j. Record of the Long-Term Suspension Hearing: All documentary evidence and record of the formal hearing are to be retained by the school as a part of the student's record. The Hearing Officer shall arrange to have a summary record made of the proceedings to include the names of those present, the witnesses, and a brief summary of the testimony of each. In addition, the school shall arrange to have the hearing recorded.

### Long-Term Suspension Appeal

1. The hearing officer imposing the suspension must include in the letter of suspension the name, title, address, and phone number of the representative of the Department of Elementary or Secondary Leadership ~~The Office of Student Equity~~ to whom an appeal may be directed.
2. The student may appeal a decision imposing a long-term suspension by filing a written appeal with the Department of Elementary or Secondary Leadership ~~The Office of Student Equity~~ within three ~~(3)~~ school days after the date notice of suspension was given, or within a time limit agreed upon by the student and the Department of Elementary or Secondary Leadership ~~The Office of Student Equity~~ during the same three ~~(3)~~ school days.
3. The basis for the appeal shall be specified in the written notice of appeal. The basis of appeal is limited to:
  - a. alleged denial of a right available to the student that resulted in an unfair hearing at the formal hearing
  - b. new evidence

- c. allegation of insufficient evidence
- d. allegation of excessive punishment

Note that appeals of recommendations for expulsion are not allowed.

- 4. If such appeal is filed, it shall be reviewed within five ~~(5)~~ school days from the date the appeal is received by the person assigned to review the appeal.
- 5. Within ten ~~(10)~~ school days of the receipt of the appeal, the Department of Elementary or Secondary Leadership ~~The Office of Student Equity~~ must notify, in writing, the person filing the appeal of any decision.
  - a. If it is determined that an unfair hearing resulted from a denial of rights, a new long-term suspension hearing shall be ordered.
  - b. If it is determined that the new evidence presented would have substantially affected the results of the conference, a new long-term suspension hearing shall be ordered.
  - c. If it is determined that the evidence against the student was insufficient, the decision to suspend may be reversed and the student immediately reinstated in school (see "Long-Term Suspension"), or the length of the suspension may be reduced.
  - d. If the Department of Elementary or Secondary Leadership ~~The Office of Student Equity~~ decides that the length of the suspension is excessive, the length of the suspension shall be reduced and notice of that decision shall be sent to the school administration and the parents.
  - e. If the Department of Elementary or Secondary Leadership ~~The Office of Student Equity~~ sustains the decision to suspend, notice to that effect must be sent to the student ~~and parent,~~ and school administration.
  - f. The student and parent may appeal the decision of the Department of Elementary or Secondary Leadership ~~The Office of Student Equity~~ directly to the Governing Board.

### Appeal to the Governing Board

- 1. If the suspension has been upheld or modified after the initial appeal, the student may further appeal by filing a written notice of appeal to the Governing Board within five days after receiving the decision of the Department of Elementary or Secondary Leadership. ~~the Office of Student Equity.~~

2. If the decision to impose a long-term suspension includes a recommendation to expel, the Board shall hear the appeal of the long-term suspension at the time that the Board makes a determination whether to hold an expulsion hearing in accordance with Board Policy JK.
3. The basis of appeal is limited to the grounds considered at the first level of appeal. The Board shall review the written record and the record on appeal and shall hear no new evidence or testimony.
4. The Board shall render its decision within ten (10) days after reviewing the record and shall notify the student and parents in writing of its decision. If the Board hears the appeal at the same time as the Board makes a decision whether to hold an expulsion hearing, it shall send notice of its decision on the appeal at the same time that notice of the expulsion hearing is sent to the student and parent(s). The Board may confirm or reverse the decision to suspend or may reduce the discipline imposed.
5. The decision of the Board is final.

## Homework

Homework ~~will~~shall be made available by the student's teachers through the end of the grading period. Teachers will only provide new assignment packets if previous packets have been completed and returned. However, because of the difficulty in students keeping up with the class work through homework alone, without the benefit of instruction, following the end of the grading period, students serving long-term suspensions will be supported through a TUSD alternative program such as distance learning.

## Re-entry Conference

Upon completion of a long-term suspension and on the day the student returns to school, an administrator must meet with the student and the student's parent to discuss school expectations and the supports that will be in place to assist the student's return to school.

~~**TUCSON UNIFIED SCHOOL DISTRICT**~~  
~~**TUCSON, ARIZONA**~~

Reviewed by Board:	July 11, 1989
Reviewed by Board:	July 9, 1991
Reviewed by Board:	June 9, 1992
Reviewed by Board:	May 25, 1995
Reviewed by Board:	March 24, 2009
	May 13, 2009 [formatting & clarification statement only]
Reviewed by Board:	June 19, 2009 [Friday Report]
Reviewed by Board:	October 29, 2010 [Friday Report]

| **Revised:** **June 9, 2015**

**LEGAL REF.:** A.R.S. §§ 15-341 & 15-342  
A.R.S. §§15-840 – 15-844

**CROSS REF.:** JFCL – Anti-Harassment Policy – Student  
JI – Rights and Responsibilities  
JICA – Student Dress  
JICFA – Hazing  
JICG – Tobacco Use by Students  
JICH – Drug and Alcohol Use by Students  
JICI – Weapons in School  
JICJ – Use of Cell Phones and Other Electronic Signaling Devices  
JICL – Bully Prohibition and Prevention  
JKA – Discipline of, and Alternative Interim Placements for Special  
Education Students  
JKAA – Discipline, Suspension, Expulsion for 504 Handicapped Students

| **Replaces TUSD Policy # ~~5060~~**

DRAFT

## Long-Term Hearing Folder Checklist

*Instructions: This checklist should go on the front of the packet of materials the Suspending Administrator will give to the Long-Term Suspension Hearing Officer. Make sure that all the documents listed on this Checklist are included in the packet for the Hearing Officer as they will be used during the Long-Term Suspension Hearing. If Expulsion is recommended after the Long-Term Suspension Hearing, this Checklist and all materials contained in the folder shall be included in the Expulsion Packet.*

- Notice of Short-Term Suspension and Notice of Long-Term Suspension Hearing Date
- Long-Term Hearing Script
- Chronology (written by Suspending Administrator)
- Exhibits and Witness Statements (with other student names redacted)
- Board Policy JK & Policy Regulation JK-R1 and JK-R2 **OR** Board Policy JKA (for Ex Ed students) or JKAA (for 504 students)
- Student Violations, Suspensions, Arrests from Mojave
- Student Attendance Block printout from Mojave
- Record of Academic, Counseling and other Interventions
- Report Card (Most Recent)
- Transcript
- Progress Reports (Originals completed by Teachers)
- ONLY IF** Ex Ed or 504: Meeting Notice (Invitation to Manifestation Determination) with proof of receipt of Procedural Safeguards
- ONLY IF** Ex Ed or 504: ~~Manifestation Outcome~~ Manifestation Determination/ Knowledgeable Group Determination Document
- Long-Term Hearing Officer Decision Worksheet

# **EXHIBIT 4**

MENDOZA PLAINTIFFS' REPLY TO THE TUSD NOVEMBER 28, 2016 RESPONSE TO THEIR REQUEST THAT THE SPECIAL MASTER BRING MULTIPLE INSTANCES OF THE DISTRICT'S NONCOMPLIANCE WITH THE USP AND ITS UNDERTAKINGS RELATED THERETO TO THE COURT'S ATTENTION

December 6, 2016

Mendoza Plaintiffs provide the following in reply to the TUSD Response to Mendoza Plaintiffs' October 28, 2016 Request Re: Alleged Noncompliance ("TUSD Response").

Changes to the Application and Selection Process for Oversubscribed Schools

Remarkably, in its response to the Mendoza Plaintiffs on this issue, TUSD simply ignores both (i) Regulation JFB-R4 which it identifies in its 2015-16 Annual Report as the document that sets forth its selection process for oversubscribed schools (and which it attaches to the Annual Report as Appendix II-18 (see Annual Report at II-29 and Appendix II-18) and (ii) its express admission at page II-41 of the Annual Report that it unilaterally revised the selection process to give "children of District employees **special consideration** in the lottery process...." (Annual Report at II-41; emphasis added.)

Instead, in the TUSD Response, the District discusses only some relatively minor language changes in the November 2015 version of Policy JFB about which the Mendoza Plaintiffs raised no issues. But it is Regulation JFB-R4 (Appendix II-18) -- adopted after the November 2015 version of Policy JFB<sup>1</sup> (but never even acknowledged in the TUSD Response) -- that is the subject of the Mendoza Plaintiffs' concern and complaint because it does indeed abandon the requirement that the application of the child of a District employee be accorded priority **ONLY** if the enrollment of that child at the requested school "will help that school meet integration targets." See Regulation JFB-R4 (Appendix II-18 at 5) (stating only that after siblings, "[c]hildren of employees are placed if seats are available" and setting forth no other conditions to be met before such placement may occur). That no pro-integrative conditions any longer apply to the placement of the children of District employees is further confirmed by the Lottery Flow Diagram attached to JFB-R4 (Appendix II-18 at 6) which visually demonstrates that all children of employees are eligible for placement in the lottery after siblings, with no other conditions attached.

The Special Master should therefore find, as requested by Mendoza Plaintiffs in their submission of October 28, 2016, that the District is not in compliance with its USP obligations as they relate to student assignment. (And that TUSD further failed to comply with its USP Section

---

<sup>1</sup> Each page of JFB-R4 is dated 2-19-16 and the last page of text states that it was adopted on February 19, 2016. (Appendix II-18 at 5.)

I,D,1 obligations in its unilateral adoption of the process set forth in Appendix II-18.)<sup>2</sup> Further, the Special Master should ask the Court to direct the District to apply the lottery process as agreed to by the parties in February 2015 (the date reflected in the redlined version of Policy JFB attached to Mendoza Plaintiffs' request for a finding of noncompliance) and not as unilaterally changed by the District in February 2016.

#### Changes to the Marketing, Outreach, and Recruitment Plan

The District asserts that it did not revise the Marketing, Outreach, and Recruitment Plan ("MOR Plan") during the 2015-16 school year without following USP Section I, D, 1 procedures, and that the MOR Plan in effect at the end of the 2014-15 school year is the plan that was in effect throughout the 2015-16 school year. (TUSD Response at 2.) Mendoza Plaintiffs are confused by this TUSD Response statement in that it directly contradicts the Annual Report statement that "[i]n 2015, the District updated the plan with an eye toward continuing what had worked and finding new ways to reach its target audience, including African American and Hispanic students. The **revised plan** focused on increasing the use of videos and other platforms as tools for showcasing schools, boosting the frequency of face-to-face, engaging families through one-to-one outreach, and improving the use of social media as a communication and marketing tool." (Annual Report at II-35; emphasis added.)

Given the contradictory TUSD statements, ambiguity in the TUSD Response, and the specificity with which the District both describes MOR Plan revisions in the Annual Report and asserts that "TUSD staff worked diligently throughout the 2015-16 school year to realize these goals" (*id.*), Mendoza Plaintiffs request that the Special Master follow up with the District to determine what exactly occurred with the MOR Plan during the 2015-16 school year and

---

<sup>2</sup> The District also asserts that it has "fulfilled its agreement to review the impact of the 'children of employee' provision" and refers the reader to its "finalized review" in Attachment D to its response. (TUSD Response at 2.) However, a comparison of Attachment D to the agreement TUSD acknowledges it made in the so-called "Sunset Email" that is included as Attachment C to the TUSD Response reveals that that is not the case. The Sunset Email, Attachment C, requires that the District provide the race/ethnicity of the employee children who were placed as well as their resident/non-resident status. However, such information is lacking in Attachment D. Further, the Sunset Email plainly contemplates separate reporting for placements pursuant to Priority 2 and Priority 5 under the agreed to lottery process in order to permit separate assessments of the impacts of Priority 2 and Priority 5 as anticipated in the Sunset Email. Mendoza Plaintiffs believe that a version of Attachment D that comports with the requirements of the Sunset Email, including a breakout of the results based on Priority, should be promptly provided. They have questions about the terminology employed (*e.g.*, "balanced placement") and additional questions that, if not addressed in the revised Attachment D, they will pursue through the RFI process rather than in this submission.



whether the District did indeed revise the Plan without following the USP Section I, D, 1 procedure. If the District did unilaterally revise the MOR Plan, the Special Master should detail the instance of USP noncompliance to the Court. If the District has not revised the MOR Plan, Mendoza Plaintiffs respectfully request that the Special Master direct the District to re-file the Annual Report to remove what would then be inaccurate references to a revised MOR Plan.

#### Changes to the Dropout Prevention and Graduation Plan

The TUSD Response seeks to sidestep the District's obligation to follow the USP Section I,D,1 process relating to changes to plans governed by the USP with its assertion that "[n]o revisions or changes were made to the DPG Plan during the 15-16 school year." (TUSD Response at 2.) But that does not address the concern expressed by the Mendoza Plaintiffs in their request for a Special Master finding of noncompliance. The issue is not what occurred *during* the 2015-16 school year. Rather, it is presented by the statement in the Annual Report at page V-195 (largely confirmed in the TUSD Response at 2) that at the end of the 2015-16 school year District staff "met to analyze the plan and revise its strategies for the 2016-17 year" and the further statement (also on page V-195) that the "revised DPG plan will be provided in the 2016-17 Annual Report." Mendoza Plaintiffs appreciate the fact that the District seeks to modify its strategies based on its experience but that does not relieve the District of its obligation to bring proposed changes in USP-governed plans to the Plaintiffs and the Special Master for their review and comment pursuant to USP Section I, D, 1 and certainly does not justify the District in holding a revised plan until it files its next Annual Report after the 2016-17 school year (thereby negating the ability of the Plaintiffs and the Special Master to comment on new strategies in place for that school year).

The Special Master therefore should find, as requested by Mendoza Plaintiffs in their submission of October 28, 2016, that the District is not in compliance with its USP obligations as they relate to revisions of the Dropout Prevention and Graduation Plan. Further, the Special Master should ask the Court to direct the District to promptly provide the Plaintiffs and the Special Master with its proposed revisions to that Plan. In no event should the Plaintiffs and the Special Master have to wait until the filing of the 2016-17 Annual Report to learn what revisions to the Plan the District apparently put into place as of the start of this school year.

#### Changes to Policy Regulations JI-R, JK-R1, JK-R2, and JK-R2-E3

In the TUSD Response, the District asserts that the revisions it made to the above-cited regulations were "minor" and that they do not reflect the type of change that would trigger USP Section I, D, 1 review. (TUSD Response at 3.) However, the redlined policy regulations governing short-term suspension (JK-R1) and long-term suspension (JK-R2) reflecting those revisions (attached to the TUSD Response as Exhibit E) demonstrate that the District revisions

were not “minor” and instead are noncompliant not only with USP Section I, D, 1, but also with USP Section VI, B, 2, b.

USP Section VI, B, 2, b. governs “due process protections for student discipline” and expressly cites TUSD regulations JK-R1 and JK-R2 as regulations TUSD is to revise to “ensure that students and parents are provided with a fair, impartial, and language-accessible proceeding... before exclusionary discipline or punishment is imposed, *as well as an opportunity to appeal*” (emphasis added).

Each of the above policy regulations was revised to include a new “Alternatives to Suspension” section. In regulation JK-R1 (short-term suspensions), this new section states that “[p]rior to any determination to suspend a student, the administrator shall first consider the use of appropriate **alternatives to suspension**, including, but not limited to: restorative conference, abeyance contract, or **In-School Intervention**.” (See TUSD Response, Exhibit E; emphasis added.) The new “Alternatives to Suspension” section within regulation JK-R2 (long-term suspensions) contains identical language but adds “**Alternative Education Placement**” among the “alternatives” that should be considered. (See *Id.*; emphasis added.) Each of these policy regulations then goes on to detail an appeals process that governs “suspensions” only. (See *Id.*) Thus, there is no ability to appeal an in-school intervention or referral to DAEP because under these regulations, they are not considered a “suspension” although they are “exclusionary” discipline for which there must be an appeals process under USP Section VI, B, 2, b.<sup>3</sup>

This issue highlights the dispute between the District, on one side, and the Mendoza Plaintiffs and DOJ, on the other, regarding what constitutes “exclusionary discipline.” As Mendoza Plaintiffs and the DOJ have indicated, they believe all discipline that removes a student from their regular classroom is “exclusionary.”<sup>4</sup> Similarly, in-school intervention and

---

<sup>3</sup> Mendoza Plaintiffs understand that, unlike the situation with respect to in-school intervention, a suspension hearing occurs before students who subsequently are to be administered a long-term out-of-school suspension are given the option to attend the DAEP program in place of that out-of-school suspension. (Appendix VI-36 at 2.) What they are not entirely clear about is whether students who opt to attend the DAEP program can then appeal their long-term suspension. In any event, Policy Regulation JK-R2 (long-term suspension) plainly does not contemplate an appeals process for referrals to DAEP and therefore, on its face, violates USP Section VI, B, 2, b. Mendoza Plaintiffs understand there to be no hearing in connection with the administration of in-school intervention.

<sup>4</sup> As Mendoza Plaintiffs explained during the November 30, 2016 meeting in Tucson among the parties and Special Master, they understand that as a practical matter, discipline that, for example, removes the student from the classroom for an hour to “cool down” should not be

referrals to DAEP should be considered “suspensions” under these policy regulations to permit a District action to be appealed as required by USP Section VI, B, 2, b. As this issue and the parties’ November 30 discussion makes clear, what is considered “exclusionary” (or here a “suspension”) has implications not only for the accurate reporting of discipline data and the ability to make meaningful comparisons to discipline data from past years; it also affects the extent to which the discipline is subject to the requirements of the USP.

Plainly, had the District come forth with proposed revisions to Policy Regulations JK-R1 and JK-R2 as required under USP Section I, D, 1 before adopting those changes, Mendoza Plaintiffs (and, presumably, the DOJ) would have commented on and objected to the revisions. Because the regulation revisions violate USP Section VI, B, 2, b and were created and adopted in violation of the I, D, 1 process, Mendoza Plaintiffs continue to request that the Special Master report this District noncompliance to the Court. Further, they ask that the Special Master recommend that the Court direct that the District promptly bring its discipline processes into conformity with Section VI, B, 2, b of the USP.

#### Changes to Facilities Condition Index Component Weights

The explanation that the District offers for its unilateral change in the Facilities Condition Index (“FCI”) makes no sense given that the FCI and the Technology Conditions Index (“TCI”) were developed within months of each other<sup>5</sup> and that the District actually filed them with the Court on the same day. (See Docs. 1777 and 1778, both filed February 27, 2015.)

Further, having obtained the parties’ agreement to the two indices, it was not for the District to determine on its own that the “communication category in the FCI was duplicative of the newly-created [sic] category evaluated in the TCI” (TUSD Response at 3) and then, on its own, to decide that the weight accorded “technology/communications” systems in the FCI should be reduced by 2/3 (from 15% to 5%) and that the resulting 10% should be divided equally between “grounds” which has no relation of which the Mendoza Plaintiffs are aware to “technology/communications” and to “special systems” (that is, fire alarm, security systems, and intercom (see Appendix IX-2 at 61)). Although the District asserts these changes are “non-material” (TUSD Response at 3), they represent both a decision to separate aspects of a school’s technology from an overall assessment of the condition of the school and its educational suitability (another of the topics covered and rated in the FCI) as well as a decision

---

considered “exclusionary” under the USP (and thus should not be subject to USP requirements for exclusionary discipline).

<sup>5</sup> In an email dated October 14, 2013, counsel for the District circulated a draft of the FCI together with a document setting forth the plaintiffs’ comments. By email dated February 25, 2014, counsel for the District circulated a draft of the TCI for comment.

to double the weight afforded “grounds” and “special systems” in that assessment (having decided to increase each from 5% to 10%).

Accordingly, Mendoza Plaintiffs believe that the District’s actions with respect to the FCI are out of compliance with the USP and should be reported to the Court.

#### Certificated Staff

Based on Mendoza Plaintiffs’ review of the TUSD Response and further review of the District’s 2015-16 Annual Report filing, Mendoza Plaintiffs no longer pursue their request that the Special Master bring this issue to the Court’s attention.

#### Ethnic Classification

Mendoza Plaintiffs understand that in June 2012, before there was any USP Reporting, indeed before the USP was filed with and approved by the Court, the parties and the Special Master agreed that when a student had no primary identification and was identified “equally as both Black and Hispanic” or when a student was identified as both “Black or African American and one other race other than Hispanic”, that student would be “counted as Black for purposes of the Unitary Status Plan.” (Memorandum dated June 8, 2012 from Willis Hawley to Fisher/Mendoza Parties at 2; see also, the December 10, 2013 Governing Board presentation “Racial/Ethnic Integration: How do we measure it, report it, and promote it” at page 24.) Their concern and the basis for their request for a finding of noncompliance stems from the statement in the District’s report on disciplinary outcomes broken down by race and ethnicity in its 2015-16 Annual Report that the discipline data presented in that report (at Appendix VI-54) “differs from prior USP Reporting because this report uses updated USP ethnicity coding.” The Appendix then goes on to say that “[p]rior USP reports used federal ethnicity coding.” (*Id.*)

Mendoza Plaintiffs do not know what the District means by its reference to “updated USP ethnicity coding” given that “USP coding” has (or should have) been in place for years. Nor do they understand what the District means by its statement that “[p]rior USP reports used federal ethnicity coding” given the decision made in June, 2012 (and confirmed by the District in December 2013), before any USP reporting, as to how the District was to report data concerning Black or African American students. They also remain concerned that all USP data be presented in a consistent manner from report to report and within reports so that meaningful comparisons can be made.

Given the statements in Appendix VI-54 and the TUSD Response, they therefore now request that the Special Master investigate to determine whether the District reported consistent with the Special Master’s June 2012 direction in Appendix VI-54 of the Annual Report and whether the adjustments it apparently made to data for the preceding three school years

was warranted based on the June 2012 directive. If it is the case that the District did not begin reporting consistent with the June 2012 directive until this most recent Annual Report, Mendoza Plaintiffs further request that the Special Master determine the reason for that delay and whether other reports that reflect data broken down by race and ethnicity either in the most recent Annual Report or earlier Annual Reports should be revised so that consistent data is presented across reports and from year to year.

#### Assignment of First-Year Teachers

In its TUSD Response, the District wholly fails to address Mendoza Plaintiffs' concern that "80% of first-year teachers (102 out of 127) were assigned to racially concentrated schools or schools performing below the District average in the 2015-16 school year." (See Appendix IV-29 (also demonstrating that 43% of first-year teachers were assigned to schools that were *both* racially concentrated and were performing below the District average with respect to student achievement).) Instead of providing any evidence to the contrary, the District simply asserts that the "USP only requires the District to 'make efforts' in these areas" and that it "clearly 'made efforts' in these areas as set forth in its annual reports." (TUSD Response at 4-5.) (The District took the same position that this USP obligation "is not a requirement" with respect to the 2014-15 school year. (See Special Master's Annual Report (Doc. 1890) ("SMAR") at 15.))

The District is wrong in asserting that its annual reports demonstrate that it "has clearly 'made efforts'" regarding the placement of first-year teachers. Indeed, for each of the 2014-15 and 2015-16 school years, it was TUSD annual report data that revealed that the District was treating this USP requirement to avoid placing first-year teachers at racially concentrated schools or schools performing below the District average as essentially non-existent. Moreover, in stating generally that the annual report evidences its efforts in this area –but pointing to no discussion of any such efforts -- the District ignores that its Annual Report provided no data specific to the assignment of beginning teachers to "Racially Concentrated schools or schools in which students are achieving at or below the District average" ( USP Section IV, E, 5). (Mendoza Plaintiffs analyzed and compiled the data in Appendix IV-29 to determine the District's "progress" in this area.) Nor does the 2015-16 (or 2014-15) Annual Report provide any information regarding specific "efforts" "[t]hrough the human resources department coordinator...to ...reduce the number of beginning teachers hired by Racially Concentrated schools or schools in which students are achieving below the District average" as required by USP Section IV, E, 5 or any evidence of any "case-by-case" exceptions (*see id.*) the Superintendent made with respect to the placement of first-year teachers.<sup>6</sup>

---

<sup>6</sup> Presumably the District avoids any reference to this provision in its response because the existence of a provision allowing an exception to the provision limiting the placement of first-

While Mendoza Plaintiffs appreciate that this USP provision may not be the easiest to comply with, the District is charged with implementing it in good faith. Notwithstanding that for the 2014-15 school year, the Special Master made clear that “the District appears to be clearly out of compliance” “[w]ith respect to the assignment of beginning teachers” (SMAR at 15), the District’s own uncontroverted evidence suggests that it made no good faith effort to comply with the provision during the 2015-16 school year. The Special Master should therefore find, as requested by Mendoza Plaintiffs in their October 28 submission, that the District is not in compliance with its USP Section IV, E, 5 obligations regarding the placement of first-year teachers. Further, Mendoza Plaintiffs repeat their October 28 request that the Special Master’s Implementation Committee monitor the District’s compliance in this area for the “balance of this school year and through the hiring process for next year in an effort to actively manage the District into compliance with USP Section IV, E, 5.”

---

year teachers in Racially Concentrated and underperforming schools confirms that that provision is indeed a requirement and not simply an exhortation.

# **EXHIBIT 5**

The District, indeed all of the parties and the Special Master, must recognize that the definition of exclusionary discipline has never been entirely finite and absolute. Thus, it is difficult to respond to the seemingly simple question as to whether the District's position on what constitutes "exclusionary discipline" has changed. There has been, the parties must all acknowledge, inconsistency in the understanding and application of the concept and its definition, as the following demonstrates.

**1. The parties have never treated the USP limits on exclusionary discipline as a bright-line rule applicable to all disciplinary actions.**

The 2013 revised GSRR (and subsequent revisions), developed collaboratively with the Special Master and Plaintiffs, seemingly applied the USP limits on "exclusionary discipline" to Level 1, 2, and 3 violations, but did not apply those limits to Level 4 and 5 violations:

For all but the most severe offenses (Levels 4 and 5 in the "Action Levels" section of this document below), an Exclusionary Consequence (*"any disciplinary consequence that removes a student from classroom instruction, including, but not limited to, in-school and out-of-school suspension, placement in an alternative setting or program, and expulsion"*) must be limited to instances in which (a) the violation is a level 3, (b) student misbehavior is ongoing and escalating, and (c) only after the District has first attempted and documented the types of intervention(s) used in PBIS and/or Restorative Practices...the District shall not use Exclusionary Consequences for low-level conduct (Action Levels 1-2 below)..."

2013-14 GSRR, page 5; 2016-17 GSRR, page 8 (emphasis added).

Thus, for more than three years the District has operated under language permitting exclusionary discipline for the "most severe" offenses (Level 4 and 5 violations) regardless of whether or not the behavior was ongoing or escalating, whether the District first attempted and documented interventions, or whether safety was implicated. We would note that Level 4 violations like "Burglary," "Breaking and Entering," or possession of "Other Weapons" do not necessarily trigger the USP's safety exception, yet the parties – understanding the USP's language on exclusionary discipline -- have agreed that the District could impose exclusionary discipline in these instances (even in the absence of a safety concern) under the existing GSRR.

It is also notable that the following Level 1 responses are permissible under the GSRR: time out; class reassignment; behavior intervention group, restorative circle. These responses may last from a few minutes (time out), to half an hour (restorative circle with support staff), to an entire day (reassignment to a different class). Each of these responses, one might well argue, also results in the removal of a student from classroom instruction, as each would constitute "placement in an alternative setting". Nonetheless, at no point over the past three years has



any party indicated that these established Level 1 responses are inappropriate “exclusionary discipline”. To its knowledge, the District’s position (and that of the Special Master and Mendoza and Fisher Plaintiffs based on their comments in November) has not changed: the USP definition of exclusionary discipline does not, and cannot, be applied so rigidly that any response that removes a student from classroom instruction should be deemed exclusionary discipline.

**2. The proposed Code (revised through the I(d)(1) process by the parties) does not treat USP limits on exclusionary discipline as a bright-line rule**

The proposed Code, like the GSRR, permits several responses that would remove a student from classroom instruction with no requirement that the behavior be “ongoing and escalating” or that interventions must first be attempted and documented (e.g. out-of-classroom cool down, mediation, behavioral or academic coaching, In-School Intervention (ISI), etc.). The District supports the existing proposed Code, as does the DOJ (based on its email of December 22, 2016). Thus to its knowledge, the District’s position (and that of the Special Master and the Plaintiffs) has not changed: the USP definition of exclusionary discipline does not, and cannot, be applied so rigidly that any response that removes a student from classroom instruction should be deemed exclusionary discipline.

**3. The District’s ISI manual defines ISS and ISI as exclusionary discipline; the Code proposed by Jim Freeman and the Working Group does not**

The District’s In-School Intervention Manual states: “ISI and ISS programs still count as an exclusionary consequence.” *See* 2015-16 AR, Appendix VI-29 [ECF 1965-2 at 27]. This does not align with the proposed Code.

In-School Intervention, a positive alternative to suspension, is referenced in the proposed Code as an acceptable and appropriate Level C response that may be used in certain situations “depending on the severity of the incident and the surrounding context.” *See* Proposed Code, p.5. In the Code, In-School Intervention and In-School Suspension are listed among several responses, followed by the statement that “[o]ther similar, non-exclusionary responses” may also be used. This list, and subsequent statement, was purposefully placed by the Working Group before the listing of specific exclusionary consequences under Level C, including out-of-school suspensions, expulsions, etc. The position taken by Jim Freeman and the Working Group is that ISS and ISI are acceptable responses that should not be treated as “exclusionary” discipline as they are not subject to the same limits as the specified list of exclusionary discipline at the end of the listed Level C responses.

#### 4. Office of Civil Rights Guidance Suggests that ISI/DAEP are not exclusionary

The DOJ recently (during the budget meeting) expressed a position that any action that removes a student from their normal classroom (not “classroom instruction” or “classroom settings” – terms used in the USP) constitutes exclusionary discipline. DOJ’s position is inconsistent with the position of the United States regarding students with disabilities under the Individuals with Disabilities in Education Act (IDEA).

It is certainly arguable that students with disabilities are entitled in a very general sense to heightened levels of protection when it comes to the application of discipline. 34 CFR 300.530, for example, provides that school districts must provide specified educational services to qualifying disabled students after they have been suspended or removed from their educational placement for more than ten days in a school year. The Office for Civil Rights has previously issued interpretive comments related to this section of code. Those comments tell us that an in-school suspension is not considered a suspension, or a “removal” from the disabled child’s educational placement, so long as three tests are met:

1. The child is afforded the opportunity to continue to appropriately participate in the general curriculum;
2. The child continues to receive the special education services required by his or her IEP; and
3. The child continues to participate with non-disabled children to the extent they would have in their current placement.

See, 71 Fed. Reg. 46,715 (2006). According to the Office of Civil Rights, special education students, who have a heightened level of protection, are not deemed to “removed” or “suspended” when they participate in in-school suspension when certain criteria are met. These same criteria (access to curriculum, service continuation, and access to peers) are the foundation of the In-School Intervention (ISI) and District Alternative Education Placement (DAEP) programs as *alternatives* to suspension. Alternatives to suspension should not be defined in the same category as suspensions – particularly where the student is not “removed from classroom instruction” and has access to a certified teacher, curriculum, peers, and support staff dedicated to identifying and addressing the root cause of the behavior.

#### 5. The Special Master’s and Plaintiffs’ Position on Exclusionary Discipline is not Clear

At our November meetings, the parties discussed whether a 30-minute cool-down period would be considered exclusionary, but there was no consensus on the point.<sup>1</sup> Based on that discussion, it is clear that the parties do not have a clear position.

---

<sup>1</sup> The Code provided by Jim Freeman permits up to an hour for an out-of-class “cool down” but the existing GSRR states that “time out” should not last more than 30 minutes.

### The District's Position

While the Special Master and Plaintiff positions on exclusionary discipline are still not clear, the District requests that they submit their positions on exclusionary discipline to the District in writing no later than January 9, 2017. Against the backdrop of the information provided above, the District submits its position:

1. Neither the Special Master, the Plaintiffs, Jim Freeman, the Working Group, nor the District have ever applied USP limits on exclusionary discipline (aka exclusionary consequences) as a bright line rule applicable to any removal of a student from classroom instruction.
2. Applying the USP limits on exclusionary discipline as a bright line rule is not in the best interests of students or of creating supportive and inclusive learning environments.
3. The District agrees with the approach proposed by Jim Freeman, and echoed by the DOJ, to evaluate disciplinary incidents on a case-by-case basis and to implement the appropriate *response* from Level A, B, or C to address the root cause of behavior (these *responses* include ISI and, through the School Safety Protocol and/or Persistent Misconduct Process, DAEP). ISI and DAEP are *alternatives to suspension* designed to identify and address the root cause of behavior, not consequences designed to punish. So long as the District is providing access to curriculum, a certified teacher, peers, and support staff dedicated to identifying and addressing root causes of behavior, ISI and DAEP should not be deemed exclusionary discipline nor subject to the USP limits on exclusionary discipline.
4. Either the proposed Code, or the USP, must be revised if the Parties take the position that USP limits on exclusionary discipline are absolute (despite that until a few weeks ago, no party nor the Special Master has ever suggested they should be absolute).

# **EXHIBIT 6**

Mendoza Plaintiffs' Response to TUSD's December 23, 2016 "Clarification" re "Exclusionary Discipline"

January 9, 2016

While the Mendoza Plaintiffs, like the DOJ, believe their position on what constitutes "exclusionary" discipline has been clear and consistent, they provide an explanation of their position below per the District's request in its December 23, 2016 memo.

As they have repeatedly stated, Mendoza Plaintiffs believe that discipline that removes students from their regular classroom for any significant amount of time constitutes "exclusionary" discipline. Their articulation of what is "exclusionary" is consistent with the USP's definition of the term, that is, "any disciplinary consequence that removes a student from classroom instruction, including, but not limited to, in-school suspension, out-of-school suspension, placement in an alternative setting or program, and expulsion." (USP, Doc. 1713, at Appendix A, #17.) As explained at the November 2016 meetings in Tucson, Mendoza Plaintiffs do not believe that a student who, for example, has been reassigned to a different classroom for a half-hour to "cool down," has been subjected to "exclusionary" discipline – they do however believe that the District is obligated to document such discipline. (We also believe that, to the extent there exists disagreement on what is an appropriate "cool down" period (see TUSD's December 23 memo, page 3 n.1 citing the difference between the Draft Code developed by Mr. Freeman and the GSRR, limiting such "cool down" periods to, respectively, one-hour and half-hour maximums), the existence of the issue does not modify the USP definition of "exclusionary discipline" or suggest that "the definition of exclusionary discipline has never been entirely finite and absolute.")

The Mendoza Plaintiffs agree with the DOJ that "until the District recently asserted that DAEP and ISI were not forms of exclusionary discipline, the parties had always followed the definition of Exclusionary Discipline in the USP and considered ISI to fall within that definition." As the District notes, TUSD's ISI Manual correctly states that both ISS and ISI "**still count as an exclusionary consequence.**" (TUSD Annual Report for 2015-16 School Year, ISI Manual, Doc. 1965-2 at VI-29.) Indeed, that manual goes on to state that ISI "has been **designed to be the 'least' exclusionary [discipline] possible by providing the same curriculum as the student would receive in the classroom** and by creating structures at the school site for support of the student's success." (Id.; emphasis added.) Mendoza Plaintiffs believe the District's position in its ISI Manual to be perfectly consistent with the USP definition of exclusionary discipline and to reflect differentiation among forms of exclusionary discipline where some exclusionary discipline, for example ISI which includes curriculum instruction, is "le[ss] exclusionary" than other forms of exclusionary discipline. (Plainly, DAEP also is "exclusionary" under the District position as reflected in the ISI Manual.) Further demonstrating that the District's assertion is

inconsistent with its past practice as well as the USP definition of “exclusionary discipline” is the fact that it, in the 2015-16 school year, trained its staff to understand that ISI is exclusionary discipline. (See TUSD Annual Report for the 2015-16 school year, Appendices VI-30 – VI-31, both at Power Point #3 (training staff to understand that, under an “Exclusionary Discipline” heading, it “is still the case with ISI” that the discipline is exclusionary).)<sup>1</sup> Accordingly, Mendoza Plaintiffs agree with the DOJ that before taking its recent position, the District well understood (and communicated to its staff as well as to Plaintiffs and the Special Master) that ISI is exclusionary, and that differentiation between types of exclusionary discipline “does not... remove any consequence from the definition of Exclusionary Discipline.”

Moreover, the Mendoza Plaintiffs strongly disagree with the following TUSD statement in support of its contention that the “parties have never treated the USP limits on exclusionary discipline as a bright-line rule applicable to all disciplinary actions”: For years TUSD “operated under language permitting exclusionary discipline for the ‘most severe’ offenses (Level 4 and 5 violations) regardless of whether or not the behavior was ongoing or escalating, whether the District first attempted and documented interventions, or whether safety was implicated. We would note that [some] Level 4 violations... do not necessarily trigger the USP’s safety exception, yet the parties – understanding the USP’s language on exclusionary discipline – have agreed that the District could impose exclusionary discipline in these instances even in the absence of a safety concern under the existing GSRR.” This statement is incorrect, unsupported by the record, and reflects a position that directly contradicts the District’s past position upon which Mendoza Plaintiffs’ relied in deferring a request for an R&R.

Specifically, during the 2014 development of the revised GSRR, the Mendoza Plaintiffs raised their concern that the GSRR needed to include “a limitation that restricts the use of long-term suspensions [only applicable to Level 4 or 5 violations] to instances in which student misbehavior is ‘ongoing’ and ‘escalating,’ which mirrors the limitation on short-term suspensions on page 17 of the GSRR, and is mandated by the USP.” (Mendoza Plaintiffs’ November 5, 2014 email.) They also stated their “willingness to defer their pursuit of an R&R if the District indicates that it will bring proposals to address [this issue, among others] to the Governing Board.” (*Id.*) In response, the District indicated the GSRR “sufficiently addressed” Mendoza Plaintiffs’ concerns and provided the following explanation:

---

<sup>1</sup> Given the recent assertion of position by the District, it is worth noting that the Appendices reflect identical training being given on this point in August 2015 (App. VI-30) and again in February 2016 (App. VI-31). Further, it should be remembered that the ISI Manual, containing the express statement to the effect that ISI is exclusionary discipline, was shared with the Plaintiffs and the Special Master in the summer of 2015 in the course of the District explaining to them what ISI was and how it was to be implemented.

**“The GSRR, the USP, and our training to staff (and training to Hearing Officers who must approve long-term suspension)– all include language limiting exclusionary consequences to instances in which student misbehavior is ongoing and escalating, and the District has first attempted and documented appropriate interventions – subject to the USP provision that “[n]one of these revisions [to the GSRR] shall prevent school personnel from protecting student safety as appropriate.” Every Level 4 or 5 (the only types that can lead to long term suspension) poses a potential safety issue. Also, the GSRR already includes the following protection (aligned with the USP) for long term suspensions:**

- a. [p17] “Hearing Officers may take this action [issuing a long term suspension] only after the site administration has exhausted other disciplinary strategies (see interventions listed under Action Level 1 for examples of appropriate strategies), or when they have at least considered those alternatives and rejected them as inappropriate in a given situation” and
- b. [p20] “Out of School Suspension and/or Abeyance – Long-Term (11-30 Days)  
\*OUT-OF-SCHOOL SUSPENSIONS ARE SUBJECT TO LIMITATIONS DESCRIBED ON PG 17”.

Long-Term Suspensions are different than Short-Term Suspensions – that is why the express language is in one place and not the other. Long-Term Suspensions are subjected to an additional layer of scrutiny and analysis through an independent and objective Hearing Officer. **The GSRR has sufficient language – as does our training to staff and to Hearing Officers – to limit exclusionary consequences as required by the USP but also to take into account student safety.”** (S. Brown November 5, 2014 email (emphasis added).)

Thus, in stark contrast to its position in the December 23 memo, the District previously asserted that the GSRR (and its staff training) included the USP limitations for all exclusionary discipline (and long-term suspensions specifically) and that every level 4 and 5 violation implicated student safety. Further, Mendoza Plaintiffs relied on these express statements from the District in deciding not to pursue an R&R on the issue of whether the GSRR contained language sufficient to limit long-term suspensions as required by the USP provisions addressing “exclusionary discipline”. Thus, the District is incorrect that the parties “agreed” to permit “exclusionary discipline for the ‘most severe’ offenses (Level 4 and 5 violations) regardless of whether or not the behavior was ongoing or escalating, whether the District first attempted

and documented interventions, or whether safety was implicated.” Indeed, the opposite is true: the parties have all understood that long-term suspensions (as with all exclusionary discipline) are subject to the USP limitations on exclusionary discipline. Accordingly, the District’s conclusion that the “parties have never treated the USP limits on exclusionary discipline as a bright-line rule applicable to all disciplinary actions” is incorrect. The District cannot therefore seek to redefine what exclusionary discipline is, and certainly cannot do so on the basis of inaccurate statements regarding how the parties have in the past treated the USP limitations on exclusionary discipline.

In its attempt to demonstrate that USP limits on exclusionary discipline have purportedly not been treated as a bright-line rule and that there has existed a lack of clarity and disagreement on what constitutes “exclusionary discipline,” the District makes multiple references to what it claims to have been the “position taken by Jim Freeman and the Working Group [] that ISS<sup>2</sup> and ISI are acceptable responses that should not be treated as “exclusionary” discipline... .” (TUSD’s December 23, 2016 memo at 2.) Mendoza Plaintiffs do NOT read the draft code as asserting that ISS and ISI are non-exclusionary discipline. (Nor, as just noted in Footnote 2 herein, could they do so given the express inclusion of ISS in the USP definition and given the District’s own recognition that exclusionary practices take place when a student is “excluded from the **regular** classroom environment...” (Annual Report, Appendices VI-30- VI-31 at Power Point #3; emphasis added.)) More importantly, while the Mendoza Plaintiffs appreciate the hard work of Mr. Freeman and the Working Group in developing the draft Code, the parties are not bound and the USP definition of “exclusionary discipline” is not modified by what the District asserts its consultant and the Working Group intended in developing the draft Code.

Further, to the extent there exists any confusion about the “Level C” consequences in the draft Code’s Table One (on page 4), it can be dealt with by revising the placement of the reference to ISS and ISI (by, for example, simply inserting the reference into the last “Level C” asterisk in Table One listing other exclusionary discipline) and not by now putting forth the new argument that ISI and ISS are non-exclusionary discipline. (In that regard, we note that this District argument, if accepted, would illogically result in redefining in-school suspension as non-exclusionary even though no party, including the District, has at any point before the delivery of the December 23 memo argued or even suggested that in-school-suspension is non-exclusionary. (*See Id.* at 4, point 3 under heading “The District’s Position.”))

---

<sup>2</sup> It must also be noted that regardless of what “positions” are now being ascribed to Jim Freeman and the Working Group, they lack the power to amend the USP and the USP expressly states that ISS (in school suspension) is “exclusionary discipline.” *See* USP, Doc. 1713, Appendix A, Definitions at #17, quoted in full at the outset of this memo.



As detailed above, the parties have long applied the USP's limitations on exclusionary discipline and considered each of ISI and ISS to be "exclusionary." The District further held the position (as detailed in the ISI Manual) that discipline that removes students from classroom but in which instruction is provided is simply "le[ss] exclusionary," but still exclusionary nonetheless. Thus, the District cannot now seek to redefine what is "exclusionary" or back away from the positions it has taken by relying on incorrect references to the parties' past dealings or to claimed positions taken by its consultant and Working Group.

Particularly in light of the parties' past treatment of the USP limitations on exclusionary discipline as outlined above, the Mendoza Plaintiffs are deeply concerned that the District now has apparently severely and unilaterally curtailed the due process rights of students subject to ISI by listing those types of exclusionary discipline as an "alternative to suspension" and providing the opportunity to appeal only to "suspensions" in violation of USP Sections VI, B, 2, b. and I, D, 1. (See Mendoza Plaintiffs' December 6 Reply to the TUSD Response re: Mendoza Plaintiffs' Request for Findings of Noncompliance with the USP ("Mendoza Plaintiffs' Reply").) (With regard to DAEP, the District's unilaterally revised written policy too violates the above-cited USP sections, although Mendoza Plaintiffs understand that in practice, students subject to DAEP have had an opportunity to appeal before opting to participate in DAEP.)

As far as Mendoza Plaintiffs can tell, the District has not responded to the Special Master's December 12, 2016 memo in which he states that "the District should abide by processes specified in Section VI.B.2.b. of the USP and by the policies in place before the District made its changes to these policies." Mendoza Plaintiffs therefore ask that the District promptly inform the Special Master and the parties (1) whether the District agrees to follow the processes in place before it made the changes to Regulations JK-R1 and JK-R2 that are reflected in the documents attached to its November 28, 2016 response to the Mendoza Plaintiffs' Request for Findings of Noncompliance as Attachment E and (2) whether it will cease taking any actions that suggest that ISI (and ISS) are not exclusionary discipline and revise the draft Code of Conduct to the extent necessary to eliminate any possible confusion in this regard. So that there can be no lack of clarity with respect to the Mendoza Plaintiffs' position, now that the District has based an argument that ISI (and ISS) are not exclusionary on where reference to these forms of discipline appear in the listing of possible Level C outcomes in the draft Code of Conduct, they herewith confirm that they will seek an R&R should the Code of Conduct not be revised to eliminate any suggestion that ISI (and ISS) are not exclusionary discipline. <sup>3</sup>

---

<sup>3</sup> In our email of December 23, 2016 concerning the Code of Conduct and the possibility of asserting an R&R upon its adoption we wrote: "We also emphasize that in reviewing the

---

December 16, 2016 Draft code, we do not read the phrase “[o]ther similar, non-exclusionary responses” in the table on page 4 as an assertion or suggestion that in-school suspension and in-school intervention (responses noted in the table) are non-exclusionary. Based on that understanding, we do not currently intend to object to the code of conduct as written (but as indicated above, may seek an R&R for clarification).” In light of the position asserted by the District in its December 23 memo, it is clear that the District no longer shares the referenced understanding. Hence, the need for either a revision to the draft Code or an R&R if it is adopted in its current form.

# **EXHIBIT 7**

From: [Eichner, James \(CRT\)](#)  
To: [Brown, Samuel](#); [Juan Rodriguez](#); [Willis D. Hawley](#); [Rubin Salter Jr.](#); [Thompson, Lois D. \(lthompson@proskauer.com\)](#); [Chanock, Alexander \(CRT\)](#); [Simons, Shaheena \(CRT\)](#); [Desegregation](#)  
Cc: [Jaeger, Todd](#); [Bruce Converse \(BConverse@step toe.com\)](#); [Taylor, Martha](#); [Eichner, James \(CRT\)](#)  
Subject: RE: Report of Mendoza Request for Reports of Noncompliance  
Date: Friday, January 06, 2017 6:15:17 AM

---

Sam, Juan and everyone:

While the United States believes its position on what constitutes exclusionary discipline has been clear and consistent, below is our response to the District's memorandum.

The Unitary Status Plan ("USP") defines "Exclusionary Discipline" to include both in-school suspension ("ISS") and alternative programs, such as the District Alternative Education Program ("DAEP"). The District now asserts that neither In-School Intervention ("ISI") nor DAEP should be considered Exclusionary Discipline because "the definition of exclusionary discipline has never been entirely finite and absolute." ISI did not exist when the USP was created and therefore could not have been explicitly referenced in the definition of Exclusionary Discipline. However, ISI, like ISS, removes students from classroom instruction and the parties, until the District's recent arguments to the contrary, have always considered ISI Exclusionary Discipline. Moreover, the District's argument ignores that while ISS, in-school Intervention ("ISI"), out-of-school suspension ("OSS"), DAEP and expulsion are all forms of Exclusionary Discipline, the decree to which they remove students from their classrooms and schools are different. Therefore progressive discipline requires that when Exclusionary Discipline is necessary, the District use the form (and duration) of Exclusionary Discipline that addresses the misconduct with the least possible disruption to the student's education. This differentiation between forms of Exclusionary Discipline, which the United States has encouraged in the District's codes of conduct and other policies, does not, however, remove any consequence from the definition of Exclusionary Discipline, nor does it alter the USP's limitations on when Exclusionary Discipline may be imposed.

The USP defines "Exclusionary Discipline" to include "any disciplinary consequence that removes a student from classroom instruction, including, but not limited to, [ISS, OSS], placement in an alternative setting or program, and expulsion." The parties have never agreed to, nor has the Court approved, any modification to this definition. Until the District recently asserted that DAEP

and ISI were not forms of exclusionary discipline, the parties had always followed the definition of Exclusionary Discipline in the USP and considered ISI to fall within that definition. For example, when the parties started discussing the DAEP program in 2015, the United States did not object to that program because of its explicit understanding that DAEP would be considered a form of Exclusionary Discipline under the USP's definition, and therefore the District would only use that program in circumstances in which a student would otherwise be subject to a long-term OSS or an expulsion. Similarly, as the District notes, its ISI Manual makes clear that both ISS and ISI "still count as an exclusionary consequence."

That the United States has not objected to District codes of conduct that have differentiated between forms of Exclusionary Discipline reflects the need to give building administrators guidance on how to choose between forms of Exclusionary Discipline. For example, the current draft of the proposed 2016-2017 code of conduct ("Proposed Code"), in listing disciplinary responses, differentiates between more serious forms of Exclusionary Discipline (including OSS and DAEP) and less serious forms of Exclusionary Discipline (ISI and ISS). This does not change the fact that all of these disciplinary responses are Exclusionary Discipline. Rather it reflects that ISI and ISS are alternatives to those forms of Exclusionary Discipline that remove students from their home schools and therefore are the preferable disciplinary responses in situations where Exclusionary Discipline is necessary to address student misconduct.

The District is therefore incorrect in asserting that the United States' decision to not object to the Proposed Code means the United States agrees that DAEP and ISI (or ISS) are not forms of Exclusionary Discipline. The United States did not object because it believes that if properly implemented, the Proposed Code will lead to District compliance with the requirements the USP sets for Exclusionary Discipline. Under the Proposed Code, DAEP may only be used in accordance with the Persistent Misconduct Process and/or the Safe Schools Protocol. The Persistent Misconduct Process implements the requirement that conduct be ongoing and escalating (and the District has tried and documented interventions) before Exclusionary Discipline is imposed. Similarly, the Safe Schools Protocol is a guide for school administrators to determine whether Exclusionary Discipline is required to protect safety.

Similarly, we have not objected to the Proposed Code's treatment of ISS and

ISI, because we see nothing in the Proposed Code that dictates that ISS or ISI be used in circumstances where Exclusionary Discipline would be prohibited under the USP. This is true in large part because the Proposed Code, unlike previous versions of the District's code of conduct does not dictate any particular consequence for any type or level of misconduct. Instead, the table listing disciplinary responses provides a menu of options for administrators to consider in addressing student misconduct. In using that menu, administrators are required to satisfy one of the central requirements of the Proposed Code, that disciplinary responses are "structured to maximize productive teaching and learning time and minimize the amount of time that students are removed from their classrooms." Therefore, we expect that ISI and ISS under the Proposed Code will be generally used in two circumstances. First, when disciplinary responses that do not remove students from their classroom at all, or remove students for less time such as an out-of-classroom cool down of less than one hour (Note: The United States has not considered cool downs Exclusionary Discipline because it is distinguishable from ISS in terms of how little time it removes a student from class and because it is clearly designed to address the exigent circumstances of ongoing misbehavior) would not be sufficient to address student misconduct. We can imagine this happening when time is needed to finish investigating an incident, complete the Safe Schools Protocol, or as a brief and time-limited measure to address an exigent circumstance created by ongoing student misbehavior. In these cases, the use of ISS and ISI would comply with the USP because it would be necessary to protect student safety and other important interests such as due process rights. Second, ISI and ISS not only can be used, but the United States encourages them to be used when the requirements for assigning a student to a more serious form of Exclusionary Discipline are satisfied but the school decides that ISS or ISI, which keep the student in school and therefore provides greater learning opportunities for the student than OSS, would be effective.

For all of the reasons set forth above, the United States maintains its consistent position that DAEP, ISI and ISS are all forms of Exclusionary Discipline.

---

**From:** Brown, Samuel [mailto:Samuel.Brown@tusd1.org]

**Sent:** Friday, December 23, 2016 5:10 PM

**To:** 'Juan Rodriguez'; Willis D. Hawley; Rubin Salter Jr.; Thompson, Lois D.

(lthompson@proskauer.com); Eichner, James (CRT); Chanock, Alexander (CRT); Simons, Shaheena (CRT); Desegregation

**Cc:** Jaeger, Todd; Bruce Converse (BConverse@steptoe.com); Taylor, Martha

**Subject:** RE: Report of Mendoza Request for Reports of Noncompliance

Juan: please see attached clarification. Have a great weekend - Sam

---

**From:** Juan Rodriguez [<mailto:jrodriguez@MALDEF.org>]  
**Sent:** Tuesday, December 20, 2016 6:40 PM  
**To:** Willis D. Hawley; Rubin Salter Jr.; Thompson, Lois D. ([lthompson@proskauer.com](mailto:lthompson@proskauer.com)); Eichner, James (CRT); Chanock, Alexander (CRT) ([Alexander.Chanock@usdoj.gov](mailto:Alexander.Chanock@usdoj.gov)); shaheena simons; Desegregation; Brown, Samuel  
**Cc:** John Robertson; Becky Montano; Vicki Balentine  
**Subject:** RE: Report of Mendoza Request for Reports of Noncompliance

Sam,

Can you provide us with clarification on whether, following the Tucson meetings and the Special Master's December 12 memo, each of which addressed the disagreement on what constitutes "exclusionary" discipline, the District's position on what is "exclusionary" discipline has changed? (I just want to get a clear understanding on the District's current position on the issue.)

**Juan Rodriguez** | Staff Attorney

**MALDEF** | [www.maldef.org](http://www.maldef.org)  
634 South Spring Street, 11<sup>th</sup> Floor, Los Angeles, CA 90014  
213.629.2512, ext. 136 t / 213.629.0266 f  
[jrodriguez@maldef.org](mailto:jrodriguez@maldef.org)

*MALDEF: The Latino Legal Voice for Civil Rights in America.*

CONFIDENTIALITY NOTICE: This e-mail transmission from The Mexican American Legal Defense & Educational Fund, and any documents, files or previous e-mail messages attached to it may contain confidential information that is legally privileged. If you are not the intended recipient, or a person responsible for delivering it to the intended recipient, you are hereby notified that any disclosure, copying, distribution or use of any of the information contained in or attached to this transmission is strictly prohibited. If you have received this transmission in error, please immediately notify us by reply e-mail or by telephone at 213.629.2512, and destroy the original transmission and its attachments without reading or saving it in any manner.

**From:** Willis D. Hawley [<mailto:wdh@umd.edu>]  
**Sent:** Monday, December 12, 2016 9:12 AM  
**To:** Rubin Salter Jr.; Juan Rodriguez; Thompson, Lois D. ([lthompson@proskauer.com](mailto:lthompson@proskauer.com)); Eichner, James (CRT); Chanock, Alexander (CRT) ([Alexander.Chanock@usdoj.gov](mailto:Alexander.Chanock@usdoj.gov)); shaheena simons; Desegregation  
**Cc:** John Robertson; Becky Montano; Vicki Balentine  
**Subject:** Report of Mendoza Request for Reports of Noncompliance

**Please see attached.**

--

**Willis D. Hawley**  
**Professor Emeritus of Education and Public Policy**  
**University of Maryland, College Park**  
**Senior Adviser, Southern Poverty Law Center**

# **EXHIBIT 8**



**Statement collectively explaining RFIs #843 - #846**

**RFI #843:** Please explain what is meant by “updated ethnicity coding” and set forth why the District changed the ethnicity coding from what was used in past years, including any reasons for not consulting or informing the Plaintiffs and Special Master about the change in ethnicity coding in the 2015-16 school year, and who made the decision to change that coding.

**RFI#844:** Please provide a version of Appendix VI-54 that reflects the ethnicity coding that was used in Appendix 1 of the USP.

**RFI#845:** Please provide confirmation that the Annual Report data provided in past years in response to USP Section VI, G, b. uses the same ethnicity coding as that in Appendix 1 of the USP.

**RFI #846:** Please identify all data in the Annual Report and its appendices that is based on the ‘updated ethnicity coding’ reflecting in Appendix-54. This request is intended to cover all presentation of data in the Annual Report and appendices, not just that relating to Section VI of the USP and discipline

**RFIs #843, #844, #845 and #846 are all explained collectively in the statement below:**

In the 2015-16 Annual Report, Appendix VI-54 correctly used the USP ethnic coding reporting criteria that is also used throughout the entire Annual Report. This appendix shows four years of discipline summary data. It carries forward three years of discipline summary data tables from the prior year and then adds a new discipline summary table for the reporting year. For consistency and comparability across years, the summary data for preceding years (2012-13 to 2015-16) in Appendix VI-54 was also run using the USP ethnicity reporting criteria.

In past Annual Reports, the data in this appendix used federal ethnicity coding (e.g. in 2014-15 Appendix VI-1) which was inconsistent with how ethnicity was reported in other sections of the Annual Report. Therefore, the summary data in Appendix VI-54 is the most accurate way to compare discipline data by USP ethnicity over the last four years.

To be clear to the reader, a statement was placed inside the Appendix VI-54 tables that stated: *This discipline data differs from prior USP Reporting because this report used updated USP ethnicity coding. Prior USP reports used federal ethnicity coding. The total N sizes remain the same. Only distribution across ethnicities has changed.* This statement clearly informs the reader that the USP ethnic reporting criteria was used for the 2015-16 discipline summary reports in Appendix VI-54 whereas in prior years, federal ethnic reporting was used such as in 2014-15 Appendix VI-1. In updating these tables by using the USP reporting criteria, the data conformed to the USP ethnic reporting found throughout the Annual Report.

# **EXHIBIT 9**

May 17, 2016

To: Parties

From: Bill Hawley

Re: Request for Agreement Among the Parties Regarding Guidelines for Achieving School Site Teacher Diversity

### Explanation

On May 9, 2016, I sent a memo to you asking for comments on a proposal related to implementation of the USP provisions dealing with site level teacher diversity. I receive one comment from the Mendoza plaintiffs and have amended the original proposal in response to those comments. The changes are identified below in *italics*. As I indicated, the implementation is a matter of considerable concern to teachers and principals in the District so clarifying the process and the schools involved is very important. I understand that the District is now implementing the provisions of the USP in 26 schools listed below.

I am preparing to submit the amended summary of recommendations from the May 9 memo to the Court as a stipulation that has the agreement of the parties. If here is any objection to this, please let me know immediately.

### Introduction

Forty-five TUSD schools do not meet the USP criteria for a racially diverse faculty (15 % =/- the faculty average by race for each school level).

However, applying this 15% criteria without considering the situation in many schools may not be productive. The 15% rule is commonly used but has its roots in cases where all white and all black schools were being integrated.

Among the reasons for having a diverse faculty in schools are:

1. Having students learn from teachers from different races undermine stereotyping and fosters confidence among students and their ability to relate to people of other races.
2. Providing students with teachers of the same race might help other teachers understand the experiences and dispositions diverse students bring to the school.
3. Teachers serve as role models and their professionalism may give students confidence that they too can achieve in these and comparable roles.
4. A diverse faculty is likely to arrive at more nuanced and sophisticated decisions than the faculty that is predominantly of a single race, especially in schools with diverse student population.
5. Having colleagues of different races with whom one collaborates may break down racial stereotypes among teachers.
6. Teachers of different races and backgrounds can facilitate communication with diverse families and communities.

These purposes of a diverse faculty at each school can be achieved in schools with a significant number of teachers from different races-- in this case, Anglo and Latino--interacting with students on a regular basis. Some schools that meet the 15% criterion are less "racially balanced" than schools that do not. For example, Dodge Middle School has 16 Anglo teachers, one African American teacher and two Latino teachers. Palos Verde High School has 38 Anglo teachers, two African American teachers and six Latino teachers. Both of these schools, as well as others with very small numbers of Latino teachers, meet the USP guidelines.

In this memo, I make several recommendations to guide the process of bringing the faculties of the District schools in the compliance with respect to racial diversity as defined by the USP in ways that will achieve the objectives of the USP more productively than would rigid adherence to the 15% rule. I asked your approval of these guidelines.

### Analysis

In the analysis below, I consider only the numbers and percentages of Anglo and Latino teachers. Teachers of other races are so small in number that applying the 15% rule makes no sense. For example, there

are fewer African American teachers serving the District than there are schools in the District.

The 45 TUSD schools that do not meet the USP criterion for diversity can usefully be divided into three groups. The first group includes 26 schools that do not meet the criteria and also have significant differences in the numbers of Anglo and Latino teachers. Changes shall be made in these faculties so they, at minimum, will be in compliance with the provisions of the USP. The second group includes nine schools that have reasonably diverse faculties even though they do not meet the 15% rule. The third group of schools are dual language schools that typically have more Latino teachers than the criteria would allow. However, as I indicated in an earlier memo to the parties, the difficulty of recruiting and retaining Anglo or African American bilingual teachers is substantial and I believe that these schools, while they shall not be exempted from the effort to increase diversity, shall not be considered as being in noncompliance with the USP.

#### Group 1

Bloom

Collier

Dunham

Fruchthendler

Gale

Henry

Holladay

Howell

Hudlow

Kellond

Lineweaver

Marshall

Miles

Miller

Myer-Ganoung

Hughs

Roberts-Naylor

Soleng-Tom

Steele

Tolson

Whitmore

Booth-Fickett

Dietz

Safford

Vail

UHS (UHS is only One percentage point off on Anglos but because there are so few non-Anglo teachers. It is important to have non-white faculty in a school where the District is working to integrate its student body. Having strong Latino and African American role models is very important to counter stereotype threat among African American and Latino students and to provide cultural perspectives to Anglo teachers, when needed.

## Group 2

I believe that the schools in Group 2 shall be exempted from the requirement that their faculties be meet the 15% rule because their faculties are reasonably "racially balanced". The number of Anglo and Latino teachers in each of these schools now seems sufficient to perform the roles outlined above that racially diverse faculties serve for their students, teachers and families.

School	Teachers					
	Total	Anglo N	Latino N	AA N	Anglo %	Latino %
Banks	16	7	6	2	44	38
Borton	28	13	12	-	46	43
Carillo	18	9	8	-	50	44
Cavett	16	6	9	1	38	56
Manzo	16	6	9	-	38	56
Ochoa	9	5	4	-	44	56
Warren	16	7	7	-	44	44
C.E. Rose	33	14	16	1	47	48
Morgan Maxwell	27	11	15	1	41	56

As indicated above, replacing teachers in schools without looking at the specific situation and possible consequences seems unwise. Effective instruction and a civil learning environments are facilitated when teachers know students in a school faculty cohesion is important to the coherent implementation of policies, curricula and instructional practices. Professional Learning Communities work best where faculties are relatively stable. About 120 teachers would have to move if the 15 percent rule were applied to all schools in Groups 1 and 2. If moving faculty causes good teachers to leave the District, that would have negative consequences for students. The downside of sticking with the 15 percent rule without looking at each school is illustrated by the Ochoa situation. To meet the USP guidelines for faculty diversity, an Anglo teacher would have to replace a Latino teacher so that there was five Anglo teachers and four Latino teachers in a school in which Latinos comprise about 82 percent of the student body and that has a unique approach to learning.

Of course, new people can invigorate a school but when that strategy is applied, it shall be done intentionally with specific people and goals in mind.

Stipulation

1. Schools that meet the standards for diversity spelled out in the USP are not subject to requirements for change in faculty racial composition. However, the District shall:
  - a. be proactive in diversifying schools that meet the criteria but are predominantly one race (such as Dodge Erickson and Palo Verde).
  - b. place new teachers in schools and deal with transfers so that a school does not become noncompliant with respect to racial diversity.
  
2. Schools in Group 1 above shall meet the diversity standards in the USP over the next two school years with at least half of the schools being compliant at the start of the 2016-17 school year. *These schools are:*  
*to be listed*
  
3. Schools in Group 2 shall not be required to alter the current number of Anglo and Latino teachers. Shall the size of the faculties in the schools increase or decrease, *or shall any new appointments to existing positions be made*, the District shall seek to maintain a “racially balanced” faculty. *Proposed additions to the faculty in Group 2 schools that alter the number of Latino and Anglo teachers shall be submitted to the Special Master prior to the appointment.*  
  
*Group 2 schools will be listed here.*
  
4. Dual language schools would be exempted from the USP requirement with respect to the 15% rule but the District shall continue efforts to recruit and retain Anglo and African American bilingual teachers in dual language schools.
  
5. Hard to staff teaching positions-- defined now has math, science, *bilingual* and special education-- may be filled by persons who negatively affect or fail to remedy the faculty diversity compliance status of Group 1 and Group 2 schools if a person who would diversify



the faculty cannot be identified. The Special Master shall monitor all such appointments.

6. *The District shall submit a report to the Special Master every two weeks relating to appointments made in each of the three groups of schools. These reports shall identify the race and certification field(s) of the appointees. The Special Master will share these reports with the plaintiffs, with his comments.*

# **EXHIBIT 10**

August 15, 2016

To: Parties

From: Bill Hawly

Re: Report on Teacher Diversity Plan

The District submitted its third report on implementation of the Teacher Diversity Plan (TDP) at start of the school year. The District claims that 17 of the 26 target schools have met the standards for diversity in the USP. My analysis indicates that in only 11 of the 26 schools are teachers “racially balanced” or “integrated”.

We arrive at different conclusions because the District looks only at the proportions of African American and Latino’s teachers. The District says that it uses the literal wording of USP provisions . I, on the other hand, base my conclusions on the provisions of the Teacher Diversity Plan that the district developed in response to a Court Order dated March 26, 2016. The relevant provision of the USP says:

The District shall identify significant disparities (i.e., more than a 15 percentage point variance) between the percentage of African American or Latino certificated staff or administrators at an individual school and district-wide percentages for schools at the comparable grade level (Elementary School, Middle School, K-8, High School).

The TDP submitted by the District to which there were no objections sites the Court Order that it is

required to “...develop and implement a plan to reduce by half by the beginnings of the 2016-17 school year, the number of schools in which there are existing racial disparities as defined y the USP, among the teaching staffs” and “ to eliminate all significant disparities in 2017-18 “.

The TDP, however, accepts my assertion that 26 schools currently have ”significant disparities” in the racial composition of their faculties to be the primary targets of this plan in 2016-17. Those schools are listed I the plan.

It may be recalled that when I developed my recommendations to the District, I proposed that several schools that did not meet the criteria be exempt from having to do so because they have significant numbers of both white and Latino teachers. The District was happy to accept this recommendation.

I based this recommendation for exemption on six justifications for diversifying school faculties and argued that we should focus on the intent of this provision in the USP. The schools I recommended be excluded all had relatively diverse faculties, some more diverse than schools that met the USP criteria. If we were to focus on the literal wording of this provision of the USP rather than intent exempting schools, including dual language schools, would be inappropriate.

It is clear that the District accepted my view—one consistent with the way faculty diversity is defined generally-- that the definition of significant disparities includes white teachers. The data provided in the District report includes 26 schools and identifies the range of white teachers that needs to be achieved in order to meet the provisions of the TDP. Moreover, it included 26 schools in its effort to implement the plan and counts some of the schools that had been in violation because of the proportion of white students as success stories. If only Latino and African American teachers were considered, the number of schools in violation of the USP would have been 18 (rather than 26) plus 4-5 of those I recommended be exempted because of their diversity despite the fact that they did not meet the USP definition of faculty integration.

So we have a messy situation. Technically, the District has met the requirements specified in the USP. It almost met the criteria in its own Teaching Diversity Plan that was developed in response to a court order. To complicate things a bit further, the schools identified in the plan and the report on progress in implementing the plan identify slightly different schools.

It appears that the District sought to eliminate diversity in 26 schools as provided for in the TDP.

When it made less progress than it had hoped, the District revisited USP and unilaterally redefined the goals of the TDP and to focus on the numbers rather than the substance of the provision.

What next? There is little that can be done at this point to deal with whatever disparities now exist in the racial compositions of school faculty. Hopefully, the district will continue to try to implement the Teacher Diversity Plan. It does appear that its implementation efforts were genuine and the incentive plan developed was sensible and innovative. The problem is that the incentive plan did not work well. Only eight teachers transferred in response to the incentives provided. Almost all of faculty integration that occurred was because teachers resigned and left District and their positions were filled by new hires. Moreover, in order to achieve the integration in the schools that are now integrated, the majority of new appointments were made in schools that had previously been C and D scales in 2014-15.

It seems that it will be necessary to revise the incentive plan. To determine whether different incentives might be effective, teachers who turned down incentives, as well as others, should be interviewed to learn what might have motivated them to transfer. In addition, whether introducing entry incentives to attract more diverse faculty to schools with disparities should be explored.

With respect to the USP provisions related to school site teacher diversity, 11 schools meet the criteria. Four or five schools are within 3 points but each of these schools has an overwhelmingly white faculty-- Kellond, for example, has 21 white teachers and 3 Latino teachers; Steele has 16 White teachers and 2 Latino teachers and all the new hires were White.

The District shall identify significant disparities (*i.e.*, more than a 15 percentage point variance) between the percentage of African American or Latino certificated staff or administrators at an individual school and district-wide percentages for schools at the comparable grade level (Elementary School, Middle School, K-8, High School).“ Please note that the USP definition of “significant disparity” includes only African American and Latino certificated staff. Thus, these are the only two race/ethnicities that are to be considered in determining whether a school has a “significant disparity” under the USP.

It appears that the efforts to get teachers to transfer was not effective.

I think it will only get harder next year since it seems likely that no one in the present faculty will be interested in transferring next year except, perhaps, this year’s new hires.

I note that over 25 percent of new hires were assigned to C and D schools (as graded in 2014-15). And of 5 new 4 additions to UHS, only one was Latino and none were AA.

Bill Hawley

# **EXHIBIT 11**



**From:** [Willis D. Hawley](#)  
**To:** [Rubin Salter Jr.](#); [Thompson, Lois D. \(lthompson@proskauer.com\)](#); [Juan Rodriguez](#); [Eichner, James \(CRT\)](#); [Chanock, Alexander \(CRT\) \(Alexander.Chanock@usdoj.gov\)](#); [shaheena simons](#); [Desegregation](#); [Converse, Bruce](#); [Charlton, Paul](#)  
**Cc:** [Becky Montano](#); [Vicki Balentine](#); [John Robertson](#)  
**Subject:** Report to the Court on TDP  
**Date:** Tuesday, September 06, 2016 4:51:28 PM  
**Attachments:** [TDP Report to the Court.docx](#)

---

**Please see attached. I will file tomorrow. Plaintiffs will note that teh District has agreed to use th TDP as it was approved by the plaintiffs. Bill**

--

**Willis D. Hawley**  
**Professor Emeritus of Education and Public Policy**  
**University of Maryland, College Park**  
**Senior Adviser, Southern Poverty Law Center**

## **Progress Report with Respect to Implementation of Plans to Ensure that School Faculties are Racially Diverse**

The USP requires that the proportions of African American and Latino staff (operationalized as teachers) of each school do not vary more than 15% of the proportion of African American and Latino teachers at each of four grade structures.

The Court has ordered the District to develop and implement plans “to reduce by half by the beginning of the 2016-17 school year the number of schools in which there are existing racial disparities, as defined by the USP, among the teaching staffs” and to “eliminate all significant disparities in 2017-18 using the practices” outlined in the initial plan “and such other practices as the District may deem appropriate.”

Similar goals are common in desegregation plans and is consistent with one of the Green factors. Among the reasons for these efforts are that students will have the opportunity to learn from the diverse teaching staff and teachers will have the benefit of the funds of knowledge that their colleagues of different racial backgrounds bring to their schools.

The Special Master analyzed data on teaching staffs for 2015-16 and identified more than half of the District’s schools as being insufficiently diverse. In this analysis, the Special Master included schools where the proportion of white teachers vary more than 15%. This is common in school desegregation plans and is consistent with the rationale for teacher diversity. In the Special Master’s recommendations to the parties with respect to the development of a teacher diversity plan (TDP), the Special Master proposed that several schools not meeting the 15% +/-rule be exempted from the diversity requirement because (1) the racial composition of the teachers in the school is officially diverse to satisfy the intent of the provision and (2) dual language schools needed teachers who are bilingual and most bilingual teachers are Latino.

The District developed a comprehensive TDP that included the proposed exemptions and the inclusion of white teachers in the diversity measure (see Exhibit 1). There were no objections to the TDP by the plaintiffs or the Special Master. The plan assumes that no teacher will be required to

transfer in order to achieve the goals of the plan. Note: one or more schools had no open teaching positions for the 2016-17 school year and thus had no positions into which a more diverse candidate could have transferred or been placed.

The District made a substantial effort to implement the plan and was successful in reaching 85% of its goal for the current school year, the goal being to reduce the number of identified schools with teacher disparities from 26 to 13. The District reduced the number of identified schools from 26 to 15.

The District has affirmed its commitment to implement the plan to which parties agreed. While the District did not fully meet its goals for the current year, it expresses optimism that by learning from the experience in implementing the plan and by beginning of the process much earlier in the school year that it was able to do so in the past year, it will meet the diversity goals set out in the TDP.

# **EXHIBIT 12**

Race/Ethnicity of Certificated Staff at school site including percentage by race 8/12/2016	Resignations										New Hires					Transfers					Current Count					Current Percentage																					
	White	Af. Am.	Hispanic	Asian/Pi	Nat Am.	Total	White	Af. Am.	Hispanic	Asian/Pi	Nat Am.	Total	White	Af. Am.	Hispanic	Asian/Pi	Nat Am.	Total	White	Af. Am.	Hispanic	Asian/Pi	Nat Am.	Total	White	Af. Am.	Hispanic	Asian/Pi	Nat Am.	Total																	
<b>TOTAL</b>	1840	94	749	65	35	2783	66%	3%	27%	2%	1%	100%	166	14	50	7	238	156	10	64	6	7	243	5	0	-2	0	0	8	1662	78	693	60	38	2531	66%	3%	27%	2%	2%	100%						
<b>ELEMENTARY</b>	706	27	310	28	14	1085	50-80%	2%	29%	3%	1%	100%	75	8	22	5	110	70	5	23	4	2	104	2	0	-1	-1	-1	-1	638	21	277	26	13	975	65%	0-19%	28%	3%	1%	100%						
<b>Range</b>																																															
Bloom Elementary School 1128	17	2	2	1	0	22	78%	11%	11%	0%	0%	100%	7	2			9	4	2				6						0	14	0	4	1	0	19	74%	0%	21%	5%	0%	100%						
Collier Elementary School 1170	11	0	0	0	11	100%	0%	0%	0%	0%	0%	100%	1				1						0						0	10	0	0	0	0	10	100%	0%	0%	0%	0%	100%						
Dunham Elementary School 1211	10	0	1	0	11	91%	0%	0%	9%	0%	0%	100%	1				1						0						0	9	0	1	0	0	10	90%	0%	10%	0%	0%	100%						
Fruithandler Elementary School 1225	15	0	3	0	18	88%	0%	13%	0%	0%	0%	100%	1				1	2	1				3	1	1				2	15	0	1	0	0	16	94%	0%	6%	0%	0%	100%						
Gale Elementary School 1228	20	0	2	1	0	23	87%	0%	9%	4%	0%	100%	1				1	1	2				3	-2					0	23	78%	0%	17%	4%	0%	100%											
Henry Elementary School 1238	18	0	1	0	19	94%	0%	6%	0%	0%	0%	100%	2				2	2					2						0	19	84%	0%	16%	0%	0%	100%											
Holladay Magnet Elementary School 1239	14	3	1	0	18	75%	19%	6%	12%	0%	0%	100%	4	3			7	6	1				7	1	1				2	20	85%	0%	10%	5%	0%	100%											
Holladay Magnet Elementary School 1245	14	2	2	0	18	76%	12%	12%	6%	0%	0%	100%	2				2	1	1				2	2	2				0	17	71%	18%	12%	0%	0%	100%											
Hudlow Elementary School 1251	20	0	2	1	0	23	87%	0%	9%	4%	0%	100%	5				5	7	2				9	3	1				4	22	82%	0%	14%	0%	0%	100%											
Kellond Elementary School 1275	28	0	3	0	1	32	89%	0%	9%	0%	3%	100%	4				4	1	2				3						0	31	81%	0%	13%	0%	6%	100%											
Lineweaver Elementary School 1281	13	0	2	3	0	18	69%	0%	13%	19%	0%	100%	1				1	2	1				3	-1					0	15	73%	0%	13%	0%	0%	100%											
Marshall Elementary School 1295	24	0	3	1	0	28	86%	0%	11%	4%	0%	100%	2				2	2	2				4						0	29	83%	0%	17%	0%	0%	100%											
Miller Elementary School 1308	12	0	15	0	0	27	44%	0%	56%	0%	0%	100%	2				2	3	8				10						0	14	0	0	0	0	0	0	0	0	0	0	100%						
Myers/Ganoung Elementary School 1317	24	0	3	1	0	28	82%	0%	14%	5%	0%	100%	6				6	1					3	1					0	14	0	0	0	0	0	0	0	0	0	0	100%						
Sam Hughes Elementary School 1257	18	0	3	0	0	21	83%	0%	17%	0%	0%	100%	1				1	2	1				3	2	0				0	20	81%	5%	14%	0%	0%	0	0	0	0	0	100%						
Soleing Tom Elementary School 1410	18	2	1	0	0	21	86%	10%	5%	0%	0%	100%	4				4	5	1				6	4					0	20	75%	10%	15%	0%	0%	0	0	0	0	0	100%						
Steele Elementary School 1413	16	1	3	1	0	21	76%	5%	14%	5%	0%	100%	4				4	5	6				6	6					0	19	84%	0%	16%	0%	0%	0	0	0	0	0	100%						
Tolson Elementary School 1417	5	1	14	0	0	20	25%	6%	69%	0%	0%	100%	2	1			3	4	1				5	1					0	19	21%	5%	74%	0%	0%	0	0	0	0	0	100%						
Whitmore Elementary School 1455	23	0	2	0	0	25	90%	0%	10%	0%	0%	100%	2				2	2					4	1	1				0	21	86%	0%	14%	0%	0%	0	0	0	0	0	100%						
<b>K-8</b>	256	21	181	10	8	476	54%	4%	38%	2%	2%	100%	35	3	14	1	53	26	2	19	2	0	49	-1	0	-2	0	0	-3	239	20	176	11	11	457	52%	5%	38%	3%	2%	100%						
<b>Range</b>																																															
Booth-Fickett Math/Science Magnet School 1510	54	4	9	3	0	70	77%	6%	13%	4%	0%	100%	12				12	18	7				9						0	42	4	5	1	0	52	81%	8%	10%	2%	0%	0	0	0	0	0	0	100%
Dietz K-8 School 1197	26	2	2	0	0	30	88%	4%	8%	0%	0%	100%	9	1			10	14	7				21	3	1				0	25	4	4	1	0	34	74%	12%	12%	3%	0%	0	0	0	0	0	0	100%
Miles Exploratory Learning Center	16	1	6	0	0	23	70%	4%	26%	0%	0%	100%	1				1	2	1				3	3					0	16	0	8	0	0	24	67%	0%	33%	0%	0%	0	0	0	0	0	100%	
Roberts/Naylor K-8 School 1525	22	4	10	2	1	39	56%	10%	26%	5%	3%	100%	9	1			10	14	7				21	5	1				0	20	5	11	3	3	41	48%	12%	26%	7%	7%	0	0	0	0	0	0	100%
Safford K-8 Magnet 1535	37	4	15	0	2	58	64%	7%	26%	0%	3%	100%	6				6	8	1				15	-1					0	39	5	20	0	2	66	59%	8%	30%	0%	3%	0	0	0	0	0	0	100%
<b>MIS</b>	305	16	82	10	3	416	73%	4%	20%	2%	1%	100%	21	0	4	0	26	9	0	4	0	1	14	-1	0	0	0	1	0	261	13	75	7	4	360	73%	4%	21%	2%	1%	0	0	0	0	0	0	100%
<b>Range</b>																																															
Alice Vail Middle School 1555	37	1	2	1	1	42	88%	2%	5%	2%	2%	100%	7				7	9					11	-3					0	39	1	4	1	0	45	87%	2%	9%	2%	0%	0	0	0	0	0	0	100%
<b>HS</b>	516	30	170	16	10	787	71%	4%	22%	2%	1%	100%	26	3	7	2	38	24	0	9	0	1	34	8	0	1	0	1	10	507	23	149	13	10	702	72%	3%	21%	2%	1%	0	0	0	0	0	0	100%
<b>Range</b>																																															
University High School 2675	43	0	5	3	0	51	88%	0%	8%	4%	0%	100%	6				6	5	7				12	2	46	0	4	3	0	2	46	0	4	3	53	87%	0%	8%	6%	0%	0	0	0	0	0	0	100%
AK (3)	12	0	6	1	0	19	63%	0%	32%	5%	0%	100%	2	0	1	0	3	0	0	0	0	0	0	-1	19	0	19	2	0	40	48%	0%	48%	5%	0%	0	0	0	0	0	100%						
<b>Range</b>																																															
<b>TOTAL</b>	1840	94	749	65	35	2783	66%	3%	27%	2%	1%	100%	157	9	47	7	221	111	7	51	7	5	181	8	0	-2	2	0	8	1664	77	697	59	39	2536	66%	3%	27%	2%	2%	0	0	0	0	0	0	100%

# **EXHIBIT 13**

**April 19, 2017**

**To: Parties**

**From: Bill Hawley**

**Re: Comments on Version 3 of 910g Budget**

Purpose

This memo is a portion of the comments I will be making on the proposed budget. I offer them now because I know the District is at work on amending the proposed budget and it may be helpful to know the recommendations I will be making.

Mentors for First and Second Year Teachers

The formula that the District has developed for determining the appropriate number of mentors seems reasonable. The number of mentors budgeted should be determined using this formula and the calculations involved should be made explicit.

Itinerant Teachers for CRC (can't we get a better title for these experts?)

The District should clarify the criteria used to determine how many itinerant teachers will be needed. More intensive mentoring should be available for first year CRC teachers than for second year CRC teachers and mentoring should not be required for more experienced CRC teachers. An average of 1/5 FTE should be assigned for teaching, the average number of mentees of different experience levels, etc.

Mentors for Beginning Teachers in Low Performing Schools

The number of teachers in this category should be made explicit and the budget numbers should reflect this estimate. For example one mentor oversees 10 teachers in these schools...

Research-based Programs

No programs should be implemented that are not based on solid research or have not been demonstrated as effective in TUSD. In the case of programs found to be effective in TUSD, the District should cite the empirical evidence of such effectiveness. Among the programs that appear

to fail this test are: Seven Habits of Highly Effective Teens; Fred Jones classroom management; Club Z tutoring; Courageous Conversations; Capturing Kids' Hearts; and others.

### Family Engagement

At least one family/community liaison should be assigned to schools serving students eligible for free and reduced meals (not just lunch).

### GATE

The District should fund an additional 12 cluster GATE programs over the next three years, with at least four new programs being introduced in each of the next two years. It is not necessary to fund programs in every grade, though this is obviously desirable.

It appears that implementing a self-contained GATE program at Wheeler may have some integrative affect. This effect will be greater if this is an open GATE program like the one at Tully. A self-contained program at Roberts Naylor is unlikely to have integrative outcomes.

### Non-instructional Staff

The District should eliminate all newly proposed positions in magnet and transitioning schools that are not essential to the implementation of a new research-based program for strengthening the theme (without supplanting). This guideline would not apply to MTSS facilitators, the new restorative practice position discussed at the recent budget meeting or instructional coaches in schools where students are performing below the District average. If there is no MTSS facilitator at a relatively large school that is performing below the District average, a data coach may be warranted. I have no objection to MTSS Leads at any school.

### Consultants

The District should justify the employment of any outside consultant. It seems clear that many of the consultants used do not align their advice to the ongoing approaches being promoted by the District. This is abundantly clear with respect to culturally responsive pedagogy. I am happy to provide evidence supporting this assertion. Moreover, when consultants come in to provide workshops for 1-3 days (and the like), they often provide their own take on the topic and there are no opportunities for follow-up. When the



consultant comes to the District as a trainer of trainers dealing with an integral part of what staff are to know and be able to do, this can be valuable. However, in justifying the consultant for IEEE, the district indicates that this person will provide one-on-one training. Typically, consultants are hired to build the system capacity (e.g., training trainers). TUSD seems to be proposing the opposite.

### BOOST

Additional investments in BOOST appear to be warranted.

### Global Issues Courses

I withdraw my opposition to the global issues courses but believe they should not be characterized as CRC courses. Rather, these courses should be considered as additions to the multicultural curriculum.

# **EXHIBIT 14**

## VI. Appendix F: GATE Data

## GATE Data SY 2011-2012

	<i>African-American</i>	<i>Hispanic/Latino</i>	<i>Native American</i>	<i>White</i>
<b>TOTAL ENROLLMENT</b>				
Total Enrollment (K-12)	3,448 (5.8%)	36,133 (60.7%)	2,310 (3.9%)	14,584 (24.5%)
HS Enrollment (9-12)	1,140 (6.4%)	9,925 (55.6%)	586 (3.3%)	5,258 (29.4%)
MS/K-8 Enrollment (6-8)	786 (6.1%)	8,085 (63.2%)	542 (4.2%)	2,758 (21.6%)
ES/K-8 Enrollment (K-5)	1,522 (5.3%)	18,123 (62.7%)	1,183 (4.1%)	6,568 (22.7%)
<b>GATE ENROLLMENT</b>				
Compared to total group pop. at sites where offered	155 (4.6%)	2,374 (6.9%)	116 (5.6%)	1,832 (13.1%)
Compared to total group pop. of the District	4.4%	6.4%	4.9%	12.4%
<b>CLUSTERING</b> (Enhanced Pull-Out) Offered at ten ES				
Compared to group pop. at sites where offered	47 (14.8%)	342 (12.2%)	15 (14.2%)	240 (13.9%)
Compared to District	1.3%	0.9%	0.6%	1.6%
<b>PULL-OUT</b> Offered at all ES and K-8s				
Compared to group pop. at sites where offered	29 (1.6%)	861 (4.3%)	41 (3.2%)	696 (9.4%)
Compared to District	0.8%	2.3%	1.7%	4.7%
<b>RESOURCE</b> Offered at 14 of 22 MS, and 9 of 12 HS				
Compared to group pop. at sites where offered	57 (3.2%)	692 (4.6%)	35 (4.1%)	518 (7.3%)
Compared to District	1.6%	1.9%	1.5%	3.5%
<b>SELF-CONTAINED</b> Offered at five ES and three MS				
Compared to the group pop. at sites where offered	23 (7.4%)	479 (11.6%)	21 (10.3%)	386 (32.2%)
Compared to District	0.7%	1.3%	0.9%	2.6%
	<i>Exceptional Education Students</i>		<i>English Language Learners</i>	
<b>Total</b>	283 (3.0%)		93 (1.9%)	
<b>Clustering</b>	93 (1.0%)		66 (1.4%)	
<b>Pull-Out</b>	113 (1.2%)		18 (0.4%)	
<b>Resource</b>	48 (0.5%)		4 (0.1%)	
<b>Self-Contained</b>	29 (0.3%)		5 (0.1%)	

## SY 2011-2012 GATE by School by Program by Race/Ethnicity

	<i>African-American</i>	<i>Hispanic/Latino</i>	<i>Native American</i>	<i>White</i>
<b>Cluster</b>				
Collier	4 (25.0%)	31 (36.9%)	2 (50.0%)	73 (33.5%)
Dietz	12 (23.1%)	38 (15.0%)	2 (33.3%)	34 (23.0%)
Erickson	8 (9.0%)	48 (13.6%)	2 (22.2%)	32 (16.8%)
Ford	8 (20.0%)	37 (14.7%)	2 (28.6%)	51 (22.9%)
Gale	2 (15.4%)	22 (15.9%)	0 (0.0%)	30 (10.9%)
Hudlow	4 (11.4%)	34 (14.8%)	1 (16.7%)	22 (12.9%)
Lyons	6 (21.4%)	36 (16.7%)	2 (66.7%)	29 (19.1%)
Miller	0 (0.0%)	71 (9.1%)	5 (8.9%)	11 (3.6%)
Robins	1 (9.1%)	89 (24.3%)	2 (28.6%)	32 (26.7%)
Whitmore	8 (34.8%)	38 (21.6%)	2 (28.6%)	51 (27.6%)
<b>Pullout</b>				
Banks	0 (0.0%)	17 (5.5%)	0 (0.0%)	7 (4.5%)
Blenman	1 (1.0%)	23 (6.2%)	1 (4.5%)	9 (3.9%)
Bloom	0 (0.0%)	5 (2.9%)	0 (0.0%)	9 (3.7%)
Bonillas	0 (0.0%)	25 (6.5%)	1 (6.7%)	5 (5.7%)
Borman	0 (0.0%)	8 (6.0%)	0 (0.0%)	20 (5.6%)
Borton	0 (0.0%)	17 (6.0%)	0 (0.0%)	27 (21.4%)
Brichta	1 (5.0%)	22 (5.8%)	1 (4.3%)	4 (8.3%)
Carrillo	1 (5.6%)	20 (6.2%)	1 (11.1%)	0 (0.0%)
Cavett	0 (0.0%)	10 (2.8%)	0 (0.0%)	1 (10.0%)
Collier	0 (0.0%)	8 (9.6%)	0 (0.0%)	28 (12.8%)
Corbett	0 (0.0%)	12 (3.9%)	0 (0.0%)	18 (8.7%)
Cragin	0 (0.0%)	9 (3.1%)	0 (0.0%)	5 (3.2%)
Davidson	0 (0.0%)	8 (2.9%)	0 (0.0%)	3 (2.2%)
Davis	1 (20.0%)	42 (14.0%)	0 (0.0%)	14 (38.9%)
Dietz	1 (1.9%)	4 (1.6%)	0 (0.0%)	11 (7.4%)
Drachman	0 (0.0%)	18 (5.7%)	0 (0.0%)	9 (24.3%)
Dunham	0 (0.0%)	6 (5.5%)	0 (0.0%)	8 (6.7%)
Erickson	1 (1.1%)	12 (3.4%)	0 (0.0%)	11 (5.8%)
Ford	1 (2.5%)	6 (2.4%)	1 (14.3%)	21 (9.4%)
Fruchthendler	0 (0.0%)	18 (14.2%)	0 (0.0%)	75 (22.3%)
Gale	2 (15.4%)	11 (8.0%)	2 (66.7%)	40 (14.6%)
Grijalva	0 (0.0%)	32 (3.9%)	1 (2.9%)	1 (3.3%)
Hollinger	0 (0.0%)	23 (3.9%)	0 (0.0%)	1 (4.0%)
Henry	2 (5.6%)	9 (6.8%)	0 (0.0%)	19 (9.6%)
Holladay	2 (6.5%)	10 (4.7%)	1 (11.1%)	15 (25.9%)
Howell	0 (0.0%)	8 (2.8%)	0 (0.0%)	6 (4.0%)
Hudlow	0 (0.0%)	12 (5.2%)	0 (0.0%)	9 (5.3%)
Hughes	0 (0.0%)	28 (15.7%)	0 (0.0%)	58 (28.0%)
Johnson	0 (0.0%)	1 (0.3%)	0 (0.0%)	0 (0.0%)
Kellond	0 (0.0%)	10 (3.7%)	0 (0.0%)	32 (14.5%)
Lawrence	0 (0.0%)	16 (9.0%)	9 (4.8%)	0 (0.0%)
Lineweaver	0 (0.0%)	19 (6.6%)	2 (20.0%)	9 (4.3%)
Lynn/Urquides	0 (0.0%)	11 (1.2%)	1 (4.5%)	0 (0.0%)
Lyons	0 (0.0%)	6 (2.8%)	2 (66.7%)	9 (5.9%)
Maldonado	0 (0.0%)	27 (5.9%)	5 (8.6%)	2 (3.8%)
Manzo	0 (0.0%)	7 (2.5%)	0 (0.0%)	0 (0.0%)

Marshall	1 (4.8%)	11 (5.6%)	0 (0.0%)	16 (8.7%)
Menlo Park	0 (0.0%)	8 (2.8%)	0 (0.0%)	1 (9.1%)
Miles – E.L.C.	0 (0.0%)	21 (12.6%)	1 (12.5%)	26 (18.2%)
Miller	0 (0.0%)	28 (3.6%)	2 (3.6%)	4 (4.9%)
Mission View	0 (0.0%)	8 (2.1%)	0 (0%)	0 (0.0%)
Myers-Ganoung	0 (0.0%)	7 (1.6%)	0 (0.0%)	2 (2.5%)
Ochoa	0 (0.0%)	7 (2.4%)	3 (8.1%)	0 (0.0%)
Oyama	0 (0.0%)	17 (3.1%)	1 (2.5%)	1 (2.3%)
Pueblo Gardens	0 (0.0%)	14 (3.0%)	0 (0.0%)	0 (0.0%)
Roberts	0 (0.0%)	2 (0.9%)	0 (0.0%)	0 (0.0%)
Robins	0 (0.0%)	30 (8.2%)	0 (0.0%)	21 (17.5%)
Robison	0 (0.0%)	9 (2.5%)	0 (0.0%)	1 (2.4%)
Rose	0 (0.0%)	27 (3.9%)	0 (0.0%)	1 (9.1%)
Schumaker	2 (5.4%)	14 (7.1%)	0 (0.0%)	16 (9.6%)
Sewell	2 (7.4%)	7 (3.6%)	0 (0.0%)	9 (6.6%)
Soleng Tom	0 (0.0%)	22 (13.8%)	0 (0.0%)	64 (20.0%)
Steele	3 (7.3%)	12 (5.9%)	2 (20.0%)	14 (7.1%)
Tolson	0 (0.0%)	21 (4.3%)	1 (11.1%)	3 (7.7%)
Tully	1 (1.8%)	12 (2.9%)	3 (15.8%)	4 (4.4%)
Van Buskirk	1 (10.0%)	15 (3.1%)	0 (0.0%)	0 (0.0%)
Vesey	1 (3.8%)	31 (4.5%)	0 (0.0%)	6 (4.7%)
Warren	0 (0.0%)	7 (2.5%)	0 (0.0%)	1 (3.4%)
Wheeler	0 (0.0%)	12 (5.9%)	0 (0.0%)	14 (8.0%)
White	0 (0.0%)	21 (3.0%)	0 (0.0%)	6 (8.5%)
Whitmore	1 (4.3%)	11 (6.3%)	0 (0.0%)	21 (11.4%)
Wright	2 (1.8%)	0 (0.0%)	0 (0.0%)	4 (3.3%)
Booth-Fickett Magnet	2 (1.3%)	24 (3.3%)	0 (0.0%)	15 (4.2%)
McCorkle PreK-8	0 (0.0%)	23 (4.2%)	2 (11.1%)	1 (3.6%)
Naylor	0 (0.0%)	2 (0.4%)	0 (0.0%)	0 (0.0%)
Townsend	2 (2.2%)	5 (1.5%)	0 (0.0%)	6 (3.1%)
<b>Self-Contained</b>				
Corbett	1 (2.27%)	28 (9.1%)	0 (0.0%)	74 (35.7%)
Hollinger	0 (0.0%)	66 (11.3%)	0 (0.0%)	12 (48.0%)
Lineweaver	2 (16.7%)	51 (17.7%)	0 (0.0%)	64 (30.9%)
Tully	1 (1.8%)	28 (6.7%)	0 (0.0%)	26 (28.6%)
White	1 (7.7%)	76 (11.0%)	5 (9.6%)	22 (31.0%)
Doolen	9 (8.3%)	35 (9.3%)	4 (12.9%)	82 (28.4%)
Pistor	4 (17.4%)	148 (14.2%)	8 (16.7%)	21 (30.4%)
Vail	5 (8.5%)	51 (11.4%)	4 (30.8%)	86 (35.2%)
<b>Resource</b>				
Dodge Magnet	2 (14.3%)	26 (10.6%)	0 (0.0%)	26 (19.7%)
Carson	2 (3.0%)	24 (7.7%)	0 (0.0%)	22 (10.3%)
Doolen	5 (4.6%)	19 (5.0%)	3 (9.7%)	23 (8.0%)
Booth-Fickett Magnet	2 (1.3%)	25 (3.4%)	0 (0.0%)	25 (6.9%)
Gridley	2 (4.9%)	19 (7.3%)	1 (5.9%)	69 (15.8%)
Magee	1 (1.5%)	31 (10.7%)	2 (18.2%)	72 (17.5%)
Mansfeld	5 (11.4%)	123 (19.3%)	7 (24.1%)	27 (33.8%)
Maxwell	4 (14.8%)	45 (12.1%)	0 (0.0%)	4 (14.3%)
Pistor	1 (4.3%)	3 (0.3%)	0 (0.0%)	0 (0.0%)
Secrist	3 (11.5%)	23 (11.1%)	0 (0.0%)	32 (13.3%)
Townsend	4 (4.4%)	6 (1.9%)	0 (0.0%)	9 (4.7%)
Utterback Magnet	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (1.2%)
Roskruge Magnet	1 (10.0%)	42 (6.6%)	3 (3.6%)	4 (8.5%)

Catalina Magnet	7 (3.3%)	28 (3.3%)	1 (1.7%)	10 (2.4%)
Cholla Magnet	1 (1.4%)	72 (4.4%)	6 (4.2%)	11 (5.0%)
Palo Verde Magnet	2 (1.1%)	20 (3.3%)	2 (7.7%)	13 (3.4%)
Pueblo Magnet	1 (2.1%)	31 (1.6%)	3 (3.2%)	0 (0.0%)
Rincon	7 (6.0%)	42 (6.1%)	1 (5.0%)	31 (7.4%)
Sabino	1 (1.9%)	10 (3.5%)	0 (0.0%)	41 (4.4%)
Sahuaro	1 (0.7%)	25 (4.1%)	0 (0.0%)	51 (4.4%)
Santa Rita	7 (5.3%)	21 (3.9%)	0 (0.0%)	10 (1.8%)
Tucson Magnet	5 (2.6%)	96 (3.9%)	6 (3.6%)	59 (9.5%)

# **EXHIBIT 15**

**GATE Enrollment on Day 40 of SY 2015-16**

<b>TOTAL ENROLLMENT</b>		<b>White</b>	<b>African American</b>	<b>Hispanic/Latino</b>	<b>Native American</b>	<b>Asian/Pacific Islander</b>	<b>Multi Racial</b>	<b>Total</b>
Total Enrollment (K-12)	<b>N</b>	9855	4162	28999	1781	938	1577	47312
	<b>%</b>	20.8%	8.8%	61.3%	3.8%	2.0%	3.3%	100.0%
ES Enrollment (K-5)	<b>N</b>	3982	1610	10530	686	320	689	17817
	<b>%</b>	22.3%	9.0%	59.1%	3.9%	1.8%	3.9%	100.0%
MS Enrollment (6-8)	<b>N</b>	1985	908	6522	446	173	292	10326
	<b>%</b>	19.2%	8.8%	63.2%	4.3%	1.7%	2.8%	100.0%
HS Enrollment (9-12)	<b>N</b>	3357	1260	8408	422	385	445	14277
	<b>%</b>	23.5%	8.8%	58.9%	3.0%	2.7%	3.1%	100.0%
<b>GATE Enrollment</b>								
GATE Enrollment	<b>N</b>	1311	208	1839	83	82	162	3685
	<b>%</b>	35.6%	5.6%	49.9%	2.3%	2.2%	4.4%	100.0%
% of District Ethnic Total		13.3%	5.0%	6.3%	4.7%	8.7%	10.3%	7.8%
<b>Pull-out</b>								
Pullout GATE Enrollment	<b>N</b>	551	80	727	23	31	65	1477
	<b>%</b>	37.3%	5.4%	49.2%	1.6%	2.1%	4.4%	100.0%
% of District Ethnic Total		5.6%	1.9%	2.5%	1.3%	3.3%	4.1%	3.1%
<b>Self-contained</b>								
SC GATE Enrollment	<b>N</b>	382	44	471	19	25	60	1001
	<b>%</b>	38.2%	4.4%	47.1%	1.9%	2.5%	6.0%	100.0%
% of District Ethnic Total		3.9%	1.1%	1.6%	1.1%	2.7%	3.8%	2.1%
<b>Resource</b>								
Resouce GATE Enrollment	<b>N</b>	378	84	641	41	26	37	1207
	<b>%</b>	31.3%	7.0%	53.1%	3.4%	2.2%	3.1%	100.0%
% of District Ethnic Total		3.8%	2.0%	2.2%	2.3%	2.8%	2.3%	2.6%
<b>Exceptional Education</b>								
		<b>%</b>		<b>N</b>		<b>%</b>		
<b>Total</b>		104	2.8%	44	1.2%			
<b>Pull-out</b>		39	2.6%	19	1.3%			
<b>Resource</b>		52	4.3%	16	1.3%			
<b>Self-Contained</b>		13	1.3%	9	0.9%			



# **EXHIBIT 16**

**From:** Juan Rodriguez  
**To:** ["Willis D. Hawley"](#)  
**Cc:** ["Thompson, Lois D.";](#) [Rubin Salter Jr. \(Rsjr3@aol.com\);](#) [Eichner, James \(CRT\);](#) [Simons, Shaheena \(CRT\);](#) ["Taylor, Martha";](#) ["Bruce Converse";](#) [Brown, Samuel;](#) [Desegregation](#)  
**Subject:** TUSD's 2016-17 GSRR Issues  
**Date:** Wednesday, August 17, 2016 6:04:21 PM  
**Attachments:** [TUSD Website GSRR as of 8.16.16.pdf](#)  
[RFIRSJR20160812.pdf](#)

---

Dr. Hawley,

The Mendoza Plaintiffs write to request that you look into issues concerning the "2016-17 Guidelines for Student Rights and Responsibilities (GSRR)" posted on the District's website at <http://tusd1.org/contents/stuguidelines/stuguidelines.html> and attached here. As detailed further below, given that the 2016-17 GSRR has been made available to the public and presumably has been sent home with every TUSD student, we are greatly concerned with the following statement included in the 2016-17 GSRR within a new "Frequently Asked Questions Regarding Discipline" ("FAQ") section at pages 5-6: *"This coming school year, students who violate the Code of Conduct by fighting will be suspended short term out of school, followed by a two day in school intervention, and each will be counseled. Students who fight a second time during the school year are subject to being assigned to our District Alternative to Education Program for a period of time."* (The Plaintiffs and Special Master never were given the opportunity to review or comment on this new section as is required by the USP and the Mendoza Plaintiffs only learned of its existence when they accessed the GSRR this week to read it against the draft Code of Conduct. We also note that the bottom of the page that contains the quoted language appears to be inaccurate and misleading with its representation that it was part of the material "approved July 14, 2015." )

The 2016-17 GSRR posted on the District's website suggests that the quoted disciplinary response to fighting already is in effect. As you likely already know, the District included very similar provisions on page 8 of its August 10, 2016 draft **proposed** code of conduct. However, the Fisher Plaintiffs' August 12, 2016 information requests (attached) recite information they have learned that suggests that the District already is applying the above-quoted disciplinary response to fighting. Given that the webpage on which the 2016-17 GSRR is posted indicates that the page was last updated on January 6, 2016, it is unclear to us exactly when the 2016-17 GSRR with the above-quoted language was posted and whether the District already is implementing the new exclusionary policy for "fighting". If the District is already implementing the policy of administering out-of-school suspensions and referrals to DAEP for fighting as set forth in the above-quoted FAQ, not only would USP Section I, D, 1 (concerning Plaintiff and Special Master review and comment) have been violated, so would have USP Section VI, B, 2, a. which requires that the District "limit exclusionary consequences to instances in which student misbehavior is ongoing and escalating, and the District has first attempted and documented the types of intervention(s) used in PBIS and/or Restorative Practices."

Indeed, implementation of the District's new fighting policy would be a significant expansion of exclusionary practices beyond what is allowed by the GSRR the Plaintiffs and Special Master reviewed and that the Governing Board approved because (1) it requires out-of-school suspension for a student's first fight while ignoring the above USP limitation for exclusionary consequences, and

(2) with regard to a student's second fight within a school year --which would result in referral to DAEP under the new FAQ language -- fighting actually is a level 3 code violation but according to the express language of the GSRR (as distinct from the FAQ language) DAEP only is allowed for level 4 and 5 violations as an alternative to long-term out-of-school suspensions (which also are not allowed for level 3 violations).

Because it appears that the District has violated the review and comment requirements of the USP and stated its intent to -- or already started to implement a disciplinary action that -- violates the provisions of the USP relating to discipline (as well as the provisions of the approved GSRR), the Mendoza Plaintiffs are constrained to request that you take such actions as are necessary to determine the following and, if then warranted, also report the District's noncompliance with the USP to the Court pursuant to USP Section 10, E, 6: (1) whether the District has directed administrators to implement the new fighting policy set forth in the FAQ, (2) when the District posted the 2016-17 GSRR, including the FAQ reciting the new fighting policy, to its website, (3) whether the District has indeed sent copies of the 2016-17 GSRR including the FAQ reciting the new fighting policy home with students, and (4) whether any students have already been subjected to the disciplinary outcomes set forth in the FAQ fighting policy. Mendoza Plaintiffs ask that you then take such actions as may be necessary, including, but not limited to suggesting to the District how it should remedy the situation and bring itself into compliance with the USP and filing a report and recommendation to the Court should the District decline to follow your recommended course of action.

-

Thank you,

**Juan Rodriguez** | Staff Attorney

**MALDEF** | [www.maldef.org](http://www.maldef.org)

634 South Spring Street, 11<sup>th</sup> Floor, Los Angeles, CA 90014

213.629.2512, ext. 136 t / 213.629.0266 f

[jrodriguez@maldef.org](mailto:jrodriguez@maldef.org)

*MALDEF: The Latino Legal Voice for Civil Rights in America.*

CONFIDENTIALITY NOTICE: This e-mail transmission from The Mexican American Legal Defense & Educational Fund, and any documents, files or previous e-mail messages attached to it may contain confidential information that is legally privileged. If you are not the intended recipient, or a person responsible for delivering it to the intended recipient, you are hereby notified that any disclosure, copying, distribution or use of any of the information contained in or attached to this transmission is strictly prohibited. If you have received this transmission in error, please immediately notify us by reply e-mail or by telephone at 213.629.2512, and destroy the original transmission and its attachments without reading or saving it in any manner.

# **EXHIBIT 17**

# TUCSON UNIFIED

## SCHOOL DISTRICT

### *2016-17 GUIDELINES FOR STUDENT RIGHTS AND RESPONSIBILITIES (GSRR)*

Together, students, parents<sup>1</sup>, teachers, staff, and principals share the responsibility in creating and sustaining an environment that enhances student achievement and well being in the Tucson Unified School District. We ask for the support of students and parents to achieve this goal. The Guidelines for Student Rights and Responsibilities (GSRR) addresses:

- The rights and responsibilities of students and parents
- Conduct which may require discipline
- Responsibilities of administrators and teachers to implement discipline, which includes behavioral supports and interventions that promote safety and support student success
- Administrative responsibilities for Due Process

Please read these Guidelines and develop a thorough understanding of the details. By following the Guidelines, you can help our school district become a safer and more supportive environment for the students and staff.

Student discipline is subject to the provisions of Governing Board policies and state and federal laws. Students will be disciplined in accordance with Governing Board Policy JK and its accompanying regulations. Students with disabilities shall be disciplined in accordance with the Individuals with Disabilities Education Act (IDEA), Section 504, and applicable Governing Board Policies and Regulations – JK, Student Discipline; JK-R5, Discipline Of, and Alternative Interim Educational Placements For, Special Education Students; and JK-R6, Discipline, Suspension, Expulsion for 504 Students—as applied to these Guidelines for Student Rights and Responsibilities. Students may also be subject to applicable civil and/or criminal penalties if they violate the law.

These Governing Board Policies and Administrative Regulations are available for review in the principal's office and online at [www.tusd1.org](http://www.tusd1.org). (follow the link to “Student Rights”) Copies of this booklet are available in Spanish on the reverse side of this booklet and can be obtained online at [www.tusd1.org](http://www.tusd1.org). (follow the link to “Student Rights”)

Estos Planes de Acción del Consejo Gobernante, y Reglamentos Administrativos se hacen disponibles para revisión en la oficina del director escolar y en [www.tusd1.org](http://www.tusd1.org). Las copias en español de este folleto están disponible al dorso de este folleto y se pueden obtener en línea en [www.tusd1.org](http://www.tusd1.org).

**TUSD Governing Board:**

Adelita S. Grijalva, President; Kristel Ann Foster, Clerk; Michael Hicks; Cam Juárez; Dr. Mark Stegeman

**Superintendent:**

Heliodoro Torres (H.T.) Sánchez, Ed.D.

<sup>1</sup> “Parents” as used throughout this document refers to parents and/or legal guardians

**TABLE OF CONTENTS:**

Guidelines for Student Rights and Responsibilities Acknowledgement Form..... 3

Frequently Asked Questions..... 5-6

QUICK GUIDE TO OFFENSES..... 7

SECTION A: PURPOSE ..... 8

    1. What Are The “Guidelines For Student Rights And Responsibilities” And  
    And Why Are They Needed?..... 8

    2. When Do These Guidelines Apply?..... 9

SECTION B: STUDENT AND PARENT RIGHTS AND RESPONSIBILITIES ..... 10

    1. Students Have A Right To ..... 10-11

    2. Students Have A Responsibility To ..... 11

    3. Parents And Guardians Have A Right To ..... 12

    4. Parents And Guardians Have A Responsibility To ..... 12

SECTION C: GENERAL INFORMATION..... 12

    1. Equal Education Opportunities & Anti-Harassment Policy (Policy JB)..... 12-13

    2. Governing Board Position On Gang Behavior And Activity ..... 13

    3. Student Attendance (Policy JE) ..... 13

    4. Dating Abuse (Policy JICL) ..... 13

    5. Bullying, Intimidation & Harassment (Policy JICK) ..... 13

    6. School Dress Code (Required At Every School-Policy JICA) ..... 14

    7. Bus Rules ..... 14-15

    8. Student Use Of Cell Phones And Other Electronic Devices (Policy JICJ) ..... 15

    9. Hazing (Policy JICFA)..... 16

SECTION D: KNOW THE ACTIONS ..... 17

    1. Conduct Which Must Be Reported To Law Enforcement ..... 17

    2. Conduct Which May Be Reported To Law Enforcement ..... 17

    3. Due Process ..... 17-18

    4. Due Process For Students With 504 Plans or IEP’s ..... 18

    5. In School Interventions/Suspensions..... 18

    6. Out Of School Suspensions ..... 19

    7. Alternative Education Placement..... 19

    8. Abeyance Contracts ..... 20

    9. Appeals ..... 20

    10. Expulsion ..... 20

    11. Principal Application for Waiver Of Mandatory Disciplinary Actions..... 20

SECTION E: RESTORATIVE PRACTICES; POSITIVE BEHAVIOR INTERVENTIOSN AND SUPPORTS... 21-22

SECTION F: DEFINITIONS ..... 22

SECTION G: ACTION LEVELS..... 23

SECTION H: VIOLATIONS ..... 25-33

    • Important Information..... 24

    • Aggression..... 25

    • Other Violations of School Policies ..... 26

    • Alcohol, Tobacco and Other Drugs Violations ..... 27-28

    • Arson ..... 28

    • Attendance Policy Violations (Out of School Suspension Not Permitted) ..... 28

    • Dishonesty ..... 29

    • Harassment and Threat, Intimidation ..... 29

    • School Threat or Interference ..... 30

    • Sexual Offenses ..... 30

    • Technology, Improper Use Of ..... 31

    • Theft ..... 31-32

    • Trespassing; Vandalism or Criminal Damage..... 32

    • Weapons and Dangerous Items (Possession Of) ..... 32-33

# GUIDELINES FOR STUDENT RIGHTS AND RESPONSIBILITIES (GSRR)

## 2016-17 SY ACKNOWLEDGEMENT FORM

The Tucson Unified School District strives to be one of the best in the country. We can accomplish this mission by working as a team with you, faculty, staff, parents and the community. You, the students, are the most critical members of this team. Your success as a valued and critical member of the team can be measured when:

- **You take responsibility for your actions**
- **You help create a positive school culture and climate**
- **You are proud of your school**
- **You always do your best**

With your commitment to positive outcomes, we will continue to grow and excel!

This form must be signed and dated by you and your parent/guardian after reviewing the 2015-2016 GSRR. **This form must be returned to your school within 5 days of receiving the GSRR**

I acknowledge that I have read and reviewed the information in the GSRR with my child.

-----  
PARENT SIGNATURE & DATE

-----  
STUDENT SIGNATURE & DATE

-----  
SCHOOL, GRADE & TEACHER (HOMEROOM)





## Frequently Asked Questions Regarding Discipline

**Q – Has TUSD established procedures for addressing disciplinary issues *prior* to writing a referral?**

A. Yes. Interventions to address and attempt to change behaviors are required to be attempted and documented. The referral process may be utilized before a student is in danger of exclusionary discipline.

**Q – What is exclusionary discipline?**

A. These are consequences used by school administrators that temporarily remove a student from their regular educational setting. An example of exclusionary discipline is an out of school suspension.

**Q – Does TUSD investigate bullying allegations on its campuses?**

A. Yes. All reports of bullying are investigated by the principal. If the allegation of bullying is sustained, disciplinary actions that are aligned with the Code of Conduct/GSRR are assigned, and may include exclusionary actions. You may find the Governing Board regulation on bullying through the following link: [JICK-R](#)

**Q – Are ‘free fights’ permitted under the current Code of Conduct/GSRR?**

A. No. TUSD strives to maintain a safe and secure learning environment for all. We in no way condone violence at our schools. Administrators record evidence of interventions and restorative actions. This coming school year, students who violate the Code of Conduct by fighting will be suspended short term out of school, followed by a two day in school intervention, and each will be counseled. Students who fight a second time during the school year are subject to being assigned to our District Alternative Education Program for a period of time.

**Q – Have site administrators been disallowed or discouraged from suspending students of color?**

A. No. Suspension for any and all students is allowed as long as the non-exclusionary procedures have been satisfied first. The Code of Conduct/GSRR applies to all students regardless of race. However, the district and school principals do review discipline trends and patterns. Principals are encouraged to look at their discipline data through various factors, which includes race, areas of campus where problems are more prevalent, and classrooms where teachers may need more support.

**Q – What is racial/ethnic disproportionality as it applies to school discipline?**

A. Disproportionality in discipline means that one particular race or ethnicity of students receives discipline consequences different from other student groups. One example would be if a particular sub-group of students made up 10% of the student population but 30% of the students being disciplined. Another example of disproportionality would be if a sub-group of students received more serious consequences for a particular violation code than other students who were given consequences for the same infraction.

**Q – Does TUSD minimize student violation levels?**

- A. No. TUSD does not minimize student violations. Principals may petition to have a violation level modified, but only a Director or Assistant Superintendent can permit the level to be changed. We want principals to work with each student and parent individually, while at the same time to be consistent in how the Code of Conduct is enforced.

**Q – Does TUSD suspend students?**

- A. Yes. TUSD does not suspend for level 1 or 2 violations. However, sites may use exclusionary discipline for higher level violations, especially if those violations interfere with the ability to maintain a safe and secure learning environment. Principals are asked to monitor and judge the severity of a Code of Conduct/GSRR violation. Maintaining a safe and secure school is a top priority for the District and for our principals.

**QUICK-GUIDE TO OFFENSES**

<b>CATEGORY</b>	<b>VIOLATION</b>
AGGRESSION (Page 25)	Verbal Provocation, Recklessness, Minor Aggressive Act, Other Aggression, Disorderly Conduct, Endangerment, Fighting, Assault, Aggravated Assault
ALCOHOL, TOBACCO AND OTHER DRUGS (Page 27)	Inappropriate use of Over the Counter Drugs, Inhalants, Unknown Drug, Substance Represented as of Illicit Drug, Inappropriate use of Prescription Drugs, Illicit Drug, Alcohol Violation, Tobacco Violation, Possession of Drug Paraphernalia
ARSON (Page 28)	Arson of a Structure or Property, Arson of an Occupied Structure
ATTENDANCE POLICY VIOLATION (Page 28)	Other Attendance Violations, Tardy, Unexcused Absence, Leaving School Grounds without Permission, Truancy
DISHONESTY (Page 29)	Cheating, Forgery, Lying, Plagiarism
HARASSMENT AND THREAT, INTIMIDATION (Page 29)	Threat or Intimidation, Bullying, Harassment (nonsexual), Hazing
OTHER VIOLATIONS OF SCHOOL POLICIES (Page 26)	Dress Code Violation, Parking Lot Violation, Public Display of Affection, Other Violation of School Policies and Regulations, Contraband, Disruption, Gambling, Inappropriate Language, Defiance or Disrespect Towards Authority and Non Compliance, Negative Group Affiliation/Illegal Organization
SCHOOL THREAT OR INTERFERENCE (Page 30)	Fire Alarm Misuse, Other School Threat, Bomb Threat, Chemical or Biological Threat
SEXUAL OFFENSES (Page 30)	Sexual Harassment, Pornography, Sexual Harassment with contact, Indecent Exposure or Public Sexual Indecency, Sexual Assault or Rape, Sexual Abuse or Sexual Conduct with minor, or Child Molestation
IMPROPER USE OF TECHNOLOGY (Page 31)	Telecommunication Device, Other Technology, Computer, Network Violation
THEFT (Page 31-32)	Petty Theft, Theft – School Property or Non-School Property, Burglary or Breaking and Entering, Extortion, Robbery, Armed Robbery, Burglary (First Degree)
TRESPASSING, VANDALISM OR CRIMINAL DAMAGE (Page 32)	Trespassing, Graffiti or Tagging, Vandalism of Personal Property, Vandalism of School Property
WEAPONS AND DANGEROUS ITEMS; POSSESSION OF (Page 32-33)	Dangerous Items, Other Weapons, Simulated Firearms, Firearms

## SECTION A: PURPOSE

### 1. WHAT ARE THE GUIDELINES AND WHY ARE THEY NEEDED?

TUSD is committed to partnering with students and parents to provide an environment that is safe, supportive, and conducive to learning, and is committed to reduce racial and ethnic disparities in the administration of school discipline. To help promote and maintain that environment, the GSRR:

- Specify the rights and responsibilities of students and parents
- Describe conduct which violates those rights and responsibilities
- Provide guidance and instruction to help students resolve discipline problems in a manner that supports their development
- Strive to ensure consistent application of disciplinary actions so that students from school to school will receive similar actions for similar violations.
- Assure the rights of students and parents when disciplinary action is taken

Disciplinary consequences must be non-discriminatory, fair, age-appropriate, and correspond to the severity of the student’s misbehavior. When considering responses to violations, the District strives to keep students in the classroom whenever possible. For all but the most severe offenses (Levels 4 and 5 in the “Action Levels” section of this document below), an Exclusionary Consequence (“any disciplinary consequence that removes a student from classroom instruction, including, but not limited to, in-school and out-of-school suspension, placement in an alternative setting or program, and expulsion.”) must be limited to instances in which (a) the violation is a level 3, (b) student misbehavior is ongoing and escalating, and (c) only after the District has first attempted and documented the types of intervention(s) used in PBIS and/or Restorative Practices. If Exclusionary Consequences are imposed, students will have fair due process that includes an opportunity to appeal (see Policy JK and accompanying regulations). For all offenses, disciplinary consequences must be paired with meaningful instruction and supportive guidance (e.g. constructive feedback and re-teaching) so students are offered an opportunity to learn from their behavior and, where possible, offered an opportunity to continue to participate in the school community.

While prioritizing student, staff, and public safety, the District shall not use Exclusionary Consequences for low-level conduct (Action Levels 1-2 below), shall only involve School Safety and/or law enforcement in high-level student discipline (Action Levels 4-5 below), such as when a student is a danger to self or others (to the extent permitted by law), and shall keep students in the classroom setting whenever possible as members of the school community. School Safety personnel will not participate in the discipline decision(s) that occur after an incident. This in no way prohibits School Safety involvement during or immediately after an incident to protect student, staff, or visitor safety.

All district personnel administering discipline to students should be informed if a student has a disability under either Section 504 or IDEA or if the student is suspected of having – or is being considered for an evaluation for – a disability. There are specific procedures that must be followed for students who are considered disabled under federal law, including determining whether the misbehavior is a manifestation of the student’s disability.

## 2. WHEN DO THESE GUIDELINES APPLY?

- During regular school hours
- While being transported on the school bus or other school district-sanctioned transportation
- At times and places where the principal or other school official or employee has jurisdiction over students
- During school-sponsored events
- During field trips
- During athletic functions
- When students are going to and from school (“portal to portal”)
- During other school-related activities

Additionally, the principal is authorized to begin disciplinary action when a student's misconduct away from school has a detrimental effect on the other students, or on the orderly educational process, because the violation is directly connected to prior violations at school, or threatens to produce further violations at school.

***Students who believe they have experienced discrimination, harassment, hazing, dating abuse, bullying, or unfair disciplinary actions, may file a complaint with the site principal, assistant principal, Student Equity at 225-4316, or online at [www.tusd1.org/deseg](http://www.tusd1.org/deseg)***

***Parents who believe their student has experienced discrimination, harassment, hazing, dating abuse, bullying, or unfair disciplinary actions, may file a complaint with the site principal, assistant principal, Student Equity at 225-4316, or online at [www.tusd1.org/deseg](http://www.tusd1.org/deseg)***

<b>SECTION B: STUDENT AND PARENT RIGHTS AND RESPONSIBILITIES</b>
--

TUSD believes that educating a student is a collaborative effort with the student and parent. To support this collaboration we realize that each party has rights and responsibilities. **The following identification of these rights and responsibilities is a general list to provide guidelines, with the intention of not being comprehensive or all-inclusive.** (See Policy JI “Rights and Responsibilities”)

**1. STUDENTS HAVE A RIGHT TO:**

- a. Learn in a safe, clean, orderly and positive climate – one that is unbiased, nonjudgmental, and free from prejudice, discrimination, verbal or physical threats and abuse.
- b. Receive high quality instruction that is comprehensible and appropriate to their level of academic and linguistic development.
- c. Be expected to achieve at high levels.
- d. Be taught in ways that are responsive to students’ individual needs, and respond to students’ individual racial, ethnic, linguistic and cultural backgrounds.
- e. Receive appropriate accommodations to meet individual needs. (as supported by documentation)
- f. Express their ideas and perspectives on issues and topics relevant to their education, including school policies and procedures.
- g. Participate in student activities, including extracurricular activities.
- h. Be treated with respect, and to be treated as a unique individual with differing needs, learning styles and abilities in a manner that encourages and enhances individual self-esteem.
- i. Be treated in a fair and equitable manner by teachers and administrators.
- j. Privacy. (See the “Notification of Privacy Rights of Parents and Students” at page 36)
- k. Due process of law.
- l. Have school rules that are enforced in a consistent, fair and reasonable manner.
- m. Be free to request an interpreter or translator at any step of the disciplinary process.
- n. Be free from retaliation, from fear of retaliation, and from sex discrimination and sexual harassment at school, including dating abuse. A victim has the right to transfer to another school. (See Policy JICL “Dating Abuse”).
- o. Receive fair, equitable, non-discriminatory disciplinary actions that are aligned with the GSRR.
- p. Have teachers and administrators who will follow all District policies related to known allegations of discrimination, harassment, hazing, bullying, and incidents that require mandatory reporting. Such known allegations/incidents must be reported to site administration immediately.
- q. Be treated in a manner that is respectful of and responsive to their cultural traditions.
- r. Administrators who will:
  - model appropriate behavior and expect appropriate behavior from students and teachers
  - hold students and teachers accountable for student learning
  - expect parents to be collaborative partners regarding student achievement
  - work collaboratively with Student Equity.
  - host student assemblies (or other appropriate meetings) to communicate positive core values and behavioral expectations, and to explain the GSRR, Positive Behavioral Interventions and Supports (PBIS), and Restorative Practices (RP) in an age-appropriate manner
  - hold informational sessions for parents at least twice per school year at each school, which shall include information regarding GSRR, PBIS, RP, due process and appeal procedures, and guidance for making parent complaints about student discipline
  - make decisions regarding removing students and/or staff for safety reasons
  - discipline students in accordance with the GSRR
  - Consistently and accurately report discipline consequences for students into the database

- s. Full access to opportunities within the educational environment without experiencing discrimination on the basis of race, color, religion/religious beliefs, sex, gender, gender identity, age, national origin, sexual orientation, creed, citizenship status, marital status, political beliefs/affiliation, disability, home language, or family, social or cultural background. This includes the availability of all support services which promote the development of student potential. (See Policy AC “Non-Discrimination”, ACA “Sexual Harassment”, and JB “Equal Educational Opportunities and Anti-Harassment”).
- t. Acquire English and such other languages as may be available at the school for students to study.
- u. Access to a classroom environment that encourages the use of English, promotes appreciation of other languages, and respects students’ right to use their native language to facilitate communication and enhance academic achievement.
- v. Access to books and other reading materials for supplementary and recreational use, including materials that may be available in other languages.
- w. Access to non-instructional interpretation services when communicating with the school, and in some cases, to translated copies of certain school forms and documents.
- x. Receive a copy of this handbook (GSRR).
- y. Have access to quality learning resources, including learning technology.
- z. Have access to their formal student records.
- aa. Have access to school assignments/homework while serving a disciplinary suspension for the duration of the suspension and have options for alternative instructional opportunities for any remaining suspension.

**2. STUDENTS HAVE A RESPONSIBILITY TO:**

- a. Attend school daily according to school district adopted calendar, arrive on time, bring appropriate materials, and be prepared to participate in class and complete assignments.
- b. Strive for academic growth and to strive for their personal best.
- c. Participate fully in the classroom, curriculum and learning process during the entire class period.
- d. Make positive contributions to an environment that allows fellow students to have equal access to educational opportunities.
- e. Make positive contributions to an environment that allows fellow students to be free from discrimination, harassment, hazing and bullying.
- f. Make up work resulting from an absence.
- g. Respect the rights, feelings, and property of fellow students, parents, school staff, visitors, guests, and school neighbors.
- h. Conduct themselves in an appropriate and respectful manner while on school grounds, school buses, at bus stops, at any school-related activity, and in the classroom, so as not to interfere with the rights of another student to learn and to contribute to a safe and orderly environment that is conducive to learning.
- i. Display behavior that does not compromise the safety of other students and/or staff.
- j. Follow discipline guidelines adopted by the school and District.
- k. Protect and take care of the school’s property.
- l. Abide by the governing board policies and regulations.
- m. Assist the school staff in running a safe school, and to help maintain the safety and cleanliness of the school environment.
- n. Read and ask questions to understand the information in the Guidelines for Student Rights and Responsibilities handbook (GSRR).

**3. PARENTS AND GUARDIANS HAVE A RIGHT TO:**

- a. Receive official reports (quarterly or more frequently) of the student's academic progress, attendance and behavior.
- b. Request and be granted conferences with teachers, counselors and/or the principal.
- c. Receive explanations from teachers about their student's grades and disciplinary procedures.
- d. Access and review school records pertaining to their student. (see Annual Privacy Notice, pg. 37)
- e. Receive a copy of this handbook (GSRR).
- f. Receive immediately an oral *and* a written notification anytime a student receives in-school suspension, or is sent home for any safety and/or disciplinary reason. (including suspensions)
- g. Request an interpreter or translator at any step of the disciplinary process.
- h. Request a review of all disciplinary actions relating to their student.
- i. Non-instructional (not related to instruction) interpretation services when communicating with the school, and in some cases, to translated copies of certain school forms and documents.
- j. Direct their student's education, upbringing and moral or religious training.
- k. Make health care decisions for the minor child.
- l. Be notified promptly if an employee of this state, any political subdivision of this state, any other governmental entity or any other institution suspects that a criminal offense has been committed against the minor child by someone other than a parent, unless the incident has first been reported to law enforcement and notification of the parent would impede a law enforcement or child protective services investigation. This paragraph does not create any new obligation for TUSD to report misconduct between students at school, such as fighting or aggressive play, that are routinely addressed as student disciplinary matters by the school.
- m. Express appropriately their ideas and perspectives on issues and topics relevant to their child's education, including school policies and procedures.
- n. Be treated in a manner that is respectful of and responsive to their cultural traditions.

**4. PARENTS AND GUARDIANS HAVE A RESPONSIBILITY TO:**

- a. Communicate and collaborate with teachers to support student achievement.
- b. Attempt to participate and be active at their student's school.
- c. Be partners with school staff by sharing appropriate ideas for improving student learning and by helping to prevent and/or resolve student discipline problems.
- d. Provide supervision of the student's health, physical and emotional well being, and assume responsibility for the student's timely regular attendance.
- e. Promptly provide the school with explanations for student absences or tardiness.
- f. Ensure student compliance with school and district policies and regulations.
- g. Read and ask questions to understand the information in the GSRR.
- h. Reinforce the importance of students' adherence to values and behaviors described in the GSRR.

<b>SECTION C: GENERAL INFORMATION</b>
---------------------------------------

**1. EQUAL EDUCATIONAL OPPORTUNITIES AND ANTI-HARASSMENT (POLICY JB)**

It is the policy of the TUSD to prohibit discriminatory harassment based on actual or perceived race, color, religion/religious beliefs, sex, gender, gender identity, age, national origin, sexual orientation, creed, citizenship status, marital status, political beliefs/affiliation, disability, home language, parental status, status with regard to public assistance, limited proficiency in English, or family, social or cultural background, or any other reason not related to the student's individual capabilities or on the basis of association with others identified by these categories. TUSD shall investigate all complaints, formal or



informal, verbal or written, of discriminatory or other harassment, and shall take appropriate action against anyone who is found to have violated this policy.

## **2. GOVERNING BOARD POSITION ON GANG BEHAVIOR AND ACTIVITY**

The behaviors that have become associated with gang activity or membership, especially violence and intimidation will not be tolerated on or near school property or in activities associated with school. In accordance with this position, any students engaging in gang activities will be disciplined to the fullest extent of TUSD policies, and prosecuted, if applicable, according to local ordinances, and state and federal laws.

**Gang:** An ongoing formal or informal association of persons in which members or associates individually or collectively engage in the commission, attempted commission, facilitation or solicitation of any felony act and that has at least one individual who is a criminal street gang member.

**Gang-Related Incident:** An incident is considered gang-related when it involves gang recruitment, gang initiation, fights between rival gangs, or other similar behaviors, but does not include non-threatening behavior such as handshakes, signs, or wearing of particular colors.

**Bias-Related and Hate-Related Incidents:** An incident is considered bias-related or hate-related when a reasonable person would conclude that it was motivated, in whole or in part, by the perpetrator's bias or attitude against an individual victim or group based on perceived or actual personal characteristics. Such characteristics include: ancestry or ethnicity, disability, sex, gender, immigration or citizenship status, race, religion or religious practices, or sexual orientation.

## **3. STUDENT ATTENDANCE (POLICY JE)**

Regular attendance is essential for success in school; therefore, absences shall be excused only for necessary and important reasons. Such reasons include illness, bereavement, other family emergencies, and observance of major religious holidays of the family's faith. A Parent/Guardian should notify the school prior to the absence/tardy with a call, note or email that his/her child is unable to attend or will be late to school. The call, note or email must address the date/time and reason for the absence.

## **4. DATING ABUSE (POLICY JICL)**

Dating abuse is a pattern of behavior in which one person uses or threatens to use physical, sexual, verbal, or emotional abuse to control the person's former or present dating partner. Behaviors used may include, but are not limited to, physical abuse, emotional abuse, sexual abuse, and/or threats. TUSD is committed to maintaining a school campus environment that is safe and secure for all students, and dating abuse will not be tolerated. TUSD employees aware of dating abuse shall respond in a manner consistent with District training. Students are encouraged to report all known or suspected instances of dating abuse involving themselves or other students, either verbally or in writing, to a teacher, site administrator, Student Equity (225.4316). The District will investigate all complaints.

## **5. BULLYING, INTIMIDATION AND HARASSMENT (POLICY JICK)**

Bullying is a form of harassment. Bullying is the repeated intimidation of students by the real or threatened infliction of physical, verbal, written, electronically transmitted (including cyberbullying), or emotional abuse, or through attacks on the property of another (including verbal taunts, name-calling and put-downs, extortion of money or possessions, or spray-painting derogatory terms on a student's locker or vehicle). Students who engage in any act of bullying while at school, at any school function, in connection to or with any District sponsored activity or event, or while en route to or from school, are subject to disciplinary action.

## 6. SCHOOL DRESS CODE (REQUIRED AT EVERY SCHOOL) (POLICY JICA)

Acceptable school dress is neat, clean and appropriate. While the school cannot and does not dictate styles, it is expected that students will abide by the following rules demonstrating appropriateness in dress as though this were their daily place of business.

- Shoes must be worn in school.
- Hats and sunglasses may be worn outside in the sun for an extended period of time for protection from the sun. A principal in collaboration with School Safety may institute stricter requirements at a high school experiencing safety-related issues.
- Dark glasses may not be worn inside buildings unless a documented health problem exists.
- No gang related apparel or items are allowed (e.g., “wearing colors known to be affiliated with a particular gang, or wearing clothing with illustrations of known gang signs or symbols”).
- Students may not wear clothing or accessories in school buildings or on school grounds that are:
  - Hazardous, damaging, or presenting danger to school property or persons including but not limited to: extended belts (belts should fit proper length), choke chains, dog collars, wallet chains or any type of spiked apparel or jewelry;
  - Depicting and/or promoting and/or endorsing illegal or violent activities, illegal drugs, tobacco, or alcohol;
  - Vulgar, obscene, indecent, libelous, or degrading of others on the basis of race, color, religion, ancestry, national origin, sex, gender, sexual orientation or disability; and/or
  - Distracting so as to interfere with the teaching or learning process such as extremely revealing garments including but not limited to short shorts, short skirts, short dresses (must cover buttocks while standing and sitting), tube tops, net tops, swimsuits, strapless tops, spaghetti strap tops, halter tops, muscle shirts, basketball shirts without an accompanying T-shirt, no tights to be worn as pants, garments with plunging necklines, transparent and see through garments, (midsections must be covered and undergarments shall be completely covered with outer clothing).

Students who violate standards may be asked to do any of the following depending on circumstances:

- Turn inappropriate clothing inside out.
- Change into clothing that may be provided by the school.
- Change into other clothing which has been brought to school.
- Remove the jewelry or other accessory.

\*NOTE ON SCHOOL DRESS CODES: The above-stated guidelines represent minimum standards. Individual schools may adopt additional guidelines, but may not apply exclusionary discipline without first giving the student an opportunity to address the alleged violation. Students wearing inappropriate clothing are given an opportunity to change clothing or they will be released from school in the company of the parent/guardian. Students who are unable to comply with the dress code may access TUSD’s clothing bank (520) 232-7058.

## 7. BUS RULES

**Student Behavior Policy** Proper student behavior contributes to the overall safety and comfort of the ride to and from school. Following driver directions and all ridership rules is paramount to maintain a safe and enjoyable ride for all. Infractions will be dealt with through the District-approved Student Conduct policies which include driver interventions, the student's principal, and other administrators as deemed appropriate. Riding is a privilege; parents and students should discuss and make sure they know the rules:

- Always comply with bus driver's/monitor's directions
- Use classroom voice only (no profanity/loud noises/threats/intimidation)
- Remain seated; keep hands, feet, and head inside bus
- All personal possessions must be under control at all times
- Keep unauthorized materials and substances off bus (animals, glass objects, weapons, illegal substances, or large objects that occupy a seat space)
- No eating or drinking on the bus

As a last resort, violations of these bus rules may result in the loss of bus privileges for a limited time, not to exceed 30 days.

### **Safety Precautions for Students**

- Know the route to and from the bus stop, safety precautions and common courtesies to be maintained en route and at the bus stop
- Know the correct bus route number
- Discuss what to do if the bus is late in the morning or no one is home in the afternoon
- ALWAYS board/depart the bus at the correct stop as known and approved by the parent

### **8. STUDENT USE OF CELL PHONES AND ELECTRONIC DEVICES (POLICY JICJ)**

For purposes of this policy, "electronic devices" include, but are not limited to, cell phones, Mp3 players, iPods, personal digital assistants (PDA's), e-book readers, compact disc players, portable game consoles, cameras, digital scanners, lap top computers, tablet computers and other electronic or battery powered instruments which transmit voice, text, or data from one person to another. Students may possess and use cellular telephones and/or other electronic signaling devices subject to limitations of this and other policies of the District under the following conditions and guidelines:

- Cell phones and/or electronic devices are to be kept out of view in a student's locker, pocket, or a carrying bag.
- Such devices shall not be turned on or used during instructional time, except as authorized by the teacher.
- The principal shall establish additional guidelines appropriate to campus needs.
- Students violating the policy may have the electronic device confiscated and be subject to disciplinary action. Any search of the contents of an electronic device shall be by an administrator in accordance with the Guidelines for Students Rights and Responsibilities.

**Reasonable efforts will be taken to secure property that has been confiscated** (i.e. lock the item in a drawer, take the item to the office to be secured in a locked area, etc.); **however, neither the District nor staff is responsible for loss, damage, or theft of any electronic device even if loss, damage or theft results from the device being confiscated.**

## 9. HAZING (POLICY JICFA)

There shall be no hazing, solicitation to engage in hazing, or aiding and abetting another who is engaged in hazing of any person enrolled, accepted for or promoted to enrollment, or intending to enroll or be promoted to District schools within twelve (12) calendar months. For purposes of this policy a person as specified above shall be considered a “student” until graduation, transfer, promotion or withdrawal from the District school.

“Hazing” means any intentional, knowing or reckless act committed by a student, whether individually or in concert with other persons, against another student, and in which both of the following apply:

- The act was committed in connection with an initiation into, an affiliation with, or the maintenance of membership in any organization that is affiliated with an education institution
- The act contributes to a substantial risk of potential physical injury, mental harm or degradation, or causes physical injury, mental harm or personal degradation

“Organization” means an athletic team, association, order, society, corps, cooperative, club, or similar group that is affiliated with an educational institution and whose membership consists primarily of students enrolled at that educational institution.

It is no defense to a violation of this policy if the victim consented or acquiesced to hazing. In accord with statute, violations of this policy do not include either of the following:

- Customary athletic events, contests or competitions sponsored by an educational institution
- Any activity or conduct that furthers the goals of a legitimate educational curriculum, a legitimate extracurricular program, or a legitimate military training program

All students, teachers and staff shall take reasonable measures within the scope of their authority to prevent violations of this policy. Students and others may report hazing to any staff member. Staff members must report the incident to the school administrator or next higher administrative supervisor, in writing, with such details as may have been provided. A failure by a staff member to timely inform the school administrator or next higher administrative supervisor of a hazing allegation or their observation of an incident of hazing may subject the staff member to disciplinary action in accord with District policies. The staff member shall preserve the confidentiality of those involved, disclosing the incident only to the appropriate school administrator or next higher administrative supervisor or as otherwise required by law. Any instance of reported or observed hazing which includes possible child abuse or violations of statutes known to the staff member shall be treated in accord with statutory requirements and be reported to a law enforcement agency.

To assure that students and staff are aware of its content and intent, a notice of this policy and procedure shall be posted conspicuously in each school building and shall be made a part of the Rights and Responsibilities section of the student handbook. Forms for submitting complaints are to be available to students and staff in the school offices. Disposition of all reports/complaints shall be reported to the Superintendent. The Superintendent will determine if the policies of the District have been appropriately implemented and will make such reports and/or referrals to the Board as may be necessary.

All violations of this policy shall be treated in accord with the appropriate procedures and penalties provided for in District policies related to the conduct and discipline of students, staff, and others.

<b>SECTION D: KNOW THE ACTIONS</b>
------------------------------------

### **ADMINISTERING THE GUIDELINES FOR STUDENT RIGHTS AND RESPONSIBILITIES**

The Arizona Department of Education has developed a list of violations as well as a list of possible actions a school district may take in response to a violation. TUSD has categorized these possible actions into five levels depending on the severity of the violation. In this way, students from school to school will receive similar actions for similar violations. A major consideration in the application of the Guidelines for Student Rights and Responsibilities is to identify the most appropriate disciplinary action necessary to bring about positive student behavior. Actions are not to be considered in isolation but rather as part of the overall goal of creating inclusive and supportive environments for students. For instance, restorative circles should not be isolated events at a campus, but should instead become part of the routine process in addressing behavior. At the elementary level, the age and developmental level of the child may be considered in interpreting the severity of the discipline imposed. Student services personnel, such as counselors, social workers, learning support coordinators, or psychologists, play a vital role in assisting the student in resolving any problems influencing the student's behavior.

#### **1. CONDUCT WHICH MUST BE REPORTED TO LAW ENFORCEMENT**

In addition to disciplinary action at the school level, certain criminal behavior must be reported to appropriate law enforcement agencies. Principals, assistant principals, or designees **are required to report the following incidents:**

Use or threat to use a deadly weapon or dangerous instrument	Homicide	Burglary in the first degree
Aggravated Assault resulting in serious physical injury	Sexual Assault	Arson of an occupied structure
Sexual conduct with a minor under 15 years of age	Armed Robbery	Any dangerous crime against minors
Possession, use, sale, or attempted sale of illegal drugs	Kidnapping	Bomb threats

Additionally, pursuant to A.R.S. § 13-3620, school personnel are required to immediately report any reasonable belief of non-accidental physical injury, neglect, or sexually related offense against a minor.

#### **2. CONDUCT WHICH MAY BE REPORTED TO LAW ENFORCEMENT**

Additionally, principals, assistant principals, or designees **MAY** report to law enforcement agencies other potentially disruptive incidents when necessary to maintain safety or seek restitution. When appropriate, school officials should utilize supports and interventions that provide guidance and structure to the student and help them to improve their behavior without involving law enforcement. An administrator must immediately notify an Assistant Superintendent or Director, and Student Equity, when law enforcement is contacted. Incidents that may be reported to law enforcement when necessary to maintain safety or seek restitution include, but are not limited to, the following:

Possession, sale or distribution of dangerous substances, including alcohol or legal drugs			
Demonstration by students which is likely to create unsafe conditions			
Threats	Setting off a false fire alarm	Assault	Vandalism

#### **3. DUE PROCESS**

Any student whose conduct may warrant suspension or expulsion will be provided due process. This is a legal safeguard that protects the rights of students and their parents and is constitutionally guaranteed.

Due process steps include:

- Oral or written notice to the student of the charges against the student
- An opportunity to present the student's side of the story in an informal hearing or meeting
- The allowance, for safety considerations, for a student to be removed from the school prior to an informal hearing with that hearing to follow as soon as practical
- Adequate notification and an opportunity for a fair hearing
- That parents will be informed in writing of all suspensions and that they have the right to a conference with the principal
- That if parents are not satisfied with any school official's decision they are entitled to request a review by the school official's immediate supervisor
- Formal due process (including a hearing officer) in long-term suspension and expulsion proceedings
- A right to appeal disciplinary decisions to the Assistant Superintendent, Director, Principal, Assistant Principal or Designee.

#### **4. DUE PROCESS FOR STUDENTS WITH 504 PLANS OR IEPs**

**Students with disabilities under Section 504 or IDEA (and students suspected of having a disability) may be disciplined in the same manner as any other student and may be suspended for up to 10 cumulative days of school per school year. If a suspension beyond 10 cumulative days is contemplated, special procedures must be followed.**

**A manifestation determination conference must be held prior to the 11<sup>th</sup> day of suspension**

If the manifestation determination conference concludes that the student's behavior is a manifestation of the student's disability, then no further disciplinary action can be taken. The 504 or IEP team should convene to develop an appropriate behavior plan for the student. If the manifestation determination conference concludes that the student's behavior is not a manifestation of the student's disability, the District may impose whatever long-term suspension or expulsion it would impose under the same circumstances if a non-disabled student were the offender. The District has no obligation to continue to provide educational services to a 504 student during the period of a long-term suspension or expulsion. However, the District must continue to provide educational services for students eligible under IDEA. Please refer to the appropriate Governing Board regulations JKA and JKAB and to the Exceptional Education Handbook for specific procedures

A student with a disability under IDEA may be referred to an Interim Alternative Educational Settings in circumstances involving the use or possession of drugs, weapons, or serious bodily injury. Refer to the Exceptional Education Handbook for specific procedures.

#### **5. IN-SCHOOL INTERVENTION/SUSPENSION**

An alternative to short-term suspension which allows students to continue receiving classroom instruction from content certified teachers in a classroom on campus, where available. In-school suspension may be run by a highly qualified teacher. The students will continue their core curriculum, where available.

## 6. OUT OF SCHOOL SUSPENSIONS

Conferences to resolve the problem must be scheduled with the parent, student, and other appropriate school staff members as part of the continuum of supports and interventions implemented to support student success.

**Short-Term Suspension** – A principal or principal’s designee may suspend a student from school from one (1) to ten (10) school days due to misconduct, depending on the severity of the misconduct. However, principals must limit exclusionary consequences to instances in which student misbehavior is ongoing and escalating, and the District has first attempted and documented the types of intervention(s) used in PBIS and/or Restorative Practices, as appropriate.

Make-up Work (Short-Term Suspension): If students are suspended, they are entitled to an opportunity to complete their coursework to ensure that they do not fall behind academically. Regulation JK-R1, Short Term Suspension states: “The student is allowed access to class assignments and to make up tests upon return to school. Homework must be made available for the parent to pick up at the school office.” Or, when feasible, homework shall be made available online. School administrators should assist parents and students with the shared responsibility to make arrangements to obtain such assignments and homework and to have completed assignments returned to the school for grading and credit. One set of assignments must be completed and returned before another set of assignments can be picked up. Students on suspension who successfully complete such assignments shall be allowed a reasonable time to take makeup tests upon returning to school. During the term of the suspension, the student is to remain away from all TUSD schools and activities. If it is necessary to come to a school, the student must make prior arrangements with the principal or principal’s designee.

**Long-Term Suspension** – Hearing Officers are used to investigate facts and make determinations regarding a recommendation for a long-term suspension or expulsion. A Hearing Officer may suspend a student from school for up to 180 days. Long-term suspensions of more than 30 days shall not be imposed except for Violations at Level 5. Hearing Officers may take this action only after the site administration has exhausted other disciplinary strategies (see interventions listed under Action Level 1 for examples of appropriate strategies), or when they have at least considered those alternatives and rejected them as inappropriate in a given situation. Students suspended more than 20 days may have an option to enroll in the “Life Skills” alternative to suspension program. “Life Skills” alternative to suspension program provides an alternative setting for students to continue to receive instruction during the period of suspension.

**Alternative Education Placement**-An alternative to long-term suspensions which allows students to continue receiving classroom instruction from content certified teachers at an alternative campus.

Make-up Work (Long-Term Suspension): If students are suspended, they are entitled to an opportunity to complete their coursework to ensure that they do not fall behind academically. School administrators should assist parents and students with the shared responsibility to make arrangements to obtain such class assignments and homework and to have completed assignments returned to the school for grading and credit. One set of assignments must be completed and returned before another set of assignments can be picked up at the school office. Or, when feasible, homework shall be made available online. Students on suspension who successfully complete such assignments shall be allowed a reasonable time to take makeup tests upon returning to school. Homework will be made available by the student’s teachers for the remainder of the grading period. However, because of the difficulty in students keeping up with class work through homework alone, without an instruction component, after the end of a grading period, students will receive academic support through a TUSD alternative program such as

distance learning. During the term of the suspension, the student is to remain away from all TUSD schools and activities. If it is necessary to come to a school, the student must make prior arrangements with the principal or principal's designee.

#### **7. ABEYANCE CONTRACTS (REGULATION JK-R4)**

An administrator should offer an abeyance contract unless there are particular circumstances that would make it inappropriate. Under an abeyance contract, an administrator would not immediately impose the assigned disciplinary action if (1) the student admits to committing the infraction, (2) the student and parent/legal guardian agree to certain conditions, and (3) the student and parent/legal guardian sign a contract, called an abeyance contract. The term of the abeyance contract may not exceed the maximum suspension term for the offense level. If a student violates his/her abeyance contract with a suspendable offense, the student must serve the remaining term of the initial offense plus the suspension for the additional offense. These two suspensions would be served concurrently. (The last days of the first suspension would also be the first days of the additional suspension)

#### **8. APPEALS**

Students and parents/guardians have the right to appeal short-term and long-term suspension decisions; however, there is no appeal from the Governing Board's final decision regarding long-term suspension appeals or its expulsion decisions. (See Policy JK and accompanying regulations)

#### **9. EXPULSION**

Expulsions will only be recommended for Level 5 violations. Expulsion is defined as the permanent withdrawal of the privilege of attending a TUSD school unless the Governing Board reinstates the privilege. A principal may or, in some cases, must request that the Superintendent recommend to the Governing Board the expulsion of a student. This is the most serious disciplinary step available. As part of its decision to expel, the Governing Board may permit the student to apply for readmission through the office of the Assistant Superintendent after any period of time it may set. The Governing Board, or designee, may establish further conditions within the readmission process with which the student must comply prior to their admission to the instructional process. During the term of the expulsion, the student is to remain away from all Tucson Unified School District schools and activities. If it is necessary to come to a school, the student must make prior arrangements with the principal or principal's designee.

Students with disabilities eligible under IDEA will continue to be offered educational services, although in an alternative setting.

#### **10. PRINCIPAL APPLICATION FOR WAIVER OF MANDATORY ACTIONS**

For violations requiring Action Level 4 or 5 consequences, the principal has the prerogative to seek the waiver of any portion or all of the mandatory disciplinary action through the appropriate Assistant Superintendent. The principal may seek the waiver and, if granted, the parties directly involved shall be informed of the reasons the waiver was granted.

Waivers may **not** be sought when the prescribed disciplinary action involves the possession of a firearm or the threatening of an educational institution. By state law in such a case, only the Governing Board may decide, on a case by case basis, whether to impose less than the mandatory penalty.



## SECTION E: RESTORATIVE PRACTICES; POSITIVE BEHAVIORAL INTERVENTIONS AND SUPPORTS (PBIS)

### RESTORATIVE PRACTICES

Restorative Practices is a framework to give those affected by conflict the tools and principles needed to resolve problems and build relationships. Restorative Practices focus upon the emotional and social disturbance created by conflict and provides a process for holding students accountable for their actions while building a supportive school environment.

In schools, Restorative Practices provides a proactive approach for building a community of care based on collaboration, mutual understanding, and reciprocated respect. This process holds students accountable for their actions while, at the same time, building a caring school environment. Attention is given to the victim and the wrongdoer, whether they are student or staff. Restorative Practices allows wrongdoers an opportunity to rejoin the school community after they have made amends. See below for a description of Restorative Practice strategies that may be used by sites.

All sites shall have or share a Restorative and Positive Practices Site Coordinator (“RPPSC”). A school’s learning supports coordinator may be designated to serve as the RPPSC for the site. The RPPSCs shall be responsible for assisting instructional faculty and staff to: (a) effectively communicate school rules; (b) reinforce appropriate student behavior; and (c) use constructive classroom management, positive behavioral interventions and supports, and restorative practices strategies.

Restorative Practices actions range from informal to formal. In schools, these actions include:

- *Small impromptu circles:* a few people meet to briefly address and resolve a problem; facilitated by district staff including teachers, counselors, administrators, and/or learning supports coordinators.
- *Group or classroom circles:* a larger group can meet in a large circle or a classroom circle to discuss issues, answer questions, solve problems, or offer feedback; facilitated by district staff including teachers, administrators, and/or learning supports coordinators.
- *Formal restorative conferences:* address serious problems of behavior. These conferences may involve wrongdoers, victims, parents, and school administrators. Only those trained in formal conferences can facilitate a formal conference.
- *Teen courts:* are problem-solving courts that provide an alternative action for students who have committed an offense, facilitated by their peers.

### POSITIVE BEHAVIORAL INTERVENTIONS AND SUPPORTS

Positive Behavioral Interventions and Supports (“PBIS”) is an evidence-based, proactive, data driven framework that includes a range of tiered interventions designed to prevent problem behavior while teaching socially appropriate behaviors. The focus of PBIS is creating and sustaining school

environments for all students in which appropriate behavior is supported and problem or disruptive behavior is redirected. This culture is created by:

- Defining and teaching behavioral expectation
- Monitoring and acknowledging appropriate behavior
- Providing corrective and appropriate consequences for behavioral errors
- Providing appropriate services for students who need additional behavioral supports
- Using a team-based management system to oversee the PBIS program
- Using referral data for problem solving

In the Positive Behavior Intervention Support (PBIS) system, students, who do not respond to the school wide or classroom supports that are in place for all students, may be evaluated to determine the function of the misbehavior through Functional Behavioral Assessment (FBA) and an intervention may be matched to their circumstance. Interventions which have been shown to be successful across age and grade levels include: mentoring, social skills groups, daily monitoring of selected problem behaviors. In a handful of situations, when these group supports are not sufficient, highly individualized interventions involving multiple systems and based on data may be implemented. If the situations involve a victim or multiple victims, Restorative Practices are complementary. See “Level 1” on page 24 below for a list of interventions.

## SECTION F: DEFINITIONS

Selected terms that may otherwise be subject to varying interpretations are defined below:

**May:** a choice to act or not, as distinguished from “shall,” which requires a specific action.

**Shall:** expressing a command or required action.

**Ongoing and Escalating:** “Ongoing” means the student continues to violate the GSRR, even after the District has tried **and** documented interventions. “Escalating” means the administrator can articulate that the behavior has worsened.

*Example (Ongoing): Student X verbally provokes a fight between two other students by taunting the students. Receives a Level I action, receives an intervention, and then provokes another fight.*

*Example (Escalating): Student X verbally provokes a second fight, using language that begins as taunting but escalates to cursing and personal attacks.*

**Physical Injury:** an impairment of physical condition that does not require external medical attention.

**Reckless:** lacking appropriate caution; careless of consequences. A student whose actions put themselves and/or others in harm’s way.

**Repeated:** said, done, or occurring again and again (at least twice).

**Serious Physical Injury:** an impairment of physical condition that interferes with a student’s ability to receive instruction, **and** is the type of injury that would reasonably require external medical attention.

**Sustained:** continuing for an extended period or without interruption; prolonged.

## SECTION G: ACTION LEVELS

<b>GUIDANCE</b>	<p>When considering actions, the District strives to implement Restorative Practices and to keep students in their classroom whenever possible. Disciplinary actions must be non-discriminatory, fair, age-appropriate, and correspond to the severity of the student's misbehavior.</p> <p>Principals may exercise reasonable discretion in deciding which violation occurred.</p> <p>The chart below lists actions that may be taken by school administration as the result of a violation. The Action Level identifies maximum action for violations assigned to that level. Multiple actions may be applied to a single violation. <b>Actions listed in bold are the minimum and mandatory action for that level of violation. For all violations, parent notification and student conference are mandatory.</b></p>		
<b>LEVEL 1</b>	<ul style="list-style-type: none"> <li>• <b>Parent Notification and Conference Request</b></li> <li>• <b>Student Conference</b></li> <li>• Restorative Circle</li> <li>• Restorative Conference</li> <li>• Confiscation of Contraband</li> <li>• Student Verbal Apology</li> <li>• Student Written Apology</li> <li>• Warning</li> <li>• Referred to Outside Agency</li> </ul>	<ul style="list-style-type: none"> <li>• Detention (before/after school; lunch)</li> <li>• Peer Mediation</li> <li>• Privileges Suspended</li> <li>• Restitution</li> <li>• Saturday School</li> <li>• Teen Court</li> <li>• Functional Behavioral Assessment</li> <li>• Behavior Learning Packets</li> <li>• Time Out (not to exceed 30 minutes)</li> <li>• Reflective Essay</li> <li>• Meeting With School Counselor</li> <li>• Community Service (not work detail)</li> </ul>	<ul style="list-style-type: none"> <li>• Reassignment To Different Class</li> <li>• Behavior Contract</li> <li>• Behavior Intervention Group</li> <li>• Threat Assessment</li> <li>• Behavior Intervention Plan</li> <li>• Monitoring of Selected Problem Behaviors</li> <li>• Other Action (consistent with other Level 1 interventions that are approved by the RPPSC).</li> </ul> <p><i>*Some actions may not be available at all sites</i></p>
<b>LEVEL 2</b>	<p>Any Action from the prior level(s) <b>may</b> also be imposed.</p> <ul style="list-style-type: none"> <li>• <b>Restorative Conference and/or Restorative Circle</b></li> <li>• Social Skills Groups and/or Mentoring</li> </ul>		
<b>LEVEL 3</b>	<p>Any Action from the prior level(s) <b>may</b> also be imposed.</p> <ul style="list-style-type: none"> <li>• <b>Short-Term In School Action and/or Abeyance</b></li> <li>• <b>Restorative Conference and/or Restorative Circle</b></li> <li>• In School Suspension/Intervention or Out Of School Suspension and/or Abeyance (Short Term 1-10 Days) but only where student misbehavior is ongoing and escalating, and only after the site has first attempted and documented the types of intervention(s) used in PBIS or Restorative Practices).</li> </ul>		
<b>LEVEL 4</b>	<p>Any Action from the prior level(s) <b>may</b> also be imposed.</p> <ul style="list-style-type: none"> <li>• <b>Out of School Suspension and/or Abeyance – Long-Term (11-30 Days)</b></li> <li>• <b>Restorative Conference and/or Restorative Circle (upon re-entry to school)</b></li> </ul>		
<b>LEVEL 5</b>	<p>Any Action from the prior level(s) <b>may</b> also be imposed.</p> <ul style="list-style-type: none"> <li>• <b>Out of School Suspension and/or Abeyance – Long-Term (11-180 Days)</b></li> <li>• <b>Restorative Conference and/or Restorative Circle (upon re-entry to school)</b></li> <li>• Expulsion</li> </ul>		

## IMPORTANT INFORMATION

1. All parent conferences will be made in a timely manner. Parents may participate in a conference via phone or another accessible mode of communication. Students will not be disciplined further merely because their parent cannot participate in a conference.
2. A student who willingly assists or forces another student to commit a violation of these guidelines will be held equally accountable for the violation.
3. Attempted violations may require Actions. Administrators will determine the appropriate level of Action to take for an attempted violation. The Action will generally be at a level less than -that of the actual violation.
4. Administrators may apply an action that is one level higher than that listed, but only after receiving written approval from the Assistant Superintendent or Director from Elementary or Secondary Leadership. The Assistant Superintendent or Director will not permit a single type of behavior to be elevated more than one level, regardless of the frequency of occurrence. Student Equity will review whether the teachers and/or administrators have attempted to effectively implement interventions to address any underlying or unresolved issues.
5. Two Level 2 violations (“Telecommunication Device” and “Other Technology”) may be elevated to a Level 3 violation but cannot result in out of school suspension. One Level 3 violation (“Improper Use of Technology, Computer”) may be elevated to a Level 4 violation but cannot result in a long-term suspension.
6. For suspensions, Administrators must communicate with Student Equity immediately. Student Equity will review all suspensions.
7. When determining the appropriate level of action to take, administrators shall consider a student’s claim of self defense, defense of others or defense of property.
8. When determining the appropriate action to take, Administrators at the elementary level (Pre-K-5<sup>th</sup> Grade) may consider all violations, *with the exception of possession of firearms or any incidence of threat to an educational institution*, at one level lower than that of the actual violation.
9. Administrators may not withdraw a student’s open enrollment or magnet status during the school year as a consequence for a discipline violation.
10. Students will not receive any suspension for attendance violations.
11. Law Enforcement Officers, including School Resource Officers, School Safety Officers, and other law enforcement and security personnel shall not be involved in low-level student discipline. Low level offenses are levels 1, 2 and 3. **This in no way prohibits contacting School Safety during or immediately after an incident to protect student, staff, or visitor safety.** An administrator must immediately notify an Assistant Superintendent or Director and Student Equity when law enforcement is contacted. Law Enforcement may be contacted in cases of vandalism where the District is seeking restitution for damage to school property. “Involvement” of School Safety means that School Safety personnel will not participate in the discipline decision(s) that occur after an incident. This in no way prohibits School Safety involvement during or immediately after an incident to protect student, staff, or visitor safety.

<b>SECTION H: VIOLATIONS</b>
------------------------------

The Arizona Department of Education has identified the following violations:

<b>AGGRESSION</b>	
<i>Violation</i>	<i>Action Level</i>
<b>Provocation (verbal or nonverbal)</b> Use of language or gestures that <b>may incite</b> another person or other people to fight.	<b>1</b>
<b>Recklessness</b> Unintentional, careless behavior that <b>may pose</b> a safety or health risk for yourself or for others.	<b>1</b>
<b>Minor Aggressive Act</b> Student engages in intentional, <b>non-serious but inappropriate physical contact</b> such as, but not limited to: hitting, poking, pulling, pushing, tripping, , pulling a chair out from underneath another person, or other behaviors that demonstrate low level hostile conduct.	<b>2</b>
<b>Other Aggression</b> Includes other acts of aggression not specifically listed within the Aggression section including, but not limited to, intentional, <b>serious and inappropriate physical contact</b> including, but not limited to, any example listed under "Minor Aggressive Act" that may result in a serious physical injury.	<b>3</b>
<b>Disorderly Conduct</b> Engaging in any one of the following acts where there is clear evidence the student <b>intended to disturb, or knew that he or she disturbed</b> , the peace or quiet of a school, neighborhood, family or person: <ol style="list-style-type: none"> <li>1. Engaging in violent or seriously disruptive behavior.</li> <li>2. Using abusive or offensive language or gestures to any person present in a manner <b>likely to provoke</b> immediate physical retaliation by such person.</li> <li>3. Making any protracted commotion, utterance or display with the intent to prevent the transaction of the business of a lawful meeting, gathering or procession.</li> <li>4. Refusing to obey a lawful order to disperse issued to maintain public safety.</li> <li>5. Recording/distributing fights on any social media outlet.</li> </ol>	<b>3</b>
<b>Endangerment</b> Students <b>recklessly</b> put themselves or another person at substantial risk of imminent death or serious physical injury through acts such as, but not limited to: rock throwing, skateboarding on campus, etc.	<b>3</b>
<b>Fighting</b> <b>Mutual participation</b> in any form of physical altercation or aggression.	<b>3</b>
<b>Assault</b> A person commits assault by: (1) Intentionally, knowingly or recklessly causing any physical injury to another person; or (2) Intentionally placing another person in reasonable apprehension of imminent physical injury; or (3) Knowingly touching another person with the intent to injure, insult or provoke such person. (see A.R.S. § 13-1203)	<b>4</b>
<b>Aggravated Assault</b> A person commits aggravated assault if the person: <ol style="list-style-type: none"> <li>1. Causes serious physical injury to another.</li> <li>2. Uses a deadly weapon or dangerous instrument.</li> <li>3. Commits the assault by any means of force that causes temporary but substantial disfigurement, temporary but substantial loss or impairment of any body organ or part or a fracture of any body part.</li> <li>4. Commits the assault while the victim is bound or otherwise physically restrained or while the victim's capacity to resist is substantially impaired.</li> <li>5. Commits assault and the person is in violation of an order of protection.</li> <li>6. Commits the assault knowing or having reason to know that the victim is any of the following: law enforcement officer, prosecutor, firefighter, EMT/Paramedic engaged in official duties, teacher or any school employee on school grounds, on grounds adjacent to the school or in any part of a building or vehicle used for school purposes, teacher or school nurse visiting a private home in the course of the</li> </ol>	<b>5</b> <b>Mandatory report to law enforcement</b>

teacher's or nurse's professional duties or any teacher engaged in any authorized and organized classroom activity held on other than school grounds. (see A.R.S. § 13-1204)	
--	--

<b>OTHER VIOLATIONS OF SCHOOL POLICIES</b>	
<i>Violation</i>	<i>Action Level</i>
<b>Dress Code Violation</b> Student wears clothing that does not fit within the dress code guidelines stated by school or district policy.	<b>1</b>
<b>Parking Lot Violation</b> Student displays inappropriate behaviors involving a motor vehicle including, but not limited to, unsafe driving in the parking lot, parking in unauthorized areas, parking in fire lanes or disabled persons space/area, parking in two or more parking spaces with one vehicle, excessive audio or radio sound, blocking driveway or access, and/or littering.	<b>1</b>
<b>Public Display of Affection</b> Inappropriate displays of affection. (i.e. kissing)	<b>1</b>
<b>Other Violation of School Policies and Regulations</b> Other violations of written school, or district-wide, policy or regulation.	<b>1</b>
<b>Language (verbal or nonverbal), Inappropriate</b> Student delivers verbal or nonverbal messages that include swearing, name calling, or use of words or gestures in an inappropriate way.	<b>2</b>
<b>Contraband</b> Items stated in school policy as prohibited because they may disrupt the learning environment.	<b>2</b>
<b>Combustible</b> Student is in possession of substance or object that is readily capable of causing bodily harm or property damage. (e.g. matches, lighters)	<b>2</b>
<b>Disruption</b> Student engages in behavior causing a substantial interruption in a class or activity including, but not limited to, loud talking, yelling, or screaming; noise with materials; throwing objects; or out-of-seat behavior.	<b>2</b>
<b>Gambling</b> To play games of chance for money or to bet a sum of money.	<b>2</b>
<b>Defiance or Disrespect Towards Authority and Non Compliance</b> Student engages in repeated behavior including, but not limited to, refusal to follow directions, or, talking back, or swearing at a staff member or delivers socially rude interactions.	<b>2</b>
<b>Negative Group Affiliation / Illegal Organization</b> Anti-social organizations, secret societies, criminal street gangs, and other sets of individuals that are not sanctioned by the Governing Board and which are determined to be disruptive to teaching and learning. This includes wearing of symbolic apparel, making gestures, writing on and marking of property, or altering of personal appearance to symbolize membership in an organization with a history of, or determined to be, a disruption to teaching and learning.	<b>3</b>

<b>ALCOHOL, TOBACCO AND OTHER DRUG VIOLATIONS</b>		
<i>Definitions</i>		
<p><b>Drug Violation:</b> Unlawful use, cultivation, manufacture, distribution, sale, purchase, possession, transportation or importation of any controlled drug or narcotic substance or equipment and devices used for preparing or taking drugs or narcotics. Includes being under the influence of drugs at school, school-sponsored events and on school-sponsored transportation. Includes over-the-counter medications if abused by the student.</p> <p><b>Possession:</b> knowing exercise of dominion or control over an item. <b>Use:</b> the act of using or being under the influence.</p> <p><b>Sale:</b> to transfer or exchange an item to another person for anything of value or advantage, present or prospective.</p> <p><b>Share:</b> to allow another person to use or enjoy something that one possesses.</p>		
<i>Violation</i>		<i>Action Level</i>
<b>Over the Counter Drugs, Inappropriate use of</b> Medicines that may be purchased directly without a prescription from a health care professional. Inappropriate use includes any use other than that described on the packaging or recommended by a health care professional.		
	<b>Possession</b>	2
	<b>Use</b>	2
	<b>Sale</b>	3
	<b>Share</b>	3
<b>Inhalants</b> Inhalants include medications, anesthetics, or other compounds in vapor or aerosol form, taken by inhalation This does NOT include e-cigarettes or hookah sticks, or items such as markers, glue, etc.		
	<b>Possession</b>	4
	<b>Use</b>	4
	<b>Sale</b>	5
	<b>Share</b>	5
<b>Unknown Drug</b> (if a drug is identified, after an investigation, a different violation may be identified)		
	<b>Possession</b>	4
	<b>Use</b>	4
	<b>Sale</b>	5
	<b>Share</b>	5
<b>Substance Represented as an Illicit Drug</b> A substance that is not an illicit drug but that is represented as, and could be perceived as being, an illicit drug.		
	<b>Possession</b>	4
	<b>Use</b>	4
	<b>Sale</b>	5
	<b>Share</b>	5
<b>Prescription Drugs, Inappropriate use of</b> Medicines obtained with the lawful prescription of a health care professional. Inappropriate use includes any use other than that described by the prescription.		<b>Mandatory report to law enforcement</b>
	<b>Possession</b>	4
	<b>Use</b>	4
	<b>Sale</b>	5
	<b>Share</b>	5
<b>Illicit Drug</b> Illicit drugs include dangerous drugs, narcotic drugs, marijuana, and peyote as defined by A.R.S. § 13-3401, and appearing in any form, including seeds, plants, cultivated product, powder, liquid, pills, tablets, etc.		<b>Mandatory report to law enforcement</b>
	<b>Possession</b>	4
	<b>Use</b>	4
	<b>Sale</b>	5
	<b>Share</b>	5
<b>Alcohol Violation</b> The violation of laws or ordinances prohibiting the manufacture, sale, purchase, transportation, possession or use of intoxicating alcoholic beverages or substances represented as alcohol. This includes being intoxicated at school, school-sponsored events and on school-sponsored transportation.		
	<b>Possession</b>	4
	<b>Use</b>	4
	<b>Sale</b>	5
	<b>Share</b>	5
<b>Tobacco Violation</b> The possession, use, distribution or sale of tobacco products on school grounds (including any device or		

substance that delivers nicotine such as e-cigarettes, nicotine patches and hookah sticks), at school-sponsored events and on school-sponsored transportation. (see A.R.S. §36-798.03).		
	<b>Possession</b>	<b>2</b>
	<b>Use</b>	<b>2</b>
	<b>Sale</b>	<b>3</b>
	<b>Share</b>	<b>3</b>
<b>Possession of Drug Paraphernalia</b> Drug paraphernalia means all equipment, products and materials of any kind which are used, intended for use or designed for use in planting, propagating, cultivating, growing, harvesting, manufacturing, compounding, converting, producing, processing, preparing, testing, analyzing, packaging, repackaging, storing, containing, concealing, injecting, ingesting, inhaling or otherwise introducing into the human body a drug in violation of this chapter. (see A.R.S. § 13-3415 )		
	<b>Possession</b>	<b>2</b>
	<b>Use</b>	<b>2</b>
	<b>Sale</b>	<b>3</b>
	<b>Share</b>	<b>3</b>

<b>ARSON</b>	
<i>Definitions</i>	
<b>Structure:</b> a building or place with sides and a floor used for lodging, business, transportation, recreation, or storage	
<b>Occupied structure:</b> any structure in which one or more persons is, or is likely to be present, or is so near as to be in equivalent danger at the outset of the fire or explosion. This includes any dwelling house, whether occupied or not.	
<b>Property:</b> anything other than a structure that is owned and has value of any kind (e.g., a backpack, school book, clothing, etc.).	
<b>Damage:</b> as used here, means a tangible or visible impairment to a surface.	
<b>Reckless Burning:</b> recklessly causing a fire or explosion resulting in damage to a structure, wild land, or property. (see A.R.S. § 13-1702).	
<i>Violation</i>	<i>Action Level</i>
<b>Arson of a Structure or Property</b> A person commits arson of a structure or property by knowingly and unlawfully damaging a structure or property by knowingly causing a fire or explosion. (see A.R.S. § 13-1703)  <i>NOTE: Burning one's own property is not arson, with the exception of burning one's own property with the knowledge that it will ignite another's property or a structure. Burning one's own property may, where appropriate, be considered reckless burning.</i>	<b>4</b>
<b>Arson of an Occupied Structure</b> A person commits arson of an occupied structure by knowingly and unlawfully damaging an occupied structure by knowingly causing a fire or explosion. (see A.R.S. § 13-1704)	<b>5</b> <b>Mandatory report to law enforcement and Fire Dept.</b>
<i>NOTE: Administrators may consider acts of arson that are only reckless (as opposed to knowing or intentional), or that damage property with a value under \$100, at Level 3. Please see the definition of Reckless Burning above.</i>	

<b>ATTENDANCE POLICY VIOLATION (Out of school suspension is not permitted)</b>	
<i>Violation</i>	<i>Action Level</i>
<b>Other Attendance Violations</b> <b>Examples:</b> leaving school, without signing out in the main office; leaving school at lunch, without a pass; obtaining a pass to go to a certain place and not reporting there; becoming ill and going home or staying in the restroom, instead of reporting to the nurse's office; or coming to school, but not attending classes.	<b>1</b>
<b>Tardy</b> Arriving at school or class after the scheduled start time.	<b>1</b>
<b>Unexcused Absence</b> When a student is not in attendance <b>for an entire day</b> and does not have an acceptable excuse.	<b>1</b>
<b>Leaving School Grounds without Permission</b> Leaving school grounds or being in an "out-of-bounds" area during regular school hours without permission of the principal or principal designee.	<b>1</b>
<b>Truancy</b> When a child between 6-16 years of age has an unexcused absence for at least one class period during the day.	<b>1</b>



<b>DISHONESTY</b>	
<i>Violation</i>	<i>Action Level</i>
<p><b>Cheating</b> To intentionally share with another, or take from another, intellectual property for the purpose of deceit or fraud, or to take or steal intellectual property from another with or without their knowledge and present it as the student's own.</p>	<b>2</b>
<p><b>Forgery</b> Falsely and fraudulently making or altering a document, including hall passes and parent signatures.</p>	<b>2</b>
<p><b>Lying</b> To make an untrue statement with intent to deceive or to create a false or misleading impression.</p>	<b>2</b>
<p><b>Plagiarism</b> To steal and pass off the ideas or words of another as one's own, including material obtained online.</p>	<b>2</b>

<b>HARASSMENT AND THREAT, INTIMIDATION</b>	
<i>Violation</i>	<i>Action Level</i>
<p><b>Threat or Intimidation</b> When a person indicates, by words or conduct, the intent to cause physical injury or serious damage to a person or their property, or intentionally places another person in reasonable apprehension of imminent physical injury. This may include threats or intimidation that occurs online or through a telecommunication device. (see A.R.S. § 13-1202).</p>	<b>3-</b>
<p><b>Bullying</b> Bullying is the repeated intimidation of students by the real or threatened infliction of physical, verbal, written, electronically transmitted, or emotional abuse, or through attacks on the property of another. It may include, but not be limited to actions such as verbal taunts, name-calling and put-downs, including ethnically based or sex or gender-based verbal put-downs, and extortion of money or possessions. Bullying can be physical in form (e.g., pushing, hitting, kicking, spitting, stealing); verbal (e.g., making threats, taunting, teasing, name-calling); non-verbal/ cyber-bullying (e.g., text messages, email, social networking-such as, but not limited to "Twitter"); or psychological (e.g., social exclusion, spreading rumors, manipulating social relationships).</p>	<b>3</b>
<p><b>Harassment, nonsexual</b> A person commits harassment if, with intent to harass or with knowledge that the person is harassing another person, the person:</p> <ol style="list-style-type: none"> <li>1. Anonymously or otherwise communicates or causes a communication with another person by verbal, electronic, mechanical, telegraphic, telephonic or written means in a manner that harasses.</li> <li>2. Repeatedly commits an act or acts that harass another person.</li> <li>3. Surveils or causes another person to surveil a person for no legitimate purpose.</li> <li>4. On more than one occasion makes a false report to a law enforcement, credit or social service agency. (see A.R.S. § 13-2921)</li> <li>5. Stalking-Following another person in or about a public place for no legitimate purpose after being asked to desist.</li> </ol> <p><i>NOTE: Bullying and Sexual Harassment are types of Harassment. Indicate Harassment, nonsexual if the violation is not specifically Bullying or Sexual Harassment, or if the specific type of harassment is not known.</i></p>	<b>3</b>
<p><b>Hazing</b> "Hazing" means any intentional, knowing or reckless act committed by a student, whether individually or in concert with other persons, against another student, and in which <u>both</u> of the following apply: 1. The act was committed in connection with an initiation into, an affiliation with or the maintenance of membership in any organization that is affiliated with an educational institution. ("Organization" means an athletic team, association, order, society, corps, cooperative, club or other similar group that is affiliated with the school and whose membership consists primarily of students enrolled at the school.). 2. The act contributes a substantial risk of potential physical injury, mental harm or degradation or causes physical injury, mental harm or personal degradation. (see A.R.S. § 15-2301)</p> <p>*Administrators <u>may</u> treat incidents of hazing at a Level 4 as appropriate to the situation, and in conjunction with Student Equity.</p>	<b>3</b>

<b>SCHOOL THREAT OR INTERFERENCE</b>	
<i>Definitions</i>	
Threatening an educational institution (School Threat) means to interfere with or disrupt an educational institution by doing any of the following: <ol style="list-style-type: none"> <li>1. For the purpose of causing, or in reckless disregard of causing, interference with or disruption of an educational institution, threatening to cause physical injury to any employee of an educational institution or any person attending an educational institution.</li> <li>2. For the purpose of causing, or in reckless disregard of causing, interference with or disruption of an educational institution, threatening to cause damage to any educational institution, the property of any educational institution, the property of any employee of an educational institution or the property of any person attending an educational institution.</li> <li>3. Going on or remaining on the property of any educational institution for the purpose of interfering with or disrupting the lawful use of the property or in any manner as to deny or interfere with the lawful use of the property by others.</li> <li>4. Refusing to obey a lawful order to leave the property of an educational institution.</li> </ol> NOTE: "interference with or disruption of" includes only those acts that might reasonably lead to the evacuation or closure of a school property or to the postponement, cancellation, or suspension of any class or other school activity (though actual evacuation, closure, postponement, cancellation or suspension is not required).	
<i>Violation</i>	<i>Action Level</i>
<b>Fire Alarm Misuse</b> Intentionally ringing fire alarm when there is no fire.	<b>4</b>
<b>Bomb Threat</b> Threatening to cause harm by using or threatening to use a bomb, or arson-causing device.	<b>5</b> <b>Expulsion</b> <b>required by law</b>
<b>Chemical or Biological Threat</b> Threatening to cause harm using dangerous chemicals or biological agents.	<b>5</b> <b>Expulsion</b> <b>required by law</b>
<b>Other School Threat</b> The incident cannot be coded in one of the above categories but did involve a school threat.	<b>5</b> <b>Expulsion</b> <b>required by law</b>

<b>SEXUAL OFFENSES</b>	
<i>Violation</i>	<i>Action Level</i>
<b>Harassment, Sexual</b> Sexual harassment includes unwelcome sexual advances, requests for sexual favors, and other verbal, graphic, written, or physical conduct of a sexual nature where such conduct has the purpose or effect of creating an intimidating, hostile, or offensive educational environment. Sexual harassment can include nonverbal forms (e.g., "sexting," tweeting, or otherwise sending messages through networking sites and/or telecommunication devices), or physical conduct of a sexual nature.	<b>3</b>
<b>Pornography</b> Pornography is the sexually explicit and obscene depiction of persons, in words or images. <b>Examples:</b> viewing and/or sharing nude or sexually-charged images (non-art, non-educational) of people in books, magazines, electronic devices, or on the internet; using an electronic device to send or receive nude images, partially-nude images, or images that are sexual in nature ("i.e. sexting"), or drawing nude images, partially-nude images, or images that are sexual in nature that have no redeeming educational value.	<b>3</b>
<b>Harassment, Sexual with contact</b> Sexual harassment that includes physical contact.	<b>4</b>
<b>Indecent Exposure or Public Sexual Indecency</b> A violation of A.R.S. § 13-1402 Indecent exposure, § 13-1403 Public sexual indecency, or engaging in other sexual acts. <b>Examples:</b> public urination, streaking, masturbation, "peeping tom" (including taking photos or videotaping), exposing another student's private parts, or engaging in intercourse, or oral sex.	<b>4</b>

<b>TECHNOLOGY, IMPROPER USE OF</b>	
<i>Violation</i>	<i>Action Level</i>
<p><b>Telecommunication Device</b> Students may possess and use cellular telephones and/or other electronic signaling devices subject to limitations of this and other policies of the District under the following conditions and guidelines: (1) Cell phones and/or electronic devices are to be kept out of view in a student's locker, pocket, or a carrying bag; (2) Such devices shall not be turned on or used during instructional time, except as authorized by the teacher; (3) The principal shall establish additional guidelines appropriate to campus needs; (4) Students violating the policy may have the electronic device confiscated and be subject to disciplinary action. Any search of the contents of an electronic device shall be by an administrator in accordance with the Guidelines for Students Rights and Responsibilities. (see Policy JICJ)</p> <p><b>Examples:</b> use of telecommunication devices (cell phones, pagers, etc.) for non-instructional purpose</p>	<b>2</b>
<p><b>Other Technology</b> <b>Examples:</b> Gaming systems, iPods, iPads, Tablets, tec.</p>	<b>2</b>
<p><b>Computer</b> <b>Examples:</b> use of school computers for non-instructional purpose, copyright or trademark infringement, knowingly uploading or downloading destructive or malicious programs or software, loading personal software or disks onto school computers without permission of an administrator, vandalism of computers or computer equipment.</p>	<b>3</b>
<p><b>Network Violation</b> <b>Examples:</b> use of computer network for non-instructional purpose, knowingly uploading or downloading destructive or malicious programs or software, sharing passwords, attempting to read, delete, copy or modify the email of other users, accessing secure areas other than for educational purposes, transmitting material information or software in violation of any district policy or regulation, local, state or federal law or regulation, or tampering with or misuse of the computer networking system or taking any other action inconsistent with this regulation will be viewed as a network violation.</p>	<b>3</b>

<b>THEFT</b>	
<i>Violation</i>	<i>Action Level</i>
<p><b>Petty Theft</b> Thefts for cash, or property, valued under \$100.</p>	<b>2</b>
<p><b>Theft – School Property or Non-School Property</b> A person commits theft if, without lawful authority, the person knowingly: b. Controls property of another with the intent to deprive the other person of such property; or c. Converts for an unauthorized term or use services or property of another entrusted to the defendant or placed in the defendant's possession for a limited, authorized term or use; or d. Obtains services or property of another by means of any material misrepresentation with intent to deprive the other person of such property or services; or e. Comes into control of lost, mislaid or misdelivered property of another under circumstances providing means of inquiry as to the true owner and appropriates such property to the person's own or another's use without reasonable efforts to notify the true owner; or f. Controls property of another knowing or having reason to know that the property was stolen; or g. Obtains services known to the defendant to be available only for compensation without paying or an agreement to pay the compensation or diverts another's services to the person's own or another's benefit without authority to do so. (see A.R.S. § 13-1802)</p>	<b>3</b>
<p><b>Burglary or Breaking and Entering</b> Entering or remaining unlawfully in or on the personal property of another, a classroom, a residential structure or yard or a nonresidential structure or in a fenced commercial property with the intent to commit any theft or any felony therein. (see A.R.S. § 13-1506 - § 13-1507)</p>	<b>4</b>
<p><b>Extortion</b> A person commits theft by extortion by knowingly obtaining or seeking to obtain property or services by means of a threat to do in the future any of the following: 1. Cause physical injury to anyone by means of a deadly weapon or dangerous instrument. 2. Cause physical injury to anyone except as provided in paragraph 1 of this subsection. 3. Cause damage to property. 4. Engage in other conduct constituting an offense. 5. Accuse anyone of a crime or bring criminal charges against anyone. 6. Expose a secret or an asserted fact, whether true or false, tending to subject anyone to hatred, contempt or ridicule or to impair the person's credit or business. 7. Take or withhold action as a public servant or cause a public servant to take or withhold action.</p>	<b>4</b>

8. Cause anyone to part with any property. (see A.R.S. § 13-1804)	
<b>Robbery</b> A person commits robbery if in the course of taking any property of another from his person or immediate presence and against his will; such person threatens or uses force against any person with intent either to coerce surrender of property or to prevent resistance to such person taking or retaining property. (see A.R.S. § 13-1902)	<b>4</b>
<b>Armed Robbery</b> A person commits armed robbery if, in the course of committing robbery (see definition above) such person or an accomplice: (1) Is armed with a deadly weapon or a simulated deadly weapon; or (2) Uses or threatens to use a deadly weapon or dangerous instrument or a simulated deadly weapon. (see A.R.S. § 13-1904)	<b>5</b> <b>Mandatory report to law enforcement</b>
<b>Burglary (First Degree)</b> A person commits burglary in the first degree if such person or an accomplice enters or remains unlawfully in or on a residential structure or yard or a nonresidential structure or in a fenced commercial with the intent to commit any theft or any felony therein (see A.R.S. § 13-1506 and 13-1507) and knowingly possesses explosives, a deadly weapon or a dangerous instrument in the course of committing any theft or any felony. (see A.R.S. § 13-1508)	<b>5</b> <b>Mandatory report to law enforcement</b>

<b>TRESPASSING; VANDALISM OR CRIMINAL DAMAGE</b>	
<i>Definitions</i>	
<b>Criminal damage:</b> Willful destruction or defacement of school property, commercial property located on school property, or personal property of another person, so as to substantially impair its function or value in an amount of five thousand dollars or more. Administrators may consider acts of vandalism that result in damages exceeding \$5,000 in value at a Level 4.	
<b>Examples:</b> Substantial destruction of copy machines, school vehicles, student vehicles, or certain technology, science, or computer equipment.	
<i>Violation</i>	<i>Action Level</i>
<b>Trespassing</b> To enter or remain on a public school campus or school board facility without authorization or invitation and with no lawful purpose for entry. This includes students under suspension or expulsion and unauthorized persons who enter or remain on a campus or school board facility after being directed to leave by the chief administrator or designee of the facility, campus or function.	<b>2</b>
<b>Graffiti or Tagging</b> Writing on walls; drawings or words that are painted or sprayed on walls and/ or other surfaces that can be easily removed with soap or cleaner.	<b>2</b>
<b>Vandalism of Personal property</b> Willful destruction or defacement of personal property.	<b>3</b>
<b>Vandalism of School Property</b> Willful destruction or defacement of school property. <b>Examples:</b> Destroying school computer records, carving initials or words in desk top, spray painting on walls, or damaging vehicles.	<b>3</b>

<b>WEAPONS AND DANGEROUS ITEMS (POSSESSION OF)</b>	
<i>Violation</i>	<i>Action Level</i>
<b>Dangerous Items</b> Knife with a blade length of less than 2.5 inches, air soft gun, b.b.gun, laser pointer, letter opener, mace/pepper spray, paintball gun, pellet gun, razor blade/box cutter, simulated knife, taser or stun gun, tear gas, firecrackers, smoke and stink bombs, gas, lighter fluid, and other dangerous items (anything that under the circumstances in which it is used, attempted to be used or threatened to be used is readily capable of causing death or serious physical injury).  <b>Mandatory report to law enforcement if under the circumstances in which it is used, attempted to be used or threatened to be used is readily capable of causing death or serious physical injury.</b>	<b>3</b>

<p><b>Other Weapons</b>  <b>Examples:</b> Billy club, brass knuckles, knife with a blade length of at least 2.5 inches, nunchakus.  <b>Mandatory report to law enforcement if under the circumstances in which it is used, attempted to be used or threatened to be used the item is readily capable of causing death or serious physical injury.</b></p>	<p><b>4</b></p>
<p><b>Simulated Firearm</b>                  Possession of a simulated firearm made of plastic, wood, metal or any other material which is a replica, facsimile, or toy version of a firearm.  <b>If the simulated firearm is used to threaten or intimidate, the violation will be considered a level 4.</b></p>	<p><b>3</b></p>
<p><b>Firearms</b>                  Except as provided in subsection B, an un-emancipated person who is under eighteen years of age and who is unaccompanied by a parent, grandparent or guardian, or a certified hunter safety instructor or certified firearms safety instructor acting with the consent of the un-emancipated person's parent or guardian, shall not knowingly carry or possess on his person, within his immediate control, or in or on a means of transportation a firearm in any place that is open to the public or on any street or highway or on any private property except private property owned or leased by the minor or the minor's parent, grandparent or guardian. (see A.R.S §13-3111(A))</p> <p><b>“Firearm”</b> means any loaded or unloaded handgun, pistol, revolver, rifle, shotgun or other weapon that will expel, is designed to expel or may readily be converted to expel a projectile by the action of an explosive. Firearm does not include a firearm in permanently inoperable condition. (see A.R.S. § 13-3101)</p> <p><b>“Other Firearms”</b> –Firearms other than handguns, rifles or shotguns including:–any weapon (including a starter gun) which will or is designed to or may readily be converted to expel a projectile by the action of any explosive; the frame or receiver of any weapon described above; Any firearm muffler or firearm silencer; Any destructive device, which includes: Any explosive, incendiary, or poison gas; Bomb; Grenade; Rocket having a propellant charge of more than four ounces; Missile having an explosive or incendiary charge of more than one-quarter ounce, Mine or similar device. Any weapon which will, or which may be readily converted to, expel a projectile by the action of an explosive or other propellant, and which has any barrel with a bore of more than one-half inch in diameter. Any combination or parts either designed or intended for use in converting any device into any destructive device described in the two immediately preceding examples, and from which a destructive device may be readily assembled. (see 18 U.S.C. 921)</p> <p><i>NOTE: This definition does not apply to items such as toy guns, colorful plastic water guns, cap guns, bb guns, and pellet guns)</i></p>	<p><b>5</b>  <b>Expulsion required by law</b>  <b>Mandatory report to law enforcement</b></p>

**INDEX**

- Abeyance Contracts, 20
- Acknowledgement Form, 3
- Action Levels, 23
- Administering of Guidelines, 17
- Aggravated Assault, 25
- Aggression, 25
- Alcohol Violation, 27
- Alcohol, Tobacco and other Drugs, 27-28
- Alternative Education Placement, 19
- Anti-Harassment Policy, 13
- Appeals, 20
- Armed Robbery, 32
- Arson of a Structure or Property, 28
- Arson of an Occupied Structure, 28
- Arson, 28
- Assault, 25
- Attendance Policy, 13
- Attendance Violation, 28
- Bomb Threat, 30
- Bullying, 29
- Bullying, Intimidation & Harassment, 13
- Burglary (First Degree), 32
- Burglary or Breaking & Entering, 31
- Bus Rules, 14-15
- Cell Phones, 15
- Cheating, 29
- Chemical or Biological Threat, 30
- Combustible, 26
- Computer, 31
- Conduct Which May be Reported, 17
- Conduct Which Must be Reported, 17
- Contraband, 26
- Dangerous Items, 32
- Dating Abuse, 13
- Defiance or Disrespect, 26
- Definitions, 22
- Dishonesty, 29
- Disorderly Conduct, 25
- Disruption, 26
- Dress Code Violation, 26
- Due Process for Students with 504 or IEP, 18
- Due Process for Students, 17-18
- Endangerment, 25
- Expulsions, 20
- Extortion, 31
- Fighting, 25
- Fire Alarm Misuse, 30
- Firearms, 33
- Forgery, 29
- Gambling, 26
- Gang Activity, 13
- General Information, 12-16
- Governing Board Position on Gang Activity, 13
- Graffiti or tagging, 32
- Harassment and Threat, Intimidation, 29
- Harassment, Nonsexual, 29
- Harassment, Sexual, 30
- Hazing, 16, 29
- Illicit Drugs, 27
- Important Information, 24
- Indecent Exposure/Public Sexual Indecency, 30
- Inhalants, 27
- In-School Intervention/Suspension, 18
- Language, Inappropriate, 26
- Law Enforcement, Reports to, 17
- Leaving School Grounds, 28
- Long-Term Suspension, 19
- Lying, 29
- Minor Aggressive Act, 25
- Negative Group Affiliation, 26
- Network Violation, 31
- Other Aggression, 25
- Other Attendance Violations, 28
- Other School Threat, 30
- Other Technology, 31
- Other Violation of Policies, 26
- Other Weapons, 32
- Out of School Suspensions, 18
- Over the Counter Drugs, 27
- Parents/Guardians Have a Responsibility to, 12
- Parents/Guardians Have a Right to, 12
- Parking Lot Violation, 26
- Petty Theft, 31
- Plagiarism, 29
- Pornography, 30
- Positive Behavior Interventions and Supports, 21-22

Possession of Drug Paraphernalia, 28  
Prescription Drugs, 27  
Principal Application for Waiver, 20  
Public Display of Affection, 26  
Purpose, 8  
Recklessness, 25  
Restorative Practices, 21  
Rights & Responsibilities, 10-12  
Robbery, 32  
School Dress Code, 14  
School Threat or Interference, 30  
Sexual Harassment, 30  
Sexual Harassment with Contact, 30  
Sexual Offenses, 30  
Short-Term Suspension, 19  
Simulated Firearms, 33  
Student Attendance, 13  
Students Have a Responsibility to, 11  
Students Have a Right to, 10-11  
Substance Represented as an Illicit Drug, 27  
Tardy, 28  
Technology, Improper Use of, 31  
Telecommunication Device, 31  
Theft, 31  
Theft-School/Non-School Property, 31  
Threat or Intimidation, 29  
Tobacco Violation, 27-28  
Trespassing, 32  
Trespassing; Vandalism or Criminal Damage, 32  
Truancy, 28  
Unexcused Absence, 28  
Unknown Drug, 27  
Vandalism of Personal Property, 32  
Vandalism of School Property, 32  
Vandalism, 32  
Verbal Provocation, 25  
Violations & Actions, 25-33  
Weapons & Dangerous Items, 32  
What are the Guidelines, 8  
When do the Guidelines Apply, 9

## TUSD ANNUAL NOTIFICATION OF PRIVACY RIGHTS OF PARENTS AND STUDENTS

The Family Educational Rights and Privacy Act (FERPA) affords parents and “eligible students” (students over 18 years of age, or who attend an institution of postsecondary education) certain rights regarding the student’s education records. These rights are:

**(1) The right to inspect and review the student’s education records within 45 days from the day TUSD receives a request.**

The parent(s) and/or eligible student may inspect and review student’s education records, and TUSD policies and regulations governing use of those records, by making an appointment with the student’s school principal. A copy of state and federal statutes and regulations concerning student records is available for reasonable inspection in the Office of the Superintendent or designee, 1010 E. 10th Street, Tucson, Arizona. A list of the types of records maintained, and an explanation of any record, will be provided by appropriate TUSD personnel upon request.

Federal law assumes that both parents are equally entitled to review their child’s records. If there is a custody order in place that prohibits the provision of this information to one parent, please provide TUSD with a copy of the custody order, signed by a judge.

**(2) The right to request the amendment of the student’s education records that the parent(s) and/or eligible students believes are inaccurate, misleading, or otherwise in violation of the student’s privacy rights under FERPA.**

Such a request must be in writing to the student’s school principal, must clearly identify the part of the record they want changed, and must specify why it should be changed. If TUSD, decides not to amend the record as requested by the parent(s) and/or eligible student, TUSD will notify the parent(s) and/or eligible student of the decision, and the parent(s) and/or eligible student may further request a hearing regarding the request for amendment, as provided by federal and state statutes, rules and regulations.

**(3) The right to privacy of personally identifiable information in the student’s education records, except to the extent that FERPA authorizes disclosure without consent.**

TUSD must obtain the written consent of the parent or eligible student prior to releasing personally identifiable information from the education records of a student, except in circumstances where federal and state law authorize disclosure without consent, such as disclosure to school officials with legitimate educational interests. A school official is a person employed by TUSD as an administrator, supervisor, instructor, or support staff member (including health or medical staff and law enforcement unit personnel); a Governing Board member; a person or company with whom TUSD has outsourced services or functions it would otherwise use its own employees to perform (such as an attorney, auditor, medical consultant, or therapist); a parent or student serving on an official committee, such as a disciplinary or grievance committee; or a parent, student, or other volunteer assisting another school official in performing his or her tasks. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibility.

Upon request, schools will disclose education records, without consent, to officials of another school district in which a student seeks or intends to enroll, or is already enrolled if the disclosure is for purposes of the student’s enrollment or transfer.

**(4) The right to file a complaint with the U.S. Department of Education concerning alleged failures by TUSD to comply with the requirements of FERPA.**

Any complaints arising from an alleged violation of these rights may be submitted to the Superior Court of Pima County, Arizona, or to:

The Family Policy Compliance Office  
U.S. Dep’t of Education  
400 Maryland Avenue, SW  
Washington, D.C. 20202  
(202) 260-3887

Directory Information

FERPA requires that TUSD, with certain exceptions, obtain a parent’s/guardian’s written consent prior to the disclosure of personally identifiable information from your child’s education records. However, TUSD may disclose appropriately designated “directory information” without written consent, unless you have advised TUSD to the contrary in accordance with TUSD procedures (see Administrative Regulation 5130). The primary purpose of directory information is to allow TUSD to include this type of information from your child’s education records in certain school publications, such as:

- The annual yearbook;
- Honor roll or other recognition lists;
- Graduation programs; and
- Sports activity sheets showing weight/height of team members.

Directory information, which is information that is generally not considered harmful or an invasion of privacy if released, can also be disclosed to outside organizations without a parent’s prior written consent. Outside organizations include, but are not limited to, companies that manufacture class rings or publish yearbooks. In addition, two federal laws require local educational agencies (LEAs) receiving assistance under the *Elementary and Secondary Education Act of 1965* (ESEA) to provide military recruiters, upon request, with the following information – names, addresses and telephone listings – unless parents have advised the LEA that they do not want their student’s information disclosed without their prior written consent.

If you do not want TUSD to disclose directory information from your child’s education records without your prior written consent, you must notify TUSD on TUSD Form 274, prior to October 1st. TUSD has designated the following information as directory information:

Name, address, parent or guardian telephone listing, date and place of birth, major field of study, participation in officially recognized activities and sports, weight and height of members of athletic teams, dates of attendance, degrees (diplomas) and awards received, the most recent previous educational agency or institution attended by the student, personally identifiable photographs, videotapes, films and other visual media, personally identifiable interviews, either audio only or audio and visual, and other similar information.

Under federal law, this information is considered directory information and does not require the written consent of a parent/eligible student to release. If you object to the release of directory information you must notify the principal or designee of the school, in writing, on TUSD Form 274, prior to October 1st. If Form 274 is not received by October 1st, it will be assumed that there is no objection to releasing such information. This procedure shall be done annually. Pursuant to federal law, upon request, TUSD may disclose education records without prior parental/eligible student consent, to officials of another school district in which a student seeks or intends to enroll. For further information, contact the Principal’s Office at the school where the student(s) attend in TUSD.



**TUSD ANNUAL NOTIFICATION OF RIGHTS UNDER THE PROTECTION OF PUPIL RIGHTS AMENDMENT (PPRA)**

PPRA affords parents certain rights regarding our conduct of surveys, collection and use of information for marketing purposes, and certain physical exams.

These include the right to:

**(1) Consent before students are required to submit to a survey that concerns one or more of the following protected areas (“protected information survey”) if the survey is funded in whole or in part by a program of the U.S. Dep’t of Education (ED) –**

1. Political affiliations or beliefs of the student or student’s parent;
2. Mental or psychological problems of the student or student’s family;
3. Sex behavior or attitudes;
4. Illegal, anti-social, self-incriminating, or demeaning behavior;
5. Critical appraisals of others with whom respondents have close family relationships;
6. Legally recognized privileged relationships, such as with lawyers, doctors, or ministers;
7. Religious practices, affiliations, or beliefs of the student or parents; or
8. Income, other than as required by law to determine program eligibility.

**(2) Receive notice and an opportunity to opt a student out of –**

1. Any other protected information survey, regardless of funding;
2. Any non-emergency, invasive physical exam or screening required as a condition of attendance, administered by the school or its agent, and not necessary to protect the immediate health and safety of a student, except for hearing, vision, or scoliosis screenings, or any physical exam or screening permitted or required under State law; and
3. Activities involving collection, disclosure, or use of personal information obtained from students for marketing or to sell or otherwise distribute the information to others.

**(3) Inspect, upon request and before administration or use –**

1. Protected information surveys of students;
2. Instruments used to collect personal information from students for any of the above marketing, sales, or other distribution purposes; and
3. Instructional material used as part of the educational curriculum.

These rights transfer from the parents to a student who is 18 yrs old, or an emancipated minor under State law.

TUSD will develop and adopt policies, in consultation with parents, regarding these rights, as well as arrangements to protect student privacy in the administration of protected information surveys and the collection, disclosure, or use of personal information for marketing, sales, or other distribution purposes.

TUSD will directly notify parents of these policies at least annually at the start of each school year and after any substantive changes. TUSD will also directly notify, such as through U.S. Mail or email, parents of students who are scheduled to participate in the specific activities or surveys noted below and will provide an opportunity for the parent to opt his or her child out of participation of the specific activity or survey.

TUSD will make this notification to parents at the beginning of the school year if the District has identified the specific or approximate dates of the activities or surveys at that time. For surveys and activities scheduled after the school year starts, parents will be provided reasonable notification of the planned activities and surveys listed below and be provided an opportunity to opt their child out of such activities and surveys. Parents will also be provided an opportunity to review any pertinent surveys. Following is a list of the specific activities and surveys covered under this requirement:

- Collection, disclosure, or use of personal information for marketing, sales, or other distribution.
- Administration of any protected information survey not funded in whole or in part by ED.
- Any non-emergency, invasive physical examination or screening as described above.

Parents who believe their rights have been violated may file a complaint with:

Family Policy Compliance Office  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, D.C. 2020

*YOUR SCHOOL IS A*  
***SAFE-T-ZONE***

***IF YOU SEE IT***

- |                   |                       |
|-------------------|-----------------------|
| ↪ <i>DRUGS</i>    | ↪ <i>VIOLENCE</i>     |
| ↪ <i>FIGHTS</i>   | ↪ <i>WEAPONS</i>      |
| ↪ <i>GANGS</i>    | ↪ <i>NON-STUDENTS</i> |
| ↪ <i>ASSAULTS</i> | ↪ <i>GRAFFITI</i>     |
| ↪ <i>TRUANCY</i>  | ↪ <i>THREATS</i>      |

**REPORT IT!**

**CONFIDENTIALITY GUARANTEED**

**TELL A SCHOOL OFFICIAL OR CALL**

***TUSD SAFETY MESSAGE LINE***  
***584-7680***

- MESSAGES CHECKED HOURLY DURING SCHOOL -  
- DAILY ON NON-SCHOOL DAYS -

**DISCRIMINATION STATEMENT:** Tucson Unified School District does not discriminate on the basis of race, color, religion/religious beliefs, sex, gender, gender identity, age, national origin, sexual orientation, , creed, citizenship status, marital status, political beliefs/affiliation, disability, home language, or family, social or cultural background in admission or access to, or treatment or employment in, its educational programs or activities. Inquiries concerning Title VI, Title VII, Title IX, Section 504, and Americans with Disabilities Act may be referred to TUSD's EEO Compliance Officer, 1010 East Tenth Street, Tucson, Arizona 85719, (520) 225-6444, or to the Office for Civil Rights, U.S. Department of Education, 1244 Speer Boulevard, Denver, Colorado 80204. See Board Policies AC "Non-Discrimination," and ACA "Sexual Harassment" for more information.

# **EXHIBIT 18**

**TUSD RFI #(s):** 603, 648-661, 663-657, 659-661, 663-664, 666-667,670,702-703, 753, 755, 776-778, 782-784,800-801, 803-804, 862-865, 879

**Estimated TUSD Staff Time:** 41 hours

**Attachment(s):** Abeyance Data 14-15; 2016-17 CRC Student Pre-Service Survey; Discipline Rates by Ethnicity; Desegregation Program Manager; Advertising List Schurz Site List Recruitment; CRPI Evidence of promotional fairs; Cathy Comstock resume & Job description; Interscholastic Parent Survey 2016

**RFI #804:** What qualifications did these individuals have to provide LSCs with PBIS training?

*District Response:* Karen Ward received her training from Chris Bosworth, College of Education, University of Arizona in compliance with a US Department of Education Safe and Drug Free Schools Demonstration Grant, 2004-2007. Part of the grant focus was to increase counseling services and to introduce PBIS in 8 of our district's elementary sites.

**RFI #862:** Beyond the November 4, 2015 Open Enrollment event at the Wakefield Center (Appendix VII-12), were there other events at the Family Engagement Centers to provide parents with information on magnet school and open enrollment?

*District Response:* The School Community Services department facilitated a parent session regarding the school choice process in early fall 2015 in anticipation of the upcoming lottery process before the priority window opened. Additionally, Magnet/Open Enrollment literature is available at all times in the Family Resource Centers and Family Resource Center staff are trained and available to assist families with information on magnet school and open enrollment.

**RFI #863:** How many Magnet School and Open Enrollment applications were completed or submitted at the District's Family Engagement Centers in the 2015-16 school year?

*District Response:* The School Community Schools department collects and processes all School Choice Applications. There is no disclosure or tracking mechanism to differentiate from where it was submission. Many applications are distributed at events without being submitted at that time. Parents/guardians indicate they want more time to peruse the Catalogue of Schools, visit school sites and/or consider the different options they've learned about. Some are not prepared to submit, as they are new to TUSD and have never before provided parental/custodial documentation into the SIS.

**RFI #864:** What marketing or promotional efforts were directed at informing parents about the availability of online and paper magnet school and open enrollment applications, and assistance in completing those applications, at the Family Engagement Centers?

*District Response:* The Family Resource Center staff attended over 20 District and community events where information was provided about the services available at the Family Resource Centers, including magnet school and open enrollment application availability and assistance. (See Appendix II-24).

**RFI #865:** Did the District complete the translation of the GSRR to Kirundi, Swahili, and Marshallese at any point during the 2015-16 school year?

*District Response:* The Guidelines for Student Rights and Responsibilities (GSRR) was not translated for Kirundi, Swahili, and Marshallese for the 2015-2016 SY due to the lack of availability of qualified translators for these languages.

# **EXHIBIT 19**

**TUSD RFI #(s): 658, 665, 668-669, 683, 685-686, 691-694, 728-730, 733, 744-745, 765, 843-846, 857-858**

**Estimated TUSD Staff Time: 56 hours**

**Attachment(s): Statement that explains RFIs #843 - #846; 2015 Induction**

**Evaluation Final; USP New Teacher Data Collection; Elevated Level 2015-2016 Redacted**

**RFI #765:** At page V-202, the Annual Report says that the Clarity system was to go on line in October 2016. Did that occur? If not, why not?

*District Response:* Yes. Clarity went live in October and the District is in process of training campuses and staff district wide.

**RFI #843:** Please explain what is meant by “updated ethnicity coding” and set forth why the District changed the ethnicity coding from what was used in past years, including any reasons for not consulting or informing the Plaintiffs and Special Master about the change in ethnicity coding in the 2015-16 school year, and who made the decision to change that coding.

*District Response:* See attached statement that collectively explains RFIs #843, #844, #845, #846.

**RFI#844:** Please provide a version of Appendix VI-54 that reflects the ethnicity coding that was used in Appendix 1 of the USP.

*District Response:* See attached statement that collectively explains RFIs #843, #844, #845, #846.

**RFI#845:** Please provide confirmation that the Annual Report data provided in past years in response to USP Section VI, G, b. uses the same ethnicity coding as that in Appendix 1 of the USP.

*District Response:* See attached statement that collectively explains RFIs #843, #844, #845, #846.

**RFI #846:** Please identify all data in the Annual Report and its appendices that is based on the ‘updated ethnicity coding’ reflecting in Appendix-54. This request is intended to cover all presentation of data in the Annual Report and appendices, not just that relating to Section VI of the USP and discipline

*District Response:* See attached statement that collectively explains RFIs #843, #844, #845, #846.

**RFI #857:** Does the District assess or review, during the school year, whether and to what extent sites hold family engagement events, trainings, or other activities during the school year?

*District Response:* There was no process to review or assess school site family engagement activities in place during the school year for SY2015-16. However, the District has developed and implemented a process for review and assessment of school site family engagement activities throughout SY2016-17.

# **EXHIBIT 20**

**Student Participation in Extracurricular Activities by School and Race 2015-16**

School Name	Category	White	African American	Hispanic	Native American	Asian American	Multi-Racial	Total
Blenman	K-8 Athletics	6	*	20	*	*	*	36
Bloom	K-8 Athletics	*	6	*	*	*	*	14
Bloom	K-8 Clubs	10	*	11	*	*	*	28
Bonillas	ES Tutoring	*	*	35	*	*	*	43
Borman	ES Tutoring	*	*	*	*	*	*	6
Borman	K-8 Athletics	42	11	16	*	*	*	70
Borman	K-8 Clubs	90	26	42	*	8	11	*
Carillo	ES Tutoring	*	*	19	*	*	*	25
Carrillo	K-8 Athletics	*	*	8	*	*	*	14
Carrillo	K-8 Clubs	*	*	34	*	*	*	39
Cavett	K-8 Clubs	*	*	*	*	*	*	*
Collier	K-8 Athletics	45	6	12	*	*	*	68
Collier	K-8 Clubs	14	*	*	*	*	*	20
Davidson	K-8 Clubs	*	*	7	*	*	*	12
Davis	K-8 Athletics	*	*	27	*	*	*	31
Dietz	K-8 Athletics	23	22	49	*	*	*	99
Drachman	K-8 Athletics	*	*	19	*	*	*	24
Dunham	ES Tutoring	11	*	6	*	*	*	17
Dunham	K-8 Athletics	27	*	25	*	*	*	60
Dunham	K-8 Clubs	9	*	12	*	*	*	23
Erickson	K-8 Athletics	13	15	25	*	*	*	60
Erickson	K-8 Clubs	6	7	44	7	*	*	67
Fickett Magnet	K-8 Athletics	36	26	77	*	*	7	151
Fickett Magnet	K-8 Clubs	26	12	30	*	*	*	71
Ford	K-8 Athletics	32	10	36	*	*	*	82
Fruchthendler	K-8 Athletics	92	7	34	*	*	*	140
Fruchthendler	K-8 Clubs	68	*	26	*	*	6	102
Gale	K-8 Clubs	31	*	18	*	*	*	58
Grijalva	K-8 Clubs	*	*	*	*	*	*	*
Henry	K-8 Athletics	20	*	16	*	*	*	42
Henry	K-8 Clubs	24	*	18	*	*	*	51
Holladay	ES Tutoring	2	11	28	*	*	*	43
Holladay	K-8 Athletics	*	*	*	*	*	*	6
Holladay	K-8 Clubs	*	8	24	*	*	*	33
Hollinger	K-8 Athletics	*	*	78	*	*	*	84
Hollinger	K-8 Clubs	*	*	82	*	*	*	86
Howell	K-8 Athletics	11	9	30	6	*	*	57
Howell	K-8 Clubs	*	*	*	*	*	*	6
Hughes	K-8 Athletics	8	*	7	*	*	*	19
Hughes	K-8 Clubs	53	14	42	*	*	8	122
Kellond	ES Tutoring	*	*	*	*	*	*	6



Kellond	K-8 Athletics	42	11	38	*	*	7	100
Kellond	K-8 Clubs	28	*	23	*	*	*	60
Laura N Banks	K-8 Athletics	15	*	54	*	*	*	71
Laura N Banks	K-8 Clubs	6	*	30	*	*	*	37
Lawrence	K-8 Athletics	*	*	33	30	*	*	65
Lineweaver	K-8 Athletics	53	9	66	*	*	11	140
Lineweaver	K-8 Clubs	68	*	69	*	*	10	153
Lynn/Urquides	ES Tutoring	*	*	58	*	*	*	60
Lynn/Urquides	K-8 Athletics	*	*	22	*	*	*	23
Lynn/Urquides	K-8 Clubs	*	*	100	*	*	*	108
Manzo	K-8 Clubs	*	*	*	*	*	*	*
Marshall	K-8 Athletics	45	9	30	*	*	*	89
McCorkle PreK	K-8 Athletics	*	*	106	*	*	*	118
Miles - E. L. C.	K-8 Athletics	36	8	41	*	*	6	92
Miles - E. L. C.	K-8 Clubs	10	2	8	*	*	*	21
Morgan Maxwell	K-8 Athletics	*	6	55	*	*	*	71
Naylor	K-8 Athletics	*	22	19	*	*	*	43
Ochoa	ES Tutoring	*	*	11	6	*	*	18
Ochoa	K-8 Athletics	*	*	56	10	*	*	69
Ochoa	K-8 Clubs	*	*	118	19	*	*	147
Pueblo Gardens	K-8 Athletics	*	*	43	*	*	*	50
Robins	K-8 Athletics	18	6	81	*	*	*	112
Rose	K-8 Tutoring	*	*	47	*	*	*	49
Rose	K-8 Athletics	*	*	98	*	*	*	103
Rose	K-8 Clubs	*	*	26	*	*	*	26
Roskruge Biling	K-8 Athletics	18	11	181	12	*	*	226
Roskruge Biling	K-8 Clubs	11	*	88	*	*	*	105
Ruskruge	K-8 Tutoring	8	8	85	6	*	*	111
Safford Magnet	K-8 Athletics	*	9	76	*	*	*	92
Sewell	K-8 Athletics	*	*	10	*	*	*	11
Sewell	K-8 Clubs	*	*	*	*	*	*	*
SolengTom	ES Tutoring	25	9	20	*	*	*	59
SolengTom	K-8 Athletics	28	9	22	*	*	*	61
SolengTom	K-8 Clubs	*	*	*	*	*	*	8
Tolson	ES Tutoring	*	*	52	*	*	*	61
Tolson	K-8 Clubs	*	*	66	*	*	*	75
Tully	ES Tutoring	*	*	*	12	*	*	14
Tully	K-8 Athletics	*	*	11	*	*	*	17
Tully	K-8 Clubs	*	*	9	*	*	*	13
Dodge Magnet	K-8 Athletics	39	12	90	*	*	*	151
Dodge Magnet	K-8 Clubs	27	*	39	*	*	*	72
Dodge Magnet	MS Tutoring	13	*	42	*	*	*	65
Doolen	K-8 Athletics	53	31	76	*	11	6	*
Gridley	K-8 Athletics	68	23	52	*	*	6	151

Gridley	K-8 Clubs	34	6	21	*	*	*	65
Gridley	MS Tutoring	27	7	21	*	*	*	64
Magee	K-8 Athletics	52	14	41	*	*	*	114
Magee	K-8 Clubs	37	6	17	*	*	*	61
Mansfeld	K-8 Athletics	14	19	99	*	*	*	140
Pistor	K-8 Athletics	8	10	118	17	*	*	156
Secrist	K-8 Athletics	32	15	34	*	*	7	89
Secrist	K-8 Clubs	*	*	*	*	*	*	*
Utterback Magn	K-8 Athletics	*	14	64	*	*	*	83
Utterback Magn	K-8 Clubs	*	*	*	*	*	*	*
Vail	K-8 Athletics	37	12	75	*	*	6	136
Vail	K-8 Clubs	*	*	*	*	*	*	*
Valencia	K-8 Athletics	9	8	124	8	*	6	*
Valencia	K-8 Clubs	*	*	19	*	*	*	21
Valencia	MS Tutoring	12	*	75	*	*	*	98
Van Buskirk	K-8 Clubs	*	*	*	*	*	*	*
Warren	K-8 Clubs	*	*	*	*	*	*	*
Wheeler	K-8 Athletics	16	*	26	*	*	*	49
Wheeler	K-8 Clubs	8	*	10	*	*	*	23
White	K-8 Athletics	*	*	17	*	*	*	20
Wright	K-8 Clubs	*	*	*	*	*	*	*
Catalina Magnet	HS Athletics	41	40	144	10	17	11	263
Catalina Magnet	HS FineArts	*	*	*	*	*	*	*
Cholla	HS Tutoring	*	*	12	*	*	*	19
Cholla Magnet	HS Athletics	22	47	369	29	*	9	*
Cholla Magnet	HS Clubs	14	9	99	7	*	*	132
Cholla Magnet	HS FineArts	17	*	50	*	*	*	72
Palo Verde Mag	HS Athletics	66	77	174	9	8	16	350
Palo Verde Mag	HS Clubs	50	45	107	*	7	7	*
Palo Verde Mag	HS FineArts	21	8	24	*	*	*	60
Pueblo	HS Tutoring	*	6	179	11	*	*	202
Pueblo Magnet	HS Athletics	12	12	402	24	*	*	455
Pueblo Magnet	HS Clubs	9	*	156	6	*	*	174
Pueblo Magnet	HS FineArts	*	*	7	*	*	*	10
Rincon	HS Tutoring	67	68	198	*	14	22	*
Rincon	HS Athletics	40	36	141	*	6	16	*
Rincon	HS Clubs	20	9	35	*	*	*	69
Rincon	HS FineArts	38	7	53	*	*	*	105
Sabino	HS Athletics	262	35	137	*	*	18	459
Sabino	HS Clubs	60	6	33	*	*	*	106
Sabino	HS FineArts	53	*	16	*	*	*	84
Sahuaro	HS Athletics	263	69	256	*	12	25	*
Sahuaro	HS Clubs	18	*	19	*	*	*	43
Sahuaro	HS FineArts	124	16	66	*	*	6	221

Santa Rita	HS Athletics	63	40	84	*	6	7	*
Santa Rita	HS Clubs	58	17	51	*	*	*	132
Santa Rita	HS FineArts	24	7	7	*	*	*	43
Tucson Magnet	HS Athletics	68	68	568	21	8	23	756
Tucson Magnet	HS FineArts	54	18	175	8	8	6	269
University	HS Athletics	196	11	111	*	26	14	*
University	HS Clubs	94	10	86	*	25	12	*
University	HS FineArts	158	9	113	*	37	20	*

# **EXHIBIT 21**

## Student Participation in Extracurricular Activities by School and Race 2015-16

School Name	Category	White	African American	Hispanic	Native American	Asian American	Multi-Racial	Total	Enrollment
Blenman	K-8 Athletics	6	*	20	*	*	*	36	
Bloom	K-8 Athletics	*	6	*	*	*	*	14	320
Bloom	K-8 Clubs	10	*	11	*	*	*	28	
Bonillas	ES Tutoring	*	*	35	*	*	*	43	422
Borman	ES Tutoring	*	*	*	*	*	*	6	443
Borman	K-8 Athletics	42	11	16	*	*	*	70	
Borman	K-8 Clubs	90	26	42	*	8	11	*	
Carillo	ES Tutoring	*	*	19	*	*	*	25	285
Carrillo	K-8 Athletics	*	*	8	*	*	*	14	
Carrillo	K-8 Clubs	*	*	34	*	*	*	39	
Cavett	K-8 Clubs	*	*	*	*	*	*	*	268
Collier	K-8 Athletics	45	6	12	*	*	*	68	216
Collier	K-8 Clubs	14	*	*	*	*	*	20	
Davidson	K-8 Clubs	*	*	7	*	*	*	12	
Davis	K-8 Athletics	*	*	27	*	*	*	31	334
Dietz	K-8 Athletics	23	22	49	*	*	*	99	512
Drachman	K-8 Athletics	*	*	19	*	*	*	24	315
Dunham	ES Tutoring	11	*	6	*	*	*	17	224
Dunham	K-8 Athletics	27	*	25	*	*	*	60	
Dunham	K-8 Clubs	9	*	12	*	*	*	23	
Erickson	K-8 Athletics	13	15	25	*	*	*	60	
Erickson	K-8 Clubs	6	7	44	7	*	*	67	
Fickett Magnet	K-8 Athletics	36	26	77	*	*	7	151	
Fickett Magnet	K-8 Clubs	26	12	30	*	*	*	71	
Ford	K-8 Athletics	32	10	36	*	*	*	82	351
Fruchthendler	K-8 Athletics	92	7	34	*	*	*	140	356
Fruchthendler	K-8 Clubs	68	*	26	*	*	6	102	
Gale	K-8 Clubs	31	*	18	*	*	*	58	398
Grijalva	K-8 Clubs	*	*	*	*	*	*	*	658
Henry	K-8 Athletics	20	*	16	*	*	*	42	361
Henry	K-8 Clubs	24	*	18	*	*	*	51	
Holladay	ES Tutoring	2	11	28	*	*	*	43	
Holladay	K-8 Athletics	*	*	*	*	*	*	6	
Holladay	K-8 Clubs	*	8	24	*	*	*	33	
Hollinger	K-8 Athletics	*	*	78	*	*	*	84	485
Hollinger	K-8 Clubs	*	*	82	*	*	*	86	
Howell	K-8 Athletics	11	9	30	6	*	*	57	
Howell	K-8 Clubs	*	*	*	*	*	*	6	
Hughes	K-8 Athletics	8	*	7	*	*	*	19	371
Hughes	K-8 Clubs	53	14	42	*	*	8	122	
Kellond	ES Tutoring	*	*	*	*	*	*	6	543
Kellond	K-8 Athletics	42	11	38	*	*	7	100	
Kellond	K-8 Clubs	28	*	23	*	*	*	60	
Laura N Banks	K-8 Athletics	15	*	54	*	*	*	71	
Laura N Banks	K-8 Clubs	6	*	30	*	*	*	37	
Lawrence	K-8 Athletics	*	*	33	30	*	*	65	
Lineweaver	K-8 Athletics	53	9	66	*	*	11	140	561

Lineweaver	K-8 Clubs	68	*	69	*	*	10	153	
Lynn/Urquides	ES Tutoring	*	*	58	*	*	*	60	522
Lynn/Urquides	K-8 Athletics	*	*	22	*	*	*	23	
Lynn/Urquides	K-8 Clubs	*	*	100	*	*	*	108	
Manzo	K-8 Clubs	*	*	*	*	*	*	*	284
Marshall	K-8 Athletics	45	9	30	*	*	*	89	263
McCorkle PreK-8	K-8 Athletics	*	*	106	*	*	*	118	881
Miles - E. L. C.	K-8 Athletics	36	8	41	*	*	6	92	286
Miles - E. L. C.	K-8 Clubs	10	2	8	*	*	*	21	
Morgan Maxwell	K-8 Athletics	*	6	55	*	*	*	71	488
Naylor	K-8 Athletics	*	22	19	*	*	*	43	
Ochoa	ES Tutoring	*	*	11	6	*	*	18	
Ochoa	K-8 Athletics	*	*	56	10	*	*	69	200
Ochoa	K-8 Clubs	*	*	118	19	*	*	147	
Pueblo Gardens	K-8 Athletics	*	*	43	*	*	*	50	379
Robins	K-8 Athletics	18	6	81	*	*	*	112	574
Rose	K-8 Tutoring	*	*	47	*	*	*	49	800
Rose	K-8 Athletics	*	*	98	*	*	*	103	
Rose	K-8 Clubs	*	*	26	*	*	*	26	
Roskruge Bilingual	K-8 Athletics	18	11	181	12	*	*	226	716
Roskruge Bilingual	K-8 Clubs	11	*	88	*	*	*	105	
Ruskruge	K-8 Tutoring	8	8	85	6	*	*	111	
Safford Magnet	K-8 Athletics	*	9	76	*	*	*	92	782
Sewell	K-8 Athletics	*	*	10	*	*	*	11	298
Sewell	K-8 Clubs	*	*	*	*	*	*	*	
SolengTom	ES Tutoring	25	9	20	*	*	*	59	426
SolengTom	K-8 Athletics	28	9	22	*	*	*	61	
SolengTom	K-8 Clubs	*	*	*	*	*	*	8	
Tolson	ES Tutoring	*	*	52	*	*	*	61	296
Tolson	K-8 Clubs	*	*	66	*	*	*	75	
Tully	ES Tutoring	*	*	*	12	*	*	14	
Tully	K-8 Athletics	*	*	11	*	*	*	17	
Tully	K-8 Clubs	*	*	9	*	*	*	13	
Dodge Magnet	K-8 Athletics	39	12	90	*	*	*	151	
Dodge Magnet	K-8 Clubs	27	*	39	*	*	*	72	
Dodge Magnet	MS Tutoring	13	*	42	*	*	*	65	
Doolen	K-8 Athletics	53	31	76	*	11	6	*	684
Gridley	K-8 Athletics	68	23	52	*	*	6	151	722
Gridley	K-8 Clubs	34	6	21	*	*	*	65	
Gridley	MS Tutoring	27	7	21	*	*	*	64	
Magee	K-8 Athletics	52	14	41	*	*	*	114	618
Magee	K-8 Clubs	37	6	17	*	*	*	61	
Mansfeld	K-8 Athletics	14	19	99	*	*	*	140	778
Pistor	K-8 Athletics	8	10	118	17	*	*	156	910
Secrist	K-8 Athletics	32	15	34	*	*	7	89	535
Secrist	K-8 Clubs	*	*	*	*	*	*	*	
Utterback Magnet	K-8 Athletics	*	14	64	*	*	*	83	531
Utterback Magnet	K-8 Clubs	*	*	*	*	*	*	*	
Vail	K-8 Athletics	37	12	75	*	*	6	136	632
Vail	K-8 Clubs	*	*	*	*	*	*	*	
Valencia	K-8 Athletics	9	8	124	8	*	6	*	

Valencia	K-8 Clubs	*	*	19	*	*	*	21	957
Valencia	MS Tutoring	12	*	75	*	*	*	98	
Van Buskirk	K-8 Clubs	*	*	*	*	*	*	*	336
Warren	K-8 Clubs	*	*	*	*	*	*	*	277
Wheeler	K-8 Athletics	16	*	26	*	*	*	49	367
Wheeler	K-8 Clubs	8	*	10	*	*	*	23	
White	K-8 Athletics	*	*	17	*	*	*	20	681
Wright	K-8 Clubs	*	*	*	*	*	*	*	
Catalina Magnet	HS Athletics	41	40	144	10	17	11	263	
Catalina Magnet	HS FineArts	*	*	*	*	*	*	*	
Cholla	HS Tutoring	*	*	12	*	*	*	19	
Cholla Magnet	HS Athletics	22	47	369	29	*	9	*	1864
Cholla Magnet	HS Clubs	14	9	99	7	*	*	132	
Cholla Magnet	HS FineArts	17	*	50	*	*	*	72	
Palo Verde Magnet	HS Athletics	66	77	174	9	8	16	350	1213
Palo Verde Magnet	HS Clubs	50	45	107	*	7	7	*	
Palo Verde Magnet	HS FineArts	21	8	24	*	*	*	60	
Pueblo	HS Tutoring	*	6	179	11	*	*	202	1621
Pueblo Magnet	HS Athletics	12	12	402	24	*	*	455	
Pueblo Magnet	HS Clubs	9	*	156	6	*	*	174	
Pueblo Magnet	HS FineArts	*	*	7	*	*	*	10	
Rincon	HS Tutoring	67	68	198	*	14	22	*	
Rincon	HS Athletics	40	36	141	*	6	16	*	
Rincon	HS Clubs	20	9	35	*	*	*	69	
Rincon	HS FineArts	38	7	53	*	*	*	105	
Sabino	HS Athletics	262	35	137	*	*	18	459	957
Sabino	HS Clubs	60	6	33	*	*	*	106	
Sabino	HS FineArts	53	*	16	*	*	*	84	
Sahuaro	HS Athletics	263	69	256	*	12	25	*	1748
Sahuaro	HS Clubs	18	*	19	*	*	*	43	
Sahuaro	HS FineArts	124	16	66	*	*	6	221	
Santa Rita	HS Athletics	63	40	84	*	6	7	*	527
Santa Rita	HS Clubs	58	17	51	*	*	*	132	
Santa Rita	HS FineArts	24	7	7	*	*	*	43	
Tucson Magnet	HS Athletics	68	68	568	21	8	23	756	3194
Tucson Magnet	HS FineArts	54	18	175	8	8	6	269	
University	HS Athletics	196	11	111	*	26	14	*	1056
University	HS Clubs	94	10	86	*	25	12	*	
University	HS FineArts	158	9	113	*	37	20	*	

Green schools have  
white student  
enrollment of 25%  
or more  
Yellow schools are  
racially  
concentrated

\* is counted as "9" except last column for Univeristy that fails to include prior cells

# **EXHIBIT 22**



---

**From:** Juan Rodriguez  
**Sent:** Thursday, March 17, 2016 6:53 PM  
**To:** Tolleson, Julie; Taylor, Martha; Alexander Chanock; James Eichner; Lois Thompson; Rubin Salter; Shaheena Simons; Willis D. Hawley  
**Cc:** Desegregation; Converse, Bruce (BConverse@steptoe.com)  
**Subject:** RE: Reallocations - Tully and Carrillo

Julie,

Thanks for your email below. While we generally also understand the ESS to focus on facility design, as you state below, we also understand that tool to assess the “existence and quality of special facilities and laboratories (e.g., ... auditoriums, theaters ...).” (USP Section IX, A, 1, (v) (emphasis added).)

The March 8, 2016 Utterback reallocation justification indicates that the Utterback auditorium is having issues with no working speakers, sound boards, or microphones (sound system), no projection system, and limited lighting. With regard to the specific “Performing Arts” component, the ESS Rubric for conducting assessments describes the following as “What to Look For”: “appropriate lighting levels,” “Performing arts spaces including auditorium ... sound booth, lighting booth, etc. meet instructional space guidelines/standards,” and the “performing arts space should have adequate and appropriate... lighting, sound system w/ ability to patch into an iPod, and technology equipment appropriate to the program.” (Multi-Year Facilities Plan, Attachment D – Education Sustainability Score Rubric (Doc1777-1) at 43-44.) Thus, the ESS “Performing Arts” assessment is to take into account each of the issues Utterback indicates it is experiencing. Notably, the items “to Look For” that are cited above and which are implicated by the issues with Utterback’s auditorium are spread across three of the five components in assessing “Performance Arts” spaces. (Id.) We therefore would expect Utterback’s “Performing Arts” ESS assessment to result in a low score. Instead, Utterback’s “Performing Arts” space received a 4.0 out of 5.0, indicating it is in “good condition” and “that it meets all of the safety components and at least 85% of other components.” (2014-15 Annual Report, Appendix IX-6 (Doc. 1852-4) at 3.)

While we appreciate that, as you state, issues may post-date the last ESS assessment of May, 16, 2015 (see id.), the significant numerous issues described with the auditorium and the indication in the justification document that it “has had no upgrades or systemic repairs since its inception in 1989” leads us to believe that the needed repairs developed over time. Also, as is implicit in our repeated indication that we are willing to have desegregation funds supplement M&O funds in repairing Utterback’s auditorium, we have little doubt that the space is in need of repair. However, that is a separate from the issue of the extent to which 910(G) money should fund those repairs because, as you expressed earlier today, the 910(G) budget expenditures should align with the desegregation order. Our concern with Utterback’s “Performing Arts” ESS score is that it appears to not reflect the issues experienced with that school’s performing arts space, which raises concerns about whether other school spaces may be in great need of repair without that need reflected in the ESS (whether it be a result of human error, scoring variation among evaluation teams, etc.), and therefore unlikely to receive the attention required to have those repair needs addressed. We hope that following resolution of the issues in my email of earlier today (below), that the District will bring back a proposal that includes 910(G) funds to supplement M&O funds to repair Utterback’s auditorium.

Thanks,  
Juan Rodriguez

---

From: Tolleson, Julie [Julie.Tolleson@tusd1.org]  
Sent: Thursday, March 17, 2016 12:18 PM

To: Juan Rodriguez; Taylor, Martha; Alexander Chanock; James Eichner; Lois Thompson; Rubin Salter; Shaheena Simons; Willis D. Hawley  
Cc: Desegregation; Converse, Bruce (BConverse@steptoe.com)  
Subject: RE: Reallocations - Tully and Carrillo

Just a quick nugget related to your questions. ESS scores are about "educational suitability" – facility design, more or less. So, that would not be the place to look for information regarding the condition or maintenance needs of a site. That information would best be gleaned from the FCI. Even then, if a system breakdown post-dated the last FCI scoring, it may or may not be reflected there.

I confess I have not looked at the FCI score for Utterback. But are saying you are skeptical as to whether conditions are as the school reports in the reallocation request? I've not been out there lately, but I do think Robin Dunbar is a principal of the highest integrity and this is the expenditure that they believe is most helpful to their existing magnet.

I suspect the Deseg team is on your inquiry and will get back to you shortly. With the first draft of the budget just having been sent, as you might imagine we have a lot of balls in the air!

Julie C. Tolleson  
General Counsel  
Tucson Unified School District  
(520) 225-6040

This communication is attorney/client privileged and confidential and solely for the identified recipient. Any disclosure, copying, distribution, or use of the contents of this communication is strictly prohibited. If you have received this communication in error, please immediately destroy it and notify the sender by reply e-mail.

From: Juan Rodriguez [mailto:jrodriguez@MALDEF.org]  
Sent: Thursday, March 17, 2016 9:56 AM  
To: Taylor, Martha; Alexander Chanock; James Eichner; Lois Thompson; Rubin Salter; Shaheena Simons; Willis D. Hawley  
Cc: Desegregation; Tolleson, Julie; Converse, Bruce (BConverse@steptoe.com)  
Subject: RE: Reallocations - Tully and Carrillo

Martha,

Just to be clear, while Mendoza Plaintiffs' only outstanding objection relates to the Utterback reallocation proposal, they still seek responses to a number of questions relating to the magnet reallocation proposals, regardless of whether the Utterback proposal moves forward.

As noted in my March 10 email, we seek an explanation of the relatively high ESS score Utterback received for "performing arts" (2014-15 Annual Report, Appendix IX-6 (Doc. 1852-4) at 3) given the substantial repairs the District described its auditorium as requiring. We again request clarification on what is meant by the reference in the "reallocations report" to Utterback having excess funds in the "Counseling line" when, as far as Mendoza Plaintiffs can tell, there were no allocations for counseling in either Utterback's improvement plan, or in the 2015-16 USP budget. We again reiterate that if these issues can be adequately addressed, we would be open to a revised Utterback proposal in which an appropriate amount of 910G funds are used to supplement M&O funds to repair its auditorium, while remaining funds go toward programs aimed at improving student academic achievement.

Mendoza Plaintiffs also again request District confirmation that the it has not abandoned any of the positions described as not having been filled at the magnet schools in the reallocation proposals, and an explanation of what is occurring with unexpended funds at magnet schools in which there have been vacancies this school year but for which no reallocations have been proposed.

Thanks,

Juan Rodriguez | Staff Attorney

MALDEF | [www.maldef.org](http://www.maldef.org)<<http://www.maldef.org/>>  
634 South Spring Street, 11th Floor, Los Angeles, CA 90014 213.629.2512, ext. 136 t / 213.629.0266 f  
[jrodriguez@maldef.org](mailto:jrodriguez@maldef.org)<<mailto:jrodriguez@maldef.org>>

MALDEF: The Latino Legal Voice for Civil Rights in America.

CONFIDENTIALITY NOTICE: This e-mail transmission from The Mexican American Legal Defense & Educational Fund, and any documents, files or previous e-mail messages attached to it may contain confidential information that is legally privileged. If you are not the intended recipient, or a person responsible for delivering it to the intended recipient, you are hereby notified that any disclosure, copying, distribution or use of any of the information contained in or attached to this transmission is strictly prohibited. If you have received this transmission in error, please immediately notify us by reply e-mail or by telephone at 213.629.2512, and destroy the original transmission and its attachments without reading or saving it in any manner.

From: Taylor, Martha [<mailto:Martha.Taylor@tusd1.org>]  
Sent: Thursday, March 17, 2016 9:31 AM  
To: Alexander Chanock; James Eichner; Juan Rodriguez; Lois Thompson; Rubin Salter; Shaheena Simons; Willis D. Hawley  
Cc: Desegregation; Tolleson, Julie; Converse, Bruce ([BConverse@steptoe.com](mailto:BConverse@steptoe.com)<<mailto:BConverse@steptoe.com>>)  
Subject: Reallocations - Tully and Carrillo

Dr. Hawley and counsel: Thank you for your feedback on the reallocations requested for Tully and Carrillo. Since no continuing objections for these reallocations were received by Tuesday 3/15/16, we will move ahead and process these requests right away so students can begin to benefit from these acquisitions as soon as possible.

Thank you.

# **EXHIBIT 23**

---

**From:** Taylor, Martha <Martha.Taylor@tusd1.org>  
**Sent:** Monday, April 03, 2017 10:08 AM  
**To:** Alexander Chanock; James Eichner; Juan Rodriguez; Lois Thompson; Peter Beauchamp; Rubin Salter; Shaheena Simons; Willis D. Hawley  
**Cc:** Desegregation; 'Converse, Bruce'  
**Subject:** 3.2.17 Reallocation Request and RFI re FCI - District Response

Dr. Hawley and counsel:

Below is our response to your comments and objections regarding our reallocation requests sent March 2, 2017..

### **3.2.17 Reallocation District Response**

- 1. Reducing negative contingency.** The District will implement this proposal as no party has objected to reducing the negative contingency.
- 2. Summer PD.** The DOJ and Special Master do not object to this proposal; the Fisher Plaintiffs object, and the Mendoza Plaintiffs have indicated that funding for Summer PD should be allocated in a manner similar to the technology reallocations from 2016 – using the “technology reallocation list.” The District has reviewed the make-up of teachers involved in summer PD in 2016 and has determined that approximately 90% of participating teachers came from schools on the “technology list” that was used last year to identify sites that would receive technology purchased with reallocated funds. Accordingly, the District proposes to allocate approximately 90% of summer PD funding from reallocated 910G funds, and will fund the remaining 10% (or, likely, more than 10%) with other sources.
- 3. Facility upgrades (security system and EMCS upgrades) @ Hollinger and Manzo.** The DOJ does not object to this request; Dr. Hawley, the Fisher Plaintiffs, and the Mendoza Plaintiffs object. Therefore, the District withdraws this request.
- 4. Roof upgrades at Safford, Hollinger, Manzo, and Carrillo.**

The DOJ and Dr. Hawley do not object to the request for a roof upgrade at Carrillo; the Mendoza Plaintiffs and Fisher Plaintiffs object to the request for roof upgrades for all four listed schools. Carrillo is unique in that it is an academically high-performing magnet school and, through the District’s efforts, has experienced significant improvements in integration over the past four years: Carrillo’s non-Latino population has doubled from 11% in 2012-13 to 22% in 2016-17, significantly improving integration and reducing racial concentration. Thus, maintaining its facilities not only improves its FCI score, but also ensures that family interest in Carrillo is not undermined by deteriorating facilities. The District withdraws its requests for roof upgrades except for its request to upgrade the roof at Carrillo. The District requests a recommendation from the Special Master on the Carrillo request.

#### **Request for Information Related to FCI Score Changes**

Question: why are the FCI scores provided in the reallocation request different than the FCI scores provided in the FCI attached to the MYFP?

**Overview:**

**Continued FCI changes:**

When our facilities shops received work orders for repairs that they cannot address, they refer them to Engineering. That triggers an investigation, and often results in a change in FCI score.

**Roofs**

TUSD's roofing crew asked that Engineering assess the roofs at Safford, Roskruge, Hollinger, Carillo, and Hughes, all of which have tile roofs and have multiple work orders that cannot be repaired because we do not have the staff or equipment required. The underlayment on these sites have been tested and found to be in very poor condition. The FCI scores were downgraded on all of these sites.

**Security Systems**

Some of our very old security systems are starting to fail, and we are unable to get parts as they are obsolete systems. If they fail, we would be unable to repair them. Our Fire Safety department has asked that FCI scores for all schools using this particular equipment be downgraded.

**Safford: Changed from 2.68 to 2.08**

**Safford Roof**

There have been 26 work orders for the Safford Roof. The underlayment was tested and found to have mostly disintegrated. Our roofing crew is unable to make these repairs. It will require a contractor with a crane to remove the tiles, replace the underlayment, and replace the tiles. This roof is in much worse condition than previously thought.

**Safford Floor**

The computer lab has two "holes" in the floor. Plywood has been secured to make sure no one falls through. However, there is a noticeable dip when stepping on the plywood. We were on site to look at the roof, and the custodian asked that we look at the floor. We agreed this is an unsafe condition that needs to be addressed.

**Hollinger: Changed from 2.63 to 2.29**

**Hollinger Roof**

We have 13 open work orders for the Hollinger Roof. Our roofing crew is unable to make the repairs, ceiling tiles are continuously replaced, and some classrooms are unusable in a heavy rainstorm. This roof is in worse condition than previously thought.

**Hollinger Security**

Some of our very old security systems are starting to fail, and we are unable to get parts as they are obsolete systems. If they fail, we would be unable to repair them. FCI scores for all schools using this particular equipment have been downgraded.

**Manzo: Changed from 2.49 to 2.32**

**Manzo Paint, Parking Lot, and Crumbled Sidewalk**

Manzo has received complaints from the surrounding community that the school's paint, parking lot, and sidewalk is becoming an eye sore to the community. We inspected the school to answer the complaints and determined that they are correct. The fascia is starting to crumble and needs to be sealed. The sidewalk has crumbled because the dumpster is there and the waste trucks are too heavy for the concrete. We need to remove the concrete and pour a thicker slab. The parking lot does not need to be replaced, but does need a slurry coat to keep it from deteriorating further.

**Manzo Security**

Some of our very old security systems are starting to fail, and we are unable to get parts as they are obsolete systems. If they fail, we would be unable to repair them. FCI scores for all schools using this particular equipment have been downgraded.

**Manzo EMCS**

Manzo does not currently have EMCS controls. While not all schools have EMCS, this school has been particularly problematic because of the number of work order received, and it cannot be evaluated centrally but requires a site visit every time an issue arises.

**Carrillo: Changed from 2.59 to 2.33**

**Carrillo Roof**

We have 17 open work orders for the Carrillo Roof. The flat roof was replaced recently, but the tiled areas continue to be a problem. Our roofing crew is unable to make the repairs. This section of the roof is in worse condition than previously thought.

**Carrillo Security**

The intercom at Carrillo failed and had to be replaced. It has changed from 1 (failing) to 5 (new). The Fire alarm system was downgraded because of an increased number of false alarms.

# **EXHIBIT 24**



---

# District Facilities Master Plan 2016-23

# Tucson Unified School District #1

---

Tucson Unified is where  
Students love to Learn  
Teachers love to Teach  
and People love to Work  
We are Team TUSD



**FINAL** June 2016

Tucson Unified is where  
Students love to Learn  
Teachers love to Teach  
and People love to Work  
We are Team TUSD



---

# District Facilities Master Plan 2016-23

## Tucson Unified School District #1

---

## I.1 INTRODUCTION/ EXECUTIVE SUMMARY

This Tucson Unified School District (TUSD) Facilities Master Plan (FMP) report has resulted from the fulfillment of the District's Strategic Plan Priority 2 which directs the staff to

*Establish/ Communicate clear vision for facilities (community) – TUSD will develop and implement a long-range Master Facilities Plan that supports and enhances student learning and achievement, and community partnerships*

### I.1.1 PURPOSE

The purpose of the TUSD Facilities Master Plan is to determine the facility repairs and improvements necessary to support the District's Strategic Plan and to establish whether a general obligation bond is needed to fund these capital needs. In response to this process has focused on the following:

- gathering data regarding the district's enrollment demographics, school facilities conditions, and the suitability of facilities to meet the current and future goals for enhancing student learning and achievement in the district
- conducting surveys to parents, teachers, and focus groups in order to determine the priorities of TUSD staff, parents, and community regarding needed school facilities improvements
- recommending a future course of action for funding such improvements

### I.1.2 FMP COMPONENT PARTS

This document is comprised of four sections:

1.0 Goals Process detail the overall goals of this FMP and the process utilized in its creation

2.0 Current and Projected Conditions describe the overall demographics and economic conditions of the region

3.0 Facilities Assessments and Conditions detail the process utilized during the assessment of the district's building inventory and

4.0 Total Capital Improvement Needs which describes funding levels needed to meet the goals established during this process

### I.1.3 CONCLUSION/RECOMMENDATIONS

Through extensive studies and meetings, the conclusions, recommendations, and findings from this process are the following:

1. Over the past 8 years, due to declining State Capital Funding expenditures for buildings maintenance and operations, the District has had to self-fund large portions of the cost of renovating and maintaining TUSD buildings – totaling more than \$116 Million;
2. TUSD community members, staff and students support the idea of funding Capital Improvements through the issuance of a bond and most support that bond amount to be at least \$240 Million or more. Most want a balanced allocation between repairs and improvements. Depending on the bond amount (if it is lower), a higher proportion may need to be allocated for repairs. Almost 70% of respondents felt that Proposition 123 would not be sufficient to handle repairs;
3. The top priorities for funding are:
  - Repairs
  - Key Facility Improvements to Enhance Learning
  - Technology
  - School Renovations for 21st Century Learning and Optimum School Size
  - Support Expansions of Successful Programs
  - Reduce the Number of Active Portable Classrooms
  - Transportation
4. Total needs identified by this FMP are \$509 Million;
5. Potential funding sources include a general obligation bond, sale of surplus real estate, and leveraging bond funding. Assessed valuation for the district is estimated at \$477 Million.
6. The Capital Funding Priorities identified herein are an assessment of the District's facility needs at a level of detail and scope that allow the District to call for a General Obligation Bond when deemed appropriate.

---

#### I.1.4 BENEFITS OF BOND ISSUANCE

The following are benefits of a TUSD General Obligation Bond:

- Every facility will receive a portion of the Capital Funding for much needed repairs and upgrades;
- Student-learning environments will benefit from safer and updated facilities;
- Teachers and staff will benefit from safer and updated working environments;
- Community and Businesses will benefit from schools that are safe, modern and more energy efficient.

---

#### I.1.5 ACRONYMS/ DEFINITIONS

**Building Efficiency** – The ratio of total building area divided by usable area

**Capacity**- The amount of occupants possible in a space

**ES**- Elementary School

**FCI**- Facility Condition Index (the ratio of needed repairs to current replacement value)

**FMP** – Facilities Master Plan

**GO** General Liability Bond

**GSF** Gross Square Feet the measure of a building from exterior wall to exterior wall includes all circulation halls SF etc

**HS** High School

**HVAC** Heating, Cooling and Air Conditioning

**K8** 8<sup>th</sup> Grade School

**MACC** Maricopa County Alternative Cost of Construction

**MS** Middle School

**NSF** Net Square Feet usable area includes all circulation etc

**RR** Restroom

**SF** Square Feet

**TUSD** Tucson Unified School District

**USP** Unitary Status Plan

**Utilization Rate** The efficiency of how a space is occupied

## TABLE OF CONTENTS

<b>SECTION I INTRODUCTION/ EXECUTIVE SUMMARY /TABLE OF CONTENTS</b>	Page i-1
---	----------

### SECTION 1.0 GOALS/PROCESS

1.1 Goals	Page 1.0-1
1.2 Process	Page 1.0-6

### SECTION 2.0 EXISTING AND PROJECTED CONDITIONS

2.1 Area Characteristics	Page 2.0-1
2.2 Sites/Facilities	Page 2.0-
2.3 District Growth	Page 2.0-12
2. Enrollment	Page 2.0-13
2. Acquisition Process	Page 2.0-1

### SECTION 3.0 FACILITIES ASSESSMENTS AND CONDITIONS

3.1 Multi-Year Facility Plan Accuracy and Surveys	Page 3.0-1
---	------------

### SECTION 4.0 TOTAL CAPITAL IMPROVEMENT NEEDS

1. Capital Improvement Goals	Page 4.0-1
2. Capital Improvement Plan	Page 4.0-1
3. Funding Sources Identified	Page 4.0-
Implementation Process	Page 4.0-

**APPENDIX A AUDIT RECOMMENDATIONS FOR FACILITIES**

**APPENDIX B DEMOGRAPHIC AND ENROLLMENT ANALYSIS**

**APPENDIX C FUNDING DATA**

**APPENDIX D FACILITIES ASSESSMENT DOCUMENTATION**

**APPENDIX E SUMMARY REPORTS OF PUBLIC PROCESS**

## ACKNOWLEDGEMENTS

### ADVISORY GROUP COMMITTEE MEMBERS

*(Support for the Advisory Team provided by Phil Swaim and Mark Bollard of Swaim Associates, and by Georgia Lacey and Theo Serrano of Geo Advertising & Marketing)*

Stefanie Doe Director of Communications Media Relations

Maureen Ashen Director of Facilities Management

Jeffery Cole Director of School Safety Security

John Bodine Director of Operations Business Office

Stuart Duncan Chief Operations Officer

Richard Foster Assistant Superintendent for Curriculum and Instruction

Anna Gallo Assistant Superintendent of Elementary and Middle Leadership

Robert Anderson Director of High Schools

Marcus Jones Director of Architecture and Engineering

Paul Larson Director of Transportation

Michael Morado Assistant Superintendent of Secondary Leadership

Scott Morrison Chief Technology Officer

Robert Anderson Director of Planning Services

Martha Taylor Director of Desegregation

### Focus Group Participants

*(Focus Groups were facilitated by the Geo Advertising & Marketing)*

Christina Isla	Staff	Christina Suerre	Teacher
Andria McHirter	Student	Aura Riala	Parent
Christine Dudle	Staff	Lillian Martine	Parent
Ethan Macri	Parent	Isa Arnes	Parent
Carl Aufan	Parent	Isa Anderson	Staff
Carlos Rendari	Staff	Don Furst	Parent
Catherine Mar	Staff	Cori Ebel	Employee
Christina Moreno	Parent	Marot Atiidad	Parent
Christine Cron	Parent	Marolsrud	Staff
Collier Hill	Parent	Mar Morse	Staff
Deanna Arris	Staff	Matt Muner	Staff
Dennis Drisill	Parent	Monica A	Parent
Carl Mendenhall	Employee	Murielle Coste	Parent
Lila Bethan	Teacher	Pete Guerrero	Employee
Lise Dariani	Teacher	Alan Schitt	Parent
Deloffan	Parent	Sandra Furst	Parent
James Oerts	Teacher	Stee Peters	Employee
Anna Alos	Parent	Susan Deal	Staff
Corenea	Parent	Susan Ostich	Parent
Alan	Employee	Silvia Alos	Employee
Math Sisler	Staff	Tea Alos	Parent
Devin Courtne	Employee	Tina Holl	Parent
Christian Atkins	Parent	Erica Itirano	Parent

Tucson Unified is where  
Students love to Learn  
Teachers love to Teach  
and People love to Work  
We are Team TUSD



---

## Section 1.0 Goals Process

# Tucson Unified School District #1

---



## 1.0 GOALS/ PROCESS

### 1.1 GOALS

#### 1.1.1 DISTRICT GOALS AND VALUES

DISTRICT MISSION STATEMENT<sup>1</sup>

The mission of the Tucson Unified School District, in partnership with parents and the greater community, is to assure each pre-K through 12<sup>th</sup> grade student receives an engaging, rigorous and comprehensive education.

The District is committed to inclusion and non-discrimination in all District activities. At all times, District staff should work to ensure that staff, parents, students and members of the public are included and welcome to participate in District activities.

TUSD STRATEGIC DIRECTION

***DELIVERING EXCELLENCE IN EDUCATION EVERY DAY***  
***GROW | REACH | SUCCEED***

The following are district-stated operational values

- **Student Centeredness** Make every decision with student success in mind
- **Caring** Act with respect, dignity and concern for all
- **Diversity** Celebrate and accept our differences as our strength
- **Collaboration** – Partnering to reach common goals
- **Innovation** Embrace new ideas and challenge assumptions
- **Accountability** Take responsibility to do things right and to do the right thing

<sup>1</sup>TUSD Board of Education District Mission Vision and Values Policy Code \_\_\_\_\_ tusd1 or Dec 10 2013

### 1.1.2 DISTRICT S COMMUNITY INVOLVEMENT

TUSD maintains an open dialog with community through open board of education meetings. Superintendent and Board of Trustees Parent Teacher Groups and Facilities Master Plan Committee sponsored meetings described herein. The following are on-going committees:

- Bond Fiscal Oversight
- Employee Benefits Trust
- School Community Partnerships
- School Council
- Student Leadership
- Technology Oversight
- Bond Proposition Trust Fund

### 1.1.3 HOW THE FACILITIES MASTER PLAN FITS INTO A LONG RANGE PLAN

The TUSD Facilities Master Plan (FMP) is one component of a larger process. Initially, the district completed three studies: a curriculum audit, an efficiency audit to improve efficiency and management effectiveness, and a demographic study. These items provided data which allowed TUSD to create a Strategic Plan to guide a variety of matters such as changes in curriculum, facilities, finance, and communication. This FMP is a result of the Facilities Strategic Priority 2.

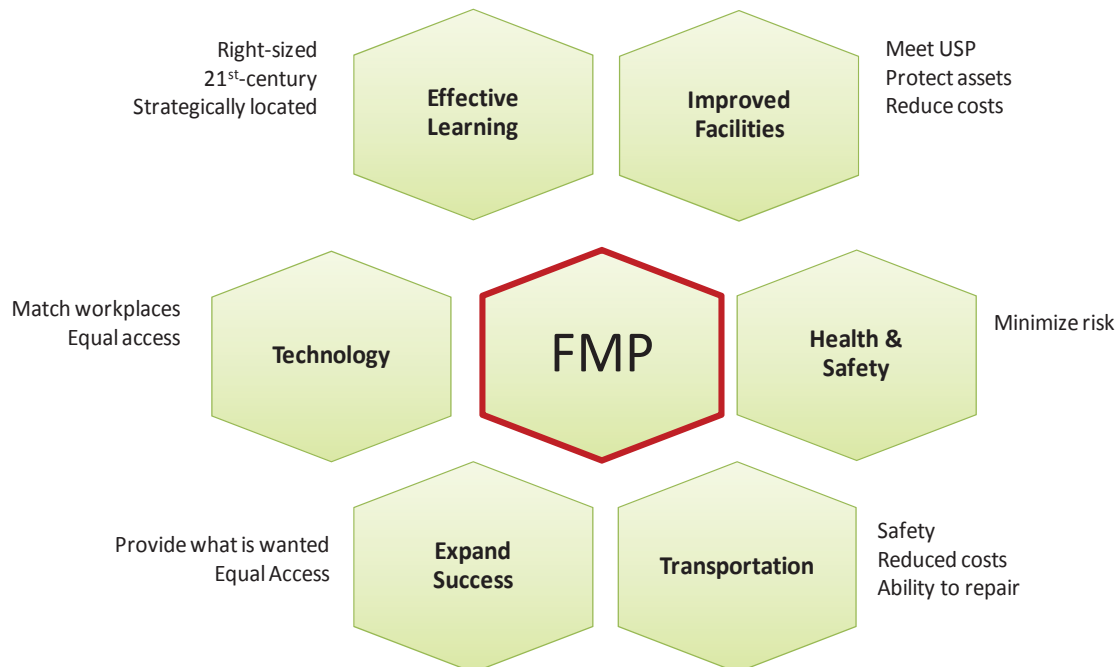
Establish/ Communicate clear vision for facilities (community) – TUSD will develop and implement a long-range Master Facilities Plan that supports and enhances student learning and achievement, and community partnerships.<sup>2</sup>



<sup>2</sup> TUSD Strategic Plan 2011-2015 <http://tUSD1.org/contents/distinfo/files/ear/index.aspx>

M TS FT FMP

To define the elements of the FMP the District cou led the reco endations of the urricula duit and fficienc duit endi ith assess ents of the District s Facilities see Section The resultin elements sho n elo include re airs and deficienc corrections on the ri ht side ith i ro e ents to enhance learnin and su ort effecti e ro ra s on the left side



1.1.4 STATE OF DISTRICT S FACILITIES

U D TUSD F T S F TS

TUSD is the Second ar est District in ri ona and consists of

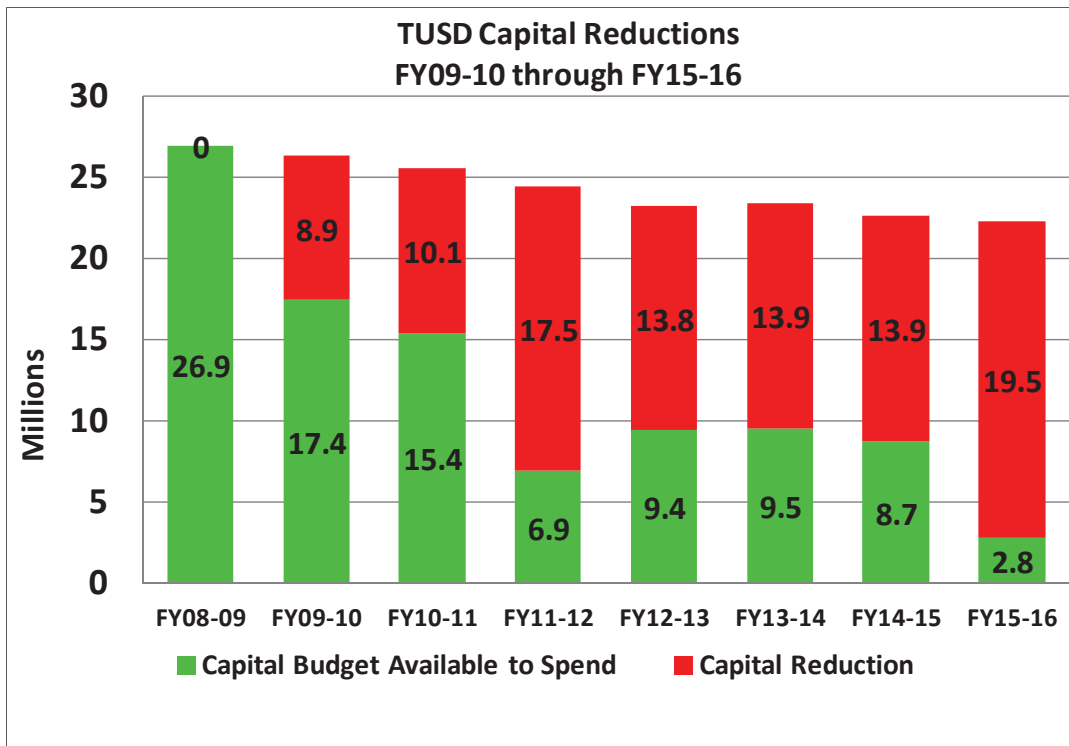
- 230 S uare Miles
- Schools
- 000 Students
- 000 000 SF of uildin s
- 26 000 or rders Per ear

ST F PT FU D T TUSD

a ital fundin is the ortion of school district funds allocated to urchase lease lease- urchase or lon -ter lease ca ital ite s such as land uildin s reno ations and land uildin i ro e ents

Since FY 2009-10 TUSD has experienced significant reductions to Capital Fund that total over 6 Million dollars over years

Figure 1.1. CAPITAL REDUCTIONS



**DEFUND**

The purpose of this Facility Master Plan is to establish whether a general obligation bond and bond is needed to fund capital needs at TUSD 2 how much funding will be needed to satisfy capital needs and 3 which capital needs will be addressed and when. The following describes what a bond is and how its limits are determined

- bonds are a mechanism for public school districts to budget additional dollars earmarked for specific construction renovation projects
- bond limits are determined a district's assessed valuation residential commercial and industrial project values
- bonds must be voter approved - voter ballot must include purpose of proposed bond sale

**FUTURE**

The overarching priority for this Facility Master Plan is to provide funding for much needed deferred maintenance with a portion of funding to be enhanced projects that will benefit students learning experiences

## TOP PRIORITIES/ OBJECTIVES FOR THIS FACILITY MASTER PLAN

(detailed information regarding facilities assessments may be found in Appendix C of this document)

**Repairs** Repairs would include roofing, HVAC, special systems, plumbing, building finishes, window and door maintenance, landscape improvements and security improvements

**Key Facility Improvements to Enhance Learning** Key facility improvements would include improvements to multi-purpose areas, libraries, science and art labs, and support key school curriculum.

- Every school would receive a portion of this funding
- During the implementation phase each school would work with the lead team to identify each project

**Technology** Key infrastructure upgrades would be implemented to support:

Projects to support this initiative include electrical upgrades and power at the correct locations, replacement of wireless routers, projects to spaces that will promote student technology interface

- Move to one location initiative
- Wireless technology and ST/M
- Better capacity for digital libraries and databases
- Computer labs and computer cafes, ethernet infrastructure

**School Renovations for 21<sup>st</sup> Century Learning and Optimal School Size** .Per recommendations of the Curriculum Audit and Efficiency Audit (See Appendix A) funding would be utilized to support improvements, consolidations, expansions or closures in order to optimize use of school facilities.

- Projects related to utilization, expansions, consolidations, partial building shutdowns
- Collaboration and ST/M learning spaces, Technology integration, better efficiency

**Support Expansions of Successful Programs** .Funding would be utilized to support the expansion of campuses and teaching areas for successful school programs.

- Space additions or redesign

**Reduce the number of portable classrooms** .In accordance with the recommendations of the Curriculum Audit (Appendix A), funding would be utilized to demolish 50 portables (17% of the current stock). To achieve the recommendations of the Curriculum Audit 100 portables would be closed or auctioned off.

- Portable demolitions

**Transportation Funding** Funding would be utilized to support the maintenance and replacement of buses.

## 1.2 PROCESS

### 1.2.1 PROCESS FOR CAPITAL PLANNING AND DECISION MAKING

#### RESPONSIBILITY AND AUTHORITY

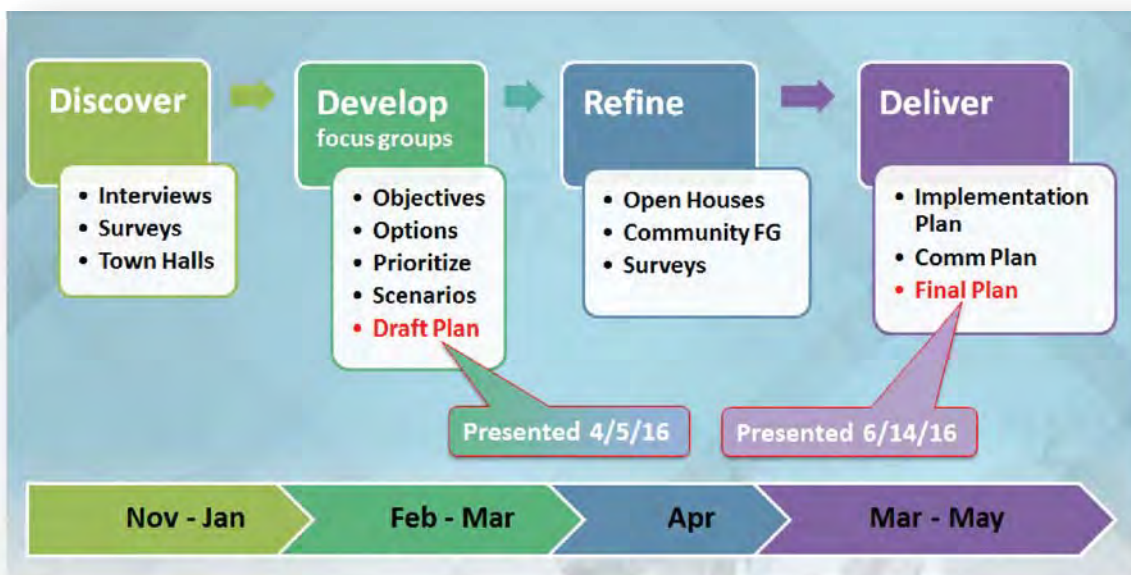
The governing board commissioned the development of this Facilities Master Plan to serve as a reference and guide for capital facilities investments at Tucson Unified School District.

It is the responsibility of TUSD to review and revise the entire content of this Facilities Master Plan whenever necessary. It is the responsibility of the governing board to adopt the content of the Facilities Master Plan and to utilize its priorities to guide future capital expenditures for facilities and to utilize recommendations herein to call for a bond question as needed to fund these investments.

#### FACILITIES MASTER PLAN PROCESS

ST P 1 ST S M T F T F T S M ST P P SS

This year Facilities Master Plan was commissioned the District to meet the objectives of the District Strategic Plan. The timeline followed the process shown below. Subsequent sections present the details of the process.



ST P 2 ST S T MS

FMP Director Team was established to review data and establish School District priorities. This committee was composed of administration and staff from a wide range of departments.

The first step of the FMP process was to kick off a meeting and during this meeting the following topics were discussed:

- What is a Facilities Master Plan
- How develop a FMP
- Objectives of the FMP
- Roles and Responsibilities
- FMP Process

It was determined that the FMP Director Team would review data and establish School District priorities. Progress reports would be presented to the governing board for comments and recommendations. The governing board would review the capital plan and determine funding sources and the timeline to implement the capital plan.

After developing the initial objectives of the FMP the Director Team developed scopes of work and interviewed outside professionals to assist in the project. Ultimately to outside professional teams were brought into the project including Marketing to handle public outreach and Sales and Associates with their SM/T Planning and FM to handle architectural assessments, cost estimates and plan development with the District's Planning Services. These teams formed the Project Team.

### STEP 3: DATA

The Project Team gathered information on existing facilities and educational programs first through research and then through existing data. The data gathered included:

#### Enrollment Projections

- Birth
- Migrations
- Housing
- Program Requirements
- Historical Enrollment

#### Educational Facility Assessments

- Physical Facilities Assessment including a Facilities Condition Index
- Academic Utilization Studies
- Site Facilities Visits. Sales Associates and their SM/T Planning included.

#### Community and School Profiles

- Demographics including a Demographic and Enrollment Analysis
- Educational Programs including an Operational Efficiency Audit and Curriculum Audit
- Financial Information

After collecting the initial data the Project Team set up leadership interviews and community meetings in a variety of formats. Participants of meetings included the following:

- Teachers

- TUSD Administration and the governing board
- Community business organizations
- Students
- Director Team
- Focus groups including Middle High - International Schools
- Tucson community through surveys to neighborhoods
- Staff
- Maintenance Personnel

STEP 1: FMP Director Team Meeting

This data was presented to the FMP Director Team and multiple focus groups as covered in Section 1.2.2. The groups reviewed and evaluated the data then developed priorities for the funding of a capital plan.

STEP 2: Data Development

### 1.2.2 COMMUNITY INPUT/ PUBLIC PROCESS

Community members including parents, students, community members, community organizations, administrators, local business owners, and city government officials were invited to participate in the FMP process.



Participants working together in Focus Groups 1 and 2





The following schedule outlines the variety of inputs and results from the processes follow

Meeting	Date
Leadership Interactions	2016
School Board Meeting	1/6/2016
Public Meeting	1/16/2016
Public Meeting	1/11/2016
Director Team Focus Group #1	2/10/2016
Board Meeting Survey #1	11/1 to 2/16
Board Meeting Survey #2	2/10/2016
Elementary Focus Group #1	2/16/2016
Middle School - Focus Group #1	2/1/2016
High School - Focus Group #1	2/20/2016
Presentation to School Board	2/26/2016
Middle School - Focus Group #2	2/2/2016
High School - Focus Group #2	3/2/2016
Strategic Initiatives #2	3/2/2016
Elementary Focus Group #2	3/2/2016
Middle School - Focus Group #3	3/12/2016
Student Director Council Meeting	3/1/2016
High School - Focus Group #3	3/1/2016
Elementary Focus Group #3	3/16/2016
Board Meeting Survey #3	6/2016
Board Meeting	1/16/2016
Board Meeting	2/20/2016
Board Meeting	1/11/2016

## SU S<sup>3</sup>

The following is a summary of information gathered through surveys during 2015 and early 2016 regarding school district facilities. Master Plan Full survey results are found in the appendices of this document.

### Methodology

The following results are based on multiple surveys directed to boards, parents, teachers, administrators, and others interested in sharing their voice about the TUSD facilities master plan. These surveys conducted over a period from October 2015 to January 1, 2016, were used to gain insight on support for facility improvement, planning, and funding.

The digital survey was created to gather suggestions and feedback about the current perceptions of TUSD facilities as well as desired improvements and future expectations. The facilities master plan survey was distributed online via a digital survey hosted on TUSD's website and tabulated at Board and Board Meeting Meetings. These surveys included:

<sup>3</sup> School District Facilities Master Plan II Survey Results February 2016

- 11/16/15 Tucson High School Info & Focus Session 3
- 12/03/15 to 1/13/16 TUSD Online Facilities Survey
- 1/06/16 Catalina High School Community Meeting 13
- 1/16/16 Palo Verde Town Hall Meeting 23
- 1/1/16 Holla High School Town Hall Meeting 1

\*Please note that the 34 Respondent answers from the 11/16/15 Preliminary Survey results, included at the end of this section, are excluded from the overall statistics because the subsequent survey questions and surveys evolved from this preliminary survey and questions are formulated differently.

**Demographic Data User Metrics**

Respondent Background

Teacher or Staff	36	30
Parent		3
Other		100
o Student		
o Other	4%	3
<b>Total</b>		<b>103</b>

Hispanic Nationality 1 16  
 \*Spanish Surnames and Spanish Specific

Responses

Online	
Durin Meeting	21

**Synopsis**

The Facilities survey results indicate a strong statistical satisfaction of 103 respondents from this survey. There was a strong favorable support for developing the 10-year FMP and for funding facility repairs and improvements.

Top concerns among respondents were:

1. Current conditions of school buildings to support education
2. Technology infrastructure and
3. The Safety of schools

Regarding 21st century education, all respondents rated it as high and were especially important to the majority of respondents.

- College Prep, STEM and Technical were ranked the three highest while
- Global studies and physical education were the lowest rated.

In regards to what issues should be included in a Facilities Master Plan and potentially beyond, the majority of respondents said that:

- Basic education as the most important issue followed
- Technology and 21st century learning then
- Security and Facilities Maintenance Programs, Fields, Athletics, Student Activities, and Transportation

espondents indicated strong support for co-unit schools with shared-use outside  
 rooms or additions note, this survey question was only available during the 12/03/15 to 1/13/16 TUSD  
 Online Facilities Survey. results are indicative of 0% of all survey respondents total respondents

As to what extent respondents would support a bond for school improvements  
 through property taxes,

- 47% would support a \$100 annual increase, followed by
- 21% supporting a \$60 annual increase and
- 18% supporting a \$40 annual increase.

It is important to note this survey question was only available during the 1/06/16 Catalina High School  
 Community Meeting, the 1/16/16 Palo Verde Town Hall Meeting and the 1/19/16 Cholla High School Town  
 Hall Meeting. results are indicative of 1% of all survey respondents 21 total respondents

#### COMMUNITY WIDE ONLINE DIGITAL WEB SURVEY<sup>4</sup>

The following is a summary of information gathered through surveys during 2015 and early 2016  
 eodertising. Marketing Full survey results are found in the appendices of this document

#### Methodology

The following results are based on a co-unit survey directed to parents members of the Tucson  
 co-unit interested in sharing their voice about the TUSD Facilities Master Plan and potential bond. This  
 survey was used to gain insight on feedback that could lead the District to a bond program. The facilities  
 survey was distributed through a radio PS campaign an online digital advertising campaign and hosted at  
 the TUSD Future website. The survey first went live on March 2, 2016 and initially ran through March 26, 2016.  
 It was decided that the survey would be extended through June 1, 2016.

The digital survey was created through collaboration between TUSD eodertising and SAI  
 associates to gather suggestions and feedback. During the initial phases of the survey an eodertising  
 website the survey was not completed due to length and language. The survey was adjusted  
 early on to make it more user-friendly. The results of the survey questions about ethnicity and income. These  
 adjustments decreased response time to under 3 minutes and caused a massive increase in completion  
 percentage.

#### Participant Metrics to Date

Sessions 2031  
 Survey visits 111  
 Completed surveys 11  
 Completion Percentage 36

## Synopsis

The community survey results to date indicate a strong statistical support of 1 community residents. The most important statistics gathered from this survey are support for bond-referred bond amounts and whether or not the participant has a child in TUSD. The support for bonds and proposed bond amount questions are important because they give the district an idea of the best path to getting a bond passed. The question about whether or not the participant has a child in TUSD schools is important because they are trying to gather data on the standard Tucson voters who do not have a reason to support TUSD.

Out of 1 total respondents, 6 do not have a child in TUSD. This shows a relatively broad support of participants from all areas of the Tucson community getting perspectives from non-TUSD affiliated community members as one of the main objectives of this survey and it is a huge positive that 6% has achieved with 0 respondents. To note that there is still support for a bond with such a large number of respondents outside of TUSD is a positive sign for a future bond initiative.

Moreover, a relatively 63% of survey visitors chose not to take or not to finish the survey and it is possible that many of these do not support a bond or have no opinion. However, many of these participants are registered voters. It is for this reason that we recommend if the bond goes forward to conduct a home survey poll of registered Tucson voters.

As we discovered in our previous surveys and meetings, many of the participants in this survey either supported the highest bond amount available or a middle-of-the-road amount.

### *20% of participants supported the largest bond amount of \$360 million*

These are the parents and community members who strongly support education.

### *28% supported \$180 million and 22% supported \$240 million*

The participants who voted for these bond amounts are the community members who want to see improvements in education but don't want to overextend themselves with tax increases.

### *16% of participants would support no bond amount*

This is by far the largest opposition TUSD has faced, to-date, on the bond measure and it is made up of community members who will not support any tax increase regardless of the current state of education.

### *13% supported the \$300 million bond amount*

These participants were parents and community members who support education but were hesitant to support the highest level of tax increases.

### *84% of participants at least supported one of the bond amounts*

*82% support districts like TUSD using bonds to make up for state funding cuts*

T S

**STAKEHOLDER INPUT<sup>5</sup>**

**Methodology**

The following results are centered on the TUSD Stakeholder Interviews. Interviews were held at offices of staff members as well as in the TUSD Board conference room during a 2-day period held on October 11, 2016. The digital survey consisted of 11 questions that were created to gather respondents' feedback for the overall goal of the initiative: a facility master plan to identify facility requirements and funding sources needed to support their long-term strategic facilities master plan.

**Synopsis**

Results are from the interviews of the TUSD Stakeholders. Results were shared with TUSD leadership, staff and TUSD Board Members. The results show a strong support for developing a 10-year FMP and for a bond to fund facility requirements which would create a better learning environment for students.

This survey demonstrates the need for developing FMP options that would be considered most important to the public such as:

“Necessary facilities infrastructure updates to enhance learning environments through maintenance, safety, security and technology infrastructure to improve the lives of students and the district as a whole.”

The plan update should be combined into one unified message that emphasizes both maintenance updates and technology infrastructure are needed. The objective of these respondents is the same: improve TUSD and improve the learning environment for student success.

FOCUS GROUPS

**ADVISORY TEAM INPUT<sup>6</sup>**

**Methodology**

An interactive Focus Group was conducted with members of the TUSD Advisory Team on February 10, 2016. This focus group is a part of TUSD's long-term Facility Master Plan to identify facility requirements and funding sources needed to support its long-term strategic plan.

This focus group was a pilot for Part 1 of 3 in a Series of Focus Groups. Each series will be held for each education level: elementary, Middle School, and High School. The objectives of the Focus Groups series are as follows:

- Focus Series #1: Facility Requirements

<sup>5</sup> See: Martin, M. (2016, October 11). TUSD Stakeholder Interviews Survey Results. Retrieved October 11, 2016.

<sup>6</sup> See: Martin, M. (2016, February 10). TUSD Advisory Team Focus Group Results. Retrieved February 10, 2016.

- F Series #2 Deletions
- F Series #3 Priority Phase
- Provide costs and estimate Surveys Results Fit to anticipated amount

### Synopsis

The in-depth analysis of all participants in this focus group yielded great results including an increase in focus group results lead to positive updates to the overall focus group presentations with items such as terminology in descriptions explanation of and description of the questions as well as an overall increase in the questions themselves

**Maintenance** roofs and Security ranked highest among respondents as to maintenance priorities

**Technology** all responses were in direct support of technology

**Program Initiatives** Maintenance ranked the highest priority followed by core academics then Security

**Building Improvements Bonds Maintenance Operation Overhead** All groups chose the bond and the authority supported bond-only initiative as in for others could mean others fail with the possibility of an overhead in 2017 or 2018

**Bond Dollars Distribution** when asked if bond dollars should be spread around the district so all schools benefit or should there be focused investments in those that need it most all groups responded varied There was no correlation among respondent groups

**Right Sizing Schools** There was a authority support for right-sizing in schools but most felt this should be separate from this bond or it could become a negative focal point because it implies at the same time closing selected schools

**Community Partnerships** when asked how to better encourage community partnerships and shared use of schools answers ranged from the current process is sufficient given the economic environment to partner what is already there and available

## FOCUS GROUP #1 | OBJECTIVES/ APPROACHES

### Methodology

An interactive focus group was conducted in elementary Schools on February 16, 2016 Middle Schools on February 17, 2016 and High Schools on February 20, 2016 to consider objectives and approaches

### Synopsis

**Maintenance** with regards to maintenance needs all groups felt that heating/cooling was a top priority This was listed as the number one concern in every group. Parking lots, building finishes, windows and door maintenance and landscaping and signage were also considered to be a top maintenance need There

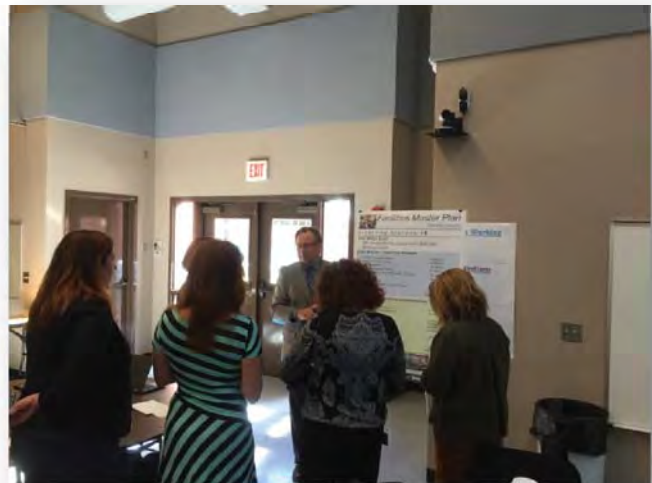
as so the correlation among students. Also important, all three groups agreed that security as a site improvement is so critical that it should be a top priority.

**Educational space** – an additional highlight between the respondents when asked for the building and/or site improvements that would best support the learning environment. Educational space responses included answers such as:

- science and art labs
- a common area for education purposes
- specialized classes for all schools
- wireless technology and STEM
- better capacity for digital libraries and databases
- computer labs and cybercafes, internet infrastructure and distance learning capabilities

**If Funding Were Not An Issue** – Participants had interesting responses when it came to the question of what improvements they would like to see if funding was limitless:

- technology
- updates to current facilities
- collaborative spaces
- accessible pathways
- updated furniture
- modular spaces
- modern and renovated buildings
  - o better space and aesthetics such as lights, outlets, fixtures, walls, paint, etc.
- better support for extracurricular activities
- improved exercise facilities
- creating a better environment for our learning
- and improve fine arts buildings



Participants working together in Focus Groups 1 and 2

**Building Improvements: Bond vs. Maintenance vs. Operation Override** – When asked what is most important at this time, improvements and/or maintenance override 2 out of the 3 groups agreed that an improvements bond is more important. All groups agreed that the cost to the taxpayer was an important part of this as well as bond oversight. Two out of three focus groups said they would support both an operations override and a maintenance improvements bond.

**Community Partnerships** – Finally, there was no consensus between any of the respondents' answers when asked how to better encourage community partnerships and shared use of schools other than variations on outreach. Their answers ranged from current processes are sufficient given the economic environment to arguing that is already there and available and having a dedicated coordinator in charge of community use.

## FOCUS GROUP #2 | DEVELOP OPTIONS<sup>8</sup>

### Methodology

To develop fair and informed options an interactive Focus group was conducted with parents teachers and staff of TUSD elementary Middle and High Schools on March 1<sup>st</sup> 2<sup>nd</sup> and 3<sup>rd</sup> 2016

### Synopsis

**How Bond Dollars Should be Distributed** In regards to the overall group's idea about how all bond dollars should be spread around the district two of three focus groups felt that all schools should see some benefit. The groups as a whole felt that the dollars were focused in certain areas.

**Pros and Cons** The overall pros of this question far outweighed the cons and the focus groups were determined on spending bond dollars equally across the district in a equitable situation based on need.

Pros mentioned were that it would improve the overall facilities to retain enrollment. This would allow each facility to keep up with current times and also help in estimating low-income families.

Some groups talked about the benefits to the schools based on refurbishment and encourage in enrollment. While others put more stress on the funding behind it and satisfying the taxpayers.

**How Schools Would Receive Focused Investments** Their overall conclusion was that it was determined a formula and the highest needs necessary to prioritize how all schools received benefits. A majority of the groups said to look at both elementary and high schools were at capacity in the most in need of focused investments.

The focus groups were then asked to develop three different scenarios as to how bond dollars should be used and high needs were the highest priorities within those scenarios. The scenarios were as follows:

*Scenario 1: Priority Facility Maintenance Repairs and some key Facility Improvements. (80%-20%)*

*Scenario 2: Focus on top Facility Maintenance Repairs with as many Improvements/ Other Options as possible (50%-50%)*

*Scenario 3: Focus on the top Facility Maintenance Repairs with Significant Improvements to some schools*

**Scenario 1** Two of three focus groups chose this scenario as the preferred ending scenario based on the fact that the one would significantly improve facilities and maintenance across all levels of schools.



**Scenario 2** Two of the three focus groups chose this scenario as as their 2nd favorite option because of the fact the scenario had a 0-0 split for the spending budget. They decided that the budget would be split into Maintenance Services, Student Services, Operations, Technology, and Transportation and Construction.

**Scenario 3** When it came to scenario number 3, two of three focus groups concluded it to be their least favorite choice.

**FOCUS GROUP #3| PRIORITIZE/PHASE OPTIONS?**

**Methodology**

An interactive Focus Group was conducted with parents and staff of TUSD on March 1<sup>st</sup>-1<sup>st</sup> 2016 to consider different bond amounts and construction options.

**Synopsis**

Each focus group was asked to share insight about the success of a potential bond scenario. The groups were given a bond scenario where they had to choose between three scenarios totaling 1.0 billion, 2.0 billion, and 3.0 billion. They were asked to choose the one that they believed the voters would approve.

**Choosing a Bond Package**

Two out of four groups supported a bond package of approximately 2.0-2.5 billion. The high school and district teacher focus groups supported 3.0 billion. The cause for this decision was based on the fact that there is much to be done in the district and the groups felt it would take the additional amount to fund the current conditions.



Participants gathered in Focus Groups 1 and 2

**Perception of Bond Allocation**

When asked about their perception of bonds and how they can encourage construction, this group had similar answers. Members of focus groups felt that there was a lack of trust within the district about how funds would be allocated. Groups agreed that showing how the money would be allocated throughout the district would be a key point to emphasize in the bond campaign. Ideas for increasing community understanding of the bond issue were offered as follows:

Leadertin Martin TUSD March 1-1 2016 TUSD Focus group #3 results

- Sharin the re ad o n of the s ecific dollar a ounts ill hel eo le ha e a etter understandin of hat the one is ein allocated for
- a in the continued trans arenc a out the ond ro ra as it de elo s is so ethin the rou felt ould hel ith future de elo ents and co unit in ol e ent ith TUSD

### *STUDENT ADVISORY GROUP<sup>10</sup>*

#### **Met odology**

n nteracti e Focus rou as conducted ith the Su erintendent s Student d isor ouncil of TUSD on March 1 th 2016

#### **Synopsis**

The Su erintendent s Student d isor ouncil ro ided er ood insi ht on current conditions of schools and hat i ro e ents the ould li e to see i le ented

#### **Conditions Needing I pro e ent**

- technolo
- infrastructure and
- safet

#### **Hig est Priorities for Student Learning**

- ST M
- i h cade ics olle e Pre and
- T

#### **Lo er Ran ing Priorities**

- Ph sical ducation
- Fine rts and
- Pro ect ased learnin

Students ere as ed to address hich arts of education ere i ortant in su ortin a facilities aster lan n this uestion students felt that the follo in ere of hi h i ortance

- asic ducation
- School Facilities Maintenance and
- Securit

#### **Most Needed Facility I pro e ents**

- etter and
- estroo s

**If Funding Were Not An Issue** er sin le rou entioned the need for etter

- 
- cafeterias
- colla orati e and student s aces
- c ercaf st le areas and
- restroo s

<sup>10</sup> eo d erisin Mar etin TUSD March 2 2016 TUSD Student d isor Focus rou esults

T S P US

**PARTICIPANT INPUT<sup>11</sup>**

**Methodology**

Two open houses were conducted for the Tucson community on April 16th and April 20th at Puelo High School and Catalina High School.

**Scenario Rankings from Participants**

**First Choice:** \$300 million dollar bond with \$160 million for facilities repairs and \$140 million for facilities improvements. Most participants felt this as the best scenario because it provided the most for the benefit of TUSD students.

**Second Choice:** \$300 million bond of which allocated \$200 for facilities repairs and \$100 million for facilities improvements. It was felt this scenario addressed the facilities needs and repairs and allotted a good split for what was needed.

**Third Choice:** \$240 million bond of which allocated \$160 million for facilities repairs and \$80 million for facilities improvements. Participants felt that this was a good overall for taxpayers and would more than likely pass a proposition.

**Fourth Choice:** \$240 million bond of which allocated \$195 million for facilities repairs and \$45 million for facilities improvements. A lot of the focus was centered on the relationship between facilities repairs and facilities improvements. Members also felt that a description on exactly what would happen with improvements at each site should be provided.

**Fifth Choice:** \$180 million bond of which allocated \$135 million for facilities repairs and \$45 million for facilities improvements. Participants liked the low cost but wondered if the District would need to go back to voters for more one in a few years.

**Sixth Choice:** \$180 million dollar bond with all of it going to facilities repairs. Participants felt that having nothing for improvements was not very desirable and it would not sufficiently meet the needs for the district.



Open House Meeting

<sup>11</sup> Leo Dertis, Martin TUSD Open Houses April 16th and April 20th 2016

Tucson Unified is where  
Students love to Learn  
Teachers love to Teach  
and People love to Work  
We are Team TUSD



---

Section 2.0.1 - Existing Protected Conditions  
Tucson Unified School District #1

---

## EXISTING AND PROJECTED CONDITIONS

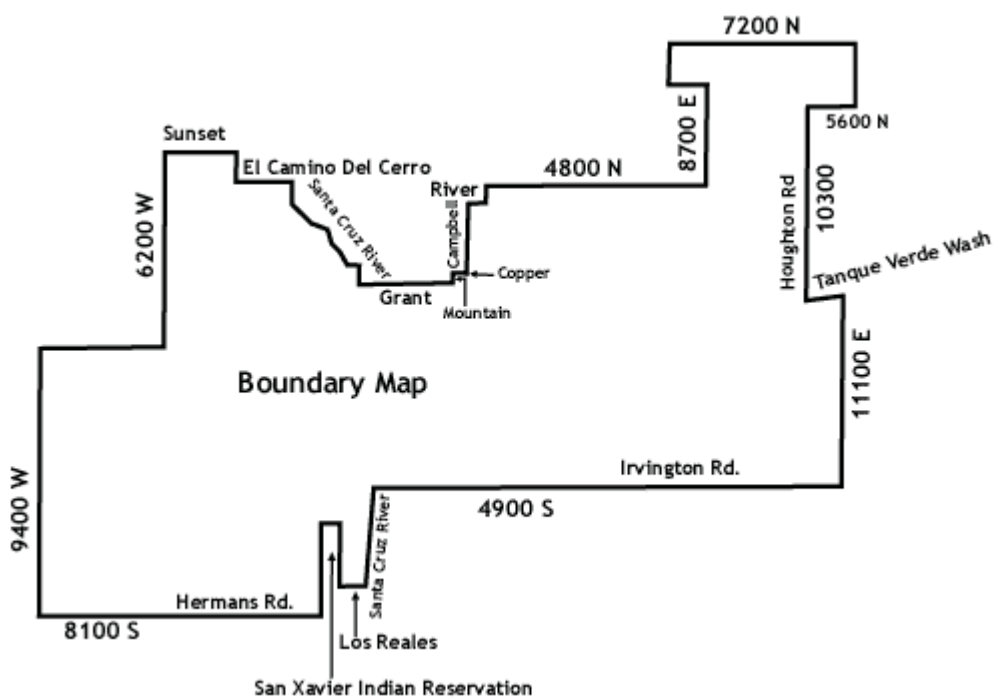
### 2.1 AREA CHARACTERISTICS

#### 2.1.1 OVERVIEW OF THE AREA

##### Location and Geography

The Tucson Unified School District serves most of the city of Tucson and all of the city of South Tucson as well as portions of unincorporated Pima County. The District's southern border is the San Xavier Reservation east of -1 and Irvington Road east of -1. The northern boundary is irregular, running from north to south as far south as Grant Road from a well-venue to a point near Interstate 1. The District extends from Melocene on the east to an airfield 100 feet east on the east side of Pates Pass Road and the Tucson States Parkway alignment 6200 feet north of Pates Pass Road.<sup>1</sup> The following boundary map from [tusd1.org](http://tusd1.org) illustrates the borders of the district, roads and other features.

Map 1 DISTRICT BOUNDARIES



##### Census Facts

With 220,000 people, Tucson is the 2nd most populated city in the state of Arizona out of 2 cities. The largest Tucson racial/ethnic groups are White (63%), followed by Hispanic (22%) and Black (6%).

<sup>1</sup> <http://tusd1.org> Tucson Unified School District Demographic and Enrollment Analysis Final Report February 2013

201 the median household income of Tucson residents was \$31,000 or 21% of Tucson residents live in poverty. The median age for Tucson residents is 33.3 years of age.

With 30,000 people South Tucson is the 3rd most populated city in the state of Arizona out of 2 cities. The largest South Tucson racial ethnic groups are Hispanic 21% followed by White 6% and American Indian. In 2011 the median household income of South Tucson residents was \$23,000 or 62% of South Tucson residents live in poverty. The median age for South Tucson residents is 32.6 years of age.<sup>2</sup>

### District Composition

The district boundaries encompass much of the city of Tucson, the entire city of South Tucson, all of Dreel Heights, almost all of Valencia, most of a fair amount of Tucson, states sections of Catalina Foothills and Tanque Verde, a few unincorporated parts of Pima County that do not fall within the confines of a census Designated Place. TUSD is currently under a federal desegregation order to help balance district schools in terms of race and ethnicity. The district was established as Pima County School District 01 in 1916, centered approximately at the latitude 32°13'1" and the longitude 110°23'0" approximately longitude, known as a Placita and assumed its current name in 1933. The district has nine traditional high schools and several alternative high schools, ten middle schools, fifty elementary and ten special schools.

### Current and Historical Enrollment

Between 2000 and 2013 enrollment in the Tucson Unified School District declined 21 percent with a loss of about 12,000 students as shown in Figures 1 and 2. Enrollment was fairly steady through 2002-03 but then began to decline about 1 percent per year at the start of the recession in 2008. Annual enrollment declines rose to between 3 and 4 percent although annual declines over the past two years have only been in the 2 to 3 percent range. The District continues to lose students according to the district as of the 100th school day in 2011 TUSD enrollment had dropped to a decrease of 21 percent. The steepest declines were seen in the 6-11th grade ranges.

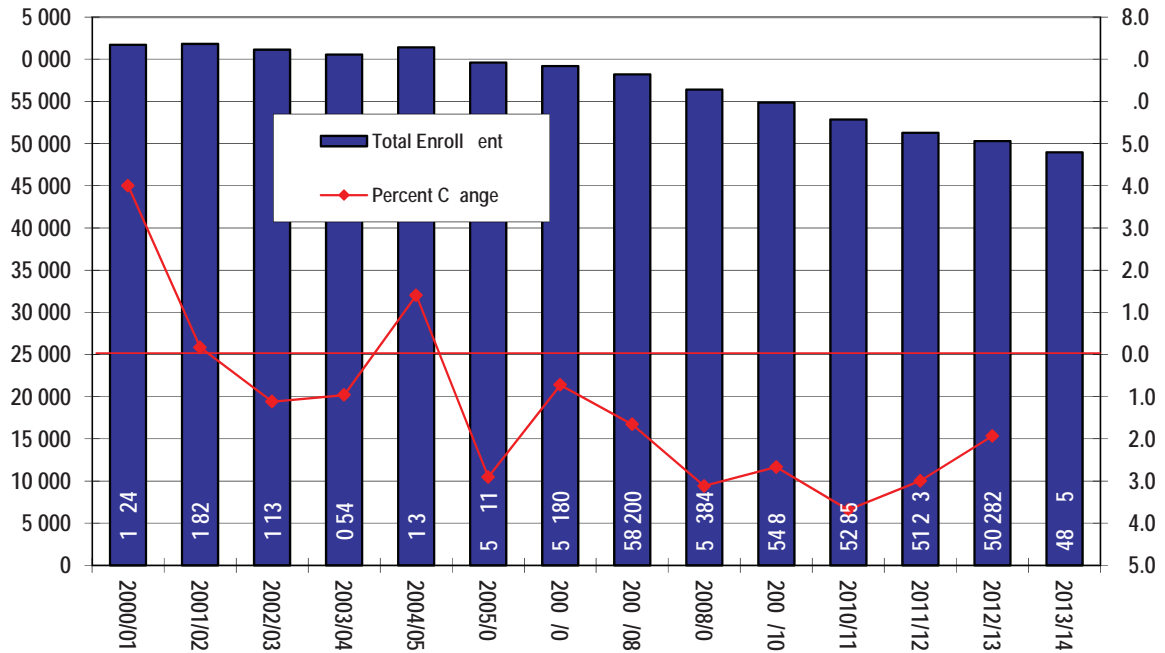
<sup>2</sup> <http://www.arizona-demographics.com>

<sup>3</sup> [http://en.wikipedia.org/wiki/Tucson\\_Unified\\_School\\_District](http://en.wikipedia.org/wiki/Tucson_Unified_School_District)

linked icons [Tucson Unified School District Demographics and Enrollment Data Final Report](#) February 2, 2013

<http://tusdstats.tusd1.org/lannin/profiles/currentrangeandenrollment>

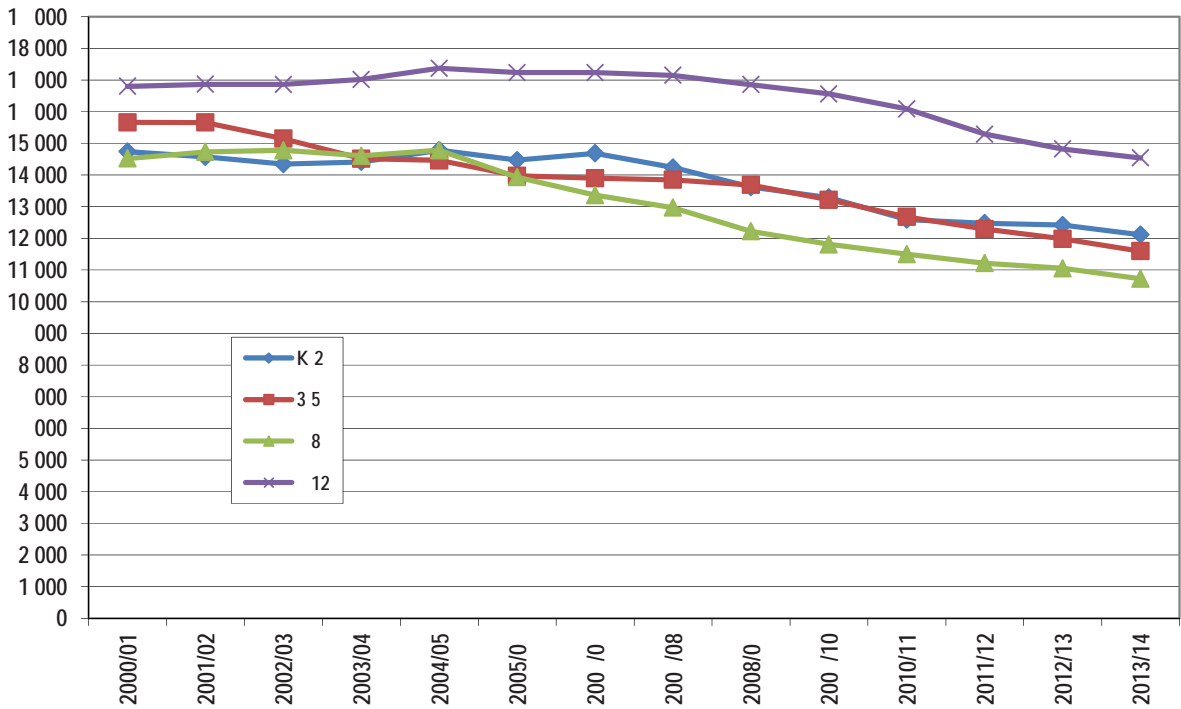
Figure 1 ENROLLMENT AND ENROLLMENT CHANGE 2000/01 2013/14



Sources: Arizona Department of Education, Tucson Unified School District, Allied Economics 2013

Credit: Applied Economics

Figure 2 ENROLLMENT BY GRADE COHORT 2000/01 2013/14



Sources: Arizona Department of Education, Tucson Unified School District, Allied Economics 2013

Credit: Applied Economics

---

### 2.1.2 ANTICIPATED CHANGES IN PROGRAMS OR OPERATION

TUSD anticipates moving towards a more hands-on project-based curriculum in the 21<sup>st</sup> century. This will necessitate the need for larger learning spaces and break out areas, outdoor learning spaces, project labs, larger science rooms and more flexible furnishings and tools. Additionally, demographics have demonstrated a flattening of overall student enrollment throughout with a change or shift towards under-served children in the south and south eastern areas of the district. This will necessitate additional classroom space in these regions with perhaps a consolidation or phasing out of classrooms in other under-utilized areas of the district.



## 2.2 SITE/ FACILITIES

### 2.2.1 TUCSON UNIFIED SCHOOL DISTRICT POPULATION CHARACTERISTICS

Detailed analyses of district population housing characteristics racial characteristics and age groups indicate some significant changes occurring which will impact the district enrollment. District population experienced a modest increase in population over the 2000-2010 decade of roughly 6%. Since 2010 however that growth has flattened to 1%.

Racial/ethnic shifts have also occurred with the white population declined as a share of the total to 21%. Hispanic population growth accounted for nearly all of the growth over the past decade offsetting the white population.

General aging of the population also occurred which has had a significant impact on the district enrollment. The number of ages 0-6 increased 2% percent while the number of 2-4 year olds rising 4% percent while ages declined 1% percent. This decline is adequate parent in the 13 age groups as an absolute number of children in the age range consistent with the parent age range while modest increases in housing turnover and the housing market recovers the aging in place in the area will have significant impact on the demographic makeup of the district.

### 2.2.2 HOUSING AND FACILITY INVENTORY

Housing activity in the district peaked in 2001/02 with over 3,000 new housing units permitted with about 3,000 of these being single family units. This steadily declined over subsequent years. The instability of the recessionary period added to the decline and overall activity levels have been seen in recent years. The low point was 2010/11 with only 1,200 residential units permitted. Slight increase has been observed since 2010 with a total of 1,000 units permitted in the following years.<sup>6</sup>

Recent trends have remained steady since 2010 with a total of 10,000 vacant households in all regions of the district.

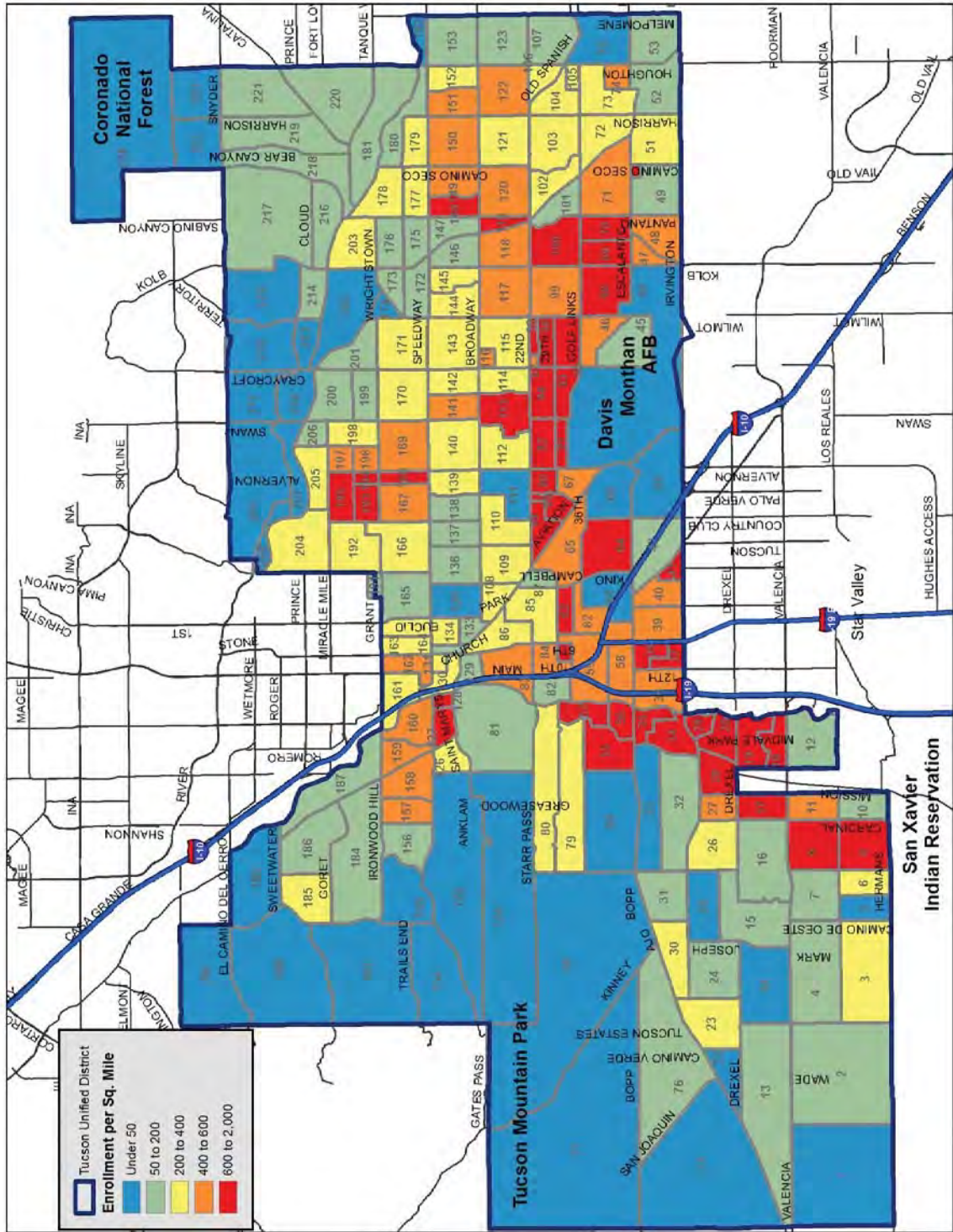
Potential growth of the district indicates a general push outwards to the south and south eastern regions of the district as shown on Maps 2 and 3 on the following page. This area also indicates the larger percentage of school aged children and young families. It should be noted that the racial/ethnic character of this region of the district is proportionally larger in Hispanic families.

#### Residential Development Potential

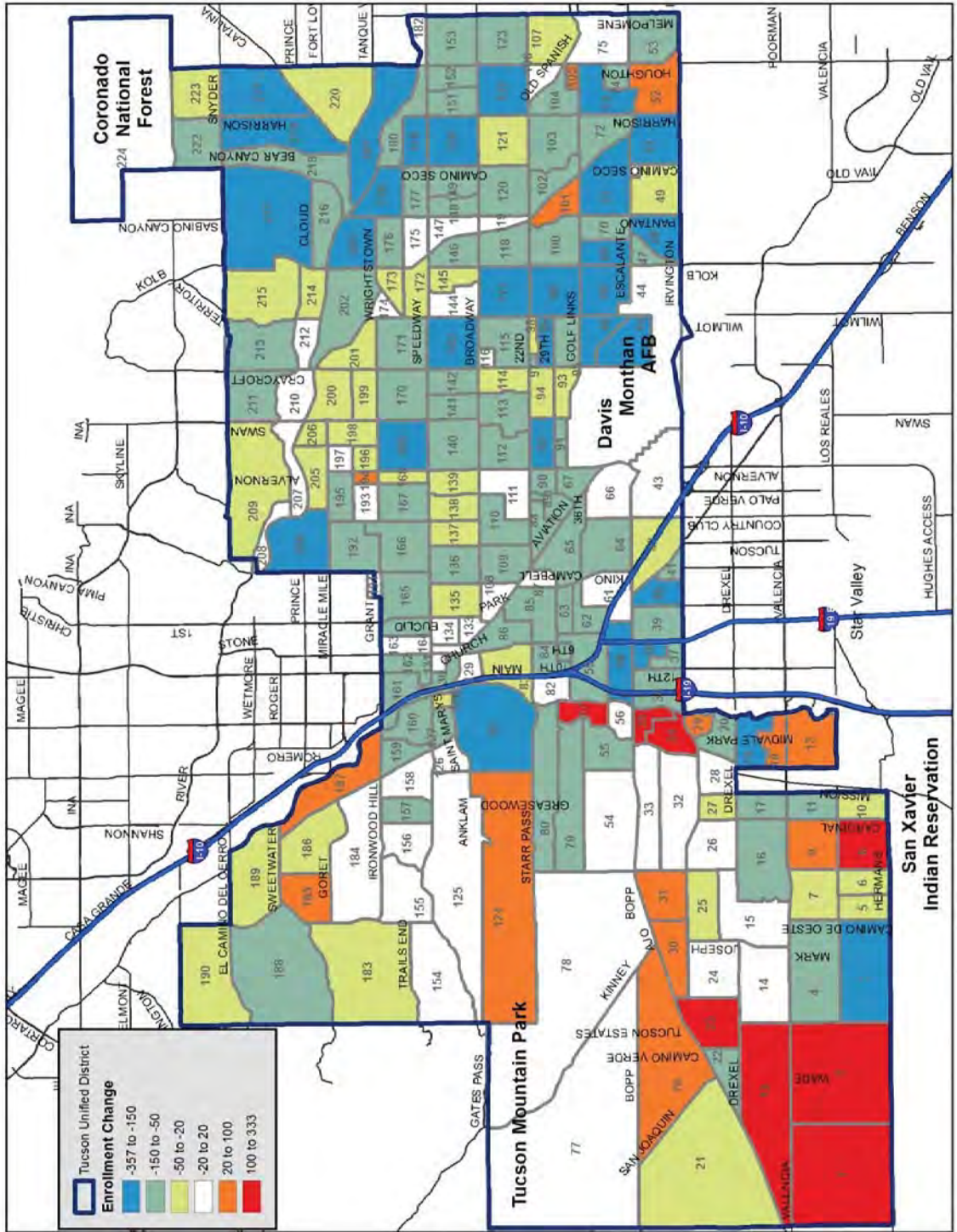
The future residential development potential within the Tucson Unified District is currently estimated to be 20,600 units. This estimate is based on non-developed lands and an estimate of currently available buildable lots. About 31 percent of the development potential is in the unimproved category generally defined as rural or infill projects that are likely to be under development intermittently over a

<sup>6</sup> Field notes Tucson Unified School District Demographic and Enrollment Analysis Final Report February 2013

Map 2 ENROLLMENT DENSITY



Map 3 CHANGE IN ENROLLMENT 2008/0 TO 2013/14



number of years. The District has a great deal of infill potential throughout and there are a number of subdivisions of various sizes that have been under development for an extended period of time and will likely continue to develop slowly.

Number of these infill projects are located west of downtown with others along the northern boundary of the District in the Catalina Foothills area. About 16 percent of the identified potential is multifamily housing which is very close to the amount actually developed over the past decade.

While residential development conditions in the Tucson Unified District will continue to improve in the next few years, much of that growth will be in small subdivisions or individual infill lots. There are some larger developments but most of the major development projects being introduced in the region now are outside the District. Major focus for development in the region will be in the Mail District. This is not to suggest the absence of new growth in the Tucson Unified District however much of the new development in the Tucson metro area can be expected to take place outside the District along I-10 and south of Rincon.

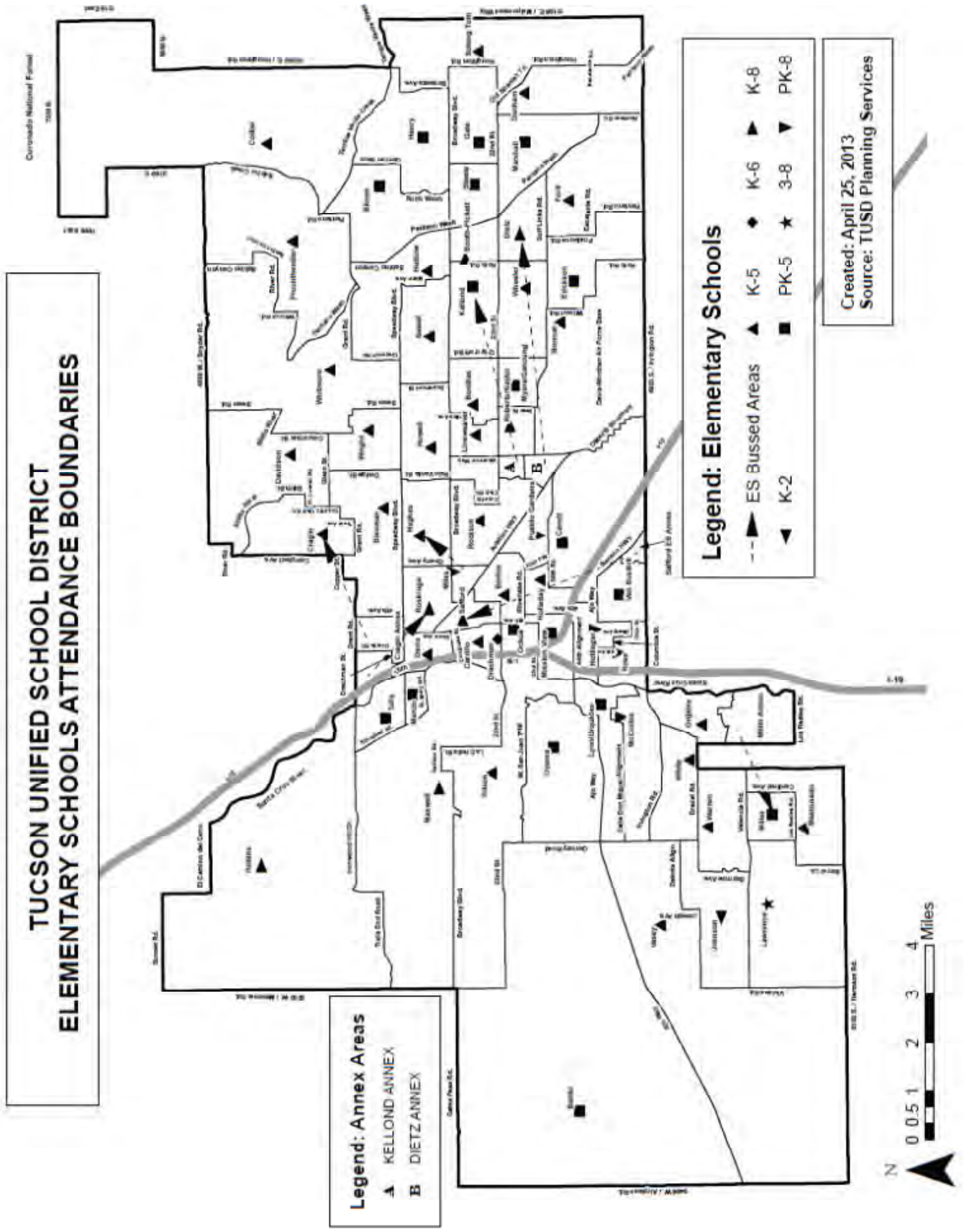
---

### 2.2.3 DISTRICT ATTENDANCE ZONES

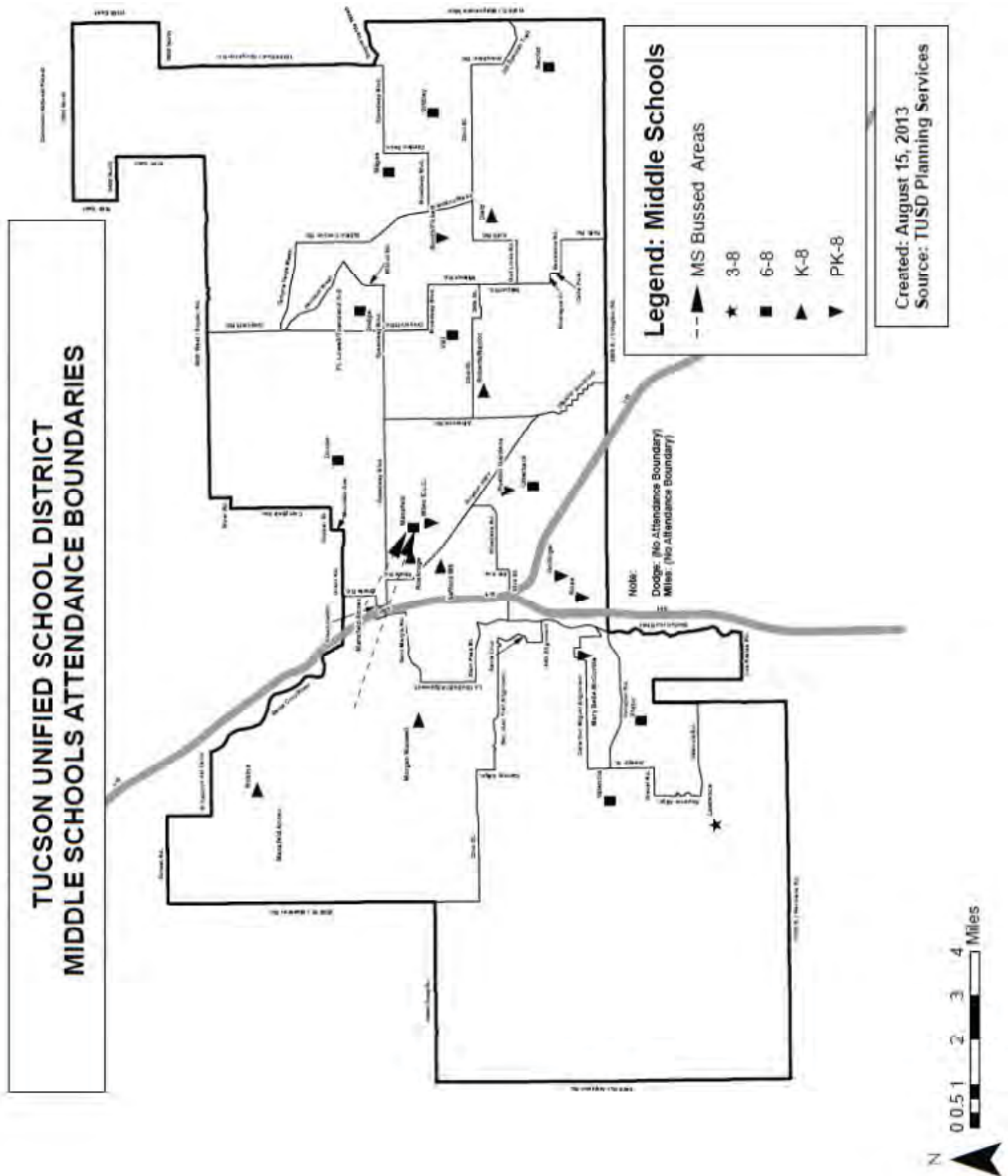
Attendance zones in the Tucson Unified District are illustrated on the following pages with maps found on the TUSD website.

As demonstrated on the maps, the bulk of schools exist to the central and eastern regions of the district. Growth indicates however that future schools and growth will push out to the southwest of the district.

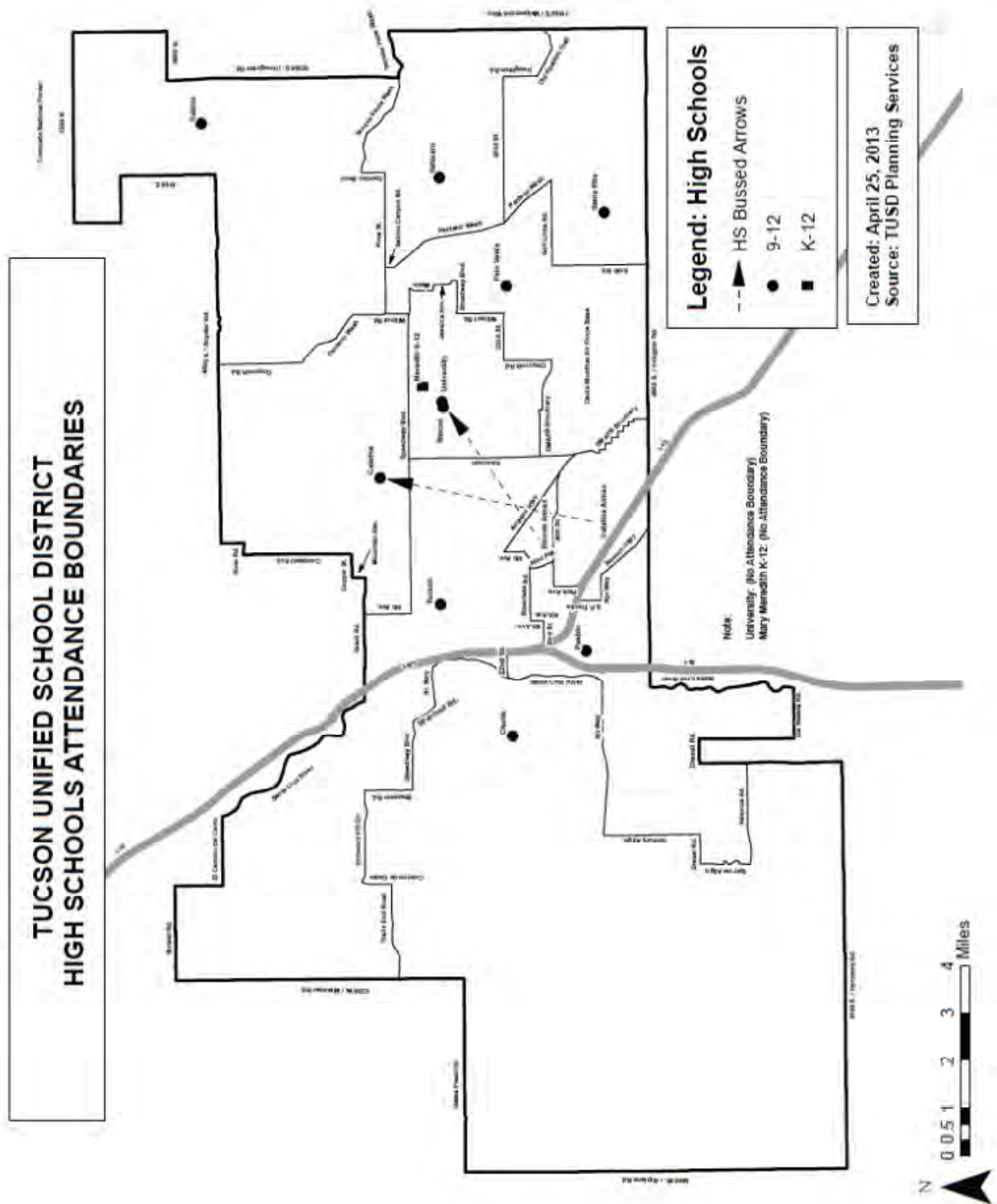
Proximity of populations to the eastern and northern districts has created the potential of student flight from the district to other districts such as Mail, High Theater and Catalina Foothills.



Elementary Attendance Zones (from tUSD1.org)



Middle School Attendance Zones (from tUSD1.org)



High School Attendance Zones (from tUSD1.org)

## 2.3 DISTRICT GROWTH

### 2.3.2 AREA ECONOMICS

#### Unemployment and Job Growth

The Bureau of Labor and Statistics reported that the unemployment rate for Tucson fell 0.2 percentage points in December 2015 to 5.3. For the same month the metro unemployment rate was 0.8 percentage points lower than the Arizona rate. The unemployment rate in Tucson peaked in October 2009 at 10.0 and is now 0.8 percentage points lower. From a post-peak low of 2.2 in March 2011, the unemployment rate has now risen 0.1 percentage points.

Table 1 Unemployment Rates 2015

Unemployment Rate	December 2015	Month/Month	Year/Year
National	5.0	0.0	0.
Arizona	5.8	0.2	0.8
Tucson	5.3	0.2	0.

The number of people unemployed in Tucson peaked in October 2009 at 33,100. There are now 23,100 fewer people unemployed in the metropolitan area. From a recent trough of 2,221 in March 2011, the number of unemployed has now risen 6,000.

Unemployed Persons	December 2015	Month/Month	Year/Year
Tucson	24,800	850	3,204

#### Housing Activity

While 12,600 new housing units are expected to be added over the next ten years, the number of new households is expected to be just over 11,000 based on the combination of new units and higher



occupancy rates over the population per household and school-age population per household rates are both expected to continue to decline slowly while new housing remains moderate the existing population is a decline in place due to real estate market conditions and general demographic trends as a result school-age population is expected to increase only 2,000 despite the creation of over 1,100 new households

## 2.4 ENROLLMENT

### 2.4.1 CURRENT ENROLLMENT AND PROJECTED ENROLLMENT

Between 2000 and 2010 enrollment decreased 1 percent or 100 students while school-age population persons age 5 to 17 residing within District boundaries decreased only 3 percent or 2,000 students. Since 2010 enrollment has dropped another 1 percent or about 3,000 students despite a steady level of school-age population during that period.<sup>10</sup>

At the present time the District attracts about 1,000 students from outside its boundaries meaning that only about 600 of the District's 300 school-age persons attend District schools. This would imply an internal capture rate of 66 percent of the resident school-age population with out-of-district students included the net capture rate rises to 66 percent. The level of out-of-district enrollment is assumed to remain at current or similar levels throughout the projection period.

In 2000-01 the District's capture rate was at a high of 80 percent meaning that 80 percent of the school-age population of the District was attending District schools at the time that level was so low compared to typical suburban areas driven by an established base of private and parochial schools in addition to charter schools. Since that time increasing enrollment and especially the introduction and proliferation of public charter schools has impacted the in-district capture rates for public school districts. Net enrollment causes a shifting of students between districts with gains and losses offsetting each other to arrive in net zero at charter schools only subtract from districts.

In terms of the comparison of students residing in the District versus the number enrolled in District schools the capture rate implies that there are currently about 2,300 school-age children living in the District but enrolling elsewhere. Capture rates are expected to continue to decline slowly over the next ten years because of the continued expansion of charter schools and increased competition from surrounding school districts.

The following tables detail the school-age population trends from 2000-01 to 2023-24.

<sup>10</sup> [Tucson Unified School District Demographic and Enrollment Analysis Final Report](#) February 2013

<sup>10</sup> [Tucson Unified School District Demographic and Enrollment Analysis Final Report](#) February 2013

Table 2 SCHOOL AGE POPULATION AND ENROLLMENT 2001-24

Year	Households	School-age Population		-12 Enrollment		Net Difference	Enrollment - Population Ratio
		Total	Per household	Total	Per household		
2000/01	18,010		0.430	1,240	0.345	15,043	0.804
2001/02	182,100	4	0.425	1,820	0.33	15,400	0.801
2002/03	185,832	8,210	0.421	1,130	0.32	1,040	0.
2003/04	180,010	8,500	0.41	0,540	0.320	18,208	0.4
2004/05	1,085,200	8,200	0.412	0,243	0.31	18,440	0.0
2005/06	1,222,300	8,448	0.408	5,110	0.310	18,830	0.8
2006/07	1,334,000	8,101	0.404	5,180	0.30	18,210	0.83
2007/08	1,322,000	283	0.400	58,200	0.301	1,083	0.80
2008/09	1,252,000	281	0.3	5,384	0.23	1,800	0.
2009/10	1,203,100	5,220	0.32	54,800	0.28	20,341	0.3
2010/11	1,100,000	4,323	0.388	52,850	0.2	21,400	0.11
2011/12	1,215,000	4,180	0.38	51,230	0.2	22,250	0.1
2012/13	1,318,300	4,200	0.385	50,282	0.20	24,008	0.
2013/14	1,302,000	4,280	0.383	48,500	0.252	25,311	0.5
2014/15	1,300,000	2,600	0.31	122,000	0.2	26,100	0.6
2015/16	1,660,000	33,000	0.30	1,000	0.23	26,100	0.63
2016/17	1,600,000		0.3	6,300	0.23	2,600	0.631
2017/18	1,260,000	0	0.3	6,000	0.23	2,133	0.623
2018/19	1,000,000	002	0.3	6,230	0.231	2,200	0.616
2019/20	201,000	30	0.3	6,020	0.22	2,260	0.611
2020/21	203,300	00	0.32	0	0.226	2,600	0.60
2021/22	200,200	6,120	0.31	1,000	0.22	30,160	0.60
2022/23	206,600	6,000	0.30	6,113	0.223	30,310	0.603
2023/24	200,600	6,260	0.36	6,260	0.222	30,610	0.602

Source: U.S. Census Bureau, American Community Survey, 2013.

Population aged 5 through 11 corresponds with kindergarten through 12th grade.

**Bolding indicates historical data.**

Credit: Applied Economics

Table 3 ENROLLMENT BY LEVEL 2001-24

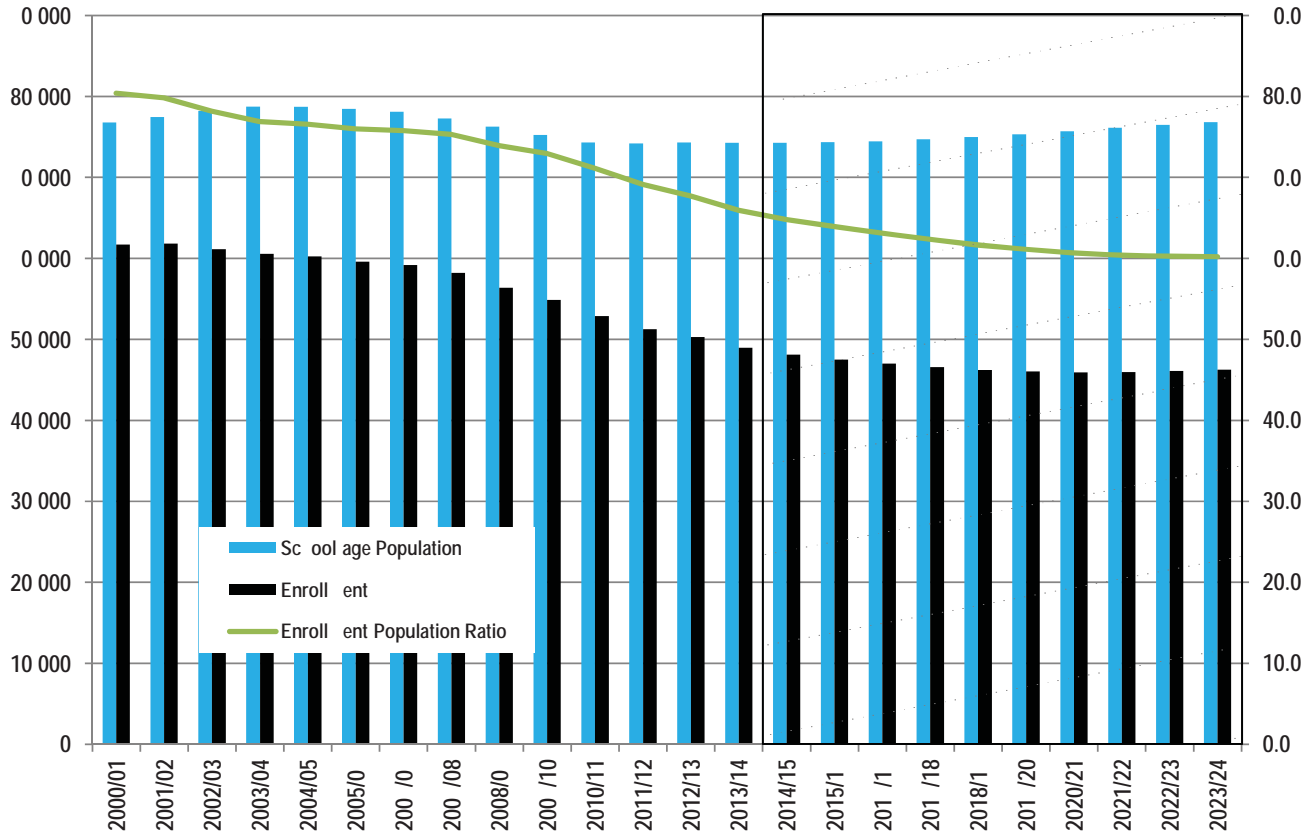
Fall	enrollment				-12 Total		
						change	change
2000/01	25 330	1 5 3	44 23	1 801	1 24		12.5
2001/02	24 835	20 125	44 0	1 8	1 82	103	0.2
2002/03	24 2 2	1 85	44 2	1 85	1 13	1	1.1
2003/04	24 01	1 514	43 533	1 01	0 54	58	1.0
2004/05	24 0 4	1 255	43 31	1 24	0 243	30	0.5
2005/0	23 81	18 5 0	42 3	1 234	5 11	32	1.0
200 /0	23 83	1 5	41 48	1 232	5 180	431	0.
200 /08	23 5 0	1 485	41 055	1 145	58 200	80	1.
2008/0	22 8 4	1 3	3 530	1 854	5 384	1 81	3.1
200 /10	22 13	1 1 8	38 31	1 5 2	54 8	1 505	2.
2010/11	21 0	15 02	3	1 088	52 85	2 022	3.
2011/12	20 3	15 310	35 83	15 2 0	51 2 3	1 584	3.0
2012/13	20 4 3	14 8	35 45	14 823	50 282	1	1.
2013/14	1 03	14 533	34 43	14 53	48 5	1 30	2.
201 1	1 0	1 202	33 2	1 1 0	122	- 3	-1
201 16	1 631	13 6	33	13 21	1	-603	-1.3
2016 1	1	13 6	33 233	13 0	6 3	- 36	-1.1
201 1	1 36	13 6	33 0 3	13 32	6	- 0	-0
201 1	1 2 0	13 6 0	32 60	13 2 0	6 230	-3	-0
201 20	1 2 6	13 6 2	32 3	13 0 1	6 02	-201	-0
2020 21	1 01	13 66	33 06	12	0	-	-0.2
2021 22	1 62	13 21	33 0 3	12	1	31	0.1
2022 23	1	13 3	33 21	12	6 113	1 2	0.3
2023 2	1 0	13 11	33 3 1	12	6 26	1 2	0.3

Source: Applied Economics, November 2013.

**Bolding indicates actuals.**

Credit: Applied Economics

Figure 3 PROJECTED ENROLLMENT 2000/01 2023/24



Credit: Applied Economics

## 2.5 CAPACITY PROCESS

The capacity of each school was calculated for this facilities master plan. The capacity is analyzed to determine whether each facility will be able to accommodate current and future student enrollment.

Utilization and capacity are not static numbers and change from year to year with changes in programs available at the school, curriculum, and scheduling, and pupil teacher ratio. Class size is recognized that the utilization and capacity of school facilities are updated on an annual basis to determine the most effective use of educational space for teaching and learning.

In 2006, the ECap spreadsheet was modified to calculate the capacity of the schools using the new staffing ratios and additions or changes made as part of the 2006 bond program. Total capacities were calculated, design and operating, as defined below. This approach has been used since then and the calculations have been updated for some elementary schools each year.<sup>11</sup>

### CURRENT DEFINITIONS

<b>Design Capacity</b>	This could be considered the available capacity. It is the capacity assuming that all of the classrooms, including resource rooms and support rooms are usable for instruction. It is the number of rooms over 60 square feet times an estimated student capacity of 20 for each room.
<b>Operating Capacity</b>	Each room is multiplied times the capacity of that room in the program that is in it and the results are summed to get the operating capacity. So, it is called programmatic capacity. For example, each full-day kindergarten room could be multiplied times 20 since that is the student teacher ratio for the budget for most schools. In the room, resource support rooms are multiplied times 0. The disadvantage of this measure of capacity is that it needs to be changed each year as programs change. This creates confusion and error.
<b>Resource Room</b>	A room that is used by students who are pulled out of their normal classroom when their normal classroom or the space they occupy in it is not filled. Another student is assumed that every school should have at least one resource room for itinerant personnel and/or services. But the total number will vary with the schools size and the programs in place to meet community needs.
<b>Support Room</b>	A classroom that is not used for instruction. For instance, it can be used for staff training, community rooms, or for administration due to lack of adequate space elsewhere.

<sup>11</sup> TUSD Capacity Spreadsheet

**CURRENT CAPACITY AND UTILIZATION AT EACH SCHOOL**

The following capacity study provides a summary of functional capacity at each school facility. It also identifies the current and projected enrollments at each school.

The summary was generated from information on each school facility that has been provided school administrators at each facility. The following capacity spreadsheets and charts have been generated to provide a clear understanding of the current enrollment versus the capacity of each facility.

## Elementary Schools Enrollment Capacity and Utilization by School

School Name	2015 Enrollment		Building Capacity	
	40t	Day	Operational Capacity	Utilization
Ans	33		60	6
Lenan	3		60	60
Loon	320		60	3
Monillas	22		60	0
Moran			620	2
Morton	21		60	0
Nichols	0		20	0
Ortiz	2		320	
Parrett	26		30	1
Phillips	216		360	60
Porter	0		600	0
Rain	36		60	3
Radison	30		60	0
Randis	33		320	10
Reid	1		20	
Drachman	31		20	
Dunham	22		30	6
Ericson	6		620	
Ford	31		30	2
Fruchthendler	36		20	
Gale	3		30	102
Griener	6		620	106
Green	361		30	3
Holladay	22		30	
Hollinger	6		10	60
Hollen	31		60	

## Elementary Schools

### Enrollment Capacity and Utilization by School Cont.

School Name	2015 Enrollment		Building Capacity		
	40t	Day	Operational Capacity	Utilization	
Adlo	2	3	3	0	6
Aches	3	1	3	0	10
Johnson	233		0		
Ellond	3		6	0	
Arance 3-	33		20		0
Ine ea er	6		20		13
nn Ur uides	22		00		
ons	0		3	0	0
Maldonado	33		6	0	3
Man o	2		3	0	1
Marshall	26		60		
Menlo Par	0		3	0	0
Miller	636		0		116
Mission ie	1		360		
Mers anoun	1		6	0	6
choa	202		330		61
a a	363		20		0
o ins -			6	0	
o ison	331		00		3
ose -	01		0		10
Schu a er	0		3	0	0
Se ell	2		330		0
Solen To	26		20		2
Steele	2		0		61
Tolson	2	6	20		
Tull	3		0		6
an us ir	336		00		6
ese	03		0		121
arren	2		3	0	3
heeler	36		0		63
hite	6	1	6	0	10
hit ore	31		0		6
ri ht	1		0		2
<b>Elementary Total</b>	<b>20</b>	<b>851</b>	<b>28</b>	<b>430</b>	<b>3.3</b>

\*Utilization includes closed schools.

## Middle and K 8 s

### Enrollment Capacity and Utilization by School

School Name	2015 Enrollment	Building Capacity	
	40t Day	Operational Capacity	Utilization
Booth-Fickett -	1220	1210	101
Carson	0	30	0
Dodge	20	3	122
Doolen	6	110	60
Hurdle	22	0	1
Johnson	0	00	0
Maize	61	20	6
Mansfield		10	6
Moran Marshall -		60	
Miles -	26	30	
Monroesdale -	623	30	
Pistor	10	30	110
Pueblodens -	3	30	2
Roscoe -	1	60	10
Safford -	3	0	0
Secrist	3	60	2
Fortwell-Townsend	0	60	0
Utterback	32	0	60
Wail	632	30	
Walencia		10	
Washfield	0	610	0
McMorley -	3	0	3
<b>Middle Total</b>	<b>1218</b>	<b>150</b>	<b>1.8</b>

\*Utilization includes closed schools.



## Hig Schools Enrollment Capacity and Utilization by School

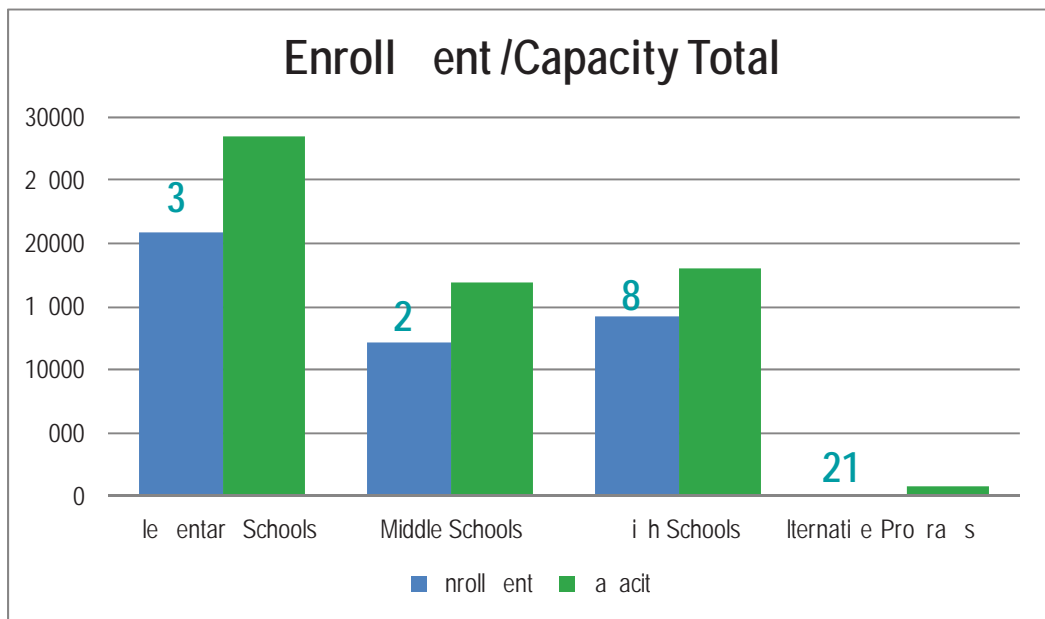
School Name	2015 Enrollment		Building Capacity	
	40t	Day	Operational Capacity	Utilization
atalina			1 00	2
holla	1	6	16 0	113
o enstine		0	130	0
Meredith -12		3	0	0
Palo Verde		121	20 0	
Pue lo		1621	1 00	
incon		11 2	10 0	10
Sa ino			1 0	
Sahuaro		1	1 0	0
Santa ita		2	20 0	26
Tucson		31	2 00	110
Uni ersit		10	00	11
<b>Hig Total</b>	<b>14</b>	<b>1 4</b>	<b>180 0</b>	<b>8.4</b>

*\*Utilization includes closed schools.*

## Alternative Programs Enrollment Capacity and Utilization by School

School Name	2015 Enrollment		Building Capacity	
	40t	Day	Operational Capacity	Utilization
lternative Pro rams		0	0	0
Dra e llt		0	0	0
Pro ect M		2	220	3
Pass llt		0	2 0	0
South est S		0	20	0
Teena e Parent Pro ra		6	1 0	36
<b>Alternati e Total</b>	<b>14</b>	<b>14</b>	<b>10</b>	<b>20.</b>

*\*Utilization includes closed schools.*



### All Schools

#### Enrollment Capacity and Utilization by School

	Enrollment	Capacity	Utilization
Elementary Schools	20,100	23,000	3
Middle Schools	12,160	16,000	2
High Schools	11,000	10,000	8
Alternative Programs	1,000	10,000	21
<b>TUSD Total</b>	<b>48,024</b>	<b>18,000</b>	<b>8</b>

Currently elementary schools within the district show an average utilization rate of 3% but range individually between 60% highly under-utilized and 122% over-utilized. Recommendation is not to add additional space but rather add space in regions where enrollment and capacities warrant additional space and consolidate or phase-out space in regions where enrollment has declined and will continue to do so.

Middle schools demonstrate a similar trend with an overall utilization rate of 2% but range between 60% and 122%. Recommendation again is consolidation in areas where growth has and is declining and increasing or re-opening closed schools in areas where growth remains steady.

High schools range between 26% and 11% utilization which is particularly concerning given the overall size of high school capacities between 1,000 to 3,000 student capacities. Recommendation is to do intensive building use in under-utilized capacities and add capacity to over-utilized capacities through possible programmatic changes such as online courses, additional periods, period shift schedules, or satellite programs at under-utilized schools.

Tucson Unified is where  
Students love to Learn  
Teachers love to Teach  
and People love to Work  
We are Team TUSD



---

## Section 3.0 Facilities Assessments and Conditions Tucson Unified School District #1

---

### 3.0 FACILITIES ASSESSMENTS

Facilities assessments were completed by TUSD in 2013-2014. This data is one component of the overall FMP in that it provides empirical data regarding the condition of facilities. Priorities for which items schools should be corrected and when is a function of the prioritization process described in Appendix D.

To supplement the facilities assessments, SAIA Associates Architects and Facilities Management Group performed the following:

1. Interviewed with department leaders to discuss what currently works well and how they see facilities in the future within the district goals in regards to student learning.
2. Selected interviews with school principals each grade level across elementary schools from the east to west sides of the district. List of questions that were similar to the public surveys were reviewed. It felt that any repairs or improvements considered should first address student learning areas. Repairs were a priority as well as the following:
  - a. Support student learning areas that reflect the schools' programs.
  - b. Some of the larger gathering areas like the multi-purpose rooms and libraries to bring them up to date.
3. Costs associated with the repairs and improvements were reviewed. Facilities Management Group and the Finance Department that specialized in school construction management and pricing costs were adjusted as necessary and an appropriate amount to cover the costs of inflation and contingencies were incorporated.

Total improvements needed must be considered relative to the district financial status, educational needs, and the ability of the community to fund these improvements.

### 3.1 MULTI YEAR FACILITIES PLAN BACKGROUND AND SUMMARY

#### 3.1.1 UNITARY STATUS PLAN (USP) LANGUAGE<sup>1</sup>

The District had developed its first Facilities Condition Index (FCI) report prior to the current USP. Consequently, in this USP directed the District to update the Facilities Plan and to add a second assessment related to the suitability of schools for the instruction, health and safety of students. These were then developed into the Multi-Year Facilities Plan (MFP) to meet the requirements of the USP. The MFP forms a cornerstone to this FMP.

USP Section (A)(1)

*In addition to developing the Facilities Condition Index ("FCI"), by July 1, 2014, the District shall develop an Educational Suitability Score*

<sup>1</sup> TUSD Multi-Year Facilities Plan, February 2014, revised March 2014

“ESS”) for each school that evaluates: (i) the quality of the grounds, including playgrounds and playfields and other outdoor areas, and their usability for school-related activities (ii) library condition (iii) capacity and utilization of classrooms and other rooms used for school-related activities (iv) textbooks and other learning resources (v) existence and quality of special facilities and laboratories (e.g., art, music, band and shop rooms, gymnasium, auditoriums, theaters, science and language labs) (vi) capacity and use of cafeteria or other eating space(s) and(vii) current fire and safety conditions, and asbestos abatement plans.

The District shall assess the conditions of each school site biennially using its *amended FCI and the ESS.*”

ased on the results of the assessments using the FCI and the ESS, the District shall develop a multi-year plan for facilities repairs and improvements with *priority on facility conditions that impact the health and safety of a school’s* students and on schools that score below a 2.0 on the FCI and/or below the District average on the ESS.

The District shall give the next priority to Racially Concentrated Schools that score below 2.5 on the FCI.

---

### 3.1.2 SUMMARY OF ASSESSMENT PROCESS

The following information is summarized from the Districts Multi- year Facilities Plan, published in February of 2015:

aintenance priorities are those that require other significant financial and funding TUSD active facilities include elementary schools 10 middle schools 10 high schools 13 - schools five alternative schools 2 early learning facilities and various administrative support buildings The total of school administrative support space throughout the TUSD including portable buildings is over 10 million square feet

component- component assessment of the District’s buildings grounds and equipment assists the operations Division in long range budget financial and projections for the District prioritized list of needs and resources helps the operations Staff communicate facility needs to Finance budget administration and the board

**FCI and ESS Development** In 2013 and 2014 the District amended the original FCI and developed the ESS in accordance with the Special Master and Plaintiffs as required by the US District Court in the interim of the 2013-14 school year the District reassessed its facilities using the FCI

The evaluation for each site started with a discussion with the site administrator followed by a re-established set of questions The ESS results as completed by a diverse group of District administrators and as read

for re-issues as the 2013-14 school year as ending. The F and SS are listed in documents detailing the scores will change as facilities projects are made and also will change as the facilities are. These two tools will complement each other first getting an accurate snapshot of the building condition from the F and then showing the impact that certain areas of disrepair have on the learning environment.

**The Facility Condition Index (FCI)** The FCI data is the focus for building projects and replacement. FCI determines the status of the facilities and provides a clear, accurate and detailed view of the facilities with an accurate baseline of the current conditions and remaining useful life of the district building assets. The age of an asset is recorded on the FCI and is considered when scoring a particular asset. The FCI answers the following questions:

- **What is the current condition of our facilities?**  
The lower scores of 1.0 through 2.0 indicate a facility is in poor condition. Middle scores are 2.0 to 3.0 score a one indicates a facility is in good condition.
- **How do we improve the index ratings and thus current conditions?**  
The conditions or categories that have a low score are a priority for projects. Replacement and construction projects once completed the score is re-evaluated. A score of 1.0 is replaced with a four after completion of the projects, the overall score will increase as well. The extent of the increase in score will depend on the height in that particular category.
- **Is our level of funding appropriate?**  
Funding should match the life cycle of a facility's components. For example, if a roof has a life cycle of 10 years with normal repair and normal wear, then a new roof should be constructed toward the end of the 10 years. If the roof reaches 20 years, that would suggest funding has not been available to address the FCI concerns.
- **Given a particular budget, what will happen to the condition of our assets over time?**  
As assets age, the FCI score declines. If funding is adequate, the assets are repaired/replaced before the FCI score gets too low. If funding is insufficient, the overall scores will deteriorate over time.
- **What should we do first?**  
After addressing any health and safety issues, we should always address the lowest scores first. This will reflect not only priority but adequate budget and appropriate budget decisions as well.

TUSD developed teams comprised of architectural, mechanical, including plumbing and civil, structural, and electrical assessors that collected and updated building conditions at each facility. This process included site and drainage, site, landscape, interior, structure, roofing, interior mechanical, plumbing, electrical, communication, life safety, and technology systems. In addition, these field teams were tasked with evaluating the condition of existing fixtures and equipment and working with district staff to determine compliance.

The FCI uses the following categories to reflect the general condition of the facilities

- Building Structure
- Building Systems
- Roofing
- Technology and Communication Systems
- Special Systems
- Grounds
- Parking Lots and Drives

**Educational Suitability Score ESS** The ESS uses a functional evaluation approach that evaluates instructional library performance physical education and supports areas to measure a facility's suitability to provide an equitable education. The Educational Suitability Assessment team made up of experienced educators and administrators was trained for two days on the concepts and routines set to discuss issues of importance for consistency as the recorded conditions at each facility.

The ESS uses the following categories to reflect the suitability of the facility

- Physical and Outdoor Space
- General Classroom Flexible Learning Space
- Early Childhood Classrooms
- Instructional Resources
- Science
- Computer and Technology
- Textbook Learning Resources
- Media Center
- Interarts
- Self-contained Classroom
- Non-instruction Space
- Fine Arts Music Rooms
- Safety and Security

The ESS is a sum of the values for each educational suitability criteria question addressed. It is then weighted for total possible points. Educational suitability criteria questions were based on the function of the facility assessed. Elementary middle high - -12 or vocational.

The data collected from both the FCI and the ESS identifies if a school has a or overall needs overall FCI score less than 2.0 and specific categorical needs individual FCI scores less than 2.0 in one or more categories. The MFPI Implementation Process through the FCI assures racially concentrated schools are not overlooked and are given a higher level of consideration.

The results of the FCI and ESS Scores may be found in the Multi-Year Facilities Plan referenced herein.

---

### 3.1.3 RESULTS AND COSTS

As a direct result of the FCI and ESS the following facilities improvements were recommended. The District Facilities Department and estimated costs were verified. An independent third party the Facility Management Group.

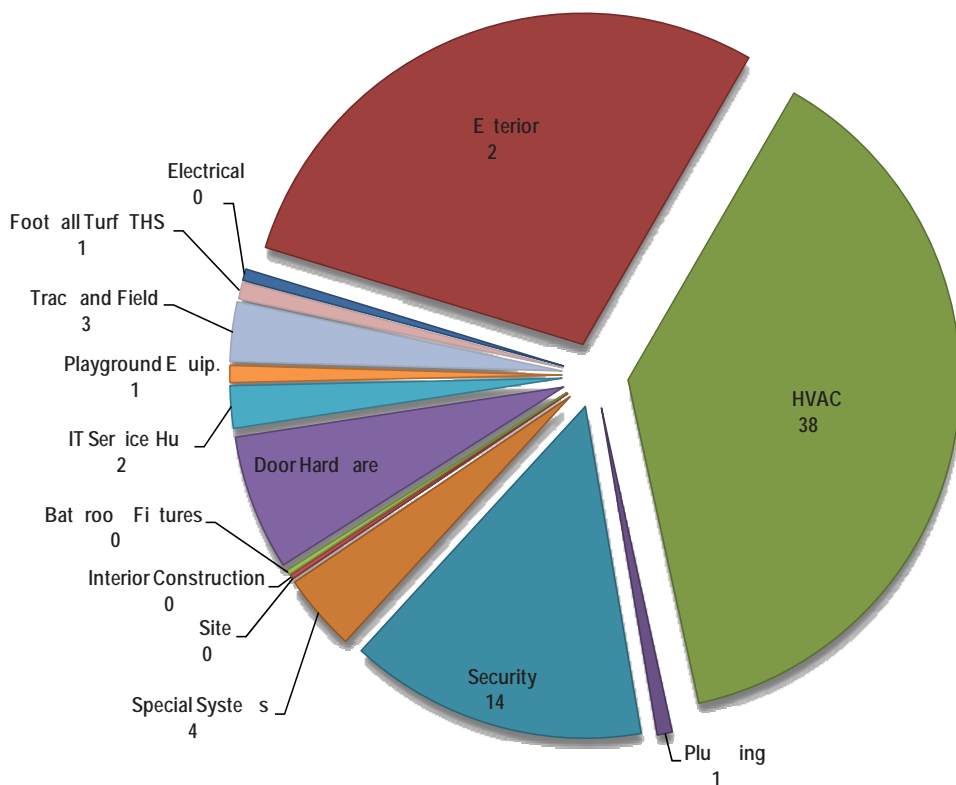
T T STS

Major systems and capital repairs were surveyed and prioritized school. The grand total of facilities systems repairs is estimated to total approximately 20 Million including inflation and contingency costs spread over ten years. The following chart is a read-only repair type.

**Facilities Systems Costs by Type**

Electrical	110200
Interior	321302
	000020
Plumbing	110060
Security	226310
Special Systems	660
Site	2100
Interior Construction	023
Bathroom Fixtures	000
Door Hardware	1300000
IT Service Unit	2000000
Playground Equipment	1600000
Track and Field	00000
Football Turf TSS	1600000
<b>Total</b>	<b>204041120.8</b>

**Facilities Systems Cost by Type**





STS D

The following charts read on total repairs needed school to be made level or building the all district needed building were included in the estimates costs include inflation and contingencies over 10 years

**Elementary Schools**

terior nclosure	1 3 1 6
S ste	2 2 1 12
Plu in S ste	1 16
Securit	13 610 6
Site	2 1 0 0
S ecial S ste s S ste	2 0 6 6
<b>Total</b>	<b>58 341 4 8.44</b>

**Middle Schools**

lectrical	0 3
terior nclosure	023 32
S ste	1 1 6
nterior onstruction and on e an	26 2
Securit	3 2 1 6
S ecial S ste s S ste	1 366 0 3 36
<b>Total</b>	<b>1 5 240.40</b>

**K-8 Schools**

terior nclosure	6
S ste	10 1 2 1
Plu in S ste	1 1 06 0
Securit	2 0 663 2
S ecial S ste s S ste	1 2 1 6
<b>Total</b>	<b>23 202 2 1. 0</b>

**High Schools**

lectrical	1 0 0 03 36
terior nclosure	22 2 36 2
S ste	31 6 6
nterior onstruction and on e an	13 6 6
Plu in S ste	1 223
Securit	6 3 1 0 3
S ecial S ste s S ste	1 12 62 00
<b>Total</b>	<b>4 551 005.22</b>

**Alternate Education**

terior nclosure	2 6 662
S ste	1 3 16
Securit	1 12 20 6
S ecial S ste s S ste	1 3 0 0
<b>Total</b>	<b>1 5 58.08</b>

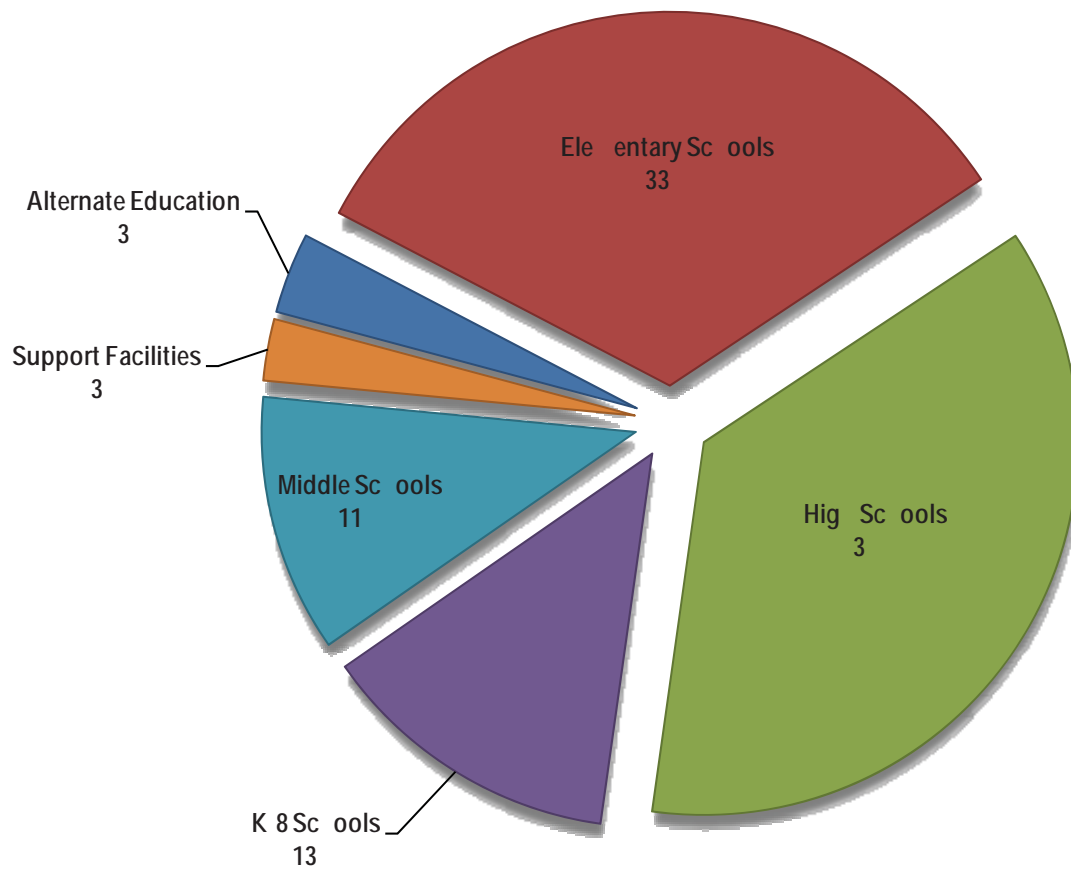
**Support Facilities**

terior nclosure	1 12 132 32
S ste	2 0 0
<b>Total</b>	<b>4 20 01 .12</b>

### Cost by Grade Level

Alternate Education	6	1	6	0
Elementary Schools	3	1		
High Schools	6	1	00	22
Support Facilities	23	202	261	60
Middle Schools	1	6	2	0
Support Facilities	20	01	12	

### Cost by Grade Level



STS P T

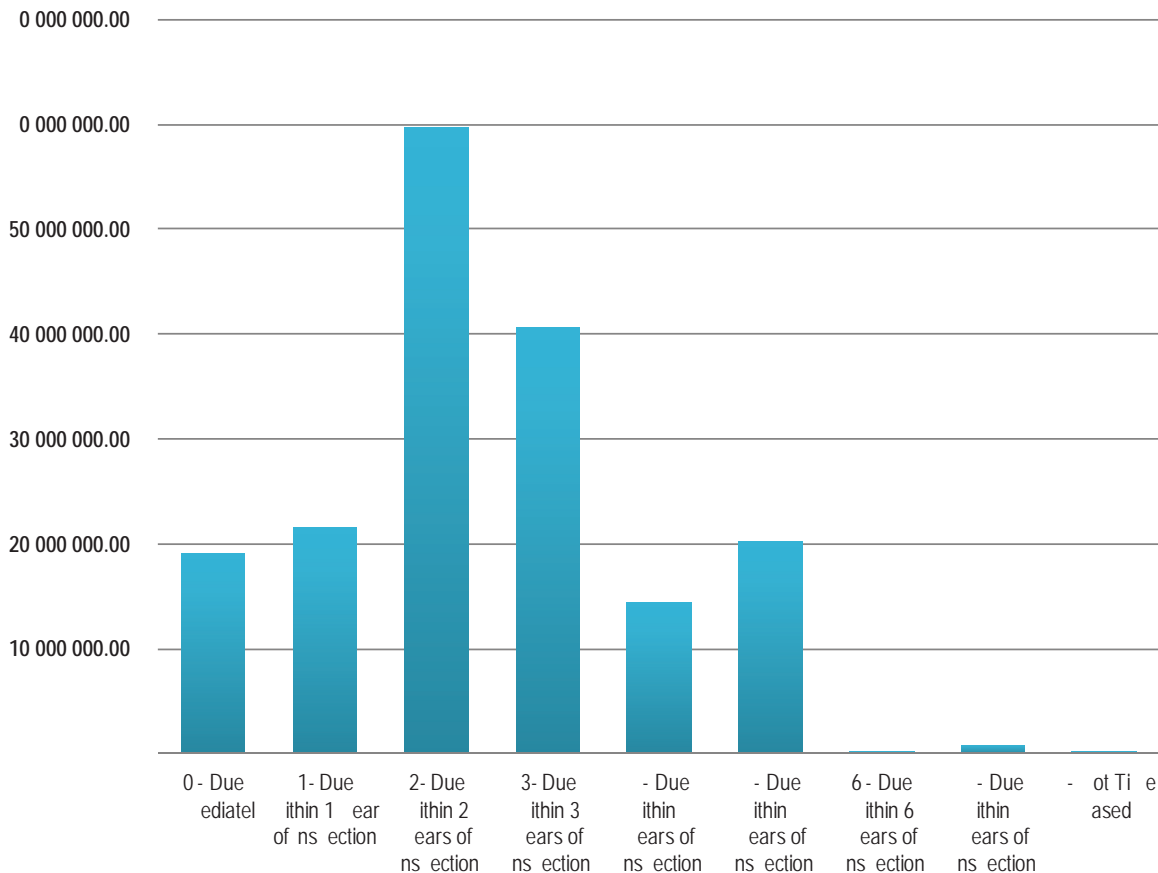
The following chart illustrates the school repairs needed. Priority level 0 repairs are needed immediately. Priority 1 projects are needed within one year etc. Assessments indicate a total of all repairs needed will be needed within the first four years of funding indicating a large portion of facilities deficiencies are in need of immediate or near immediate attention.

### Costs by Priority/ Years

0 - Due immediately	1,000
1- Due within 1 year of construction	21,616,666
2- Due within 2 years of construction	62,322,222
3- Due within 3 years of construction	6,110,333
4- Due within 4 years of construction	1,226,066
5- Due within 5 years of construction	202,332
6 - Due within 6 years of construction	126,666
7- Due within 7 years of construction	23,222
8 - Not Timely Assessed	1,106,666

not including state identified projects

### Costs by Priority/Years



---

D T D STS

Appendix D contains a detailed breakdown is a summary by school, system and priority level.

Tucson Unified is where  
Students love to Learn  
Teachers love to Teach  
and People love to Work  
We are Team TUSD



---

Section 0 Total a ital ro e ent eeds  
Tucson Unified School District #1

## TOTAL CAPITAL IMPROVEMENT NEEDS

### 4.1 CAPITAL IMPROVEMENT GOALS

Capital needs identified during the facilities assessment process total approximately 20 M. This estimate includes only facilities repairs and upgrades vital to the school facilities continued operation. The following section identifies those items plus additional items necessary for the total Capital Requirements Plan based on the following educational and community goals as described in Section 1 totaling 101 M.

- **Repair and Maintain Systems and Facilities Vital to School Operations**
- **Implement Key Facility Improvements to Enhance Learning**
- **Upgrade Technology to Support Changes in Teaching and Learning**
- **School Renovations to Support 21<sup>st</sup> Century Learning and Optimize School Size**
- **Support Expansions of Successful Programs**
- **Portable Reductions**

### 4.2 CAPITAL IMPROVEMENT PLAN

At this time the capital needs identified during the facilities assessment process for repairs only are approximately 20 Million. This estimate includes only facilities repairs and upgrades vital to the school facilities continued operation.

The following identifies those additional priorities or objectives identified to support educational and community goals.

#### TOP PRIORITIES/ OBJECTIVES FOR THIS FACILITY MASTER PLAN

\*detailed information for facilities assessments costs may be found in Appendix D of this document

**Repairs** Repairs would include roofing, HVAC (including control systems), special systems, plumbing, building finishes, window and door maintenance, and security improvements.

\*costs include contingency and inflation

- repair building systems
- repairs and selective replacement of systems only when a solution is necessary. Enditures will be aimed at maintaining systems in order to reduce work orders and more easily serviced.

204 M

**Key Facility Improvements to Enhance Learning** Key facility improvements would include improvements to multi-purpose areas, libraries, science and art labs, and support key school curriculum.

- Every school would receive a portion of this funding.
- During the implementation phase each school would work with the lead team to identify each project.

150 M

<u>Project Funding Amount per School Age Level</u>	
<b>Elementary Schools</b>	
Student Space Projects <sup>1</sup>	2,100
Per Unit Space Projects <sup>2</sup>	632,630
<b>Middle / K-8 Schools</b>	
Student Space Projects <sup>1</sup>	6,210
Per Unit Space Projects <sup>2</sup>	600,000
Technology <sup>3</sup>	213,100
Multiuse Outdoor Pavilion	0,300
<b>High Schools / Alternative Programs</b>	
Student Space Projects <sup>1</sup>	33,333
Per Unit Space Projects <sup>2</sup>	33,000
Technology <sup>3</sup>	66,660
Career Technical Education Skills	2,200
	<b>1,500,000</b>
<b>Notes</b>	
1	High School facilities should be addressed relative to restrooms and electrical space
2	Electrical sound systems acoustics with updated systems and finishes
3	Needs for enhanced student access to wireless printers, all monitors and student social interaction placement in field environment

**Technology** Key infrastructure upgrades would be implemented to support:

Projects to support a one-to-one laptop initiative include electrical upgrades and placement at the correct locations, placement of wireless routers in projects to spaces that will promote student technology interface

4 M

- wireless technology and STIM
- better capacity for digital libraries and databases
- computer labs and cybercafes, ethernet infrastructure and computer labs on-line testing, video conferencing, professional development and distance learning, etc.

<u>Project Funding Amount Per School Age Level</u>	
Elementary Schools	2,000,000
Middle - Schools	6,200,000
High Schools / Alternative Programs	1,216,000

**Total School Renovations for 21<sup>st</sup> Century Learning and Optimize School Size**. Per recommendations of the Curriculum Audit and Efficiency Audit (see Appendix E) funding would be utilized to support improvements, consolidations, expansions or closures in order to optimize use of school facilities.

0 M

- Improvements related to utilization expansions consolidations partial building shut downs
- Collaborative and STEM learning spaces
- Technology integration
- Energy efficiency

1 This budget line item would allow the District to make adjustments based on enrollment growth and decline available based on the projected increase of student enrollment in the Southeast portion of the District. Projections could be reviewed on line to address over-enrollment at a variety of levels grade configurations and sites of surrounding schools could be addressed at the same time.

2 This budget line item allows for a full renovation of a school site. This budget would allow for improvements to approximately 10 of the school sites. Sites selected for improvements would be based on community input. Many of these improvements if funded would supplement the improvements listed in Key Facility Improvements to Enhance Learning available for the 10 of the schools proposed for renovation in this proposal.

<u>Project Funding Amount Per School Age Level</u>	
Elementary Schools	000 000 00
Middle - Schools	000 000 00
High Schools Alternative Programs	16 000 000 00

**Support Expansion of Successful Programs**. Funding would be utilized to support the expansion of campuses and teaching areas for successful school programs.

- Space additions or redesign 40 M

1 There are many successful programs within the District and some have identified the available space in the current location. A possible relocation of Dietrich expansion or relocation of the Dodge campus occupational building improvements at Tucson High.

**Reduce the Number of Active Portable Classrooms**. In accordance with the recommendations of the Curriculum Audit (Appendix A), funding would be utilized to demolish 50 portables (17% of the current stock). To achieve the recommendations of the Curriculum Audit an additional 100 portables would be closed or auctioned off.

- Portable demolitions 300 000

**Transportation Funding** 8 M

<b>Grand Total</b>	<b>50 M</b>
--------------------	-------------



### 4.3 FUNDING SOURCES IDENTIFIED

#### BOND FUNDING DEFINED

Bonds for school projects are very similar to a mortgage on a home. To finance construction projects the district sells bonds to investors who will receive principal and interest. Payment is limited to 30 years.

The sale of bonds requires an election to authorize a specific amount. The district is allowed to sell without another election. The school district sells the municipal bonds when funds are needed for capital projects usually once or twice a year.

Proceeds from a bond issue can be used for the construction and renovation of facilities, the acquisition of land and the purchase of capital items such as equipment. Referenda include one for technology, uses land for future schools, portable buildings and the cost of selling bonds.

School bond elections give individuals an opportunity to vote on a plan for the construction and renovation of school facilities. It is a request to give the elected board of education the authority to sell bonds when facilities and/or renovations are needed.

#### Statutory Bonding Capacity TUSD

The Debt Service Tax Assessed on school bonds so that they are in effect on a house 1/2 of the district is limited in the amount of debt it can incur. The ratio is that the limit is the greater of 20% of the net Full Cash Assessed Valuation or 100 per Student based on the last fiscal year.

### Statutory Bonding Capacity Calculation for TUSD<sup>2</sup>

District NFAV	328,2158
Multiply by	20
Calculation Base	5,3431
Less Outstanding Class B Bonds	180,2000
<b>Total</b>	<b>4,314,431</b>

Study of 2016 1/2 of reported values and outstanding debt of TUSD indicates a ratio that may be available for potential bond funding. The bond authorization could be good for 10 years and capacity as ratio increases and class principal is retired paid off.

#### Surplus Real Estate

Another potential source of funding is the disposition of surplus real estate. The District recently sold the former high school for a ratio of 1 million and it currently has four properties in escrow worth a ratio of 1 million. There are an additional 2 vacant properties, one sold and one property that is leased. These are worth a ratio of 1 million and 6 million respectively, though the leased properties are not available to sell for five to ten years. The sales of surplus properties could cover less than 10% of the capital needs indicated in this report.

<sup>1</sup> http://www.tusd.net/finance/finance-101-questions-and-answers.aspx

<sup>2</sup> Stifel General Information Fundamentals and Bond Election Information April 2016

## Le eraging Bond Funding

nother source of income is to utilize the bond funding to leverage grants and private sponsors

## 4.4 IMPLEMENTATION PROCESS

### FMP IMPLEMENTATION PROGRAM

The FMP Implementation Program has been developed on the direction of four documents: the Unitar Status Plan, the Curriculum Audit, the Efficiency Audit, and the District's 2011 Strategic Plan. These documents contain the following recommendations:

- Regularly update and use the Facilities Condition Index and the Educational Suitability Scores to inform prioritization of facilities planning.
- Ensure that the facilities and technology planning processes include information from curriculum and instruction.
- Establish inclusive participation guidelines and ensure solicitation of input from internal and external stakeholders.
- Align implementation with the strategic objectives and mission of the District.
- Motivate all schools to expand 0 student and/or community utilization and optimal sites to support student learning, thus minimize the costs of facilities and allocate funds into classrooms.
- The Board is authorized to establish a bond oversight committee to oversee implementation of the plan over the following schedule: 10 in Year 1 of the bond, 2 in Year 2, 0 in Year 3. These are cumulative percentages.
- Report regularly on implementation progress, including objective measures of success.
- Consult with and provide the Special Master and Plaintiffs with notice and a request for approval of any of the following: attendance boundaries, changes to student assignment patterns, construction projects that will result in a change in student capacity of a school or significantly impact the nature of the facility, building or acquiring new schools, proposals to close schools, and the purchase and sale of District real property. Court Order 13-0 of 1-6-12.

In addition, the FMP community outreach, in particular the work with focus groups, highlighted the importance of establishing a bond oversight committee, as seen as a key success of the previous bond program. The focus groups also recommended development of a clear formula to determine when to hat a tent and for what projects schools receive bond funds, enrollment growth, and capacity were mentioned as top elements besides the facility assessments to consider in the formula.

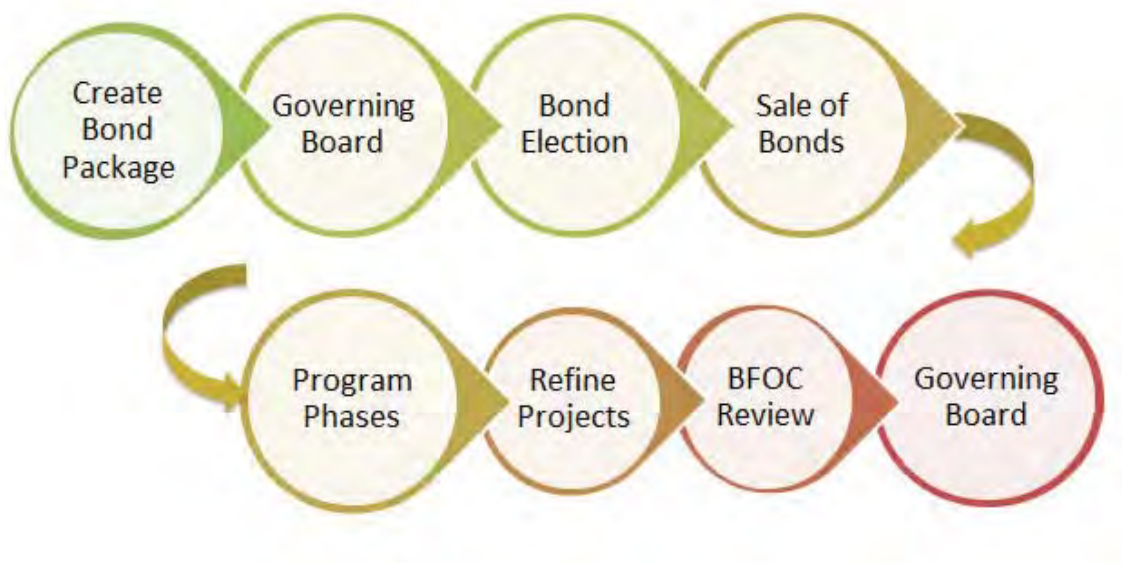
**Implementation Steps**

After a bond is approved, voters the items listed in that bond allotment must be completed with a variance of no more than 10% from the allocation established in the allotment. To accomplish this, the District, with the help of a citizen oversight committee, must track how much money is used in each bond funding category as the bond projects progress.

The overall process is as follows:

1. To establish the bond, having the District bill or with a citizen oversight group.
2. Starting with projects in the first phase, the District bill or with architects and affected stakeholders to define the projects at each site.
3. The District bill or the site projects back to a citizen oversight group for review of the project funding and for a recommendation to the governing board.

The detailed steps are shown in the following diagram and described below.



**Step 1: Create and Get Approval of a Bond Package**

Using the results of the community surveys and the scenarios developed, the focus groups the District Team will develop a description of the bond for the allotment and an argument for the bond. Typically, this must be completed early in the year, including a proposal to the board for a future election. Once approved, the District will initiate the sale of bonds as needed for the first phase of the project.

**Step 2: Establish a Bond Fiscal Oversight Committee (BFOC)**

As soon as a bond is approved, voters the District shall establish a Finance Committee on the Finance that monitored the 200 bond. The committee will be composed of citizens who are not employed by TUSD. Some Finance members from the 200 bond should be recruited to serve in at least the early phases of the

ond to help establish the new F. The roll of the F will be to help establish the basin of the bond projects and to review the projects submitted for compliance with the bond as approved by the electorate.

### Step 3 Program Phases of the Bond, the BFOC and Facilities and Instruction Staff

As the sale of the first phase of bonds is taken place, the District will select the sites/areas to address the phase. The basin will be based on the Multi-Year Facility Plan (MFP) and a clear set of principles that take into account the requirements of the USP, health and safety, the educational mission of the District and the objectives of the District Strategic Plan. This step will be accomplished by the F and District instructional and facilities staff and will be done ultimately in the project as needed. The will

1. Review the District Strategic Plan, the MFP, the USP and other relevant documents to establish objectives.
  2. Review the Capital Plan, Section and the funding categories and priorities in order to relate these to the approved bond amounts to determine what can be accomplished within the funding provided. Generally, projects will be scheduled so all projects at a site are completed at one time.
  3. Pick Areas/Projects for Implementation in at least Phase
    - a. Per the USP, priority will be given to schools that meet the following criteria:
      - i. Schools with facility conditions that impact the health and safety of students.
      - ii. Schools that score below a 2.0 on the F and/or below the District average on the SS.
      - iii. Academically concentrated schools that score below 2.0 on the F.
    - b. Priority will also be assigned to the projects. These priorities reflect the USP criteria and should be used with the top priority projects/schools to address.
    - c. Additional priority consideration should be given to:
      - i. Schools that are at least 90% capacity and are projected to remain so.
      - ii. Schools that are optimal sites to cost-effectively deliver a wide range of services.
- Establish overall objectives and budgets for those projects.

### Step 4 Hire Architects for each area/project

### Step 5 Refine Projects with Site Committees

In this step, school improvement committees of affected stakeholders will review and develop the program for each project. For repairs and MFP priorities set by F and SS, they will have initial discretion relative to the selection and prioritization of projects, though they could also be adjusted based on new information. For facilities improvements, which are less defined, the school improvement committee will develop an improvement program tailored to each site based on available funding and current site and district needs. At the completion of the school improvement committee work and based on consultation with the Special Master and Plaintiffs, as appropriate, the architect will provide a summary including estimated costs suitable for F review.

### Step Submit Projects to BOC for Review and Recommendation

### Step Approval by Governing Board

### Step 8 Review by the Special Master and Plaintiffs and Approval by the Court

here required court order 13 0 of January 6 2012 projects will be submitted to the Special Master for court approval prior the initiation of construction

Step Construction

Step 10 Celebration and Recognition

Through open houses and other such events the District will celebrate project completions and recognize participants

Tucson Unified is where  
Students love to Learn  
Teachers love to Teach  
and People love to Work  
We are Team TUSD



---

endi

Tucson Unified School District #1

---

## **APPENDIX A**

### **Audit Recommendations Related to Facility Planning**

#### **Curriculum Audit**

G.8.1: Adopt a policy that calls for the creation and periodic review and revision of a comprehensive, five- to 10-year master plan for facilities development and maintenance. Adopt a similar policy directing long-range planning for information technology.

G.8.2: Require the superintendent to submit for board approval a five- to 10-year facilities plan that (a) includes information derived from curriculum and instruction planning, as well as facility, enrollment, and community population data; and (b) reflects goals, strategies, and related components of the strategic plan to be developed in 2014. Further, require an updated five- to 10-year information technology plan. As appropriate to meet state direction, require integration of the plans.

G.8.4: Require that the plans be a result of various school- and community-based opportunities for stakeholder input, the expertise of district leaders, the architectural involvement required by Board Policy FD: Facilities Planning and Development, and other external expertise deemed advisable.

G.8.5: Require the Superintendent to schedule periodic reports to the board

A.8.1: Develop updated five- to 10-year facilities and information technology plans responding to the direction in actions G.8.1-G.8.3 to present to the board for approval.

- Ensure that the technology plan addresses state as well as local requirements.
- Involve the leadership team in establishing a process, format, and contents for the updated facilities plan.
- Continue to update and use the Facilities Condition Index and the Educational Suitability Scores to inform prioritization of facilities planning.
- Ensure that the facilities and technology planning processes include information from curriculum and instruction to facility design and finance and respond to needs identified in the information collection.
- Establish inclusive participation guidelines and ensure solicitation of input from internal and external stakeholders.

A.8.2: Create processes for the integration of all plans into the strategic planning process and final product.

A.8.4: Develop a calendar for periodic reports on plan implementation progress for the various components of the strategic plan, with emphasis on facilities and technology updates.

A.8.6: As enrollment projections dictate change, continue to evaluate educational facilities for closures and mergers and plan those in accordance with the participatory and data-supported process used in earlier such decisions.

Clarity of educational goals and their linkage to facilities and technological infrastructure is a primary need in implementing the recommendations.

## Efficiency Audit

### Recommendation 1-1: Develop a long-range strategic plan and related performance measures.

TUSD has a document entitled Strategic Plan 2011-12. This document was prepared by an architectural firm, and actually represents a long-range facilities plan as opposed to a school system strategic plan. Facility management is only one element of an organization's strategic plan.

TUSD does not have any other document that constitutes a strategic plan. These plans are generally five to seven years in duration, and outline the school system's mission, vision, goals, and specific measurable objectives. A strategic plan provides guidance to the development of other district planning documents, including the facilities master plan and a long-range technology plan. Strategic plans also drive shorter term academic improvement plans and more detailed measurable objectives. TUSD schools currently prepare an annual School Continuous Improvement Plan with measurable objectives, but these are not based on any districtwide objectives.

### Recommendation 5-1: Reduce the number of active portable classrooms.

There are 303 portable classroom units listed in the TUSD inventory. Based on a review of the capacity analyses and locations, TUSD could eliminate the use of about 130 portables (approximately 118,500 sf). The portables were reported to be owned (no leases) so the net savings would be due to reduced maintenance and repair, custodial services, and utilities. Portable units are less energy efficient and require more maintenance.

### Recommendation 5-2: Continue to evaluate school capacities and consider further school consolidation.

Best practices in determining school capacities have been researched and reported by CEFPI. School capacity is defined as the number of students that can be reasonably accommodated by a school building and site. In determining optimal school capacities, it is important to consider physical, operational, and programmatic variables. 95

- Physical variables include: school size, areas by type, site size and amenities, support facilities (e.g., kitchens, cafeterias, multipurpose rooms, etc.), number and types of teaching stations, building infrastructure, building and life safety codes.
- Operational variables include: school utilization rates, efficiency of space use, operational policies, staffing levels, funding structures, space management and scheduling, specialty academic and program offerings, and operational budgets.
- Programmatic variables include: educational program offerings, specialty programs, schedules, extended use, community use, partnerships (i.e., off-site and distance learning), class sizes, and staff ratios.

### Recommendation 5-6: Develop TUSD Operations Division strategic facilities plan.

A TUSD School Master Plan has been developed to address overall financial, academic achievement, services, equity and diversity, and facilities plans (planning perspective). After TUSD develops a districtwide strategic plan, facilities management should develop a strategic facilities plan that addresses the optimization of performance of the existing schools and organization. The strategic



facilities plan should document TUSD FM mission, vision, values, strategic objectives, and KPIs. A performance report aligning and integrating the strategic objectives and measures with the mission of TUSD should be created.

The strategic facilities plan should also describe how the TUSD Operations Division intends to create value to its stakeholders. The plan should also document how the organization will respond to both internal and external factors. External factors may include economic, political, and social concerns. Internal factors may include talent pool, organizational culture, and the availability of resources.

Day-to-day operational plans should be developed based on the strategic facilities plan using well-developed action items aligned with the objectives. Operational planning includes the plans necessary to define how the school facilities will be operated and maintained on a day-to-day basis to meet the needs of the TUSD. Examples of specific operational plans include: service requests, work control and management, workflow processes and standard operating procedures, inventory control, asset management, FCAs, planned maintenance, quality control inspections, energy management and sustainability operations, buildings and grounds operations, emergency preparedness and disaster recovery, safety and security procedures, regulatory and code compliance, hazardous communications, job safety, and communications processes.

Tucson Unified is where  
Students love to Learn  
Teachers love to Teach  
and People love to Work  
We are Team TUSD



---

endi

Tucson Unified School District #1

---

DOCUMENT AVAILABLE SEPARATELY  
FROM PLANNING SERVICES

Tucson Unified is where  
Students love to Learn  
Teachers love to Teach  
and People love to Work  
We are Team TUSD



---

endi

Tucson Unified School District #1

---

DOCUMENT AVAILABLE SEPARATELY  
FROM PLANNING SERVICES

Tucson Unified is where  
Students love to Learn  
Teachers love to Teach  
and People love to Work  
We are Team TUSD



---

endi D

Tucson Unified School District #1

---



TYPE	NAME	ASSET	REQUIREMENT	PRIORITY	SYSTEM	ESTIMATED COST
	Brichta	Main	Paint Roof	1- Due within 1 Year of In	Exterior Enclosure	\$ 504,000.00
	Brichta	Activities Center	Roofop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$ 26,659.92
	Brichta	Main	Roofop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	1- Due within 1 Year of In	HVAC System	\$ 320,533.92
	Brichta	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$ 37,415.28
	Brichta	Site - Brichta	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$ 35,787.36
	Brichta	Site - Brichta	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$ 37,091.04
	Brichta	Site - Brichta	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$ 64,039.92
	Brichta	Site - Brichta	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$ 65,546.88
	Drake Alter MS	Main	DDC System - Average Renewal	2- Due within 2 Years of In	HVAC System	\$ 25,233.60
	Drake Alter MS	Activity Center	Roofop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	4 - Due within 4 Years of In	HVAC System	\$ 41,600.16
	Drake Alter MS	Main	Roofop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	2- Due within 2 Years of In	HVAC System	\$ 42,288.00
	Drake Alter MS	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$ 12,235.44
	Project More	Classroom Addition	Gap Flashing (Counter Flashing at Parapets) Renewa	5 - Due within 5 Years of In	Exterior Enclosure	\$ 4,628.40
	Project More	Classroom Addition	Gutters and Downspouts - Aluminum Renewal	5 - Due within 5 Years of In	Exterior Enclosure	\$ 6,772.08
	Project More	Classroom Addition	Reglet Counter Flashing Renewal	5 - Due within 5 Years of In	Exterior Enclosure	\$ 12,033.84
	Project More	Site - Project More	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$ 62,030.64
	Project More	Main	Roofop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	0 - Due Immediately	HVAC System	\$ 26,162.00
	Project More	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In	Security	\$ 2,976.96
	Project More	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$ 4,326.00
	Project More	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$ 88,304.16
	Project More	Site - Project More	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$ 30,572.64
	Project More	Site - Project More	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$ 24,501.12
	Project More	Site - Project More	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$ 52,785.60
	Project More	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In	Special Systems System	\$ 20,916.00
	Project Pass HS	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$ 9,313.92
	Project Pass HS	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In	Special Systems System	\$ 30,885.12
	Schumaker	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$ 44,540.00
	Schumaker	Main	Fan Coil System - Cabinet - Cooling Only - 2 Pipe - 25% Rep	2- Due within 2 Years of In	HVAC System	\$ 104,146.56
	Schumaker	Main	Chiller - Reciprocating - Air-Cooled 100 Tons Renewa	4 - Due within 4 Years of In	HVAC System	\$ 201,094.32
	Schumaker	Main	Security System - Burglar Alarm System Renewa	4 - Due within 4 Years of In	Security	\$ 7,754.88
	Schumaker	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$ 44,131.92
	Schumaker	Main	Security System - Card Access System Renewal	4 - Due within 4 Years of In	Security	\$ 56,330.40
	Schumaker	Site - Schumaker	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$ 33,996.48
	Schumaker	Site - Schumaker	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$ 51,055.20
	Schumaker	Site - Schumaker	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$ 30,228.24
	Schumaker	Site - Schumaker	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$ 88,149.60
	Schumaker	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$ 41,070.96
	Southwest	Main	Reglet Counter Flashing Renewal	4 - Due within 4 Years of In	Exterior Enclosure	\$ 5,214.72
	Southwest	Main	Cap Flashing (Counter Flashing at Parapets) Renewa	0 - Due Immediately	Exterior Enclosure	\$ 5,785.92
	Southwest	Main	Gutters and Downspouts - Aluminum Renewal	0 - Due Immediately	Exterior Enclosure	\$ 13,545.84
	Southwest	Site - Southwest	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$ 58,927.68
	Southwest	Main	Paint Roof	2- Due within 2 Years of In	Exterior Enclosure	\$ 268,800.00
	Southwest	Main	BUR (Built-Up Roofing) Renewa	5 - Due within 5 Years of In	Exterior Enclosure	\$ 619,743.60
	Southwest	Main	Metal Roofing - High End Renewa	0 - Due Immediately	Exterior Enclosure	\$ 1,374,450.00
	Southwest	Main	Replace Condenser Pump Motor	0 - Due Immediately	HVAC System	\$ 12,600.00
	Southwest	Main	Replace Boiler	7 - Due within 7 Years of In	HVAC System	\$ 80,414.88
	Southwest	Main	Boiler HW - Gas-Fired - 1M BTU Renewal	2- Due within 2 Years of In	HVAC System	\$ 93,456.72
	Southwest	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$ 93,534.00
	Southwest	Main	Fan Coil System - Cabinet - Heating/Cooling - 4 Pipe - 50%	4 - Due within 4 Years of In	HVAC System	\$ 220,694.88

Southwest	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	132,200.88
Southwest	Site - Southwest	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	28,494.48
Southwest	Site - Southwest	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	25,494.00
Southwest	Site - Southwest	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	49,197.12
Southwest	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$	26,481.84
Teenage Parent	Site - Teenage Paren	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	31,730.16
Teenage Parent	Main	DDC System - Average Renewal	2- Due within 2 Years of In	HVAC System	\$	76,774.32
Teenage Parent	Main	Boiler HW - Gas-Fired - 1M BTU Renewal	2- Due within 2 Years of In	HVAC System	\$	93,456.72
Teenage Parent	Main	Central AHU - VAV System w/Distribution - 20% Repair/Re	3- Due within 3 Years of In	HVAC System	\$	108,341.52
Teenage Parent	Main	Heat Pump - Air/Air - Unitary Rooftop 10 ton Renewa	0 - Due Immediately	HVAC System	\$	121,487.52
Teenage Parent	Main	Chiller - Reciprocating - Air-Cooled 100 Tons Renewa	0 - Due Immediately	HVAC System	\$	160,875.12
Teenage Parent	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	114,273.60
Teenage Parent	Site - Teenage Paren	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	21,067.20
Teenage Parent	Main	Fire Alarm System - Average Density Renewal	4 - Due within 4 Years of In	Special Systems System	\$	47,476.80
					<b>Exterior Enclosure</b>	<b>\$ 2,967,662.88</b>
					<b>HVAC System</b>	<b>\$ 1,893,894.16</b>
					<b>Security</b>	<b>\$ 1,125,720.96</b>
					<b>Special Systems System</b>	<b>\$ 188,380.08</b>
					<b>Total</b>	<b>\$ 6,175,658.08</b>

Banks	Main	Replace kitchen air unit	7 - Due within 7 Years of In	HVAC System	\$ 48,038.00
Banks	Site - Banks	Replace kitchen air unit	7 - Due within 7 Years of In	HVAC System	\$ 80,703.84
Banks	Site - Banks	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$ 34,913.76
Banks	Site - Banks	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$ 33,996.48
Banks	Site - Banks	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$ 31,351.00
Banks	Site - Banks	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$ 37,045.68
Banks	Site - Banks	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$ 90,938.40
Banks	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Special Systems System	\$ 64,720.32
Blenman	Library	Paint Roof	1- Due within 1 Year of Ins	Exterior Enclosure	\$ 39,144.00
Blenman	Main	Paint Roof	0 - Due Immediately	Exterior Enclosure	\$ 298,183.20
Blenman	Library	Roofop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	1- Due within 1 Year of Ins	HVAC System	\$ 28,151.76
Blenman	Activities Center	Roofop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$ 42,386.40
Blenman	Main	DDC System - Average Renewal	2- Due within 2 Years of In	HVAC System	\$ 177,730.56
Blenman	Main	Roofop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	3- Due within 3 Years of In	HVAC System	\$ 393,158.64
Blenman	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$ 36,442.56
Blenman	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$ 49,244.16
Blenman	Site - Blenman	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$ 33,996.48
Blenman	Site - Blenman	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$ 45,615.36
Blenman	Site - Blenman	Site Development-Fence-Chain link Renewal	2- Due within 2 Years of In	Security	\$ 42,609.84
Blenman	Site - Blenman	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$ 85,911.84
Blenman	Main	Fire Alarm System - Average Density Renewal	1- Due within 1 Year of Ins	Special Systems System	\$ 71,438.64
Bloom	Site - Bloom	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$ 33,996.48
Bloom	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$ 93,534.00
Bloom	Main	Fan Coil System - Cabinet - Cooling Only - 2 Pipe - 20% Rep	2- Due within 2 Years of In	HVAC System	\$ 96,707.52
Bloom	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$ 33,781.44
Bloom	Main	Security System - Card Access System Renewal	0 - Due Immediately	Security	\$ 45,677.52
Bloom	Site - Bloom	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$ 50,873.76
Bloom	Site - Bloom	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$ 37,045.68
Bloom	Site - Bloom	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$ 87,837.12
Bloom	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$ 33,304.32
Bonillas	Site - Bonillas	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$ 33,996.48
Bonillas	Main	DX Condensing Unit - 25 Tons Renewal	5 - Due within 5 Years of In	HVAC System	\$ 33,853.68
Bonillas	Main	Roofop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$ 441,579.60
Bonillas	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$ 40,667.76
Bonillas	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$ 60,841.20
Bonillas	Site - Bonillas	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$ 55,697.04
Bonillas	Site - Bonillas	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$ 37,803.36
Bonillas	Site - Bonillas	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$ 96,163.20
Bonillas	Main	Intercom System Renewal	1- Due within 1 Year of Ins	Special Systems System	\$ 22,179.36
Borman	Site - Borman	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$ 33,996.48
Borman	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$ 74,827.20
Borman	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	0 - Due Immediately	HVAC System	\$ 137,188.80
Borman	Main	DDC System - Average Renewal	2- Due within 2 Years of In	HVAC System	\$ 141,847.44
Borman	Main	Chiller - Reciprocating - Air-Cooled 100 Tons Renewa	2- Due within 2 Years of In	HVAC System	\$ 241,311.84
Borman	Main	Central AHU - VAV System w/Distribution - 20% Repair/Re	5 - Due within 5 Years of In	HVAC System	\$ 677,139.12
Borman	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$ 35,125.44
Borman	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$ 56,147.28
Borman	Main	Security System - Burglar Alarm System Renewa	0 - Due Immediately	Security	\$ 77,290.08
Borman	Site - Borman	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$ 54,082.56
Borman	Site - Borman	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$ 24,067.68



Borman	Site - Borman	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	93,376.08
Borman	Main	Intercom System Renewal	1- Due within 1 Year of In	Special Systems System	\$	20,469.12
Borton	Main	Moderate Repair Terra Cotta and Clay Tile Roofing	2- Due within 2 Years of In	Exterior Enclosure	\$	16,309.44
Borton	Site - Borton	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Borton	Main	Paint Roof	3- Due within 3 Years of In	Exterior Enclosure	\$	327,600.00
Borton	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$	265,613.04
Borton	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	33,269.04
Borton	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	35,846.16
Borton	Site - Borton	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	32,954.88
Borton	Site - Borton	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	17,895.36
Borton	Site - Borton	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	56,896.56
Carrillo	Main	Paint Roof	2- Due within 2 Years of In	Exterior Enclosure	\$	134,400.00
Carrillo	Main	Chiller - Reciprocating - Air-Cooled 80 Tons Renewal	2- Due within 2 Years of In	HVAC System	\$	159,863.76
Carrillo	Main	Chiller - Reciprocating - Air-Cooled 80 Tons Renewal	2- Due within 2 Years of In	HVAC System	\$	159,863.76
Carrillo	Main	DDC System - Average Renewal	3- Due within 3 Years of In	HVAC System	\$	164,480.40
Carrillo	Main	Central AHU - VAV System w/Distribution - 20% Repair/ref	3- Due within 3 Years of In	HVAC System	\$	273,781.20
Carrillo	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,659.44
Carrillo	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	52,585.68
Carrillo	Site - Carrillo	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$	33,996.48
Carrillo	Site - Carrillo	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	42,478.80
Carrillo	Site - Carrillo	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	26,796.00
Carrillo	Site - Carrillo	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	73,342.08
Carrillo	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In	Special Systems System	\$	84,761.04
Cavett	Site - Cavett	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Cavett	Main	Paint roof	2- Due within 2 Years of In	Exterior Enclosure	\$	797,647.20
Cavett	Main	DX Condensing Unit - 1.5 Tons Renewal	2- Due within 2 Years of In	HVAC System	\$	3,706.08
Cavett	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	3- Due within 3 Years of In	HVAC System	\$	525,853.44
Cavett	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,951.76
Cavett	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	65,866.08
Cavett	Site - Cavett	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	48,493.20
Cavett	Site - Cavett	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	40,881.12
Cavett	Site - Cavett	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	83,726.16
Cavett	Main	Intercom System Renewal	2- Due within 2 Years of In	Special Systems System	\$	19,209.12
Collier	Site - Collier	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Collier	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$	65,474.64
Collier	Main	Chiller - Reciprocating - Air-Cooled 100 Tons Renewa	2- Due within 2 Years of In	HVAC System	\$	241,311.84
Collier	Main	Central AHU - VAV System w/Distribution - 30% Repair/ref	5 - Due within 5 Years of In	HVAC System	\$	243,769.68
Collier	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	21,989.52
Collier	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,021.04
Collier	Site - Collier	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	50,248.80
Collier	Site - Collier	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	32,027.52
Collier	Site - Collier	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	86,756.88
Collier	Main	Intercom System Renewal	2- Due within 2 Years of In	Special Systems System	\$	25,651.92
Cragin	Main	Renewal	0 - Due Immediately	Exterior Enclosure	\$	886,194.96
Cragin	Main	DDC System - Average Renewal	3- Due within 3 Years of In	HVAC System	\$	171,496.08
Cragin	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$	424,470.48
Cragin	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,069.76
Cragin	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	73,105.20
Cragin	Site - Cragin	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$	33,996.48
Cragin	Site - Cragin	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	52,871.28

Cragin	Site - Cragin	Site Development - Fencing - Chain Link Renewal	2- Due within 2 Years of In	Security	\$	41,472.48
Cragin	Site - Cragin	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	91,286.16
Cragin	Main	Intercom System Renewal	2- Due within 2 Years of In	Special Systems System	\$	21,320.88
Cragin	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In	Special Systems System	\$	70,701.12
Davidson	Site - Davidson	DDC System - Average Renewal	5- Due within 5 Years of In	HVAC System	\$	97,718.88
Davidson	Site - Davidson	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,436.00
Davidson	Site - Davidson	Automatic Openers - Single Renewal	2- Due within 2 Years of In	Security	\$	33,996.48
Davidson	Site - Davidson	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	51,379.44
Davidson	Site - Davidson	Site Development - Fencing - Chain Link Renewal	2- Due within 2 Years of In	Security	\$	34,513.92
Davidson	Site - Davidson	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	88,707.36
Davis	Main	DDC System - Average Renewal	2- Due within 2 Years of In	HVAC System	\$	97,905.36
Davis	Main	Roofstop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewal	5- Due within 5 Years of In	HVAC System	\$	360,961.44
Davis	Main	Security System - Burglar Alarm System Renewal	0- Due Immediately	Security	\$	9,335.76
Davis	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,017.68
Davis	Main	Security System - Card Access System Renewal	0- Due Immediately	Security	\$	54,253.92
Davis	Site - Davis	Automatic Openers - Single Renewal	2- Due within 2 Years of In	Security	\$	33,996.48
Davis	Site - Davis	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	32,086.32
Davis	Site - Davis	Site Development - Fencing - Chain Link Renewal	2- Due within 2 Years of In	Security	\$	21,897.12
Davis	Site - Davis	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	55,398.00
Davis	Main	Intercom System Renewal	3- Due within 3 Years of In	Special Systems System	\$	19,778.64
Davis	Main	Fire Alarm System - Average Density Renewal	0- Due Immediately	Special Systems System	\$	65,588.88
Drachman	Main	DDC System - Average Renewal	3- Due within 3 Years of In	HVAC System	\$	117,181.68
Drachman	Main	Roofstop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewal	5- Due within 5 Years of In	HVAC System	\$	471,303.84
Drachman	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,316.72
Drachman	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	49,951.44
Drachman	Site - Drachman	Automatic Openers - Single Renewal	2- Due within 2 Years of In	Security	\$	34,592.88
Drachman	Site - Drachman	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	53,034.24
Drachman	Site - Drachman	Site Development - Fencing - Chain Link Renewal	2- Due within 2 Years of In	Security	\$	36,691.20
Drachman	Site - Drachman	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	91,565.04
Drachman	Main	Intercom System Renewal	2- Due within 2 Years of In	Special Systems System	\$	21,851.76
Dunham	Main	Paint Roof	0- Due Immediately	Exterior Enclosure	\$	565,975.20
Dunham	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$	65,474.64
Dunham	Main	Cooling Tower - Stainless Steel - 110 Ton Renewal	2- Due within 2 Years of In	HVAC System	\$	143,228.40
Dunham	Main	Central AHU - VAV System w/Distribution - 20% Repair/ref	3- Due within 3 Years of In	HVAC System	\$	151,228.56
Dunham	Main	Chiller - Centrifugal wo Cooling Tower - 100 Ton Renewal	2- Due within 2 Years of In	HVAC System	\$	220,523.52
Dunham	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	43,058.40
Dunham	Main	Security System - Card Access System Renewal	1- Due within 1 Year of In	Security	\$	56,081.76
Dunham	Site - Dunham	Automatic Openers - Single Renewal	2- Due within 2 Years of In	Security	\$	33,996.48
Dunham	Site - Dunham	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	48,493.20
Dunham	Site - Dunham	Site Development - Fencing - Chain Link Renewal	2- Due within 2 Years of In	Security	\$	28,287.84
Dunham	Site - Dunham	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	83,726.16
Dunham	Main	Intercom System Renewal	1- Due within 1 Year of In	Special Systems System	\$	20,445.60
Dunham	Main	Fire Alarm System - Average Density Renewal	1- Due within 1 Year of In	Special Systems System	\$	67,798.08
Erickson	Main	Metal Roofing - Economy Renewal	2- Due within 2 Years of In	Exterior Enclosure	\$	106,443.12
Erickson	Classroom Addition	Paint Roof	1- Due within 1 Year of In	Exterior Enclosure	\$	282,979.20
Erickson	Main	Paint Roof	1- Due within 1 Year of In	Exterior Enclosure	\$	579,734.40
Erickson	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$	70,150.08
Erickson	Main	Cooling Tower - Stainless Steel - 110 Ton Renewal	1- Due within 1 Year of In	HVAC System	\$	119,355.60
Erickson	Classroom Addition	Central AHU - VAV System w/Distribution - 30% Repair/ref	3- Due within 3 Years of In	HVAC System	\$	157,998.96
Erickson	Main	Chiller - Reciprocating - Air-Cooled 80 Tons Renewal	1- Due within 1 Year of In	HVAC System	\$	159,863.76

Erickson	Main	Chiller - Reciprocating - Air-Cooled 100 Tons Renewa	1- Due within 1 Year of Ins	HVAC System	\$	201,094.32
Erickson	Main	Central AHU - VAV System w/Distribution - 30% Repair/rep	4- Due within 4 Years of Ins	HVAC System	\$	315,997.92
Erickson	Main	Security System - CCTV Renewal	2- Due within 2 Years of Ins	Security	\$	44,567.04
Erickson	Main	Security System - Card Access System Renewal	2- Due within 2 Years of Ins	Security	\$	57,445.92
Erickson	Site - Erickson	Automatic Openers - Single Renewa	2- Due within 2 Years of Ins	Security	\$	33,996.48
Erickson	Site - Erickson	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rep	2- Due within 2 Years of Ins	Security	\$	41,974.80
Erickson	Site - Erickson	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of Ins	Security	\$	37,282.56
Erickson	Site - Erickson	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of Ins	Security	\$	72,471.84
Erickson	Main	Intercom System Renewal	2- Due within 2 Years of Ins	Special Systems System	\$	20,942.88
Erickson	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of Ins	Special Systems System	\$	57,872.64
Ford	Main	Repair Aluminum Gutters and Downspouts on High-Rise St	2- Due within 2 Years of Ins	Exterior Enclosure	\$	5,633.04
Ford	Site - Ford	Automatic Openers - Single Renewa	2- Due within 2 Years of Ins	Exterior Enclosure	\$	33,996.48
Ford	Main	Paint Roof	2- Due within 2 Years of Ins	Exterior Enclosure	\$	618,189.60
Ford	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	1- Due within 1 Year of Ins	HVAC System	\$	74,827.20
Ford	Main	DDC System - Average Renewal	2- Due within 2 Years of Ins	HVAC System	\$	114,224.88
Ford	Main	Cooling Tower - Stainless Steel - 110 Ton Renewal	2- Due within 2 Years of Ins	HVAC System	\$	119,355.60
Ford	Main	Central AHU - VAV System w/Distribution - 20% repair/rep	2- Due within 2 Years of Ins	HVAC System	\$	167,027.28
Ford	Main	Chiller - Screw type 130 Ton Renewal	0 - Due Immediately	HVAC System	\$	242,281.20
Ford	Main	Security System - CCTV Renewal	2- Due within 2 Years of Ins	Security	\$	44,128.56
Ford	Main	Security System - Card Access System Renewal	2- Due within 2 Years of Ins	Security	\$	61,256.16
Ford	Site - Ford	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rep	2- Due within 2 Years of Ins	Security	\$	51,520.56
Ford	Site - Ford	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of Ins	Security	\$	40,763.52
Ford	Site - Ford	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of Ins	Security	\$	88,950.96
Ford	Main	Intercom System Renewal	3- Due within 3 Years of Ins	Special Systems System	\$	22,332.24
Fruchthandler	Main	Gutters and Downspouts - Aluminum Renewal	3- Due within 3 Years of Ins	Exterior Enclosure	\$	6,772.08
Fruchthandler	Site - Fruchthandler	Automatic Openers - Single Renewa	2- Due within 2 Years of Ins	Exterior Enclosure	\$	33,996.48
Fruchthandler	Main	Paint Roof	1- Due within 1 Year of Ins	Exterior Enclosure	\$	645,422.40
Fruchthandler	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	1- Due within 1 Year of Ins	HVAC System	\$	65,474.64
Fruchthandler	Main	Cooling Tower - Stainless Steel - 110 Ton Renewal	2- Due within 2 Years of Ins	HVAC System	\$	119,355.60
Fruchthandler	Main	Central AHU - VAV System w/Distribution - 20% Repair/re	3- Due within 3 Years of Ins	HVAC System	\$	180,569.76
Fruchthandler	Main	Chiller - Reciprocating - Air-Cooled 100 Tons Renewa	3- Due within 3 Years of Ins	HVAC System	\$	221,203.92
Fruchthandler	Main	Security System - CCTV Renewal	2- Due within 2 Years of Ins	Security	\$	42,435.12
Fruchthandler	Main	Security System - Card Access System Renewal	3- Due within 3 Years of Ins	Security	\$	63,954.24
Fruchthandler	Site - Fruchthandler	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rep	2- Due within 2 Years of Ins	Security	\$	53,376.96
Fruchthandler	Site - Fruchthandler	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of Ins	Security	\$	34,230.00
Fruchthandler	Site - Fruchthandler	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of Ins	Security	\$	92,156.40
Fruchthandler	Main	Intercom System Renewal	3- Due within 3 Years of Ins	Special Systems System	\$	23,315.04
Fruchthandler	Main	Fire Alarm System - Average Density Renewal	1- Due within 1 Year of Ins	Special Systems System	\$	64,429.68
Gale	Main	Paint Flashing	2- Due within 2 Years of Ins	Exterior Enclosure	\$	2,520.00
Gale	Main	Paint flashing	3- Due within 3 Years of Ins	Exterior Enclosure	\$	3,024.00
Gale	Site - Gale	Automatic Openers - Single Renewa	2- Due within 2 Years of Ins	Exterior Enclosure	\$	33,996.48
Gale	Main	Paint Roof	1- Due within 1 Year of Ins	Exterior Enclosure	\$	553,509.60
Gale	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	3- Due within 3 Years of Ins	HVAC System	\$	65,474.64
Gale	Main	Fan Coil System - Cabinet - Heating/Cooling - 4 Pipe 20% r	5 - Due within 5 Years of Ins	HVAC System	\$	112,645.68
Gale	Main	Cooling Tower - Stainless Steel - 110 Ton Renewal	2- Due within 2 Years of Ins	HVAC System	\$	143,228.40
Gale	Main	Chiller - Reciprocating - Air-Cooled 100 Tons Renewa	2- Due within 2 Years of Ins	HVAC System	\$	241,311.84
Gale	Main	Security System - Burglar Alarm System Renewa	1- Due within 1 Year of Ins	Security	\$	12,583.20
Gale	Main	Security System - CCTV Renewal	2- Due within 2 Years of Ins	Security	\$	44,189.04
Gale	Main	Security System - Card Access System Renewal	2- Due within 2 Years of Ins	Security	\$	54,846.96
Gale	Site - Gale	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rep	2- Due within 2 Years of Ins	Security	\$	48,331.92
Gale	Site - Gale	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of Ins	Security	\$	33,993.12

Gale	Site - Gale	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	83,447.28
Gale	Main	Intercom System Renewal	3- Due within 3 Years of In	Special Systems System	\$	19,995.36
Gale	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In	Special Systems System	\$	66,306.24
Grijalva	Main	Minor Repair Asphalt Shingled Roofing	1- Due within 1 Year of In	Exterior Enclosure	\$	3,620.40
Grijalva	Site - Grijalva	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Grijalva	Main	Paint Roof	4 - Due within 4 Years of In	Exterior Enclosure	\$	109,200.00
Grijalva	Main	DX Condensing Unit - Less Than 25 Tons Renewal	4 - Due within 4 Years of In	HVAC System	\$	44,481.36
Grijalva	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	0 - Due Immediately	HVAC System	\$	74,827.20
Grijalva	Main	Boiler HW - Gas-Fired - 1M BTU Renewal	5 - Due within 5 Years of In	HVAC System	\$	93,456.72
Grijalva	Main	DX Condensing Unit - Greater Than 25 Tons Renewal	3- Due within 3 Years of In	HVAC System	\$	93,660.00
Grijalva	Main	Central AHU - VAV System w/Distribution - 25% Repair/replace	4 - Due within 4 Years of In	HVAC System	\$	225,713.04
Grijalva	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,101.68
Grijalva	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	56,530.32
Grijalva	Site - Grijalva	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Repair	2- Due within 2 Years of In	Security	\$	40,924.80
Grijalva	Site - Grijalva	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	57,760.08
Grijalva	Site - Grijalva	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	70,659.12
Grijalva	Main	Intercom System Renewal	3- Due within 3 Years of In	Special Systems System	\$	16,487.52
Henry	Main	Paint Roof	1- Due within 1 Year of In	Exterior Enclosure	\$	67,200.00
Henry	Main	Fan Coil System - Cabinet - Cooling Only - 20% Repair/replace	3- Due within 3 Years of In	HVAC System	\$	62,487.60
Henry	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$	70,150.08
Henry	Main	DDC System - Average Renewal	4 - Due within 4 Years of In	HVAC System	\$	102,370.80
Henry	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,231.04
Henry	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	54,899.04
Henry	Site - Henry	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$	33,996.48
Henry	Site - Henry	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Repair	2- Due within 2 Years of In	Security	\$	45,586.80
Henry	Site - Henry	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	34,087.20
Henry	Site - Henry	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	78,708.00
Henry	Main	Intercom System Renewal	2- Due within 2 Years of In	Special Systems System	\$	20,013.84
Henry	Main	Fire Alarm System - Average Density Renewal	1- Due within 1 Year of In	Special Systems System	\$	55,307.28
Holladay	Library	Gutters and Downspouts - Aluminum Renewal	5 - Due within 5 Years of In	Exterior Enclosure	\$	4,740.96
Holladay	Site - Holladay	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Holladay	Library	Paint Roof	3- Due within 3 Years of In	Exterior Enclosure	\$	42,403.20
Holladay	Main	Paint roof	6 - Due within 6 Years of In	Exterior Enclosure	\$	84,000.00
Holladay	Main	Repair Roofing	5 - Due within 5 Years of In	Exterior Enclosure	\$	336,000.00
Holladay	Library	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewal	5 - Due within 5 Years of In	HVAC System	\$	20,331.36
Holladay	Classroom Addition	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewal	5 - Due within 5 Years of In	HVAC System	\$	42,851.76
Holladay	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewal	5 - Due within 5 Years of In	HVAC System	\$	336,168.00
Holladay	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,432.64
Holladay	Main	Security System - Card Access System Renewal	0 - Due Immediately	Security	\$	50,176.56
Holladay	Site - Holladay	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Repair	2- Due within 2 Years of In	Security	\$	8,979.60
Holladay	Site - Holladay	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	15,504.72
Holladay	Site - Holladay	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	17,634.96
Holladay	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$	28,141.68
Howell	Main	Minor Repair Asphalt Shingled Roofing	0 - Due Immediately	Exterior Enclosure	\$	3,620.40
Howell	Site - Howell	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Howell	Activities Center	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewal	5 - Due within 5 Years of In	HVAC System	\$	28,155.12
Howell	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewal	5 - Due within 5 Years of In	HVAC System	\$	358,443.12
Howell	Main	Security System - Burglar Alarm System Renewa	0 - Due Immediately	Security	\$	13,596.24
Howell	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	43,975.68
Howell	Main	Security System - Card Access System Renewal	0 - Due Immediately	Security	\$	49,386.96

Howell	Site - Howell	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	47,423.04
Howell	Site - Howell	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	38,419.92
Howell	Site - Howell	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	81,878.16
Howell	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$	21,604.80
Howell	Main	Fire Alarm System - Average Density Renewal	0 - Due Immediately	Special Systems System	\$	59,703.84
Hudlow	Main	Gutters and Downspouts - Aluminum Renewal	4 - Due within 4 Years of In	Exterior Enclosure	\$	6,772.08
Hudlow	Main	Paint Roof	2- Due within 2 Years of In	Exterior Enclosure	\$	8,064.00
Hudlow	Site - Hudlow	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Hudlow	Main	Paint Roof	1- Due within 1 Year of Ins	Exterior Enclosure	\$	574,173.60
Hudlow	Main	Rooftop Unitary AC - Cooling w/Gas Heat > 10 Ton Renewa	3- Due within 3 Years of In	HVAC System	\$	75,909.12
Hudlow	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	3- Due within 3 Years of In	HVAC System	\$	338,306.64
Hudlow	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,224.32
Hudlow	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	47,412.96
Hudlow	Site - Hudlow	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	51,196.32
Hudlow	Site - Hudlow	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	36,501.36
Hudlow	Site - Hudlow	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	88,394.88
Hudlow	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$	20,741.28
Hughes	Main	Minor Repair Terra Cotta and Clay Tile Roofing	1- Due within 1 Year of Ins	Exterior Enclosure	\$	15.12
Hughes	Site - Hughes	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Hughes	Main	DDC System - Average Renewal	4 - Due within 4 Years of In	HVAC System	\$	90,219.36
Hughes	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5- Due within 5 Years of In	HVAC System	\$	311,025.12
Hughes	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	42,853.44
Hughes	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,274.72
Hughes	Site - Hughes	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	33,237.12
Hughes	Site - Hughes	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	30,418.08
Hughes	Site - Hughes	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	57,385.44
Hughes	Site - Hughes	~Roadway - Traffic Control - Painted Pavement Markings Re	5 - Due within 5 Years of In	Site	\$	2,150.40
Hughes	Main	Intercom System Renewal	2- Due within 2 Years of In	Special Systems System	\$	20,830.32
Hughes	Main	Fire Alarm System - Average Density Renewal	1- Due within 1 Year of Ins	Special Systems System	\$	51,806.16
Johnson	Site - Johnson	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Johnson	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	4 - Due within 4 Years of In	HVAC System	\$	401,787.12
Johnson	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,076.48
Johnson	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	69,197.52
Johnson	Site - Johnson	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	50,531.04
Johnson	Site - Johnson	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	39,555.60
Johnson	Site - Johnson	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	87,244.08
Johnson	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$	20,181.84
Johnson	Main	Fire Alarm System - Average Density Renewal	0 - Due Immediately	Special Systems System	\$	66,922.80
Kellond	Site - Kellond	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Kellond	Library	Paint Roof	0 - Due Immediately	Exterior Enclosure	\$	63,604.80
Kellond	Main	Moderate Repair BUR (Built-Up Roofing)	0 - Due Immediately	Exterior Enclosure	\$	83,160.00
Kellond	Library	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	4 - Due within 4 Years of In	HVAC System	\$	15,247.68
Kellond	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	5 - Due within 5 Years of In	HVAC System	\$	137,188.80
Kellond	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	5 - Due within 5 Years of In	HVAC System	\$	137,188.80
Kellond	Main	Central AHU - VAV System w/Distribution - 20% Repair/Re	3- Due within 3 Years of In	HVAC System	\$	225,713.04
Kellond	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$	436,805.04
Kellond	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,318.40
Kellond	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	46,809.84
Kellond	Site - Kellond	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	46,939.20
Kellond	Site - Kellond	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	40,810.56

Elementary

Kellond	Site - Kellond	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	81,043.20
Lawrence	Main	Gutters and Downspouts - Aluminum Renewal	5 - Due within 5 Years of In	Exterior Enclosure	\$	6,772.08
Lawrence	Main	Reglet Counter Flashing Renewal	5 - Due within 5 Years of In	Exterior Enclosure	\$	12,033.84
Lawrence	Site - Lawrence	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Lawrence	Main	BUR (Built-Up Roofing) Renewa	1- Due within 1 Year of In	Exterior Enclosure	\$	1,320,031.44
Lawrence	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	43,997.52
Lawrence	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	48,350.40
Lawrence	Site - Lawrence	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	71,053.92
Lawrence	Site - Lawrence	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	34,915.44
Lawrence	Site - Lawrence	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	122,678.64
Lawrence	Main	Fire Alarm System - Average Density Renewal	0 - Due Immediately	Special Systems System	\$	66,801.84
Lineweaver	Site - Lineweaver	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Lineweaver	Main	Paint Roof	1- Due within 1 Year of In	Exterior Enclosure	\$	612,948.00
Lineweaver	Main	RoofTop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	4 - Due within 4 Years of In	HVAC System	\$	367,353.84
Lineweaver	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,662.80
Lineweaver	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	50,613.36
Lineweaver	Site - Lineweaver	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	54,163.20
Lineweaver	Site - Lineweaver	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	48,599.04
Lineweaver	Site - Lineweaver	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	93,515.52
Lineweaver	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$	22,142.40
Lynn/Urquides	Main	Moderate Repair Asphalt Shingled Roofing	1- Due within 1 Year of In	Exterior Enclosure	\$	5,431.44
Lynn/Urquides	Site - Lynn/Urquides	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Lynn/Urquides	Main	Paint Roof	3- Due within 3 Years of In	Exterior Enclosure	\$	37,800.00
Lynn/Urquides	Main	Paint Roof	1- Due within 1 Year of In	Exterior Enclosure	\$	67,200.00
Lynn/Urquides	Classroom Addition	Fan Coil System - Cabinet - Heating/Cooling - 4 Pipe - 20%	5 - Due within 5 Years of In	HVAC System	\$	44,138.64
Lynn/Urquides	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	1- Due within 1 Year of In	HVAC System	\$	70,150.08
Lynn/Urquides	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	0 - Due Immediately	HVAC System	\$	150,907.68
Lynn/Urquides	Main	Fan Coil System - Cabinet - Heating/Cooling - 4 Pipe 50% R	4 - Due within 4 Years of In	HVAC System	\$	321,846.00
Lynn/Urquides	Main	Chiller - Reciprocating - Air-Cooled 210 Tons Renewa	1- Due within 1 Year of In	HVAC System	\$	346,162.32
Lynn/Urquides	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,896.32
Lynn/Urquides	Main	Security System - Card Access System Renewal	4 - Due within 4 Years of In	Security	\$	54,810.00
Lynn/Urquides	Site - Lynn/Urquides	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	68,612.88
Lynn/Urquides	Site - Lynn/Urquides	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	70,731.36
Lynn/Urquides	Site - Lynn/Urquides	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	118,463.52
Maldonado	Site - Maldonado	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Maldonado	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$	93,534.00
Maldonado	Main	Central AHU - VAV System w/Distribution - 25% Repair/Re	3- Due within 3 Years of In	HVAC System	\$	225,713.04
Maldonado	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,101.68
Maldonado	Main	Security System - Card Access System Renewal	1- Due within 1 Year of In	Security	\$	56,530.32
Maldonado	Site - Maldonado	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	53,074.56
Maldonado	Site - Maldonado	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	41,993.28
Maldonado	Site - Maldonado	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	91,633.92
Maldonado	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$	20,608.56
Manzo	Main	Moderate Repair Terra Cocta and Clay Tile Roofing	0 - Due Immediately	Exterior Enclosure	\$	24,464.16
Manzo	Site - Manzo	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Manzo	Main	DDC System - Average Renewal	3- Due within 3 Years of In	HVAC System	\$	127,159.20
Manzo	Main	Security System - Burglar Alarm System Renewa	0 - Due Immediately	Security	\$	13,856.64
Manzo	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,210.88
Manzo	Main	Security System - Card Access System Renewal	0 - Due Immediately	Security	\$	50,332.80
Manzo	Site - Manzo	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	26,030.00

Manzo	Site - Manzo	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	35,673.12
Manzo	Site - Manzo	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	75,502.56
Manzo	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$	18,348.96
Manzo	Main	Fire Alarm System - Average Density Renewal	0 - Due Immediately	Special Systems System	\$	73,017.84
Marshall	Site - Marshall	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Marshall	Main	Moderate Repair Metal Roofing - High End	1- Due within 1 Year of In	Exterior Enclosure	\$	126,725.76
Marshall	Main	DDC System - Average Renewal	4 - Due within 4 Years of In	HVAC System	\$	143,171.28
Marshall	Main	RoofTop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$	417,947.04
Marshall	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,394.00
Marshall	Main	Security System - Card Access System Renewal	4 - Due within 4 Years of In	Security	\$	63,982.80
Marshall	Site - Marshall	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Refr	2- Due within 2 Years of In	Security	\$	50,450.40
Marshall	Site - Marshall	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	35,412.72
Marshall	Site - Marshall	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	87,104.64
Miller	Main	Repair Roof Hatch	0 - Due Immediately	Exterior Enclosure	\$	351.12
Miller	Main	Roof Hatch Replacement Renewal	0 - Due Immediately	Exterior Enclosure	\$	5,468.40
Miller	Main	Roof Hatch - Repair Renewa	5 - Due within 5 Years of In	Exterior Enclosure	\$	5,468.40
Miller	Site - Miller	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Miller	Main	BUR (Built-Up Roofing) Renewa	0 - Due Immediately	Exterior Enclosure	\$	37,116.24
Miller	Main	Asphalt Shingled Roofing Renewal	0 - Due Immediately	Exterior Enclosure	\$	572,591.04
Miller	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	1- Due within 1 Year of In	HVAC System	\$	74,827.20
Miller	Main	Central AHU - VAV System w/Distribution - 30% Repair/re	3- Due within 3 Years of In	HVAC System	\$	325,026.24
Miller	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,595.60
Miller	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	55,201.44
Miller	Site - Miller	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Refr	2- Due within 2 Years of In	Security	\$	51,318.96
Miller	Site - Miller	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	49,237.44
Miller	Site - Miller	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	88,603.20
Mission View	Main	Moderate Repair Terra Cotta and Clay Tile Roofing	1- Due within 1 Year of In	Exterior Enclosure	\$	1,631.28
Mission View	Main	Metal Roofing - Economy Renewal	7 - Due within 7 Years of In	Exterior Enclosure	\$	4,094.16
Mission View	Site - Mission View	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Mission View	Main	Paint roof	1- Due within 1 Year of In	Exterior Enclosure	\$	168,000.00
Mission View	Main	Paint Roof	3- Due within 3 Years of In	Exterior Enclosure	\$	168,000.00
Mission View	Main	RoofTop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$	387,455.04
Mission View	Main	Water Dist Complete - Average Renewal	2- Due within 2 Years of In	Plumbing System	\$	64,967.28
Mission View	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In	Security	\$	12,247.20
Mission View	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	42,504.00
Mission View	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	59,315.76
Mission View	Site - Mission View	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Refr	2- Due within 2 Years of In	Security	\$	33,801.60
Mission View	Site - Mission View	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	34,891.92
Mission View	Site - Mission View	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	58,359.84
Mission View	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$	17,298.96
Mission View	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In	Special Systems System	\$	57,365.28
Myers/Ganoung	Site - Myers/Ganoun	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Myers/Ganoung	Main	Paint roof surface	0 - Due Immediately	Exterior Enclosure	\$	201,600.00
Myers/Ganoung	Main	BUR (Built-Up Roofing) Renewa	0 - Due Immediately	Exterior Enclosure	\$	1,007,435.52
Myers/Ganoung	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$	28,061.04
Myers/Ganoung	Classroom Addition	RoofTop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	2- Due within 2 Years of In	HVAC System	\$	61,257.84
Myers/Ganoung	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	5 - Due within 5 Years of In	HVAC System	\$	137,188.80
Myers/Ganoung	Main	DDC System - Average Renewal	3- Due within 3 Years of In	HVAC System	\$	189,255.36
Myers/Ganoung	Main	Chiller - Screw type 130 Ton Renewal	1- Due within 1 Year of In	HVAC System	\$	242,281.20
Myers/Ganoung	Main	Central AHU - VAV System w/Distribution - 50% Repair/refr	3- Due within 3 Years of In	HVAC System	\$	802,636.80

Myers/Ganoung	Main	Security System - Burglar Alarm System Renewal	2- Due within 2 Years of In	Security	\$	9,624.72
Myers/Ganoung	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,825.76
Myers/Ganoung	Main	Security System - Card Access System Renewal	0 - Due Immediately	Security	\$	69,918.24
Myers/Ganoung	Site - Myers/Ganoung	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	50,652.00
Myers/Ganoung	Site - Myers/Ganoung	Site Development - Fencing - Chain Link Renewal	2- Due within 2 Years of In	Security	\$	44,693.04
Myers/Ganoung	Site - Myers/Ganoung	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	87,454.08
Ochoa	Library	Gutters and Downspouts - Aluminum Renewal	5 - Due within 5 Years of In	Exterior Enclosure	\$	1,354.08
Ochoa	Main	Moderate Repair Terra Cotta and Clay Tile Roofing	1- Due within 1 Year of In	Exterior Enclosure	\$	16,309.44
Ochoa	Site - Ochoa	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Ochoa	Library	BUR (Built-Up Roofing) Renewa	5 - Due within 5 Years of In	Exterior Enclosure	\$	47,796.00
Ochoa	Main	Paint Roof	1- Due within 1 Year of In	Exterior Enclosure	\$	50,400.00
Ochoa	Library	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$	14,231.28
Ochoa	Activities Center	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$	30,276.96
Ochoa	Classroom Addition	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	1- Due within 1 Year of In	HVAC System	\$	55,707.12
Ochoa	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	2- Due within 2 Years of In	HVAC System	\$	235,542.72
Ochoa	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In	Security	\$	9,927.12
Ochoa	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	43,270.08
Ochoa	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,602.32
Ochoa	Site - Ochoa	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	40,924.80
Ochoa	Site - Ochoa	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	34,016.64
Ochoa	Site - Ochoa	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	70,659.12
Ochoa	Main	Intercom System Renewal	1- Due within 1 Year of In	Special Systems System	\$	21,033.60
Ochoa	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In	Special Systems System	\$	52,310.16
Oyama	Site - Oyama	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Oyama	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,281.44
Oyama	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	74,867.52
Oyama	Site - Oyama	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	44,415.84
Oyama	Site - Oyama	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	29,732.64
Oyama	Site - Oyama	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	76,686.96
Robison	Main	Paint Roof	1- Due within 1 Year of In	Exterior Enclosure	\$	642,028.80
Robison	Main	DDC System - Average Renewal	3- Due within 3 Years of In	HVAC System	\$	133,936.32
Robison	Main	Sanitary Waste - Gravity Disch - Average Renewal	0 - Due Immediately	Plumbing System	\$	79,826.88
Robison	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,323.44
Robison	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	53,015.76
Robison	Site - Robison	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$	33,996.48
Robison	Site - Robison	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	45,465.84
Robison	Site - Robison	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	32,738.16
Robison	Site - Robison	Site Development - Wrought iron fencing Renewal	2- Due within 2 Years of In	Security	\$	78,499.68
Robison	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$	23,192.40
Robison	Main	Fire Alarm System - Average Density Renewal	0 - Due Immediately	Special Systems System	\$	64,090.32
Sewell	Main	Paint roof	1- Due within 1 Year of In	Exterior Enclosure	\$	621,482.40
Sewell	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	1- Due within 1 Year of In	HVAC System	\$	74,827.20
Sewell	Main	Rooftop Unitary AC - Cooling w/Gas Heat > 10 Ton Renewa	3- Due within 3 Years of In	HVAC System	\$	83,499.36
Sewell	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	4 - Due within 4 Years of In	HVAC System	\$	348,878.88
Sewell	Main	Security System - Burglar Alarm System Renewa	0 - Due Immediately	Security	\$	10,597.44
Sewell	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,362.08
Sewell	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	51,318.96
Sewell	Site - Sewell	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$	33,996.48
Sewell	Site - Sewell	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	64,031.52
Sewell	Site - Sewell	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	30,512.16



Sewell	Site - Sewell	Site Development-Wrought Iron Fencing Renewa	2- Due within 2 Years of In	Security	\$	110,554.08
Sewell	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$	22,449.84
Sewell	Main	Fire Alarm System - Average Density Renewal	0 - Due Immediately	Special Systems System	\$	62,040.72
Soleng Tom	Site - Soleng Tom	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Soleng Tom	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	0 - Due Immediately	HVAC System	\$	436,475.76
Soleng Tom	Main	Security System - Burglar Alarm System Renewa	1- Due within 1 Year of In	Security	\$	8,279.04
Soleng Tom	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,461.20
Soleng Tom	Main	Security System - Card Access System Renewal	1- Due within 1 Year of In	Security	\$	60,137.28
Soleng Tom	Site - Soleng Tom	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Re	2- Due within 2 Years of In	Security	\$	43,851.36
Soleng Tom	Site - Soleng Tom	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	43,911.84
Soleng Tom	Site - Soleng Tom	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	75,712.56
Soleng Tom	Main	Intercom System Renewal	1- Due within 1 Year of In	Special Systems System	\$	17,539.20
Soleng Tom	Main	Fire Alarm System - Average Density Renewal	1- Due within 1 Year of In	Special Systems System	\$	58,161.60
Steele	Main	Paint Roof	1- Due within 1 Year of In	Exterior Enclosure	\$	710,522.40
Steele	Main	DX Condensing Unit - 1.5 Tons Renewal	2- Due within 2 Years of In	HVAC System	\$	2,593.92
Steele	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	2- Due within 2 Years of In	HVAC System	\$	14,498.40
Steele	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	1- Due within 1 Year of In	HVAC System	\$	23,383.92
Steele	Main	Central AHU - VAV System w/Distribution - 30% Repair/Re	3- Due within 3 Years of In	HVAC System	\$	286,362.72
Steele	Main	Security System - Burglar Alarm System Renewa	1- Due within 1 Year of In	Security	\$	12,114.48
Steele	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,044.56
Steele	Main	Security System - Card Access System Renewal	1- Due within 1 Year of In	Security	\$	58,670.64
Steele	Site - Steele	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$	33,996.48
Steele	Site - Steele	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Re	2- Due within 2 Years of In	Security	\$	50,349.60
Steele	Site - Steele	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	39,177.60
Steele	Site - Steele	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	86,931.60
Steele	Main	Intercom System Renewal	1- Due within 1 Year of In	Special Systems System	\$	21,389.76
Steele	Main	Fire Alarm System - Average Density Renewal	1- Due within 1 Year of In	Special Systems System	\$	56,743.68
Tolson	Activities Center	Paint Roof	3- Due within 3 Years of In	Exterior Enclosure	\$	49,425.60
Tolson	Classroom Addition	Paint Roof	1- Due within 1 Year of In	Exterior Enclosure	\$	56,448.00
Tolson	Activities Center	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	4 - Due within 4 Years of In	HVAC System	\$	59,243.52
Tolson	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$	93,534.00
Tolson	Main	Fan Coil System - Cabinet - Cooling Only - 2 Pipe - 30% rep	4 - Due within 4 Years of In	HVAC System	\$	98,196.00
Tolson	Main	Chiller - Reciprocating - Air-Cooled 80 Tons Renewal	3- Due within 3 Years of In	HVAC System	\$	159,863.76
Tolson	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	43,997.52
Tolson	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	50,767.92
Tolson	Site - Tolson	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$	33,996.48
Tolson	Site - Tolson	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Re	2- Due within 2 Years of In	Security	\$	51,681.84
Tolson	Site - Tolson	Site Development - Fencing - Chain Link Renewa	4 - Due within 4 Years of In	Security	\$	39,555.60
Tolson	Site - Tolson	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	89,229.84
Tolson	Main	Intercom System Renewal	3- Due within 3 Years of In	Special Systems System	\$	22,209.60
Tolson	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In	Special Systems System	\$	73,649.52
Tully	Site - Tully	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Tully	Main	Paint Roof	1- Due within 1 Year of In	Exterior Enclosure	\$	760,620.00
Tully	Classroom Addition	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$	55,078.80
Tully	Main	DDC System - Average Renewal	3- Due within 3 Years of In	HVAC System	\$	158,676.00
Tully	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$	410,271.12
Tully	Main	Security System - Burglar Alarm System Renewa	3- Due within 3 Years of In	Security	\$	8,645.28
Tully	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,506.56
Tully	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	62,808.48
Tully	Site - Tully	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Re	2- Due within 2 Years of In	Security	\$	58,926.00

Tully	Site - Tully	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	38,964.24
Tully	Site - Tully	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	101,739.12
Tully	Main	Intercom System Renewal	2- Due within 2 Years of In	Special Systems System	\$	18,317.04
Tully	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In	Special Systems System	\$	60,743.76
Van Buskirk	Site - Van Buskirk	Automatic Openers - Single Renewa	0 - Due immediately	Exterior Enclosure	\$	33,996.48
Van Buskirk	Main	BUR (Built-Up Roofing) Renewa	0 - Due immediately	Exterior Enclosure	\$	159,069.12
Van Buskirk	Main	Paint roof	0 - Due immediately	Exterior Enclosure	\$	319,200.00
Van Buskirk	Main	Central AHU - VAV System w/Distribution - 20% Repair/Re	3- Due within 3 Years of In	HVAC System	\$	246,479.52
Van Buskirk	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	4 - Due within 4 Years of In	HVAC System	\$	385,465.92
Van Buskirk	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In	Security	\$	8,704.08
Van Buskirk	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,555.28
Van Buskirk	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	63,225.12
Van Buskirk	Site - Van Buskirk	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	10,815.84
Van Buskirk	Site - Van Buskirk	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	18,674.88
Van Buskirk	Site - Van Buskirk	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	34,134.24
Van Buskirk	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In	Special Systems System	\$	61,146.96
Vesey	Site - Vesey	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Vesey	Classroom Addition	Paint roof	4 - Due within 4 Years of In	Exterior Enclosure	\$	139,036.80
Vesey	Main	Security System - Burglar Alarm System Renewa	3- Due within 3 Years of In	Security	\$	10,817.52
Vesey	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,313.36
Vesey	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	52,385.76
Vesey	Site - Vesey	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	49,946.40
Vesey	Site - Vesey	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	62,138.16
Vesey	Site - Vesey	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	86,234.40
Vesey	Main	Intercom System Renewal	3- Due within 3 Years of In	Special Systems System	\$	15,277.92
Warren	Main	Replace cooling media	1- Due within 1 Year of Ins	HVAC System	\$	7,560.00
Warren	Main	Computer Room Cooling - DX w/Air Cooled Remote Conde	2- Due within 2 Years of In	HVAC System	\$	13,389.60
Warren	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$	18,706.80
Warren	Activities Center	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$	42,386.40
Warren	Main	Boiler HW - Gas-Fired - 1M BTU Renewal	2- Due within 2 Years of In	HVAC System	\$	93,456.72
Warren	Main	DDC System - Average Renewal	4 - Due within 4 Years of In	HVAC System	\$	99,576.96
Warren	Main	Central AHU - VAV System w/Distribution - Repair/Replac	4 - Due within 4 Years of In	HVAC System	\$	135,428.16
Warren	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,123.52
Warren	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	47,297.04
Warren	Site - Warren	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$	33,996.48
Warren	Site - Warren	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	47,423.04
Warren	Site - Warren	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	36,336.72
Warren	Site - Warren	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	81,878.16
Warren	Main	Intercom System Renewal	3- Due within 3 Years of In	Special Systems System	\$	17,243.52
Warren	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In	Special Systems System	\$	57,178.80
Wheeler	Main	Paint Roof	2- Due within 2 Years of In	Exterior Enclosure	\$	858,177.60
Wheeler	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	5 - Due within 5 Years of In	HVAC System	\$	116,610.48
Wheeler	Main	Central AHU - VAV System w/Distribution - 20% Repair/Re	3- Due within 3 Years of In	HVAC System	\$	270,856.32
Wheeler	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$	565,758.48
Wheeler	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,331.84
Wheeler	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	70,864.08
Wheeler	Site - Wheeler	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$	33,996.48
Wheeler	Site - Wheeler	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	47,019.84
Wheeler	Site - Wheeler	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	32,667.60
Wheeler	Site - Wheeler	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	81,182.64

Wheeler	Main	Intercom System Renewal	3- Due within 3 Years of In	Special Systems System	\$	20,667.36
Wheeler	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In	Special Systems System	\$	68,533.92
White	Classroom Addition	Paint roof	2- Due within 2 Years of In	Exterior Enclosure	\$	194,325.60
White	Main	Fan Coil System - Cabinet - Cooling Only - 2 Pipe - 20% Rep	3- Due within 3 Years of In	HVAC System	\$	62,487.60
White	Main	Boiler HW - Gas-Fired - 1M BTU Renewal	5 - Due within 5 Years of In	HVAC System	\$	93,456.72
White	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewal	5 - Due within 5 Years of In	HVAC System	\$	364,924.56
White	Main	Security System - Burglar Alarm System Renewa	3- Due within 3 Years of In	Security	\$	10,179.12
White	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	43,906.80
White	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	49,292.88
White	Site - White	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$	33,996.48
White	Site - White	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	53,417.28
White	Site - White	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	47,817.84
White	Site - White	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	92,226.96
White	Main	Intercom System Renewal	3- Due within 3 Years of In	Special Systems System	\$	21,564.48
White	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In	Special Systems System	\$	59,591.28
Whitmore	Main	Moderate Repair BUR (Built-Up Roofing)	2- Due within 2 Years of In	Exterior Enclosure	\$	8,316.00
Whitmore	Site - Whitmore	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Whitmore	Main	DDC System - Average Renewal	4 - Due within 4 Years of In	HVAC System	\$	154,119.84
Whitmore	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	42,267.12
Whitmore	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	61,004.16
Whitmore	Site - Whitmore	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	51,863.28
Whitmore	Site - Whitmore	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	40,266.24
Whitmore	Site - Whitmore	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	89,544.00
Whitmore	Main	Intercom System Renewal	3- Due within 3 Years of In	Special Systems System	\$	17,791.20
Wright	Site - Wright	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	33,996.48
Wright	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$	9,354.24
Wright	Activities Center	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In	HVAC System	\$	28,155.12
Wright	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	4 - Due within 4 Years of In	HVAC System	\$	137,188.80
Wright	Main	Central AHU - VAV System w/Distribution - 20% Repair/ref	2- Due within 2 Years of In	HVAC System	\$	361,141.20
Wright	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In	Security	\$	12,482.40
Wright	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	44,197.44
Wright	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	60,451.44
Wright	Site - Wright	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Ref	2- Due within 2 Years of In	Security	\$	52,145.52
Wright	Site - Wright	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	44,029.44
Wright	Site - Wright	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	90,031.20
Wright	Main	Intercom System Renewal	2- Due within 2 Years of In	Special Systems System	\$	17,629.92
Wright	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In	Special Systems System	\$	58,464.00
					\$	17,397,814.56
					\$	24,284,951.12
					\$	144,794.16
					\$	13,961,089.56
					\$	2,150.40
					\$	2,550,698.64
					\$	58,341,498.44
Catalina	Main	Paint roof	1- Due within 1 Year of Ins	Exterior Enclosure	\$	154,560.00
Catalina	Main	BUR (Built-Up Roofing) - Science Building Renewa	0 - Due Immediately	Exterior Enclosure	\$	227,241.84
Catalina	Main	Paint Roof	2- Due within 2 Years of In	Exterior Enclosure	\$	275,520.00
Catalina	Main	Paint Roof	2- Due within 2 Years of In	Exterior Enclosure	\$	705,600.00
Catalina	Main	BUR (Built-Up Roofing) - Areo Tek/PE Rooms Renewa	0 - Due Immediately	Exterior Enclosure	\$	741,373.92

Catalina	Main	BUR (Built-Up Roofing) - Auditorium/Theater/Classrooms/10 - Due Immediately	Exterior Enclosure	\$	1,136,205.84
Catalina	Main	Cooling Tower - Stainless Steel - 110 Ton Renewal	2- Due within 2 Years of In HVAC System	\$	119,355.60
Catalina	Main	Cooling Tower - Stainless Steel - 300 Ton Renewal	2- Due within 2 Years of In HVAC System	\$	196,449.12
Catalina	Main	Chiller - Reciprocating - Air-Cooled 100 Tons Renewa	5- Due within 5 Years of In HVAC System	\$	201,094.32
Catalina	Main	Boiler HW - Gas-Fired - 6.1 MBH Renewal	3- Due within 3 Years of In HVAC System	\$	393,081.36
Catalina	Main	Boiler HW - Gas-Fired - 6.1 MBH Renewal	3- Due within 3 Years of In HVAC System	\$	393,081.36
Catalina	Main	Central AHU - VAV System w/Distribution - 20% Repair/Req	2- Due within 2 Years of In HVAC System	\$	1,579,992.96
Catalina	Main	Security System - Burglar Alarm System Renewa	4- Due within 4 Years of In Security	\$	53,854.08
Catalina	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	132,279.84
Catalina	Main	Security System - Card Access System Renewal	4- Due within 4 Years of In Security	\$	195,610.80
Catalina	Site - Catalina	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	58,927.68
Catalina	Site - Catalina	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	58,623.60
Catalina	Site - Catalina	Site Development - Fencing - Chain Link Renewa	4- Due within 4 Years of In Security	\$	57,096.48
Catalina	Site - Catalina	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	101,216.64
Cholla	Main	Repair Glass Skylights - Monumental	1- Due within 1 Year of Ins Exterior Enclosure	\$	42,310.80
Cholla	Site - Cholla	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	58,927.68
Cholla	Classroom Addition	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	107,251.20
Cholla	Main	Paint Roof	4- Due within 4 Years of In Exterior Enclosure	\$	252,000.00
Cholla	Activity Center	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	341,275.20
Cholla	Activity Center	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	550,519.20
Cholla	Main	BUR (Built-Up Roofing) - G wing Renewa	0- Due Immediately Exterior Enclosure	\$	568,102.08
Cholla	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	705,600.00
Cholla	Classroom Addition	Central AHU - VAV System w/Distribution - 20% Repair/rep	3- Due within 3 Years of In HVAC System	\$	21,668.64
Cholla	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	121,595.04
Cholla	Main	Cooling Tower - Stainless Steel - 300 Ton Renewal	0- Due Immediately HVAC System	\$	176,804.88
Cholla	Main	Cooling Tower - Stainless Steel - 300 Ton Renewal	1- Due within 1 Year of Ins HVAC System	\$	176,804.88
Cholla	Activity Center	Central AHU - VAV System w/Distribution - 30% repair/rep	1- Due within 1 Year of Ins HVAC System	\$	189,599.76
Cholla	Activity Center	Central AHU - VAV System w/Distribution - 50% Repair/ R	2- Due within 2 Years of In HVAC System	\$	338,570.40
Cholla	Main	Central AHU - VAV System w/Distribution - 50% Repair/Req	1- Due within 1 Year of Ins HVAC System	\$	3,024,556.08
Cholla	Main	Security System - Burglar Alarm System Renewa	3- Due within 3 Years of In Security	\$	43,827.84
Cholla	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	143,744.16
Cholla	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In Security	\$	238,785.12
Cholla	Site - Cholla	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	36,020.88
Cholla	Site - Cholla	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	52,268.16
Cholla	Site - Cholla	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	62,193.60
Mary Meredith	Site - Mary Meredith	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	58,927.68
Mary Meredith	Site - Mary Meredith	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Interior Construction and Conve	\$	23,792.16
Mary Meredith	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	53,687.76
Mary Meredith	Site - Mary Meredith	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	27,909.84
Mary Meredith	Site - Mary Meredith	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	41,079.36
Palo Verde	Main	Switchgear - Heavy Duty Renewal	0- Due Immediately Electrical	\$	337,765.68
Palo Verde	Site - Palo Verde	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	58,927.68
Palo Verde	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	92,400.00
Palo Verde	Main	Paint Roof	0- Due Immediately Exterior Enclosure	\$	215,040.00
Palo Verde	Main	Paint roof	3- Due within 3 Years of In Exterior Enclosure	\$	218,400.00
Palo Verde	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	262,080.00
Palo Verde	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	378,000.00
Palo Verde	Main	Paint Roof	3- Due within 3 Years of In Exterior Enclosure	\$	386,400.00
Palo Verde	Main	Paint Roof	3- Due within 3 Years of In Exterior Enclosure	\$	1,360,800.00
Palo Verde	Main	Rooftop Unitary AC - Elec. Heat/Cooling < 10 Ton Renewa	0- Due Immediately HVAC System	\$	109,357.92
Palo Verde	Main	Central AHU - VAV System w/Distribution - 50% Repair/Req	3- Due within 3 Years of In HVAC System	\$	2,979,414.48

Palo Verde	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In Security	\$	63,199.92
Palo Verde	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	133,976.64
Palo Verde	Main	Security System - Card Access System Renewal	1- Due within 1 Year of Ins Security	\$	137,731.44
Palo Verde	Site - Palo Verde	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	80,982.72
Palo Verde	Site - Palo Verde	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	37,070.88
Palo Verde	Site - Palo Verde	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	139,821.36
Palo Verde	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In Special Systems System	\$	222,006.96
Pueblo	Main	Paint roof	3- Due within 3 Years of In Exterior Enclosure	\$	134,400.00
Pueblo	Main	Paint roof	3- Due within 3 Years of In Exterior Enclosure	\$	218,400.00
Pueblo	Main	Paint roof	4- Due within 4 Years of In Exterior Enclosure	\$	672,000.00
Pueblo	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	28,061.04
Pueblo	Main	Repair Boiler	0- Due Immediately HVAC System	\$	42,000.00
Pueblo	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5- Due within 5 Years of In HVAC System	\$	453,089.28
Pueblo	Main	Central AHU - VAV System w/Distribution - 30% repair/rep	4- Due within 4 Years of In HVAC System	\$	2,166,847.20
Pueblo	Main	Security System - Burglar Alarm System Renewa	3- Due within 3 Years of In Security	\$	57,602.16
Pueblo	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	134,006.88
Pueblo	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In Security	\$	167,378.40
Pueblo	Site - Pueblo	Automatic Openers - Single System Renewa	2- Due within 2 Years of In Security	\$	58,927.68
Pueblo	Site - Pueblo	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	61,286.40
Pueblo	Site - Pueblo	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	73,572.24
Pueblo	Main	Security System - Burglar Alarm System Renewa	3- Due within 3 Years of In Security	\$	631,448.82
Pueblo	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In Special Systems System	\$	303,520.56
Rincon	Main	Paint Roof	3- Due within 3 Years of In Exterior Enclosure	\$	1,596,000.00
Rincon	AUDITORIUM	Central AHU - VAV System w/Distribution - 20% Repair/Re	2- Due within 2 Years of In HVAC System	\$	93,896.88
Rincon	Main	Cooling Tower - Stainless Steel - 600 Ton Renewal	0- Due Immediately HVAC System	\$	245,103.60
Rincon	Main	Boiler HW - Gas-Fired - 6.1 MBH Renewal	2- Due within 2 Years of In HVAC System	\$	393,081.36
Rincon	Main	Boiler HW - Gas-Fired - 6.1 MBH Renewal	3- Due within 3 Years of In HVAC System	\$	393,081.36
Rincon	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	4- Due within 4 Years of In HVAC System	\$	1,006,864.32
Rincon	Main	Central AHU - VAV System w/Distribution - 30% Repair/Re	3- Due within 3 Years of In HVAC System	\$	1,164,680.16
Rincon	Main	Water Dist Complete - Average Renewal	0- Due Immediately Plumbing System	\$	289,437.12
Rincon	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In Security	\$	54,566.40
Rincon	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	133,024.08
Rincon	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In Security	\$	198,194.64
Rincon	Site - Rincon	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	58,927.68
Rincon	Site - Rincon	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	77,794.08
Rincon	Site - Rincon	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	58,044.00
Rincon	Site - Rincon	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	134,316.00
Rincon	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In Special Systems System	\$	383,359.20
Sabino	Main	Switchgear - Heavy Duty Renewal	0- Due Immediately Electrical	\$	245,130.48
Sabino	INDUSTRIAL EDUCAT	Cap Flashing (Counter Flashing at Parapets) Renewa	1- Due within 1 Year of Ins Exterior Enclosure	\$	3,470.88
Sabino	INDUSTRIAL EDUCAT	Gutters and Downspouts - Aluminum Renewal	1- Due within 1 Year of Ins Exterior Enclosure	\$	6,772.08
Sabino	Main	Reglet Counter Flashing Renewal	1- Due within 1 Year of Ins Exterior Enclosure	\$	8,022.00
Sabino	Main	Cap Flashing (Counter Flashing at Parapets) Renewa	1- Due within 1 Year of Ins Exterior Enclosure	\$	13,885.20
Sabino	Site - Sabino	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	62,030.64
Sabino	Main	BUR (Built-Up Roofing) - Library Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	196,943.04
Sabino	Main	BUR (Built-Up Roofing) - Admin Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	226,484.16
Sabino	Main	BUR (Built-Up Roofing) - Cafeteria, Mechanical and Classro	1- Due within 1 Year of Ins Exterior Enclosure	\$	615,444.48
Sabino	INDUSTRIAL EDUCAT	BUR (Built-Up Roofing) Renewa	1- Due within 1 Year of Ins Exterior Enclosure	\$	659,551.20
Sabino	Main	BUR (Built-Up Roofing) - Main classrooms Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	1,193,015.04
Sabino	AUDITORIUM	Central AHU - VAV System w/Distribution Renewa	4- Due within 4 Years of In HVAC System	\$	56,427.84
Sabino	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	93,534.00

Sabino	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	93,534.00
Sabino	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	4- Due within 4 Years of In HVAC System	\$	137,188.80
Sabino	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	4- Due within 4 Years of In HVAC System	\$	137,188.80
Sabino	INDUSTRIAL EDUCAT	Central AHU - VAV System w/Distribution Renewa	7- Due within 7 Years of In HVAC System	\$	561,529.92
Sabino	Main	Central AHU - VAV System w/Distribution - 20% Replace/re5	0- Due Immediately Plumbing System	\$	1,300,108.32
Sabino	Main	Restroom Fixtures 7 - Std Density - Avg Qual Renewa	5- Due within 5 Years of In Plumbing System	\$	126,399.84
Sabino	Main	Sanitary Waste - Gravity Disch - Average Renewal	3- Due within 3 Years of In Security	\$	501,695.04
Sabino	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In Security	\$	45,865.68
Sabino	Main	Security System - CCTV Renewal	3- Due within 3 Years of In Security	\$	132,284.88
Sabino	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In Security	\$	199,913.28
Sabino	Site - Sabino	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	100,296.00
Sabino	Site - Sabino	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	73,241.28
Sabino	Site - Sabino	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	173,164.32
Sahuaro	Main	Switchgear - Heavy Duty Renewal	0- Due Immediately Electrical	\$	231,420.00
Sahuaro	Main	Roof Hatch Renewal	5- Due within 5 Years of In Exterior Enclosure	\$	10,935.12
Sahuaro	Site - Sahuaro	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	60,480.00
Sahuaro	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	136,080.00
Sahuaro	Main	Paint Roof	3- Due within 3 Years of In Exterior Enclosure	\$	154,560.00
Sahuaro	Main	Paint Roof	4- Due within 4 Years of In Exterior Enclosure	\$	571,200.00
Sahuaro	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	851,760.00
Sahuaro	Main	Cooling Tower - Stainless Steel - 300 Ton Renewal	4- Due within 4 Years of In HVAC System	\$	196,449.12
Sahuaro	Main	Cooling Tower - Stainless Steel - 300 Ton Renewal	1- Due within 1 Year of Ins HVAC System	\$	196,449.12
Sahuaro	Main	Boiler HW - Gas-Fired - 6.1 MBH Renewal	3- Due within 3 Years of In HVAC System	\$	393,081.36
Sahuaro	Main	Boiler HW - Gas-Fired - 6.1 MBH Renewal	3- Due within 3 Years of In HVAC System	\$	393,081.36
Sahuaro	Main	Central AHU - VAV System w/Distribution - 20% Repair/Re	3- Due within 3 Years of In HVAC System	\$	5,439,687.12
Sahuaro	Main	Water Dist Complete - Average Renewal	0- Due Immediately Plumbing System	\$	306,243.84
Sahuaro	Main	Security System - Burglar Alarm System Renewa	4- Due within 4 Years of In Security	\$	57,734.88
Sahuaro	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	132,226.08
Sahuaro	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In Security	\$	167,761.44
Sahuaro	Site - Sahuaro	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	63,769.44
Sahuaro	Site - Sahuaro	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	41,922.72
Sahuaro	Site - Sahuaro	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	110,100.48
Sahuaro	Main	Fire Alarm System - Average Density Renewal	4- Due within 4 Years of In Special Systems System	\$	202,809.60
Santa Rita	Main	Switchgear - Heavy Duty Renewal	0- Due Immediately Electrical	\$	255,721.20
Santa Rita	Main	Roof Hatch Renewal	2- Due within 2 Years of In Exterior Enclosure	\$	10,935.12
Santa Rita	Site - Santa Rita	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	60,480.00
Santa Rita	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	100,800.00
Santa Rita	Main	Paint Roof	4- Due within 4 Years of In Exterior Enclosure	\$	154,560.00
Santa Rita	Classroom Addition	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	459,480.00
Santa Rita	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	470,400.00
Santa Rita	Main	Paint Roof	3- Due within 3 Years of In Exterior Enclosure	\$	705,600.00
Santa Rita	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	853,440.00
Santa Rita	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	28,061.04
Santa Rita	Main	Cooling Tower - Stainless Steel - 110 Ton Renewal	2- Due within 2 Years of In HVAC System	\$	119,355.60
Santa Rita	Main	Heat Exchanger - Liquid/Liquid - Plate and Frame - 400 GPl	1- Due within 1 Year of Ins HVAC System	\$	147,127.68
Santa Rita	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	3- Due within 3 Years of In HVAC System	\$	164,046.96
Santa Rita	Main	Cooling Tower - Stainless Steel - 300 Ton Renewal	2- Due within 2 Years of In HVAC System	\$	196,449.12
Santa Rita	Classroom Addition	Central AHU - VAV System w/Distribution - 20% Repair/Rej	2- Due within 2 Years of In HVAC System	\$	631,997.52
Santa Rita	Main	Central AHU - VAV System w/Distribution - 20 % Repair/Re	3- Due within 3 Years of In HVAC System	\$	902,852.16
Santa Rita	Main	DDC System - Average Renewal	2- Due within 2 Years of In HVAC System	\$	1,041,213.60
Santa Rita	Main	Security System - Burglar Alarm System Renewa	4- Due within 4 Years of In Security	\$	47,848.08

Santa Rita	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	133,182.00
Santa Rita	Main	Security System - Card Access System Renewal	4 - Due within 4 Years of In Security	\$	243,311.04
Santa Rita	Site - Santa Rita	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	106,671.60
Santa Rita	Site - Santa Rita	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	67,062.24
Santa Rita	Site - Santa Rita	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	184,175.04
Santa Rita	Main	Fire Alarm System - Average Density Renewal	4 - Due within 4 Years of In Special Systems System	\$	336,161.28
Tucson	Main	Repair Glass Skylights - Monumental	3- Due within 3 Years of In Exterior Enclosure	\$	84,621.60
Tucson	Classroom Addition	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	383,040.00
Tucson	Main	Paint roof	2- Due within 2 Years of In Exterior Enclosure	\$	504,000.00
Tucson	Classroom Addition	BUR (Built-Up Roofing) Renewa	5 - Due within 5 Years of In Exterior Enclosure	\$	647,636.64
Tucson	Classroom Addition	BUR (Built-Up Roofing) Renewa	1- Due within 1 Year of Ins Exterior Enclosure	\$	752,925.60
Tucson	Classroom Addition	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	769,120.80
Tucson	Stadium	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	2- Due within 2 Years of In HVAC System	\$	53,634.00
Tucson	Gym	Central AHU - VAV System w/Distribution - 20% Repair/rej	5 - Due within 5 Years of In HVAC System	\$	103,827.36
Tucson	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	3- Due within 3 Years of In HVAC System	\$	135,927.12
Tucson	Main	Chiller - Centrifugal wo Cooling Tower - 300 Ton Renewa	5 - Due within 5 Years of In HVAC System	\$	270,249.84
Tucson	Main	Boiler HW - Gas-Fired - 4.7M BTU Renewal	5 - Due within 5 Years of In HVAC System	\$	289,383.36
Tucson	Main	Boiler HW - Gas-Fired - 4.7M BTU Renewal	0 - Due Immediately HVAC System	\$	289,383.36
Tucson	Classroom Addition	Central AHU - VAV System w/Distribution - 20% Repair/Rej	2- Due within 2 Years of In HVAC System	\$	389,355.12
Tucson	Classroom Addition	Central AHU - VAV System w/Distribution - 20% Repair/Rej	3- Due within 3 Years of In HVAC System	\$	826,109.76
Tucson	Main	Central AHU - VAV System w/Distribution - 20% Repair/Rej	2- Due within 2 Years of In HVAC System	\$	1,083,423.60
Tucson	Main	Carpeting - Broadloom - Medium Range Renewa	0 - Due Immediately Interior Construction and Conve	\$	114,004.80
Tucson	Main	Security System - Burglar Alarm System Renewa	3- Due within 3 Years of In Security	\$	57,660.96
Tucson	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In Security	\$	125,660.64
Tucson	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	132,261.36
Tucson	Site - Tucson	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	60,480.00
Tucson	Site - Tucson	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	27,990.48
Tucson	Site - Tucson	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	48,325.20
Tucson	Main	Intercom System Renewal	4 - Due within 4 Years of In Special Systems System	\$	61,079.76
Tucson	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In Special Systems System	\$	303,824.64
				\$	1,070,037.36
				\$	22,245,936.72
				\$	31,678,788.96
				\$	137,796.96
				\$	1,223,775.84
				\$	6,381,907.38
				\$	1,812,762.00
				\$	64,551,005.22
Booth/Fickett	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In HVAC System	\$	42,288.96
Booth/Fickett	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	46,767.84
Booth/Fickett	Main	Boiler HW - Gas-Fired - 1M BTU Renewal	3- Due within 3 Years of In HVAC System	\$	93,456.72
Booth/Fickett	Main	Central AHU - VAV System w/Distribution - 25% Repair/rep	4 - Due within 4 Years of In HVAC System	\$	282,140.88
Booth/Fickett	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	3- Due within 3 Years of In HVAC System	\$	616,008.96
Booth/Fickett	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In Security	\$	9,700.32
Booth/Fickett	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In Security	\$	10,620.96
Booth/Fickett	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In Security	\$	38,579.52
Booth/Fickett	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,633.44
Booth/Fickett	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In Security	\$	91,608.72

Booth/Fickett	Site - Booth/Fickett	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	39,543.84
Booth/Fickett	Site - Booth/Fickett	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	34,104.00
Booth/Fickett	Site - Booth/Fickett	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	58,882.32
Booth/Fickett	Site - Booth/Fickett	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	70,020.72
Booth/Fickett	Main	Intercom System Renewal	2- Due within 2 Years of In Special Systems System	\$	11,250.96
Booth/Fickett	Main	Intercom System Renewal	2- Due within 2 Years of In Special Systems System	\$	41,104.56
Booth/Fickett	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In Special Systems System	\$	74,622.24
Booth/Fickett	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In Special Systems System	\$	255,571.68
Dietz	Main	Moderate Repair BUR (Built-Up Roofing)	1- Due within 1 Year of Ins Exterior Enclosure	\$	20,790.00
Dietz	Site - Dietz	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	88,273.92
Dietz	Main	Paint Roof	0 - Due Immediately Exterior Enclosure	\$	838,017.60
Dietz	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	93,534.00
Dietz	Main	Cooling Tower - Stainless Steel - 110 Ton Renewal	3- Due within 3 Years of In HVAC System	\$	131,292.00
Dietz	Main	Cooling Tower - Stainless Steel - 110 Ton Renewal	3- Due within 3 Years of In HVAC System	\$	131,292.00
Dietz	Main	DDC System - Average Renewal	1- Due within 1 Year of Ins HVAC System	\$	149,847.60
Dietz	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	3- Due within 3 Years of In HVAC System	\$	164,626.56
Dietz	Main	Chiller - Reciprocating - Air-Cooled 100 Tons Renewa	3- Due within 3 Years of In HVAC System	\$	201,094.32
Dietz	Main	Chiller - Reciprocating - Air-Cooled 100 Tons Renewa	2- Due within 2 Years of In HVAC System	\$	201,094.32
Dietz	Main	Central AHU - VAV System w/Distribution - 20% Repair/Rej	5 - Due within 5 Years of In HVAC System	\$	270,856.32
Dietz	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,549.44
Dietz	Site - Dietz	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	52,629.36
Dietz	Site - Dietz	Site Development - Fencing - Chain Link Renewa	4 - Due within 4 Years of In Security	\$	39,224.64
Dietz	Site - Dietz	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	90,867.84
Dietz	Main	Intercom System Renewal	3- Due within 3 Years of In Special Systems System	\$	20,181.84
Dietz	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In Special Systems System	\$	167,311.20
Hollinger	Main	Moderate Repair Terra Cotta and Clay Tile Roofing	1- Due within 1 Year of Ins Exterior Enclosure	\$	8,154.72
Hollinger	Main	Replace Aluminum Gutters and Downspouts	7 - Due within 7 Years of In Exterior Enclosure	\$	11,037.60
Hollinger	Site - Hollinger	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	38,023.44
Hollinger	Activity Center	Paint Roof	1- Due within 1 Year of Ins Exterior Enclosure	\$	125,580.00
Hollinger	Main	Paint roof	0 - Due Immediately Exterior Enclosure	\$	184,800.00
Hollinger	Classroom Addition	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	214,502.40
Hollinger	Activity Center	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	4 - Due within 4 Years of In HVAC System	\$	45,158.40
Hollinger	Classroom Addition	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	2- Due within 2 Years of In HVAC System	\$	89,989.20
Hollinger	Main	DDC System - Average Renewal	3- Due within 3 Years of In HVAC System	\$	166,625.76
Hollinger	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In HVAC System	\$	402,101.28
Hollinger	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In Security	\$	6,355.44
Hollinger	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In Security	\$	46,168.08
Hollinger	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,591.44
Hollinger	Site - Hollinger	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	50,208.48
Hollinger	Site - Hollinger	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	64,601.04
Hollinger	Site - Hollinger	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	86,686.32
Hollinger	Main	Fire Alarm System - Average Density Renewal	4 - Due within 4 Years of In Special Systems System	\$	156,276.96
Maxwell	Main	Gutters and Downspouts - Aluminum Renewal	5 - Due within 5 Years of In Exterior Enclosure	\$	3,386.88
Maxwell	Main	Reglet Counter Flashing Renewal	5 - Due within 5 Years of In Exterior Enclosure	\$	4,813.20
Maxwell	Main	Cap Flashing (Counter Flashing at Parapets) Renewa	5 - Due within 5 Years of In Exterior Enclosure	\$	13,885.20
Maxwell	Site - Maxwell	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	39,543.84
Maxwell	Classroom Addition	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	104,722.80
Maxwell	Classroom Addition	Paint Roof	1- Due within 1 Year of Ins Exterior Enclosure	\$	176,366.40
Maxwell	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	996,912.00
Maxwell	Main	Heat Exchanger - Liquid/Liquid - Plate and Frame Renewa	1- Due within 1 Year of Ins HVAC System	\$	100,742.88
Maxwell	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	102,888.24



Maxwell	Main	Cooling Tower - Stainless Steel - 110 Ton Renewal	1- Due within 1 Year of Ins HVAC System	\$	131,292.00
Maxwell	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	2- Due within 2 Years of In HVAC System	\$	164,626.56
Maxwell	Main	Central AHU - VAV System w/Distribution - 20% Repair/rep	3- Due within 3 Years of In HVAC System	\$	270,856.32
Maxwell	Main	Chiller - Reciprocating - Air-Cooled 210 Tons Renewa	3- Due within 3 Years of In HVAC System	\$	346,162.32
Maxwell	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In Security	\$	11,331.60
Maxwell	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In Security	\$	82,320.00
Maxwell	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,312.56
Maxwell	Site - Maxwell	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	76,441.68
Maxwell	Site - Maxwell	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	44,266.32
Maxwell	Site - Maxwell	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	131,980.80
Maxwell	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In Special Systems System	\$	159,228.72
McCorkle	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,233.60
McCorkle	Site - McCorkle	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	88,213.44
McCorkle	Site - McCorkle	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	69,056.40
McCorkle	Site - McCorkle	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	43,318.80
McCorkle	Site - McCorkle	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	119,229.60
Miles	Activity Center	Paint roof	3- Due within 3 Years of In Exterior Enclosure	\$	24,712.80
Miles	Site - Miles	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	41,870.64
Miles	Main	DDC System - Average Renewal	2- Due within 2 Years of In HVAC System	\$	97,720.56
Miles	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In HVAC System	\$	343,902.72
Miles	Main	Water Dist Complete - Average Renewal	2- Due within 2 Years of In Plumbing System	\$	61,782.00
Miles	Main	Security System - Burglar Alarm System Renewa	1- Due within 1 Year of Ins Security	\$	4,658.64
Miles	Main	Security System - Card Access System Renewal	1- Due within 1 Year of Ins Security	\$	42,305.76
Miles	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	50,028.72
Miles	Site - Miles	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	33,942.72
Miles	Site - Miles	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	23,056.32
Miles	Site - Miles	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	58,605.12
Miles	Main	Intercom System Renewal	1- Due within 1 Year of Ins Special Systems System	\$	19,741.68
Miles	Main	Fire Alarm System - Average Density Renewal	1- Due within 1 Year of Ins Special Systems System	\$	65,464.56
Pueblo Gardens	Library	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	3- Due within 3 Years of In HVAC System	\$	17,789.52
Pueblo Gardens	Main	DDC System - Average Renewal	4 - Due within 4 Years of In HVAC System	\$	144,967.20
Pueblo Gardens	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,194.96
Pueblo Gardens	Site - Pueblo Gardens	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	41,655.60
Pueblo Gardens	Site - Pueblo Gardens	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	51,641.52
Pueblo Gardens	Site - Pueblo Gardens	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	42,680.40
Pueblo Gardens	Site - Pueblo Gardens	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	89,160.96
Roberts/Naylor	Main	Moderate Repair Asphalt Shingled Roofing	0 - Due Immediately Exterior Enclosure	\$	54,306.00
Roberts/Naylor	Main	Asphalt Shingled Roofing Renewal	5 - Due within 5 Years of In Exterior Enclosure	\$	1,513,512.00
Roberts/Naylor	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	121,595.04
Roberts/Naylor	Main	Central AHU - VAV System w/Distribution - 30% Repair/rep	5 - Due within 5 Years of In HVAC System	\$	812,567.28
Roberts/Naylor	Main	Security System - Burglar Alarm System Renewa	3- Due within 3 Years of In Security	\$	19,918.08
Roberts/Naylor	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In Security	\$	72,344.16
Roberts/Naylor	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,317.60
Roberts/Naylor	Site - Roberts/Naylor	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	41,655.60
Roberts/Naylor	Site - Roberts/Naylor	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	78,602.16
Roberts/Naylor	Site - Roberts/Naylor	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	50,776.32
Roberts/Naylor	Site - Roberts/Naylor	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	135,710.40
Roberts/Naylor	Main	Intercom System Renewal	3- Due within 3 Years of In Special Systems System	\$	21,099.12
Roberts/Naylor	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In Special Systems System	\$	174,913.20
Robins	Main	Paint Roof	3- Due within 3 Years of In Exterior Enclosure	\$	958,372.80

K-8

Roskrugs	Main	DDC System - Average Renewal	4 - Due within 4 Years of In HVAC System	\$	199,931.76
Roskrugs	Main	Security System - Burglar Alarm System Renewal	3- Due within 3 Years of In Security	\$	10,893.12
Roskrugs	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In Security	\$	79,138.08
Roskrugs	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,329.36
Roskrugs	Site - Robins	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	41,440.56
Roskrugs	Site - Robins	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	71,741.04
Roskrugs	Site - Robins	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	54,232.08
Roskrugs	Site - Robins	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	123,863.04
Roskrugs	Main	Intercom System Renewal	0 - Due Immediately Special Systems System	\$	23,079.84
Roskrugs	Main	Fire Alarm System - Average Density Renewal	4 - Due within 4 Years of In Special Systems System	\$	153,073.20
Rose	Main	Paint Roof	3- Due within 3 Years of In Exterior Enclosure	\$	1,313,491.20
Rose	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	102,888.24
Rose	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	2- Due within 2 Years of In HVAC System	\$	137,188.80
Rose	Main	Fan Coil System - Cabinet - Heating/Cooling - 4 Pipe - 20% I	3- Due within 3 Years of In HVAC System	\$	898,687.44
Rose	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,208.40
Rose	Site - Rose	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	41,440.56
Rose	Site - Rose	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	46,415.04
Rose	Site - Rose	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	32,832.24
Rose	Site - Rose	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	80,136.00
Rose	Main	Fire Alarm System - Average Density Renewal	5 - Due within 5 Years of In Special Systems System	\$	157,345.44
Roskrugs	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	1- Due within 1 Year of Ins HVAC System	\$	20,136.48
Roskrugs	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	65,474.64
Roskrugs	Main	DDC System - Average Renewal	3- Due within 3 Years of In HVAC System	\$	244,312.32
Roskrugs	Main	Chiller - Reciprocating - Air-Cooled 210 Tons Renewa	3- Due within 3 Years of In HVAC System	\$	346,162.32
Roskrugs	Main	Chiller - Reciprocating - Air-Cooled 210 Tons Renewa	4 - Due within 4 Years of In HVAC System	\$	346,162.32
Roskrugs	Main	Central AHU - VAV System w/Distribution - 20% Repair/ref	4 - Due within 4 Years of In HVAC System	\$	361,141.20
Roskrugs	Main	Water Dist Complete - Average Renewal	0 - Due Immediately Plumbing System	\$	79,724.40
Roskrugs	Main	Security System - Burglar Alarm System Renewa	3- Due within 3 Years of In Security	\$	15,029.28
Roskrugs	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In Security	\$	65,509.92
Roskrugs	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,174.80
Roskrugs	Site - Roskrugs	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	41,655.60
Roskrugs	Site - Roskrugs	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	31,783.92
Roskrugs	Site - Roskrugs	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	19,577.04
Roskrugs	Site - Roskrugs	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	54,875.52
Safford ES	Site - Safford ES	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	36,828.96
Safford ES	Site - Safford ES	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	8,166.48
Safford ES	Site - Safford ES	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	63,586.32
Safford ES	Main	Intercom System Renewal	2- Due within 2 Years of In Special Systems System	\$	31,190.88
Safford ES	Main	Fire Alarm System - Average Density Renewal	1- Due within 1 Year of Ins Special Systems System	\$	147,757.68
Safford MS	Classroom Addition	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	69,510.00
Safford MS	Main	Boiler HW - Gas-Fired - 1M BTU Renewal	2- Due within 2 Years of In HVAC System	\$	76,742.40
Safford MS	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	93,456.72
Safford MS	Classroom Addition	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	3- Due within 3 Years of In HVAC System	\$	93,534.00
Safford MS	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	0 - Due Immediately HVAC System	\$	108,312.96
Safford MS	Main	Heat Exchanger - Liquid/Liquid - Plate and Frame - 400 GPI	2- Due within 2 Years of In HVAC System	\$	137,188.80
Safford MS	Main	Cooling Tower - Stainless Steel - 300 Ton Renewal	2- Due within 2 Years of In HVAC System	\$	147,127.68
Safford MS	Main	Chiller - Screw type 130 Ton Renewal	2- Due within 2 Years of In HVAC System	\$	157,158.96
Safford MS	Main	Chiller - Screw type 160 Ton Renewal	1- Due within 1 Year of Ins HVAC System	\$	242,281.20
Safford MS	Main	Central AHU - VAV System w/Distribution - 25% Repair/Re	3- Due within 3 Years of In HVAC System	\$	293,170.08
Safford MS	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	338,570.40
Safford MS	Main			\$	88,324.32

Safford MS	Site - Safford MS	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	41,655.60
Safford MS	Site - Safford MS	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	9,686.88
Safford MS	Site - Safford MS	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	16,724.40
Safford MS	Site - Safford MS	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	28,879.20
Safford MS	Main	Intercom System Renewal	3- Due within 3 Years of In Special Systems System	\$	23,844.24
Safford MS	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In Special Systems System	\$	39,533.76
				\$	6,844,585.44
				\$	10,192,914.48
				\$	141,506.40
				\$	4,280,663.52
				\$	1,742,591.76
				\$	23,202,261.60

Dodge	Library	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	4 - Due within 4 Years of In HVAC System	\$	20,331.36
Dodge	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	4 - Due within 4 Years of In HVAC System	\$	359,950.08
Dodge	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,295.76
Dodge	Site - Dodge	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	39,340.56
Dodge	Site - Dodge	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	53,054.40
Dodge	Site - Dodge	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	33,803.28
Dodge	Site - Dodge	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	91,600.32
Dodge	Main	Intercom System Renewal	4 - Due within 4 Years of In Special Systems System	\$	27,120.24
Doolen	Main	Minor Repair Terra Cotta and Clay Tile Roofing	1- Due within 1 Year of Ins Exterior Enclosure	\$	1,535.52
Doolen	Site - Doolen	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	39,340.56
Doolen	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	94,500.00
Doolen	Classroom Addition	Paint Roof	3- Due within 3 Years of In Exterior Enclosure	\$	363,518.40
Doolen	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	1- Due within 1 Year of Ins HVAC System	\$	28,061.04
Doolen	Classroom Addition	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In HVAC System	\$	34,621.44
Doolen	Main	Boiler HW - Gas-Fired - 4.7M BTU Renewal	5 - Due within 5 Years of In HVAC System	\$	289,383.36
Doolen	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In Security	\$	13,051.92
Doolen	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,287.36
Doolen	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In Security	\$	94,810.80
Doolen	Site - Doolen	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	40,029.36
Doolen	Main	Intercom System Renewal	2- Due within 2 Years of In Special Systems System	\$	27,651.12
Doolen	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In Special Systems System	\$	183,388.80
Gridley	Main	Moderate Repair Metal Roofing - Economy	2- Due within 2 Years of In Exterior Enclosure	\$	138,163.20
Gridley	Main	Paint Roof	1- Due within 1 Year of Ins Exterior Enclosure	\$	1,387,612.80
Gridley	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	3- Due within 3 Years of In HVAC System	\$	74,827.20
Gridley	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	2- Due within 2 Years of In HVAC System	\$	137,188.80
Gridley	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	0 - Due Immediately HVAC System	\$	137,188.80
Gridley	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	3- Due within 3 Years of In HVAC System	\$	250,990.32
Gridley	Main	Central AHU - VAV System w/Distribution - 20% Repair/Re	4 - Due within 4 Years of In HVAC System	\$	315,997.92
Gridley	Main	Security System - Burglar Alarm System Renewa	1- Due within 1 Year of Ins Security	\$	15,773.52
Gridley	Main	Security System - Card Access System Renewal	1- Due within 1 Year of Ins Security	\$	80,208.24
Gridley	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,625.04
Gridley	Site - Gridley	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	38,530.80
Gridley	Site - Gridley	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	42,277.20
Gridley	Site - Gridley	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	33,993.12
Gridley	Site - Gridley	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	72,994.32

Gridley	Main	Fire Alarm System - Average Density Renewal	1- Due within 1 Year of Ins Special Systems System	\$	166,224.24
Magee	Library	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	59,640.00
Magee	Classroom Addition	Minor Repair Metal Roofing - Economy	1- Due within 1 Year of Ins Exterior Enclosure	\$	64,764.00
Magee	Classroom Addition	Paint Roof	1- Due within 1 Year of Ins Exterior Enclosure	\$	328,322.40
Magee	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	1,296,758.40
Magee	Classroom Addition	Rooftop Unitary AC - Cooling w/Gas Heat > 10 Ton Renewa	1- Due within 1 Year of Ins HVAC System	\$	89,008.08
Magee	Library	Central AHU - VAV System w/Distribution Renewa	5- Due within 5 Years of In HVAC System	\$	96,153.12
Magee	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	112,240.80
Magee	Main	Cooling Tower - Stainless Steel - 110 Ton Renewal	2- Due within 2 Years of In HVAC System	\$	143,228.40
Magee	Main	Central AHU - VAV System w/Distribution - Replace/Repair	4- Due within 4 Years of In HVAC System	\$	406,284.48
Magee	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In Security	\$	14,740.32
Magee	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In Security	\$	85,663.20
Magee	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,216.80
Magee	Site - Magee	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	39,340.56
Magee	Site - Magee	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	79,206.96
Magee	Site - Magee	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	45,260.88
Magee	Site - Magee	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	136,755.36
Magee	Main	Intercom System Renewal	0- Due Immediately Special Systems System	\$	23,422.56
Magee	Main	Fire Alarm System - Average Density Renewal	2- Due within 2 Years of In Special Systems System	\$	207,120.48
Mansfield	Main	Major Repair BUR (Built-Up Roofing)	0- Due Immediately Exterior Enclosure	\$	29,070.72
Mansfield	Site - Mansfield	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	39,340.56
Mansfield	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	93,534.00
Mansfield	Main	Central AHU - VAV System w/Distribution - 20% Repair/rep	3- Due within 3 Years of In HVAC System	\$	612,134.88
Mansfield	Main	Security System - Burglar Alarm System Renewa	3- Due within 3 Years of In Security	\$	21,742.56
Mansfield	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,388.16
Mansfield	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In Security	\$	94,765.44
Mansfield	Site - Mansfield	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	27,263.04
Mansfield	Site - Mansfield	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	47,071.92
Mansfield	Main	Intercom System Renewal	1- Due within 1 Year of Ins Special Systems System	\$	23,031.12
Mansfield	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In Special Systems System	\$	152,750.64
Pistor	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	40,320.00
Pistor	Main	Paint Roof	1- Due within 1 Year of Ins Exterior Enclosure	\$	352,800.00
Pistor	Main	Repair/Replace Media	1- Due within 1 Year of Ins HVAC System	\$	7,560.00
Pistor	Main	Replace/Repair Media	1- Due within 1 Year of Ins HVAC System	\$	7,560.00
Pistor	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In HVAC System	\$	112,240.80
Pistor	Main	Central AHU - VAV System w/Distribution - 20% Repair/Rej	5- Due within 5 Years of In HVAC System	\$	728,128.80
Pistor	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In Security	\$	20,207.04
Pistor	Main	Security System - CCTV Renewal	2- Due within 2 Years of In Security	\$	88,324.32
Pistor	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In Security	\$	102,753.84
Pistor	Site - Pistor	Automatic Openers - Single Renewa	2- Due within 2 Years of In Security	\$	39,340.56
Pistor	Site - Pistor	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In Security	\$	30,572.64
Pistor	Site - Pistor	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In Security	\$	54,966.24
Pistor	Site - Pistor	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In Security	\$	99,822.24
Pistor	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In Special Systems System	\$	141,965.04
Secrist	Main	Switchgear - Heavy Duty Renewal	0- Due Immediately Electrical	\$	70,783.44
Secrist	Main	Gutters and Downspouts - Aluminum Renewal	0- Due Immediately Exterior Enclosure	\$	13,545.84
Secrist	Main	Cap Flashing (Counter Flashing at Parapets) Renewa	0- Due Immediately Exterior Enclosure	\$	13,885.20
Secrist	Main	Reglet Counter Flashing Renewal	0- Due Immediately Exterior Enclosure	\$	14,439.60
Secrist	Site - Secrist	Automatic Openers - Single Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	39,340.56
Secrist	Main	Moderate Repair Metal Roofing - Economy	2- Due within 2 Years of In Exterior Enclosure	\$	82,240.00

Secrist	Main	BUR (Built-Up Roofing) Renewa	0 - Due Immediately	Exterior Enclosure	\$	1,970,008.32
Secrist	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$	93,534.00
Secrist	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	0 - Due Immediately	HVAC System	\$	137,188.80
Secrist	Main	Cooling Tower - Stainless Steel - 110 Ton Renewal	2- Due within 2 Years of In	HVAC System	\$	143,228.40
Secrist	Main	Rooftop Unitary AC - Cooling w/Gas Heat > 10 Ton Renewa	2- Due within 2 Years of In	HVAC System	\$	204,041.04
Secrist	Main	DDC System - Average Renewal	2- Due within 2 Years of In	HVAC System	\$	225,704.64
Secrist	Main	Central AHU - VAV System w/Distribution - 10% Repair/Ret	3- Due within 3 Years of In	HVAC System	\$	225,713.04
Secrist	Site - Secrist	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	1- Due within 1 Year of Ins Interior Construction and Conve		\$	53,880.96
Secrist	Site - Secrist	Paint Masonry/Epoxy Finish - Economy Renewal	0 - Due Immediately	Interior Construction and Conve	\$	91,140.00
Secrist	Main	Security System - Burglar Alarm System Renewa	0 - Due Immediately	Security	\$	13,245.12
Secrist	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	88,314.24
Secrist	Main	Security System - Card Access System Renewal	0 - Due Immediately	Security	\$	96,211.92
Secrist	Site - Secrist	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In	Security	\$	31,046.40
Secrist	Site - Secrist	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	41,425.44
Secrist	Site - Secrist	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	118,184.64
Secrist	Main	Intercom System Renewal	0 - Due Immediately	Special Systems System	\$	28,059.36
Secrist	Main	Fire Alarm System - Average Density Renewal	5 - Due within 5 Years of In	Special Systems System	\$	186,098.64
Utterback	Main	Repair Glass Skylights - Monumental	1- Due within 1 Year of Ins Exterior Enclosure		\$	8,462.16
Utterback	Site - Utterback	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	39,340.56
Utterback	Main	Paint Roof	0 - Due Immediately	Exterior Enclosure	\$	100,800.00
Utterback	Main	Moderate Repair Single-Ply EPDM with Pavers on Roof	3- Due within 3 Years of In	Exterior Enclosure	\$	214,908.96
Utterback	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	1- Due within 1 Year of Ins HVAC System		\$	102,888.24
Utterback	Main	Heat Exchanger - Liquid/Liquid - Plate and Frame - 400 GPP	2- Due within 2 Years of In	HVAC System	\$	147,127.68
Utterback	Main	Central AHU - VAV System w/Distribution - 20% Repair/Ret	5 - Due within 5 Years of In	HVAC System	\$	758,395.68
Utterback	Main	Security System - Burglar Alarm System Renewa	3- Due within 3 Years of In	Security	\$	26,379.36
Utterback	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	88,273.92
Utterback	Main	Security System - Card Access System Renewal	3- Due within 3 Years of In	Security	\$	95,812.08
Utterback	Site - Utterback	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In	Security	\$	73,436.16
Utterback	Site - Utterback	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	58,729.44
Utterback	Site - Utterback	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	126,789.60
Utterback	Main	Intercom System Renewal	3- Due within 3 Years of In	Special Systems System	\$	27,943.44
Vail	Main	Paint Roof	0 - Due Immediately	Exterior Enclosure	\$	252,000.00
Vail	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$	112,240.80
Vail	Main	Boiler HW - Gas-Fired - 2.0M BTU Renewal	5 - Due within 5 Years of In	HVAC System	\$	164,626.56
Vail	Main	Central AHU - VAV System w/Distribution - 30% Repair/Ret	5 - Due within 5 Years of In	HVAC System	\$	677,139.12
Vail	Main	Security System - Burglar Alarm System Renewa	2- Due within 2 Years of In	Security	\$	19,503.12
Vail	Main	Security System - Card Access System Renewal	2- Due within 2 Years of In	Security	\$	85,008.00
Vail	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	88,310.88
Vail	Site - Vail	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Security	\$	39,340.56
Vail	Site - Vail	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In	Security	\$	78,198.96
Vail	Site - Vail	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	48,242.88
Vail	Site - Vail	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	135,013.20
Vail	Main	Fire Alarm System - Average Density Renewal	3- Due within 3 Years of In	Special Systems System	\$	171,277.68
Valencia	Site - Valencia	Automatic Openers - Single Renewa	2- Due within 2 Years of In	Exterior Enclosure	\$	39,340.56
Valencia	Main	Kitchen Make Up Air Unit (3,000 CFM) Renewal	2- Due within 2 Years of In	HVAC System	\$	93,534.00
Valencia	Site - Valencia	Painted Finish - Average (1 Coat Prime - 2 Coats Finish) Rer	2- Due within 2 Years of In	Interior Construction and Conve	\$	119,526.96
Valencia	Main	Security System - CCTV Renewal	2- Due within 2 Years of In	Security	\$	88,285.68
Valencia	Site - Valencia	Site Development - Fencing - Chain Link Renewa	2- Due within 2 Years of In	Security	\$	62,682.48
Valencia	Site - Valencia	Site Development - Fencing - Wrought Iron Renewal	2- Due within 2 Years of In	Security	\$	206,369.52
					<b>Electrical</b>	<b>\$</b>
						<b>70,783.44</b>

Exterior Enclosure	\$	7,023,998.32
HVAC System	\$	7,141,975.68
Interior Construction and Conv	\$	264,547.92
Security	\$	3,827,881.68
Special Systems System	\$	1,366,053.36
<b>Total</b>	<b>\$</b>	<b>19,695,240.40</b>

Carpenters Hall	Main	DX Condensing Unit - Greater Than 25 Tons Renewal	5 - Due within 5 Years of In HVAC System	\$	78,051.12
Clothing Bank/WHSE OFFICE & WAREHOU		Kitchen Make Up Air Unit (3,000 CFM) Renewal	5 - Due within 5 Years of In HVAC System	\$	28,061.04
Clothing Bank/WHSE OFFICE & WAREHOU		Boiler HW - Gas-Fired - 2.0M BTU Renewal	5 - Due within 5 Years of In HVAC System	\$	137,188.80
Duffy		18 ORIGINAL CLASSR Gutters and Downspouts - Aluminum Renewal	5 - Due within 5 Years of In Exterior Enclosure	\$	1,354.08
Duffy		18 ORIGINAL CLASSR Reglet Counter Flashing Renewal	5 - Due within 5 Years of In Exterior Enclosure	\$	2,407.44
Duffy		18 ORIGINAL CLASSR Replace Aluminum Gutters and Downspouts	7 - Due within 7 Years of In Exterior Enclosure	\$	6,622.56
Duffy		18 ORIGINAL CLASSR Minor Repair Asphalt Shingled Roofing	1- Due within 1 Year of Ins Exterior Enclosure	\$	9,051.84
Duffy		18 ORIGINAL CLASSR Skylights - Dome Type Renewal	5 - Due within 5 Years of In Exterior Enclosure	\$	14,565.60
Duffy		18 ORIGINAL CLASSR Paint roofing	1- Due within 1 Year of Ins Exterior Enclosure	\$	50,400.00
Duffy		18 ORIGINAL CLASSR D3050 - Terminal and Package Units - Rooftop Unitary AC - 6	- Due within 6 Years of In HVAC System	\$	386.40
Duffy		18 ORIGINAL CLASSR Replace A/C Unit 5 Ton: Rooftop Unitary AC - Cooling w/Gas	6 - Due within 6 Years of In HVAC System	\$	25,134.48
Duffy		18 ORIGINAL CLASSR Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In HVAC System	\$	228,501.84
Facilities Mgmt		CARPENTRY/FURNITI Gutters and Downspouts - Aluminum Renewal	2- Due within 2 Years of In Exterior Enclosure	\$	6,772.08
Facilities Mgmt		CARPENTRY/FURNITI BUR (Built-Up Roofing) Renewa	2- Due within 2 Years of In Exterior Enclosure	\$	408,654.96
Facilities Mgmt		CARPENTRY/FURNITI Window AC Units (Each) Renewal	5 - Due within 5 Years of In HVAC System	\$	1,575.84
Facilities Mgmt		INSTRUMENT REPAIR Window AC Units (Each) Renewal	3- Due within 3 Years of In HVAC System	\$	4,725.84
Facilities Mgmt		ELECTRONICS Window AC Units (Each) Renewal	3- Due within 3 Years of In HVAC System	\$	12,600.00
Facilities Mgmt		ED TECH Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton - New R	3- Due within 3 Years of In HVAC System	\$	36,247.68
Facilities Mgmt		CARPENTRY/FURNITI Unit Heaters - Gas Fired Renewal	3- Due within 3 Years of In HVAC System	\$	36,697.92
Facilities Mgmt		PLUMBING/ELECTRIC Unit Heaters - Gas Fired Renewal	5 - Due within 5 Years of In HVAC System	\$	44,567.04
Finance Building		ADMINISTRATIVE OF Paint Roof	3- Due within 3 Years of In Exterior Enclosure	\$	332,942.40
Finance Building		ADMINISTRATIVE OF DX Condensing Unit - 5 Tons Renewal	3- Due within 3 Years of In HVAC System	\$	17,791.20
Finance Building		ADMINISTRATIVE OF Boiler HW - Gas-Fired - 1M BTU Renewal	5 - Due within 5 Years of In HVAC System	\$	74,765.04
Finance Building		ADMINISTRATIVE OF DX Condensing Unit - Less Than 25 Tons Renewal	4 - Due within 4 Years of In HVAC System	\$	104,255.76
Food Services	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In HVAC System	\$	168,984.48
LIRC		ADMINISTRATIVE & I Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	1- Due within 1 Year of Ins HVAC System	\$	46,315.92
LIRC		ADMINISTRATIVE & I Boiler HW - Gas-Fired - 1M BTU Renewal	4 - Due within 4 Years of In HVAC System	\$	93,456.72
LIRC		ADMINISTRATIVE & I Cooling Tower - Stainless Steel - 110 Ton Renewal	3- Due within 3 Years of In HVAC System	\$	95,484.48
LIRC		ADMINISTRATIVE & I Chiller - Reciprocating - Air-Cooled 100 Tons Renewa	4 - Due within 4 Years of In HVAC System	\$	160,875.12
Morrow Ed Ctr	Main	Paint roof	3- Due within 3 Years of In Exterior Enclosure	\$	302,400.00
Morrow Ed Ctr	Main	DX Condensing Unit - Less Than 25 Tons Renewal	3- Due within 3 Years of In HVAC System	\$	55,602.96
Morrow Ed Ctr	Main	Rooftop Unitary AC - Cooling Only < 10 Ton - New Renewa	5 - Due within 5 Years of In HVAC System	\$	70,936.32
Morrow Ed Ctr	Main	Boiler HW - Gas-Fired - 1M BTU Renewal	0 - Due Immediately HVAC System	\$	83,176.80
Morrow Ed Ctr	Main	DX Condensing Unit - Greater Than 25 Tons Renewal	0 - Due Immediately HVAC System	\$	180,892.32
Morrow Ed Ctr	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	5 - Due within 5 Years of In HVAC System	\$	129,301.20
Rose/Wellness Ctr	Main	Paint Roof	2- Due within 2 Years of In Exterior Enclosure	\$	63,420.00
Rose/Wellness Ctr	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	3 - Due within 3 Years of In HVAC System	\$	67,656.96
Rosemont Serv Ctr	Main	Rooftop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	4 - Due within 4 Years of In HVAC System	\$	108,741.36
Starr Center	Main	Cap Flashing (Counter Flashing at Parapets) Renewa	7 - Due within 7 Years of In Exterior Enclosure	\$	3,470.88
Starr Center	Main	Gutters and Downspouts - Aluminum Renewal	5 - Due within 5 Years of In Exterior Enclosure	\$	5,418.00
Starr Center	Main	Reglet Counter Flashing Renewal	5 - Due within 5 Years of In Exterior Enclosure	\$	6,417.60
Starr Center	Main	Asphalt Shingled Roofing Renewal	1- Due within 1 Year of Ins Exterior Enclosure	\$	25,729.20

# Support Facilities

Starr Center	Main	BUR (Built-Up Roofing) Renewa	0 - Due Immediately	Exterior Enclosure	\$	146,202.00
Starr Center	Main	Chiller - Centrifugal w/o Cooling Tower Renewal	6 - Due within 6 Years of In	In HVAC System	\$	18,128.88
Starr Center	Main	Boiler HW - Gas-Fired - Average Renewa	7 - Due within 7 Years of In	In HVAC System	\$	27,686.40
Starr Center	Main	DDC System - Average Renewal	4 - Due within 4 Years of In	In HVAC System	\$	51,539.04
Starr Center	Main	Central AHU - VAV System w/Distribution Renewa	8 - Not Time Based	HVAC System	\$	151,406.64
Transportation East	TRANSPORTATION R	Paint Roof	3- Due within 3 Years of In	Exterior Enclosure	\$	24,192.00
Transportation East	TRANSPORTATION L	DX Condensing Unit - 5 Tons - New Renewa	5 - Due within 5 Years of In	In HVAC System	\$	8,895.60
Transportation East	TRANSPORTATION R	Unit Heaters - Electric (Each) Renewa	5 - Due within 5 Years of In	In HVAC System	\$	24,714.48
Warehouse (1940 E V	WAREHOUSE/STORA	Gutters and Downspouts - Aluminum Renewal	2- Due within 2 Years of In	Exterior Enclosure	\$	2,709.84
Warehouse (1940 E V	WAREHOUSE/STORA	Metal Roofing - Economy Renewal	2- Due within 2 Years of In	Exterior Enclosure	\$	183,408.96
Warehouse (1940 E V	WAREHOUSE/STORA	Unit Heaters - Gas Fired Renewal	0 - Due Immediately	HVAC System	\$	18,570.72
Warehouse (1940 E V	WAREHOUSE/STORA	DX Condensing Unit - Less Than 25 Tons Renewal	5 - Due within 5 Years of In	In HVAC System	\$	20,642.16
Warehouse (2050 W	WAREHOUSE/STORA	Gutters and Downspouts - Aluminum Renewal	2- Due within 2 Years of In	Exterior Enclosure	\$	4,063.92
Warehouse (2050 W	WAREHOUSE/STORA	Metal Roofing - Economy Renewal	2- Due within 2 Years of In	Exterior Enclosure	\$	145,745.04
Warehouse (2050 W	WAREHOUSE/STORA	Unit Heaters - Gas Fired Renewal	0 - Due Immediately	HVAC System	\$	21,885.36
Warehouse (2050 W	WAREHOUSE/STORA	Roofop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	0 - Due Immediately	HVAC System	\$	129,583.44
Warehouse (2110 W	WAREHOUSE/STORA	Gutters and Downspouts - Aluminum Renewal	2- Due within 2 Years of In	Exterior Enclosure	\$	4,063.92
Warehouse (2110 W	WAREHOUSE/STORA	Metal Roofing - Economy Renewal	2- Due within 2 Years of In	Exterior Enclosure	\$	162,120.00
Warehouse (2110 W	WAREHOUSE/STORA	Unit Heaters - Gas Fired - Renewal	0 - Due Immediately	HVAC System	\$	21,885.36
Warehouse (2110 W	WAREHOUSE/STORA	Roofop Unitary AC - Cooling w/Gas Heat < 10 Ton Renewa	0 - Due Immediately	HVAC System	\$	129,583.44
Warehouse (480 Car	WAREHOUSE/STORA	Unit Heaters - Gas Fired Renewal	1- Due within 1 Year of Ins	HVAC System	\$	4,158.00
Warehouse (480 Car	WAREHOUSE/STORA	Unit Heaters - Gas Fired Renewal	2- Due within 2 Years of In	In HVAC System	\$	6,331.92
Warehouse (480 Car	WAREHOUSE/STORA	Unit Heaters - Gas Fired Renewal	2- Due within 2 Years of In	In HVAC System	\$	22,535.52
Warehouse (480 Car	WAREHOUSE/STORA	Unitary AC - Cooling Only < 10 Ton Renewal	5 - Due within 5 Years of In	In HVAC System	\$	58,363.20
<b>Exterior Enclosure</b>					<b>\$</b>	<b>1,912,132.32</b>
<b>HVAC System</b>					<b>\$</b>	<b>2,807,884.80</b>
<b>Total</b>					<b>\$</b>	<b>4,720,017.12</b>

Tucson Unified is where  
Students love to Learn  
Teachers love to Teach  
and People love to Work  
We are Team TUSD



---

endi

Tucson Unified School District #1

---





4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

# Tucson Unified School District Facilities Master Plan Digital Web Survey Results

December 03, 2015 to January 13, 2016

## Executive Summary

### Methodology

The following results are based on a facilities survey directed towards parents, teachers, administrators and others interested in sharing their voice about the TUSD facilities. This survey was used to gain insight on feedback that can lead to a bond program. The facilities survey was distributed online via a digital survey link and hosted at the TUSD website. The survey first went live on December 3<sup>rd</sup>, 2015 and ran through January 13<sup>th</sup>, 2016.

The digital survey was created through an Advisory Panel collaboration consisting of TUSD, Geo & Associates and Swaim & Associates to gather suggestions and feedback about the current perceptions of TUSD facilities as well as desired improvements and future expectations.

### Demographical Data & User Metrics

#### Respondent Background:

- Parent: 61%
- Teacher or Staff: 30%
- Other: 10%

Hispanic Nationality: 158\* 18.4%

\*Spanish Surnames and Spanish specific (6)

Responses: 859\* 100% Completion Rate

\*Spanish Surnames and Spanish specific (6)

#### Completion:

- Pcs & Laptops: 533 Avg. Time to Complete: 17:27.
- Tablets: 42 Avg. Time to Complete: 14:24.
- Smartphones: 275 Avg. Time to Complete: 12:13.

#### Devices VS. Unique Visits:

- Pcs & Laptops: 49%
- Tablets: 5%
- Smartphones: 45%
- Other: 0%

**Synopsis**

The Facilities survey results indicate a strong statistical sampling of 859 respondents from this broad group with 61% of responses coming from parents, 30% of responses coming from staff and 10% coming from other. It is important to note that when reviewing respondents answer percentages, the average should be reviewed as well as the top 2 or 3 most common answers. For example, if a majority of respondent’s answers were an average of 3 and the second and third largest percentages were a 2 and 1 out of 5, then the overall perception would be “poor” on that answer, not “average”.

An overwhelming majority wants to receive information regarding the TUSD FMP via digital delivery with email being the top delivery mechanism and website following in second. There was a 96% favorability support for developing the 10-year FMP and funding program.

Respondents felt that current conditions of school buildings support education at a cumulative average of 2.97, while technology infrastructure averaged 2.50. TUSD school safety ranked slightly higher with a 3.49 average for Elementary Schools, a 3.10 average for Middle Schools and a 3.12 for High Schools. Results displayed that 3 out of 5 was the most popular response.

When it comes to a 21<sup>st</sup> Century Education, all programs rated very high and were especially important to the majority of respondents. College Prep, STEM, and Fine Arts were ranked the three highest, while global studies and physical education were the lowest rated.

In regards to what issues should be included in a Facilities Master Plan and potentially a bond, the majority of respondents said that Basic Education was the most important issue, averaging 4.48, followed closely by Technology at 4.45 and 21<sup>st</sup> Century Learning at a 4.31. These were followed by Security at 4.29 and Facilities Maintenance at 4.17. Playgrounds/Fields/Athletics, Student pick-up/drop off, and Busses/Transportation held a much lower priority with respondents.

Overall, the Facilities Master Plan survey results were extremely successful. The results offered some really great feedback that will be very beneficial as the messaging continues to evolve.

**1. How would you like to receive updates and information about the TUSD Facility Master Plan?**

- A. Email= 84%
- B. Website= 21%
- C. Mail= 7%
- D. In-person/public meetings= 7%
- E. Phone= 4%
- F. Other= 2%

**2. Do you feel that developing a 10-year facility plan and funding program is a positive for TUSD?**

- A. Yes= 96%
- B. No= 4%

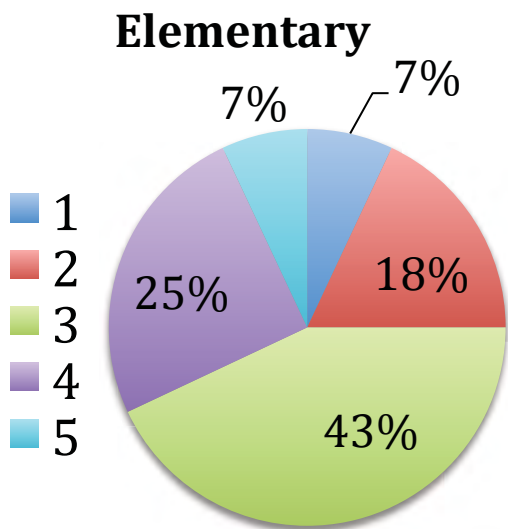
**3. Do you feel the conditions of school buildings and building systems support education?**

“Excellent” (5) to “Poor” (1)

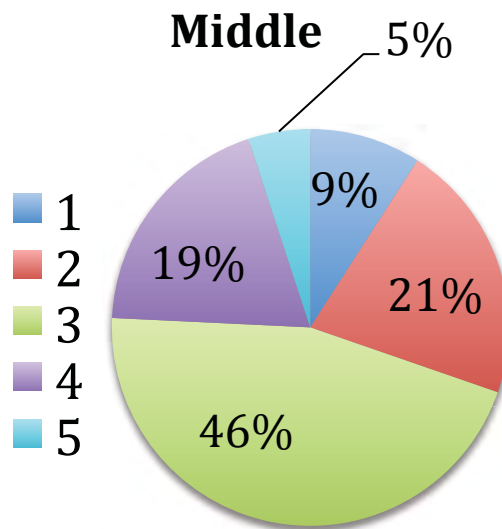


4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

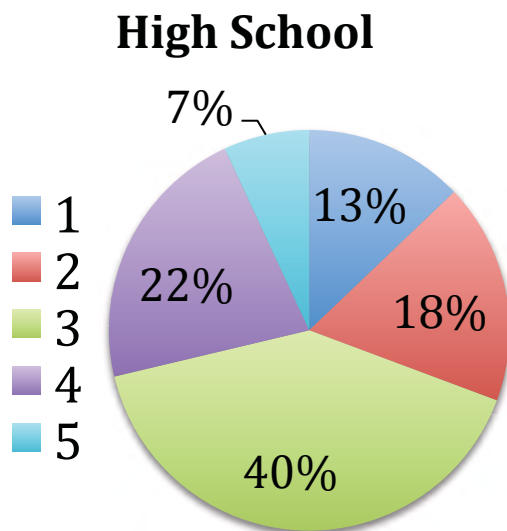
**Elementary School Average = 3.07**



**Middle School Average = 2.90**

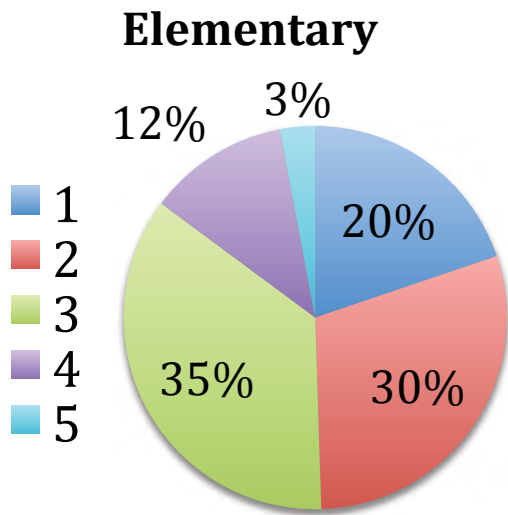


**High School Average = 2.92**

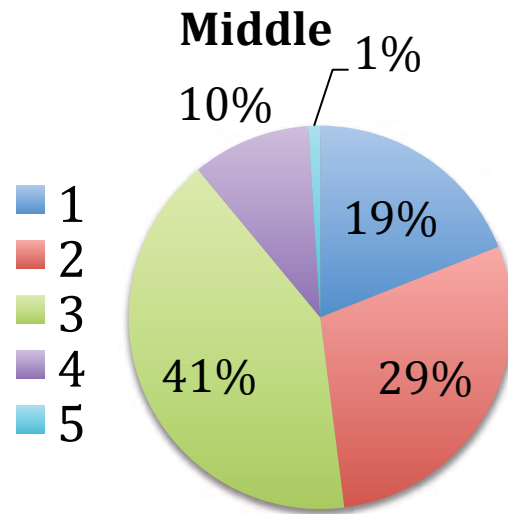


**4. Do you feel schools have the technology infrastructure and devices needed?**  
“Excellent” (5) to “Poor” (1)

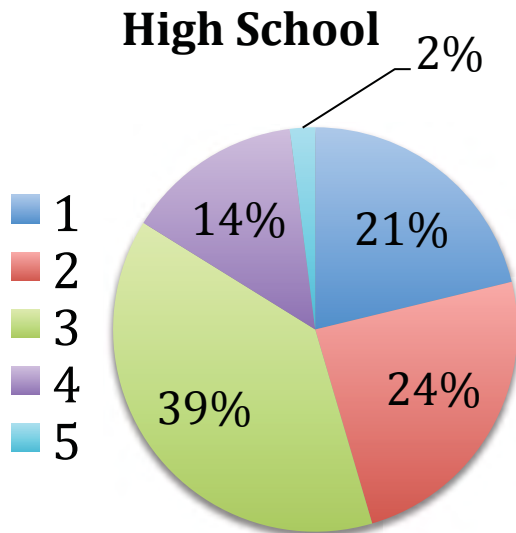
**Elementary School Average = 2.48**



**Middle School Average = 2.46**



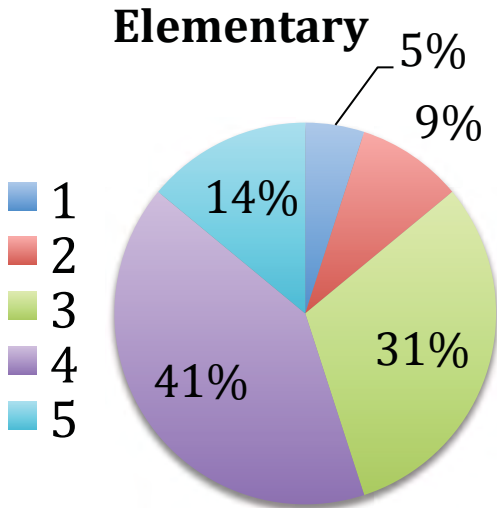
**High School Average = 2.54**



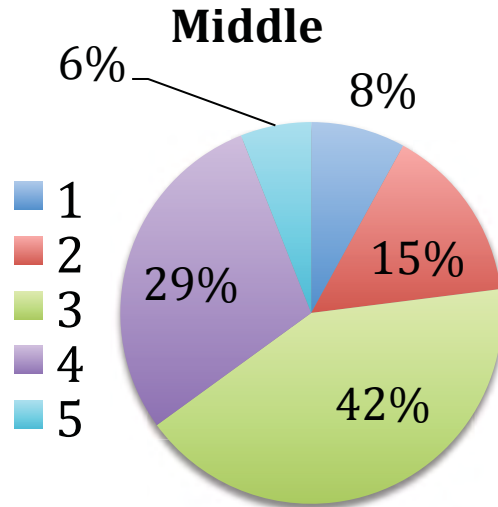
**5. Do you feel schools provide a safe & secure environment?**

“Excellent” (5) to “Poor” (1)

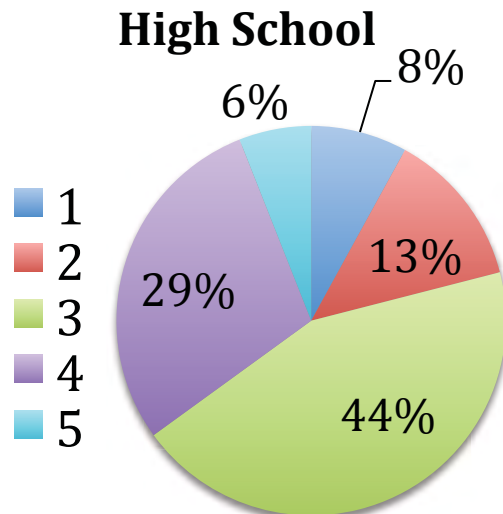
**Elementary School Average = 3.49**



**Middle School Average = 3.10**

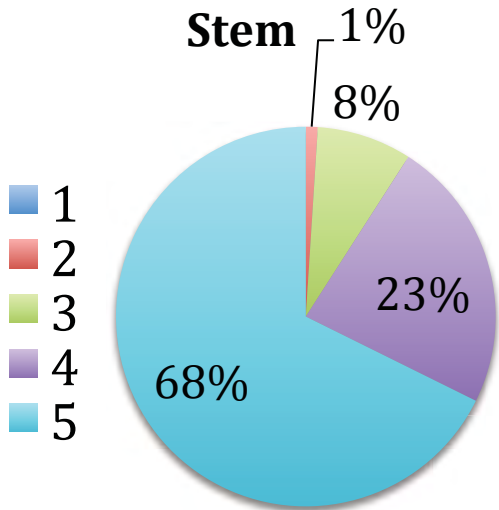


**High School Average = 3.12**

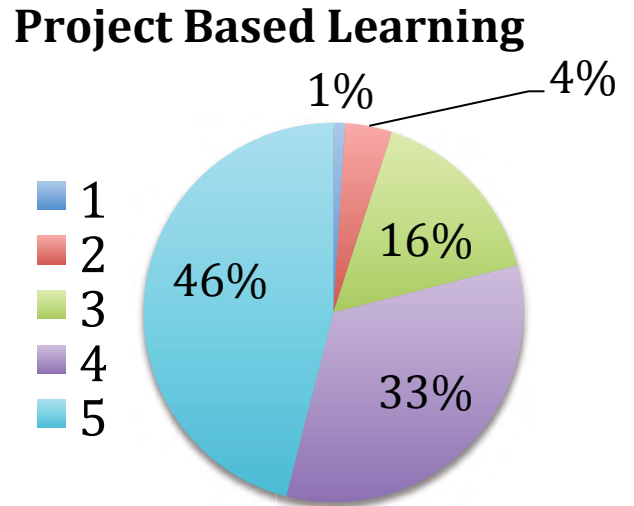


**6. How important are the following in providing a 21<sup>st</sup> century education?**  
“High” (5) to “Low” (1)

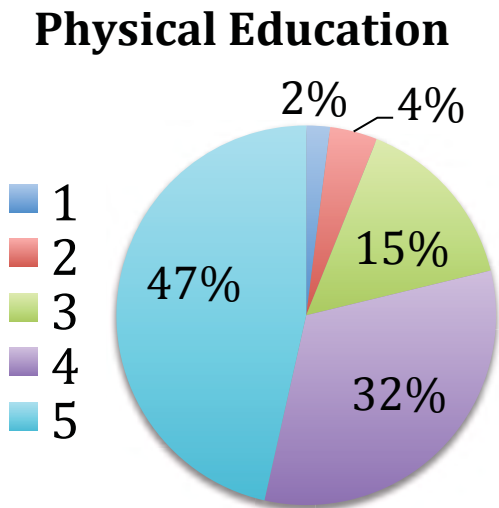
**A. STEM Average = 4.55**



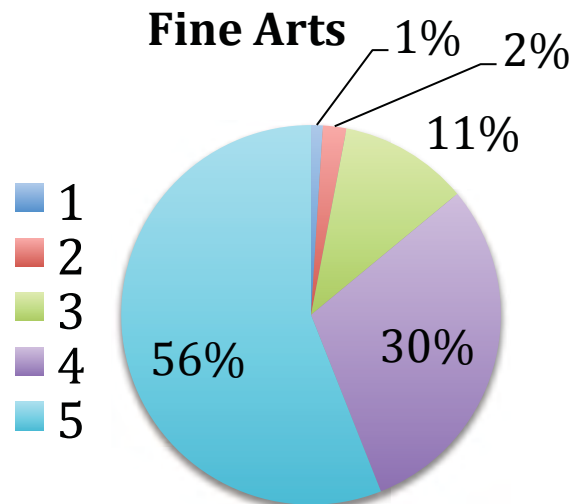
**B. Project-Based learning Average = 4.18**



**C. Physical Education Average = 4.17**



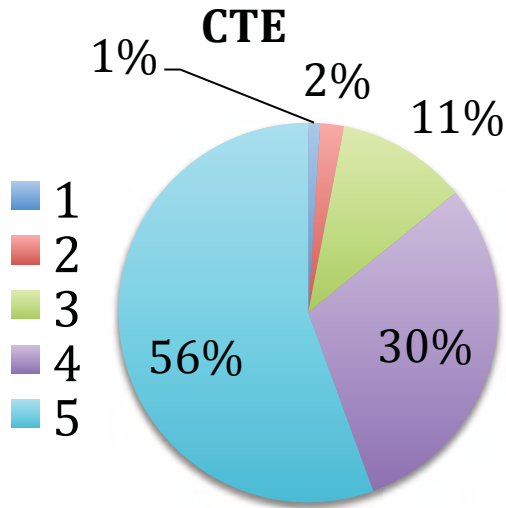
**D. Fine Arts Average = 4.38**



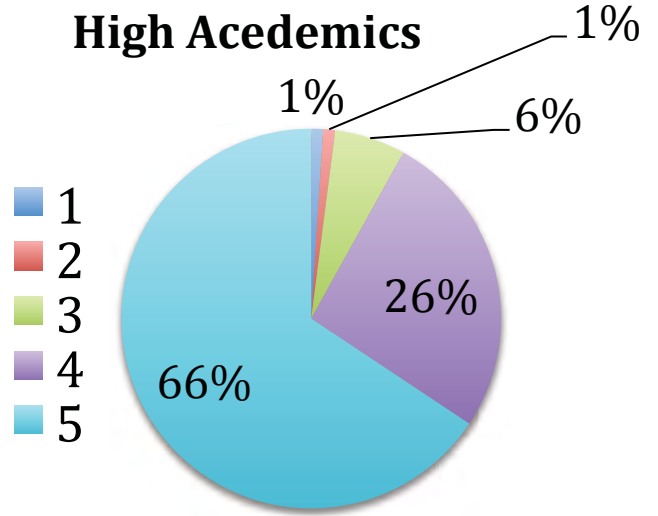


4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

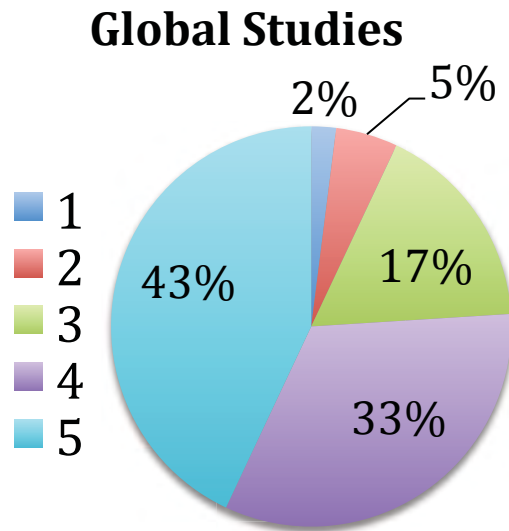
**E. CTE Average = 4.36**



**F. High Academics/College Prep Average = 4.54**



**G. Global Studies and Dual Language Average = 4.10**







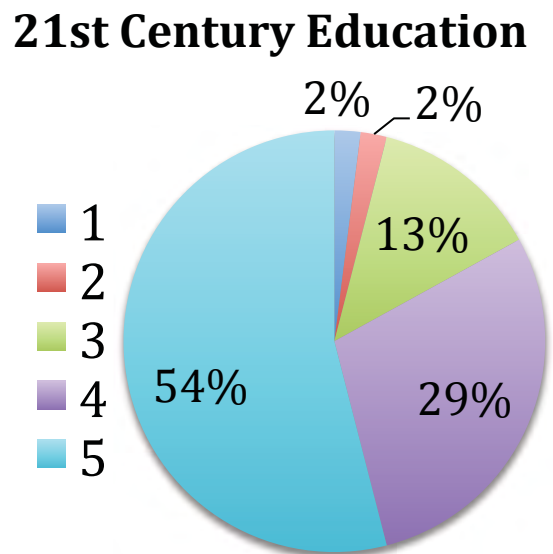
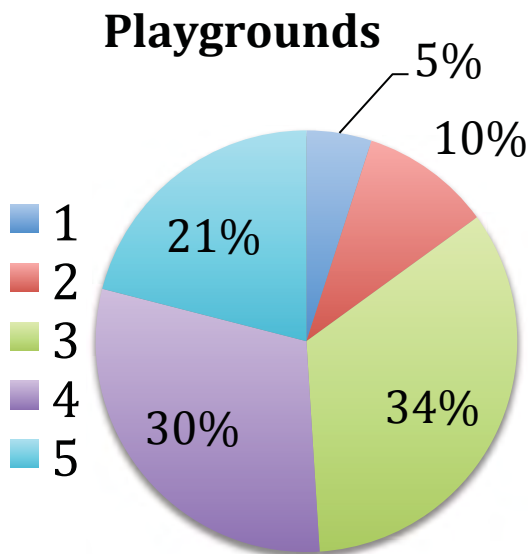


- .unique and has different challenges. Some of the district mandates are more difficult to implement in certain settings. Equity (of supplies, technology, staff) is the biggest challenge.
- Organization, communication, structure and follow through. As a prior employee I experienced huge amounts of fraud waste and abuse at the highest levels. As a community member I have experienced lack of cooperation. As a parent - web sites are not consistent for the schools, the information on the sites is sparse (ie: I had to search other school or community sites to find out sports schedules, no photos or web pages for staff, each uses different sites for parent information [like Remind or School notes] when it should be consistent on internal network, I have to call or email to find out about activities, clubs, tryouts . . . never in the bulletin, or on web page. Some teachers never respond; my son is in advanced math but has the same homework as another in math intervention -same grade; )
- Funding and classroom sizes. We're fortunate to be in a magnet school with capped classroom sizes, but it's still a little large and we have friends whose children have had 30+ students in their classroom.
- Getting TUSD to provide enough funding for school programs that make well-rounded students. Fine Arts, as well as STEM programs need more funding. Do not rob the fine arts programs to pay for STEM programs. Better pay for teachers because they deserve it.

**10. What issues that you feel are important to address for the Facilities Master Plan and possibly a bond?**  
“High” (5) to “Low” (1)

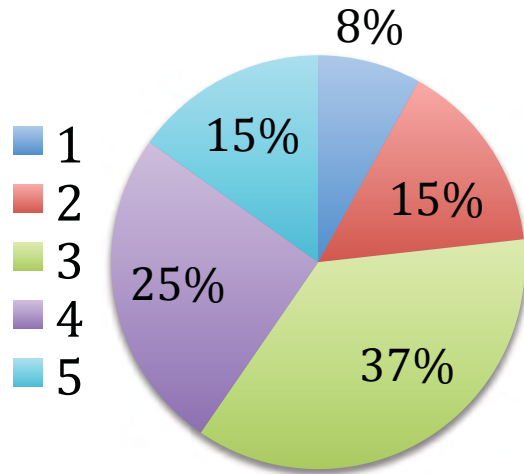
**A. Playgrounds/fields/athletics Average = 3.53**

**B. 21<sup>st</sup> Century Education Average = 4.31**



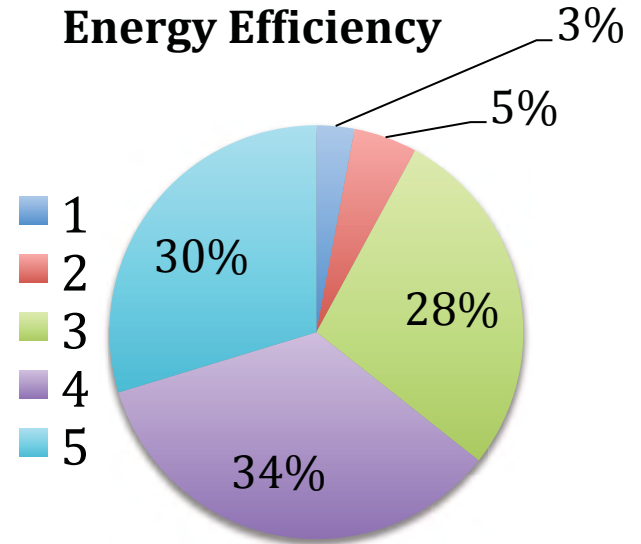
**C. Student pick-up/drop off Average= 3.25**

**Student Pick up**



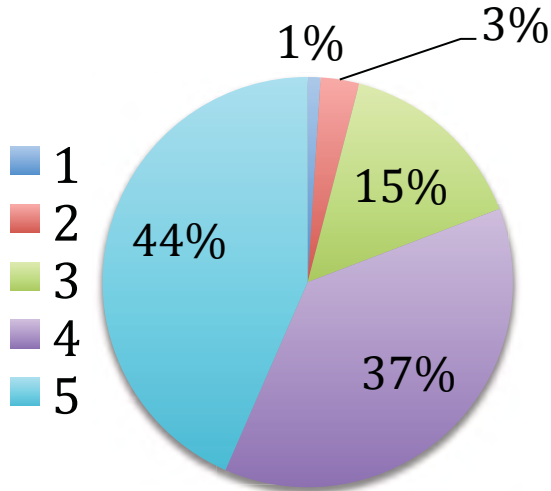
**D. Energy Efficiency Average = 3.83**

**Energy Efficiency**

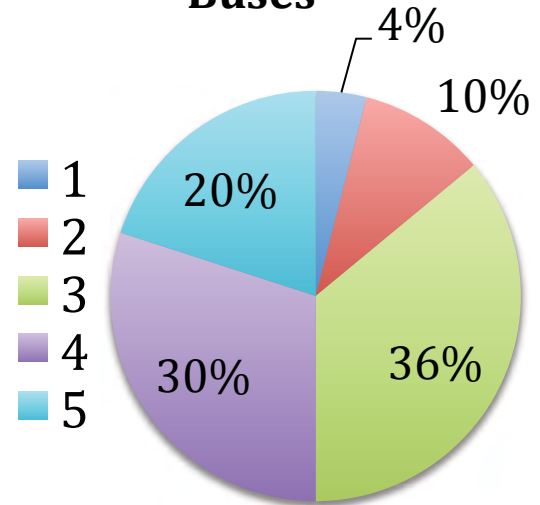


**E. School facilities maintenance Average = 4.17 F. Buses/Transportation Average = 3.50**

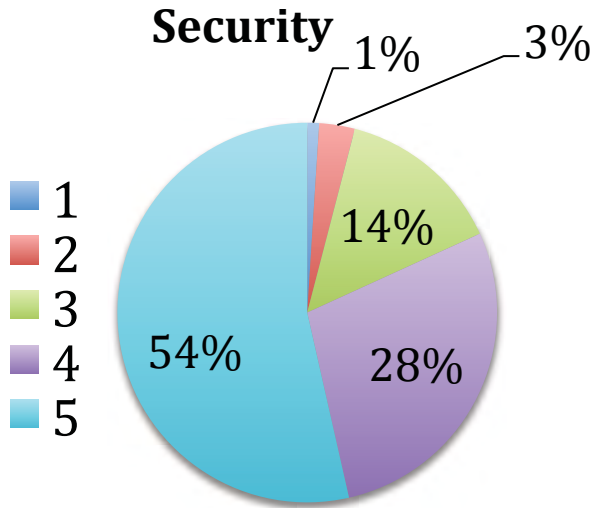
**School Facilities**



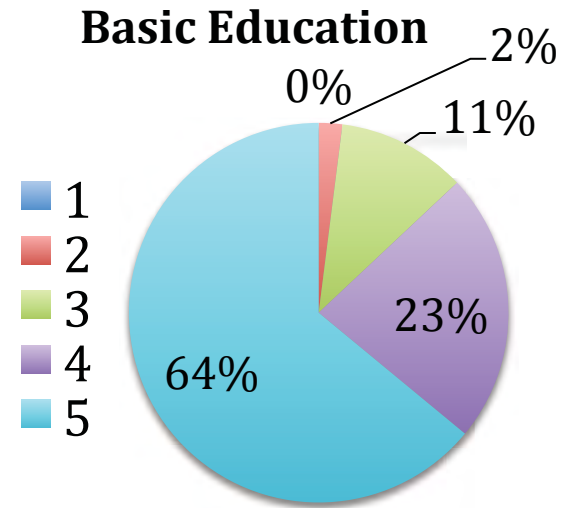
**Buses**



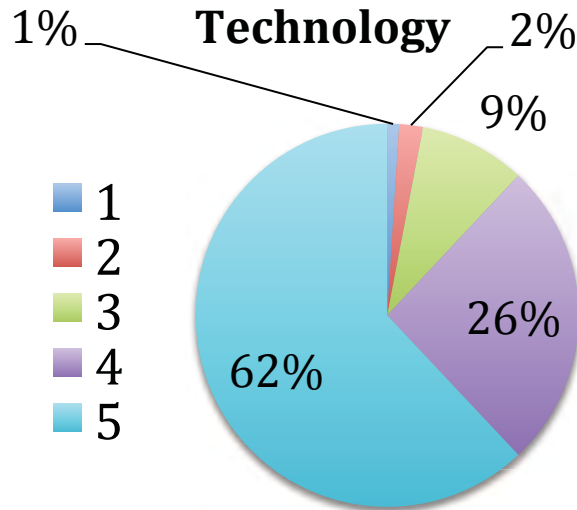
**G. Security of students and staff Average = 4.29**



**H. Basic Education Average = 4.48**



**I. Technology Average = 4.45**

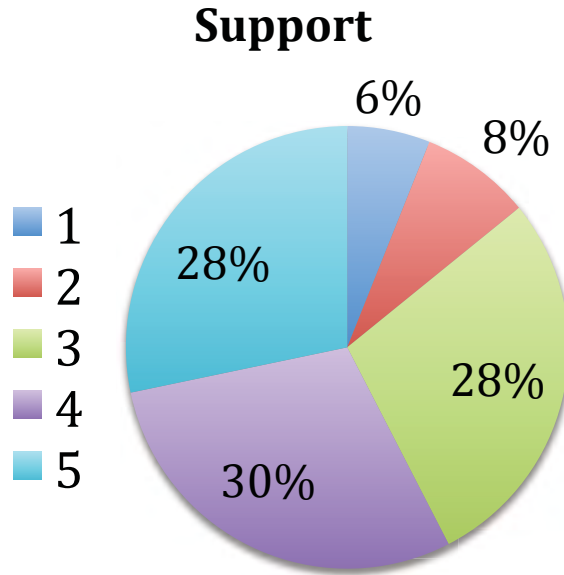




4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

**11. To what extent do you support community schools with shared-use by outside groups/organizations?**  
“Fully” (5) to “Not at All” (1)

**Support Average = 3.64**





4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

## **Tucson Unified School District Preliminary Facility Master Plan Survey November 16, 2015**

### **Executive Summary**

#### **Methodology**

The following results are centered on a survey directed to attendees of the Legislative Advocacy Info-session at Tucson High School Your Voice Event on November 16, 2015. A digital survey was created by Geo & Associates to gather suggestions and feedback from everyone involved at this event, including internal TUSD staff and representatives, for the overall goal of beginning a facility master plan to identify facility improvements and funding sources needed to support their long-term strategic facilities master plan. TUSD staff administered the surveys via digital tablet.

#### **Synopsis**

Results indicated a solid statistical sampling of 34 respondents from this targeted academia group with an equally split cross section of employees from TUSD, Private Organizations and Other Academics, while retirees were slightly represented with most being retired teachers and administrators. An overwhelming majority want to receive information regarding the TUSD FMP via digital delivery with email being the top delivery mechanism and website following. There is overwhelming initial favorability support for developing the 10-year FMP. The majority of respondents want the FMP to provide maintenance and facilities improvements, including technology upgrades, air conditioning, updated buildings and classrooms and improved science labs.

Additionally, most believe to encourage public support there must be improved communication and education toward the public with PR and positive advertising, followed in the distance by public meetings, events, and forums. Parents will be most supportive of the FMP by an overwhelming 71%, followed by TUSD Teachers and Administrators at 21%, while it is felt that retirees and others will be less supportive.

Overwhelmingly respondents feel that the most important options for the public include facility improvements to support an improved curriculum with high academic standards, project-based learning, and technology matched to the workplace, and college and career learning opportunities at 59%.

#### **Demographical Data**

Responses: 34

Employment Background:

- TUSD: 29%
- Other Academic: 24%
- Private Organization: 24%
- Retired: 12%
- Other: 12%

#### **Information delivery method regarding the TUSD Facility Master Plan?**

- A. Email – 85%
- B. Website – 18%

- C. Mail – 0%
- D. Phone – 6%
- E. In-person/public meetings – 12%

**Favorability of developing a 10-year facility plan and funding program for TUSD.**

- A. True – 97%
- B. False – 3%

**What would you like to see the TUSD facility plan and funding program accomplish?**

**Best answer:** “Green audits, efficiency, cost savings, student technology space, innovative & collaborative learning space, capital improvements, shared community facilities such as YMCA, park or college/university space, and urban agriculture and ecology/green space.”

44% said maintenance and facilities improvements—technology upgrades, air conditioning, updated buildings and classrooms, improved science labs

24% said providing more support for students, parents and teachers—higher graduations rates, special needs programs, give more resources to students, family support programs

6% said making schools safer and more welcoming

6% said better allocation of resources—stable funding plan, reasonable use of resources

6% need more information

15% other

**How can we encourage public support for funding TUSD facility improvements?**

**Best answers:** “More community forums, transparency, listening and including internal & external stakeholders in regard to district decision such as superintendent salary package, school changes. More positive media and social media PR for TUSD and students. Do more than at the Board meeting and get successful alumni stories, community partners and businesses involved.”

**Best answers:** “We can encourage more public support by making the citizens in Pima county more aware of this issue.”

**Best answers:** “Building positive relationship with public, strong online presence.”

**Best answers:** “Have tours, highlighting problems that need to be fixed- how not fixing impacts kids' education.”

**Best answers:** “Let them know this is where the money will go and not be diverted.”

**Best answers:** “Talk about property value [increasing] once building[s are] updated.”

27% said improving communication and education toward the public with PR and positive advertising

12% said public meetings, events, and forums

9% said face-to-face communication and education

9% mentioned impact on property values and rental rates

6% said more involvement and communication with stakeholders

38% other

**Which group do you feel will be most supportive of funding TUSD facility improvements?**

- A. Parents of TUSD students – 71%
- B. TUSD Teachers and Administrators – 21%
- C. Former TUSD students – 6%
- D. Retirees – 0%



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

E. Other residents inside the TUSD area – 6%

**Which group do you feel will be least supportive of funding TUSD facility improvements?**

- A. Parents of TUSD students – 9%
- B. TUSD Teachers and Administrators – 9%
- C. Former TUSD students – 0%
- D. Retirees – 56%
- E. Other residents inside the TUSD area – 26%

**Which of these options do you feel is most important to the public?**

- A. Facilities improvements to enhance learning environments and reduce costs through green building, energy efficiency, maintenance, safety and security. – 15%
- B. Facility improvements to support an improved curriculum with high academic standards, project-based learning, and technology matched to the workplace, and college and career learning opportunities. – 59%
- C. Improved financial planning and management that maximizes dollars/resources. – 15%
- D. Other: – 12%





4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

## **Tucson Unified School District**

### **Facilities Master Plan Meeting Survey Results (1-06-2016)**

**Jan 11<sup>th</sup>, 2016**

### **Executive Summary**

#### **Methodology**

The following results are based on a facilities survey directed towards parents, teachers, administrators and others interested in sharing their voice about the TUSD facilities. The facilities survey was distributed during the TUSD January 6<sup>th</sup> Facilities Master Plan Meeting via digital survey link and hard copies of the survey.

A digital survey was created through an Advisory Panel collaboration consisting of TUSD, Geo & Associates and Swaim & Associates to gather suggestions and feedback about the current perceptions of TUSD facilities as well as desired improvements and future expectations.

An exit survey link was handed out via business card at the end of the meeting to determine if any answers had changed based on the presentation. The exit survey yielded a statistically valid representative sampling size of the primary survey, with an 85% certainty/confidence level and a +/- 10% margin of error. The results were tallied from 25 people that took the exit survey. Those results are also included in this summary.

#### **Synopsis**

The January 6<sup>th</sup> meeting results indicate a strong statistical sampling of 172 respondents from this broad group with 64% of responses coming from teachers and staff, 30% of responses coming from parents and 6% coming from other. It is important to note that when reviewing respondents answer percentages, the average should be reviewed as well as the top 2 or 3 most common answers. For example, if a majority of respondent's answers were an average of 3 and the second and third largest percentages were a 2 and 1 out of 5, then the overall perception would be "poor" on that answer, not "average".

An overwhelming majority want to receive information regarding the TUSD FMP via digital delivery with email being the top delivery mechanism and website following in second. There was 100% favorability support for developing the 10-year FMP and the audience felt a funding program is a positive for TUSD.

Respondents felt that current conditions of school buildings support education at an average of 3.06, while technology infrastructure averaged 2.76. TUSD school safety ranked slightly higher than both aforementioned with a 3.62 average for Elementary Schools and a 3.24 average for Middle and High school with 3 out of 5 being the most popular results, respectively.

When it comes to a 21<sup>st</sup> Century Education, all programs rated very high and were especially important to the majority of respondents. College Prep, STEM, and CTE were ranked the three highest, while global studies and physical education were the lowest rated.

In regards to what issues should be included in a Facilities Master Plan and potentially a bond, the majority of respondents said that Technology was the most important issue, averaging 4.60, followed closely by 21<sup>st</sup> Century Education and Basic Education at a 4.49 average for both. These were followed by Security at 4.40 and Facilities Maintenance at 4.34. Playgrounds/Fields/Athletics, Student pick-up/drop off, and Busses/Transportation held a much lower priority with respondents.



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

Overall, the January 6<sup>th</sup> survey results were extremely successful. The results offered some really great feedback that will be very beneficial as the messaging continues to evolve.

Out of the results conducted in the exit survey, there was a slight but noticeable change in people's views after the presentation that affected their answers in the previous survey. This post exit survey results yielded a need of prioritization ranking in order to determine what educational and facilities issues are most important. A separate follow-up survey is need asking these same respondents to make a choice and prioritize their initial perceptions from most important down to least important.

For example, High Academics/College Prep had a slight decrease in the post exit survey with 70% being the initial reaction and 64% being the results after the presentation post exit survey. STEM increased from 67% in initial survey to 76% after the presentation in the post exit survey. Also, 21<sup>st</sup> Century Education showed an increase in results jumping from 59% initially to 88% post exit survey. Finally, respondent's willingness to support a \$100 annual property tax increase rose from 42% to 68% in the post exit survey.

### **Demographical Data**

Responses: 172

Respondent Background:

Teacher or Staff: 64%

Parent: 30%

Other: 6%

#### **1. How would you like to receive updates and information about the TUSD Facility Master Plan?**

- a. Email= 90%
- b. Website= 22%
- c. Mail= 5%
- d. Phone= 3%
- e. In-person/public meetings= 15%
- f. Other= 0%

#### **2. Do you feel that developing a 10-year facility plan and funding program is a positive for TUSD?**

- a. Yes= 100%
- b. No= 0%

#### **3. Do you feel the conditions of school buildings and building systems support education?**

"Excellent" (5) to "Poor" (1)

Elementary	1=5%	2=21%	3=45%	4=22%	5=7%	(Avg=3.06)
Middle	1=8%	2=22%	3=48%	4=17%	5=6%	(Avg=2.92)
High School	1=6%	2=12%	3=46%	4=27%	5=9%	(Avg=3.21)

#### **4. Do you feel schools have the technology infrastructure and devices needed?**

"Excellent" (5) to "Poor" (1)

Elementary	1=23%	2=42%	3=26%	4=7%	5=2%	(Avg=2.24)
Middle	1=19%	2=33%	3=39%	4=6%	5=3%	(Avg=2.42)
High School	1=11%	2=24%	3=45%	4=16%	5=3%	(Avg=2.76)

**5. Do you feel schools provide a safe & secure environment?**

“Excellent” (5) to “Poor” (1)

Elementary	1=2%	2=5%	3=37%	4=40%	5=16%	(Avg=3.62)
Middle	1=3%	2=15%	3=46%	4=28%	5=8%	(Avg=3.24)
High School	1=4%	2=11%	3=49%	4=27%	5=9%	(Avg=3.26)

**6. How important are the following in providing a 21<sup>st</sup> century education?**

“High” (5) to “Low” (1)

A. STEM (Science Technology Engineering & Math)	1=0%	2=0%	3=8%	4=25%	5=67%	(Avg=4.59)
B. Project-based Learning	1=0%	2=1%	3=10%	4=28%	5=62%	(Avg=4.51)
C. Physical Education / Interscholastic Activities	1=1%	2=1%	3=16%	4=36%	5=46%	(Avg=4.25)
D. Fine Arts	1=1%	2=1%	3=12%	4=27%	5=58%	(Avg=4.40)
E. CTE (Career & Technical Education)	1=1%	2=2%	3=4%	4=31%	5=63%	(Avg=4.53)
F. High Academics / College Prep	1=0%	2=1%	3=6%	4=23%	5=70%	(Avg=4.62)
G. Global Studies and Dual Language	1=1%	2=4%	3=17%	4=30%	5=48%	(Avg=4.19)

**7. What is the best part of TUSD schools?**

Top Comments

- TUSD has a lot of employees who are committed to do their best for children everyday. We have a plan to ensure that certified and classified employees are able to have success however we need additional funding for programs and facilities.
- Amazing diversity, talented youth, dedicated and skilled teachers, choices for families, excellence awards, dual language but not many as needed.
- Wide variety of magnet specialized schools to help support wide variety of options for students to learn and become high level learners
- Course options and offerings. Supplemental programs and supports. In most cases space and Internet access (wi-if)
- Dedicated staff, loyal families, smart, diverse students, variety of choices.

**8. What is the biggest challenge for TUSD schools?**

Top Comments

- Communication and collaboration with the community, but has improved significantly over last 2 years. TUSD must continue to work towards gaining the trust of the community.
- Size, unified effort amongst stakeholders, overcoming negative publicity and perception of low quality in Greater Tucson, state politics are negative.
- Keeping up with all expenses of education, considering political climate
- Persistent poverty and other social and historic challenges in Tucson. Income inequality between TUSD and neighboring districts. Political support for myriad approaches like charter schools.
- Capital funding for infrastructure, PD for teachers and support staff

**9. What issues that you feel are important to address for the Facilities Master Plan and possibly a bond?**

“High” (5) to “Low” (1)

A. Playgrounds/fields/athletics	1=1%	2=11%	3=34%	4=35%	5=19%	(Avg=3.59)
B. 21 <sup>st</sup> century education (as described in question 6)	1=0%	2=1%	3=9%	4=32%	5=59%	(Avg=4.49)
C. Student pick-up/drop off	1=2%	2=15%	3=40%	4=26%	5=18%	(Avg=3.44)

D. Energy efficiency and reduced operating cost	1=1%	2=5%	3=22%	4=40%	5=33%	(Avg=3.99)
E. School facilities maintenance	1=1%	2=1%	3=7%	4=44%	5=47%	(Avg=4.34)
F. Busses/Transportation	1=2%	2=8%	3=34%	4=40%	5=17%	(Avg=3.61)
G. Security of students and staff	1=0%	2=3%	3=12%	4=27%	5=58%	(Avg=4.40)
H. Basic education	1=0%	2=3%	3=10%	4=22%	5=65%	(Avg=4.49)
I. Technology		1=1%	2=1%	3=5%	4=24%	5=69% (Avg=4.60)
J. Other	0%					

**10. To what extent would you support a bond for school improvements through property taxes**

• \$100 annual increase	42%
• \$80 annual increase	7%
• \$60 annual increase	19%
• \$40 annual increase	16%
• \$20 annual increase	10%
• No Increase	5%

**POST EXIT SURVEY RESULTS:**

**1. How important are the following in providing a 21<sup>st</sup> century education?**

“High” (5) to “Low” (1)

A. STEM (Science Technology Engineering & Math)	1=0%	2=0%	3=4%	4=20%	5=76%	(Avg=4.72)
B. Project-based Learning	1=0%	2=0%	3=8%	4=40%	5=52%	(Avg=4.44)
C. Physical Education / Interscholastic Activities	1=1%	2=0%	3=8%	4=60%	5=24%	(Avg=4.08)
D. Fine Arts	1=1%	2=1%	3=12%	4=40%	5=52%	(Avg=4.44)
E. CTE (Career & Technical Education)	1=0%	2=0%	3=0%	4=40%	5=60%	(Avg=4.60)
F. High Academics / College Prep	1=0%	2=0%	3=0%	4=36%	5=64%	(Avg=4.64)
G. Global Studies and Dual Language	1=0%	2=0%	3=17%	4=40%	5=40%	(Avg=4.20)

**2. What issues that you feel are important to address for the Facilities Master Plan and possibly a bond?**

“High” (5) to “Low” (1)

A. Playgrounds/fields/athletics	1=0%	2=4%	3=28%	4=44%	5=24%	(Avg=3.88)
B. 21 <sup>st</sup> century education (as described in question 6)	1=0%	2=0%	3=0%	4=12%	5=88%	(Avg=4.88)
C. Student pick-up/drop off	1=0%	2=8%	3=56%	4=16%	5=20%	(Avg=3.48)
D. Energy efficiency and reduced operating cost	1=0%	2=0%	3=2%	4=40%	5=56%	(Avg=4.52)
E. School facilities maintenance	1=0%	2=0%	3=0%	4=36%	5=64%	(Avg=4.64)
F. Busses/Transportation	1=0%	2=12%	3=44%	4=44%	5=0%	(Avg=3.32)
G. Security of students and staff	1=0%	2=0%	3=16%	4=32%	5=52%	(Avg=4.36)
H. Basic education	1=0%	2=0%	3=0%	4=32%	5=68%	(Avg=4.68)
I. Technology		1=0%	2=0%	3=0%	4=32%	5=68% (Avg=4.68)
J. Other	0%					

**3. Would you like to participate in a focus group to develop the plan?**

A. Elementary Schools	72%
B. Middle and K-8 Schools	32%
C. High Schools and Alternative Education	20%



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

**4. To what extent would you support a bond for school improvements through property taxes**

- \$100 annual increase 68%
- \$80 annual increase 12%
- \$60 annual increase 8%
- \$40 annual increase 12%
- \$20 annual increase 0%
- No Increase 0%



4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

# Tucson Unified School District Facilities Master Plan Survey Results

## January 19, 2016 – Cholla Magnet High School

### Executive Summary

#### Methodology

The following results are based on a facilities survey directed towards parents, teachers, administrators and others interested in sharing their voice about the TUSD facilities. The facilities survey was distributed during the TUSD January 19<sup>th</sup> Facilities Master Plan Meeting at Cholla Magnet High School via digital survey link and hard copies of the survey.

A digital survey was created through an Advisory Panel collaboration consisting of TUSD, Geo & Associates and Swaim & Associates to gather suggestions and feedback about the current perceptions of TUSD facilities as well as desired improvements and future expectations.

#### Synopsis

The January 19<sup>th</sup> meeting results provided a solid statistical sampling of respondents. The respondents at this group meeting were made up of 61% teachers, 22% parents and 17% of responses were other. An overwhelming majority want to receive information regarding the TUSD FMP via digital delivery with email being the top delivery mechanism and website following in second. There was 100% favorability support for developing the 10-year FMP and the audience felt a funding program is a positive for TUSD.

It is important to note that when reviewing respondents answer percentages, the average should be reviewed as well as the top 2 or 3 most common answers. For example, if a majority of respondent's answers were an average of 3 and the second and third largest percentages were a 2 and 1 out of 5, then the overall perception would be "poor" on that answer, not "average".

Respondents felt that current conditions of school buildings support education at a cumulative average of 3.24 at all levels of education, while technology infrastructure came out at a cumulative average of 2.63 at all levels. TUSD school safety ranked slightly higher than both aforementioned with a cumulative average of 3.30 for all levels of education.

When it comes to a 21<sup>st</sup> Century Education, all programs rated very high and were especially important to the majority of respondents. College Prep, STEM, and CTE were ranked the three highest, while global studies and physical education were the lowest rated.

In regards to what issues should be included in a Facilities Master Plan and potentially a bond, the majority of respondents said Technology was the most important issue, averaging 4.78, followed closely by School facilities maintenance at 4.67 and Basic Education and 21<sup>st</sup> Century Education at a 4.47 average for both. These were closely followed by Energy Efficiency at 4.33 and Buses and Transportation at 3.94. Playgrounds/Fields/Athletics and Student pick-up/drop off held a much lower priority with respondents.

Overall, the January 19<sup>th</sup> survey results were extremely valuable, offering some really great feedback that will be very beneficial as the messaging continues to evolve. In addition, 56% of respondents would you support a \$100 annual tax increase for school improvements through property taxes, followed by 22% at an \$60 annual increase. Noteworthy offerings came from the Question and Answer session following the presentation. Recommendations included keeping the overall bond messaging concise and keeping everyone involved.

**Demographical Data**

Responses: 18  
 Respondent Background:  
 Teacher or Staff: 61%  
 Parent: 22%  
 Other: 17%

**1. How would you like to receive updates and information about the TUSD Facility Master Plan?**

- A. Email= 83%
- B. Website= 28%
- C. Mail= 6%
- D. Phone= 0%
- E. In-person/public meetings= 0%
- F. Other= 0%

**2. Do you feel that developing a 10-year facility plan and funding program is a positive for TUSD?**

- A. Yes= 100%
- B. No= 0%

**3. Do you feel the conditions of school buildings and building systems support education?**

“Excellent” (5) to “Poor” (1)

- Elementary 1= 0% 2=28% 3=39% 4=17% 5=17% (Avg=3.22)
- Middle 1= 6% 2=28% 3=33% 4=17% 5=17% (Avg=3.11)
- High School 1= 0% 2=33% 3=22% 4=17% 5=28% (Avg=3.39)

**4. Do you feel schools have the technology infrastructure and devices needed?**

“Excellent” (5) to “Poor” (1)

- Elementary 1=17% 2=33% 3=33% 4=17% 5=0% (Avg=2.50)
- Middle 1=11% 2=39% 3=33% 4=17% 5=0% (Avg=2.56)
- High School 1=11% 2=22% 3=39% 4=28% 5=0% (Avg=2.83)

**5. Do you feel schools provide a safe & secure environment?**

“Excellent” (5) to “Poor” (1)

- Elementary 1=6% 2=17% 3=44% 4=6% 5=28% (Avg=3.33)
- Middle 1=11% 2=11% 3=44% 4=22% 5=17% (Avg=3.17)
- High School 1=6% 2=6% 3=50% 4=22% 5=17% (Avg=3.39)

**6. How important are the following in providing a 21<sup>st</sup> century education?**

“High” (5) to “Low” (1)

- A. STEM (Science Technology Engineering & Math) 1=0% 2=0% 3=11% 4=17% 5=72% (Avg=4.61)
- B. Project-based Learning 1=0% 2=0% 3=11% 4=28% 5=61% (Avg=4.50)
- C. Physical Education / Interscholastic Activities 1=0% 2=11% 3=22% 4=33% 5=33% (Avg=3.89)
- D. Fine Arts 1=0% 2=0% 3=6% 4=56% 5=39% (Avg=4.33)
- E. CTE (Career & Technical Education) 1=0% 2=0% 3=11% 4=28% 5=61% (Avg=4.50)

- |                                     |      |      |       |       |       |            |
|-------------------------------------|------|------|-------|-------|-------|------------|
| F. High Academics / College Prep    | 1=0% | 2=0% | 3=11% | 4=17% | 5=72% | (Avg=4.61) |
| G. Global Studies and Dual Language | 1=0% | 2=6% | 3=22% | 4=17% | 5=56% | (Avg=4.22) |

**7. What is the best part of TUSD schools?**

Top Comments

- There are many scholastic options, for students seeking specific areas of study, to choose from.
- We have a focus and common vision. We need that to reach our community, our faculties and our students.
- I can't decide what is the best part, if everything and everyone were on the same page then everything would be the best part!
- A sense of community for our students
- The commitment to making improvements that will help students excel in education

**8. What is the biggest challenge for TUSD schools?**

Top Comments

- Sometimes it's difficult providing all of the technology necessary to help students think/work outside of the box
- Continue to change the reputation that has hindered progress. We need a board that will stop fighting and start v of our students.
- Improving some of our old buildings and the lack of adequate funding from the state
- Out dated facility and slow institute to technology

**9. What issues that you feel are important to address for the Facilities Master Plan and possibly a bond?**

“High” (5) to “Low” (1)

- |  |      |      |       |       |       |            |            |
|--|------|------|-------|-------|-------|------------|------------|
| A. Playgrounds/fields/athletics                                    | 1=0% | 2=6% | 3=28% | 4=50% | 5=17% | (Avg=3.56) |            |
| B. 21 <sup>st</sup> century education (as described in question 6) | 1=0% | 2=0% | 3=17% | 4=17% | 5=67% | (Avg=4.50) |            |
| C. Student pick-up/drop off  | 1=0% | 2=6% | 3=50% | 4=33% | 5=11% | (Avg=3.50) |            |
| D. Energy efficiency and reduced operating cost                    | 1=0% | 2=0% | 3=17% | 4=33% | 5=50% | (Avg=4.33) |            |
| E. School facilities maintenance                                   | 1=0% | 2=0% | 3=11% | 4=11% | 5=78% | (Avg=4.67) |            |
| F. Buses/Transportation  | 1=0% | 2=0% | 3=33% | 4=39% | 5=28% | (Avg=3.94) |            |
| G. Security of students and staff                                  | 1=0% | 2=0% | 3=17% | 4=11% | 5=72% | (Avg=4.56) |            |
| H. Basic education   | 1=0% | 2=0% | 3=22% | 4=11% | 5=67% | (Avg=4.44) |            |
| I. Technology  |      | 1=0% | 2=0%  | 3=6%  | 4=11% | 5=83%      | (Avg=4.78) |
| J. Other   | 0%   |      |       |       |       |            |            |

**10. To what extent would you support a bond for school improvements through property taxes**

- |                         |     |
|-------------------------|-----|
| • \$100 annual increase | 56% |
| • \$80 annual increase  | 0%  |
| • \$60 annual increase  | 22% |
| • \$40 annual increase  | 6%  |
| • \$20 annual increase  | 6%  |
| • No Increase           | 11% |





4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

# Tucson Unified School District

## Facilities Master Plan Survey Results

### January 16, 2016 – Palo Verde Magnet High School

## Executive Summary

### Methodology

The following results are based on a facilities survey directed towards parents, teachers, administrators and others interested in sharing their voice about the TUSD facilities. The facilities survey was distributed during the TUSD January 16<sup>th</sup> Facilities Master Plan Meeting at Palo Verde Magnet High School via digital survey link and hard copies of the survey.

A digital survey was created through an Advisory Panel collaboration consisting of TUSD, Geo & Associates and Swaim & Associates to gather suggestions and feedback about the current perceptions of TUSD facilities as well as desired improvements and future expectations.

### Synopsis

The January 16<sup>th</sup> meeting results provided a solid statistical sampling of respondents. The respondents at this group meeting were made up of 61% parents, 22% other and 17% teachers. An overwhelming majority want to receive information regarding the TUSD FMP via digital delivery with email being the top delivery mechanism and website following in second. There was 96% favorability support for developing the 10-year FMP and the audience felt a funding program is a positive for TUSD.

It is important to note that when reviewing respondents' answer percentages, the average should be reviewed as well as the top 2 or 3 most common answers. For example, if a majority of respondents' answers were an average of 3 out of 5 and the second and third largest percentages were a 2 and 1 out of 5, then the overall perception would be "poor" on that answer, not "average".

Respondents felt that current conditions of school buildings support education at a cumulative average of 2.77 at all levels of education, while technology infrastructure averaged 2.16 at all levels. TUSD school safety ranked slightly with a cumulative average of 3.05 for all levels of education.

When it comes to a 21<sup>st</sup> Century Education, all programs rated very high and were especially important to the majority of respondents. College Prep, STEM, and CTE were ranked the three highest, while global studies and physical education were the lowest rated.

In regards to what issues should be included in a Facilities Master Plan and paid for by a bond, the majority of respondents said that 21<sup>st</sup> Century Education was the most important issue, averaging 4.74, followed closely by Basic Education at 4.70 with Security and Technology both averaging 4.61. These were followed by Maintenance at 4.35 and Energy Efficiency at 4.22. Playgrounds/Fields/Athletics, Student pick-up/drop off, and Busses/Transportation held a much lower priority with respondents.

Overall, the January 16<sup>th</sup> survey results were extremely successful. The results offered some really great feedback that will be very beneficial as the messaging continues to evolve. In addition, 33% of respondents would support a \$100 annual tax increase for school improvements through property taxes, followed by 24% at an \$80 annual increase. Noteworthy offerings came from the Question and Answer session following the presentation. Recommendations included keeping the overall bond messaging concise and keeping everyone involved.

**Demographical Data**

Responses: 23  
 Respondent Background:  
 Teacher or Staff: 17%  
 Parent: 61%  
 Other: 22%

**1. How would you like to receive updates and information about the TUSD Facility Master Plan?**

- a. Email= 83%
- b. Website= 22%
- c. Mail= 22%
- d. Phone= 13%
- e. In-person/public meetings= 22%
- f. Other= 9%

**2. Do you feel that developing a 10-year facility plan and funding program is a positive for TUSD?**

- A. Yes= 96%
- B. No= 4%

**3. Do you feel the conditions of school buildings and building systems support education?**

“Excellent” (5) to “Poor” (1)

Elementary	1=26%	2=13%	3=30%	4=26%	5=4%	(Avg=2.70)
Middle	1=17%	2=26%	3=26%	4=26%	5=4%	(Avg=2.74)
High School	1=17%	2=13%	3=39%	4=26%	5=4%	(Avg=2.87)

**4. Do you feel schools have the technology infrastructure and devices needed?**

“Excellent” (5) to “Poor” (1)

Elementary	1=26%	2=43%	3=26%	4=4%	5=0%	(Avg=2.09)
Middle	1=17%	2=39%	3=43%	4=0%	5=0%	(Avg=2.13)
High School	1=17%	2=39%	3=43%	4=0%	5=0%	(Avg=2.26)

**5. Do you feel schools provide a safe & secure environment?**

“Excellent” (5) to “Poor” (1)

Elementary	1=9%	2=17%	3=35%	4=26%	5=13%	(Avg=3.17)
Middle	1=9%	2=26%	3=30%	4=26%	5=9%	(Avg=3.00)
High School	1=13%	2=13%	3=43%	4=22%	5=9%	(Avg=3.00)

**6. How important are the following in providing a 21<sup>st</sup> century education?**

“High” (5) to “Low” (1)

A. STEM (Science Technology Engineering & Math)	1=0%	2=4%	3=4%	4=9%	5=83%	(Avg=4.70)
B. Project-based Learning	1=0%	2=4%	3=4%	4=35%	5=57%	(Avg=4.43)
C. Physical Education / Interscholastic Activities	1=4%	2=0%	3=4%	4=48%	5=43%	(Avg=4.26)
D. Fine Arts	1=4%	2=0%	3=4%	4=39%	5=52%	(Avg=4.35)
E. CTE (Career & Technical Education)	1=0%	2=4%	3=4%	4=17%	5=74%	(Avg=4.61)

- |                                     |      |      |       |       |       |            |
|-------------------------------------|------|------|-------|-------|-------|------------|
| F. High Academics / College Prep    | 1=4% | 2=0% | 3=0%  | 4=22% | 5=74% | (Avg=4.61) |
| G. Global Studies and Dual Language | 1=4% | 2=4% | 3=17% | 4=17% | 5=57% | (Avg=4.17) |

**7. What is the best part of TUSD schools?**

Top Comments

- TUSD has a lot of employees who are committed to do their best for children everyday. We have a plan to ensure that certified and classified employees are able to have success however we need additional funding for programs and facilities.
- Amazing diversity, talented youth, dedicated and skilled teachers, choices for families, excellence awards, dual language but not many as needed.
- Wide variety of magnet specialized schools to help support wide variety of options for students to learn and become high level learners
- Course options and offerings. Supplemental programs and supports. In most cases space and Internet access (wi-fi)
- Dedicated staff, loyal families, smart, diverse students, variety of choice

**8. What is the biggest challenge for TUSD schools?**

Top Comments

- Communication and collaboration with the community, but has improved significantly over last 2 years. TUSD must continue to work towards gaining the trust of the community.
- Size, unified effort amongst stakeholders, overcoming negative publicity and perception of low quality in Greater Tucson, state politics are negative.
- Keeping up with all expenses of education, considering political climate
- Persistent poverty and other social and historic challenges in Tucson. Income inequality between TUSD and neighboring districts. Political support for myriad approaches like charter schools.
- Capital funding for infrastructure, PD for teachers and support staff

**9. What issues that you feel are important to address for the Facilities Master Plan and possibly a bond?**

“High” (5) to “Low” (1)

- |  |      |      |       |       |       |            |
|--|------|------|-------|-------|-------|------------|
| A. Playgrounds/fields/athletics                                    | 1=0% | 2=0% | 3=26% | 4=48% | 5=26% | (Avg=4.00) |
| B. 21 <sup>st</sup> century education (as described in question 6) | 1=0% | 2=0% | 3=4%  | 4=17% | 5=78% | (Avg=4.74) |
| C. Student pick-up/drop off  | 1=0% | 2=9% | 3=43% | 4=35% | 5=13% | (Avg=3.52) |
| D. Energy efficiency and reduced operating cost                    | 1=0% | 2=0% | 3=26% | 4=26% | 5=48% | (Avg=4.22) |
| E. School facilities maintenance                                   | 1=0% | 2=0% | 3=22% | 4=22% | 5=57% | (Avg=4.35) |
| F. Busses/Transportation   | 1=0% | 2=0% | 3=26% | 4=35% | 5=39% | (Avg=4.13) |
| G. Security of students and staff                                  | 1=0% | 2=0% | 3=4%  | 4=30% | 5=65% | (Avg=4.61) |
| H. Basic education   | 1=0% | 2=0% | 3=4%  | 4=22% | 5=74% | (Avg=4.70) |
| I. Technology  | 1=0% | 2=0% | 3=4%  | 4=30% | 5=65% | (Avg=4.61) |
| J. Other   | 0%   |      |       |       |       |            |

**10. To what extent would you support a bond for school improvements through property taxes**

- |                         |     |
|-------------------------|-----|
| • \$100 annual increase | 33% |
| • \$80 annual increase  | 24% |
| • \$60 annual increase  | 14% |

**GEO**

Advertising  
& Marketing

4251 E. 5th St. Tucson, AZ 85711

520-323-3221

866-50-media

- \$40 annual increase 14%
- \$20 annual increase 10%
- No Increase 5%



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

# Tucson Unified School District

## February 10, 2016 TUSD Advisory Board

### Focus Group Results

Feb 15<sup>th</sup>, 2016

## Executive Summary

### Methodology

An Interactive Focus Group was conducted with members of the TUSD Advisory Board on February 10, 2016. Independent 3<sup>rd</sup> party moderators delivered the focus group, along with a technical expertise team who provided support for questions from the participants. This focus group is a part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

This focus group was Part 1 of 3 in a Series of Focus Groups. Each series will be held for each education level: Elementary, Middle School/K-8 and High School. The objectives of the Focus Groups by series is as follow:

- FG Series #1 = Objectives/Approaches
  - The focus of this focus group session.
- FG Series #2 = Develop Options
- FG Series #3 = Prioritize/Phase Options
  - Provide Costs and Community Survey Results. Fit Options to anticipated bond amount.

Participants were debriefed on the intent of each of the 3 series and what their task was for Focus Group Series #1; Objectives/Approaches. Participants were then selected at random to break into groups to discuss each question and given an introduction of expectations of why they were there and how their participation would assist. A total of 10 members participated in the focus group, and they were broken apart into 2 groups of 3 and one group of 4. Each group was assigned a team captain. That team captain annotated his/her group answers to each question on large Post-It notes.

Each question was presented, a synopsis of the question was presented and the group had 7-10 minutes to discuss and record each answer. At the end of the focus group all questions were reviewed one-by-one with the moderator and all teams for the sole purpose of enhancing the overall process and if each question was asked and presented.

### Synopsis

There was focused interaction amongst the teams themselves and also with the moderators and the technical expertise team throughout the entire focus group by all participants in all 3 teams. The interaction was non-stop and led to lively debate among the participants themselves. Each team group utilized different tactics to arrive at their responses, with one team mathematically calculating averages on the ranking questions, while the other teams had broad group discussions.

The in-depth knowledge of all participants in this focus group yielded great results, including many improvements for all upcoming focus groups. Improvements lead to positive updates to the overall upcoming focus group presentations with items such as terminology in describing questions, explanation of and description of the questions asked, as well as an overall improvement to the questions themselves. Various questions are being moved into upcoming Series 2 or Series 3, based upon feedback from this group as to when to present said questions.

It was determined that all upcoming focus groups will receive a team handout sheet, which will free-up time with respondents not having to annotate both the questions and the answers, thus having more time to interact and have dialogue amongst their team, leading to more consistency amongst questions, an improvement in response time and will decrease deviations amongst respondents answers.

In regards to maintenance needs versus improvements priorities, there was no correlation amongst groups, one wanted them integrated, the second ranked improvements as the priority while the third group ranked maintenance needs as the top priority. HVAC, Roofs and Security ranked high among respondents as top maintenance priorities.

Technology, in one form or another, ranked highest amongst the respondents when asked for the top 5 building and/or site improvements that would best support the learning environment. Technology responses included answers such as technology & infrastructure including electrical power, media centers versus libraries, and infrastructure tech in classrooms to increasing bandwidth. All responses were in direct support of technology.

There were several similarities in groups ranking program initiatives, in order of priority, TUSD program initiatives in need of additional funding. Maintenance ranked the highest priority followed by Core Academics then Security.

When participants were asked which do you feel is most pressing at this time, either an improvements bond to improve buildings or a Maintenance & Operations override, all groups chose the bond, and the majority felt a bond only initiative, as asking for both could mean both fail, with the possibility of an override in 2017 or 2018.

When asked if bond dollars should be spread around the district so all schools benefit or should there be focused improvements in those that need it most, all groups' responses varied. One group recommended to bring all schools up to minimum standard, while a second group felt that it couldn't be equal as some schools do not need as much, and finally the third group recommend on a more student focused approach. There was no correlation among respondent groups.

There was a majority to right size schools, but most felt this should be kept separate from this bond or it would become a negative focal point when asked should the district size schools to provide effective and efficient learning environments, even if it meant closing selected schools. The minority response was to better utilize schools that are undersized.

Finally, there was no correlation between any of the respondents' answers when asked how to better encourage community partnerships and shared use of schools. Answers ranged from current process is sufficient given the economic environment to marketing what is already there and available.

### **Focus Group Questions Transcript**

#### **1. Which should take priority? Maintenance Needs or Improvements that would support Educational Programs?**

##### Group 1

- They are integrated. Can't have one without the other. Split funds between the two. Example: Technology requires infrastructure.

##### Group 2

- Improvements- support with structure
- Maintenance needs- no air= impact on education
- Lack of funding not marketable

##### Group 3

- Maintenance needs
- Safety and Security
- New Improvements to schools and Programs

**2. In regards to Maintenance, List what you think are the top 5 priorities**

Group 1

1. Roofs
2. HVAC
3. Security
4. Safety
5. Transportation

Group 2

1. HVAC
2. Signage/facade/image "curb appeal", paint, bathrooms, Asbestos, outdated feel
3. Security
4. Roofs
5. Buses (age of fleet)

Group 3

1. Roofing
2. Mechanical Systems
3. Security
4. Interior Appearance
5. Grounds and Exteriors

**3. List 5 building and/or site improvements that would best support the learning environment.**

Group 1

1. Technology & Infrastructure (including electrical power)
2. Equitable learning opportunities- minimum standard
3. STEM Learning environments
4. Library technology centers
5. Modern environments including cyber cafes experience

Group 2

1. Media center versus libraries
2. Tech in classrooms infrastructure
3. 21<sup>st</sup> century open space, collaboration
4. Fine arts facilities
5. Science labs

Group 3

1. New Schools
2. Increase Bandwidth
3. Adaptable Space
4. Security
  1. Permitted, Access, Communication, Camera, Office/Entry
5. K-8 Level Programs

**4. Goals For This FMP in Order of Priority**

- Please list the following TUSD program initiatives in need of additional funding for the overall District in order of priority from
- MOST IMPORTANT (1) to LEAST IMPORTANT (10)
  - **STEM (Science, Technology Engineering & Mathematics)**
  - **Project-Based Learning**
  - **Physical Education/ Interscholastic Activities**
  - **Fine Arts**
  - **Core Academics**
  - **Security**
  - **CTE (Career and Technical Education)**
  - **High Academics/ College Prep**

- **Global Studies and Dual Language**
- **Maintenance (Roofing, heating and cooling, other)**

Group 1

1. Core Academics
2. Maintenance
3. Security
4. STEM
5. College Prep
6. Project Based
7. CTE
8. PE
9. Fine Arts
10. Dual Language

Group 2

1. Core Academics
2. Maintenance
3. High Academics
4. CTE
5. STEM focus
6. Fine Arts
7. PE/Interscholastic
8. Global/ Dual Language
9. Security
10. Project Based Learning

Group 3

1. Maintenance
2. Security
3. Innovative Programs
4. CTE
5. PE & Athletics
6. Fine Arts
7. Core
8. Global Studies as a Dual Language
9. Project Based
10. Jazzier Programs

**5. Which do you feel is most pressing at this time? And Why?**

A. Improvements Bond to improve Buildings

B. Maintenance & Operations Override?

- Would you support both an override and a bond? What information would improve your support?

Group 1

- Bond Only 3:1

Group 2

- Bond
- Maintenance improvements are a top priority. Asking for both could mean both fail? Really need it all. Possibly override in 2017 or 2018

Group 3

- Bond
- Override MEO
- Support
- Bond- Yes





4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

- Community has no other option to address problems
- Decrease in capitol funding
- Override- No

**6. Should bond dollars be equally spread around the district so...**

- a. All schools see some benefit?
- b. Or should there be focused improvements in select areas of most need?
  - Discuss the Pros and Cons and indicate why you support one over the other.

Group 1

- We want to bring all schools up to minimum standard. Focus on needs

Group 2

- Cant be equal some don't need much. Use FCI priorities to evaluate evenly. Expanding growing schools
  - a. McCorkle
  - b. Dietz- Carson
  - c. Dodge
  - d. Tucson High

Group 3

- All students focus on their greatest needs.
  - e. Direct Improvements
  - f. Innovative Common Needs
  - g. New construction

**7. Should the District Size Schools to... provide effective & efficient learning environments?**

- b. Would you support this if it means closing selected schools? Why or Why Not?

Group 1

- Right sized schools. Keep this separate from the bond. This will become the focus.

Group 2

- Better utilize schools that are undersized
  - Make K-8's? or Middle/High
  - Secrist/Santa Rita Combine
  - Lawrence/ Johnson
  - UHS Move to Catalina or Santa Rita
  - Santa Rita- repurpose, reimagine

Group 3

- Yes- but discussion of alternate smaller schools

**8. How do we encourage better community partnerships and shared use of Schools?**

Group 1

- Current process is sufficient given the economic environment

Group 2

- Better common shared use of schools
- Marketing what's already there available
- Marquees
- Fix broken equipment in auditoriums
- CTE/ business partnerships \$ tied to it
- Reunions/Activities

Group 3

- Community partnership and shared use of principals need recruitment training.
- More prominent in the community.
- Outside partnerships -- Encourage



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

# Tucson Unified School District

## Series 1 Focus Group Results

### February 16, 2016 TUSD Elementary

## Executive Summary

### Methodology

An interactive focus group was conducted Elementary Schools on February 16, 2016. Independent third party moderators delivered the focus group, along with a technical expertise team who provided support for questions from the participants. This focus group is a part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

This focus group was Part 1 of 3 in a series of focus groups. Each series will be held for each education level: Elementary, Middle School/K-8 and High School. The objectives of the focus groups by series is as follow:

- FG Series #1 = Objectives/Approaches
  - The focus of this focus group session.
- FG Series #2 = Develop Options
- FG Series #3 = Prioritize/Phase Options
  - Provide Costs and Community Survey Results. Fit Options to anticipated bond amount.

Participants were debriefed on the intent of each of the 3 series and what their task was for Focus Group Series #1; Objectives/Approaches. Participants were then selected at random to break into groups to discuss each question and given an introduction of expectations of why they were there and how their participation would assist. A total of 10 members participated in the focus group, and they were broken apart into 2 groups of 3 and one group of 4. Each group was assigned a team captain. That team captain annotated his/her group answers to each question on simple handouts.

Each question was presented, along with a synopsis to each group and they had 5-8 minutes to discuss and record each answer. At the end of the focus group all questions were reviewed with the moderator for the sole purpose of enhancing the overall process.

### Synopsis

There was lively debate among the teams that kept the moderators and technical expertise team very active throughout the entire session. Teams had very few questions for the moderators and technical expertise team and kept most of their answers direct and to the point. Each group had unique ways of arriving at their final answers including one group that took a vote to determine their final answer.

With regards to maintenance needs, all groups felt that heating/cooling was a major priority. This was listed as the number one concern in every group. Parking lots were also considered to be a major maintenance need. There was some correlation amongst groups. Also important, all three groups agreed that security, as a site improvement, is something they would recommend.

Educational space, in one form or another, ranked highest between the respondents when asked for the top 5 building and/or site improvements that would best support the learning environment. Educational space responses included answers such as

science and art labs, a common area for education purposes and specialized classes for all schools. All responses were in direct support of better educational facilities. Also, it is important to note that all 3 groups indicated security as a site improvement is something they would recommend.

Participants had interesting responses when it came to the question of what improvements you would like to see if funding was limitless. All three felt technology was very important along with updates to current facilities. All agreed that more collaborative spaces would be very useful for educational purposes. Other high-ranking answers included accessible bathrooms, updated furniture, and modular spaces.

When asked what feels most important at this time, improvements bond or maintenance override, 2 out of the 3 groups agreed that a maintenance override is more important. Both group 1 and group 2 agreed that the cost to the taxpayer was an important part of this. Group 3 pushed for the improvements bond. They wanted to know how the bond would be spent and also felt that a maintenance override would only be short term. All three groups said they would support both operations override and a maintenance & improvements bond.

Finally, there was no consensus between any of the respondents' answers when asked how to better encourage community partnerships and shared use of schools other than variations on "outreach." The types of outreach varied from group to group. Other answers ranged from, current processes are sufficient given the economic environment to marketing what is already there and available.

### **Focus Group Questions Transcript**

#### **1. In regards to Maintenance, List what you think are the top 5 priorities**

##### Group 1

1. Heating/ Cooling
2. Parking Lot- Increased area and repave
3. Paint, Carpet, Flooring
4. Plumbing
5. Playgrounds

##### Group 2

1. Heating/ A/C
2. Making structures more modern
3. Bathroom repairs
4. Parking Lot
5. Fields/Playgrounds/Tarps
6. Security Repairs

##### Group 3

1. Heating/Cooling
2. Security
3. Plumbing
4. Electrical
5. Parking Lots

#### **2. List 5 building and/or site improvements that would best support the learning environment.**

##### Group 1

1. Science Lab

2. Art/Music Lab
3. MPR Improvements
4. Garden Improvements
5. Security- Fencing update/Improvement

Group 2

1. Increase Educational space
2. Security Improvements
3. Educational Resource Space
4. Aesthetics Promethean/SMARTBOARD effectiveness placed

Group 3

1. Specialized classes for all schools
2. Alarmed area
3. Covered outdoor recreation/cafeteria
4. MPR Updates
5. New tiles, carpet, ceiling panels

**3. If funding was limitless, what building improvements would you wish for to transform teaching & learning environments?**

Group 1

- Accessible bathrooms- Multiples
- The room from PowerPoint presentations
- Child and adult friendly furniture
- Library Updated
- Outside learning areas
- Musical Instruments
- Science Equipment
- Technology- new laptops, Promethean boards, doc cameras, projectors, Cow's
- Playground update -> new basketball courts/hoops, climbing equipment, compressed rubber protection under the equipment
- Adequate shade structures

Group 2

- More portables but really modular classrooms where classes have separate offices/space
- Room/ Classroom for Interventionists
- Extra computer space for laptops in classrooms as well as labs (2-3) 1 primary
- All schools OMA Gold
- All schools science labs/math labs

Group 3

- New furniture
- Collaborative space
- Technology units (projectors, tablets, computers)
- Party
- Modernize
- Field renovations
- Playground equipment/structure updates
- New Windows
- New Marquee
- Update front office

- Professional developers/ support for staff
- No combination class
- Teachers resource rom with limitless supply

**4. Which do you feel is most pressing at this time? And Why?**

- C. Maintenance & Improvements Bond
- D. Operations Override

- Would you support both an override and a bond?
- What information would improve your support?

Group 1

- Operations override is the most pressing
  - Would you support both? Yes
    - How much will this cost the taxpayer?
    - What will the money be used for?
    - Be precise in how/where the money will be spent

Group 2

- Operations override – push for improvements on pay
  - Would you support? Yes
    - Focus groups was meaningful
    - Surveys helped the selection of needs
    - Agreement with Group 1 on how bond will effect exactly what is the tax increase with the bond

Group 3

- Maintenance & Improvements Bond- Our schools need to be functional, maintained and upkeep
  - Would you support? Yes
    - Knowledge of how and where it will be spent.

**5. How do we encourage better community partnerships and shared use of Schools?**

Group 1

- Build relationships with community partnership
- Community Liaison for all schools
- Partner with non-profits
- Streamline the process to allow community partners to provide support

Group 2

- Vocal/visual advertisement
- Have a list of procedures on how to setup and use school facilities
- Have financial support for maintenance during events
- Actually know what's happening at the school so everyone knows.
- Make sure facilities are accessible to community. I.e. AC/Heat, access to internet, bathrooms
- Modernized equipment

Group 3

- Outreach
  - Symbiotic relationship
  - In-kind trade
- Little large space collaborate
- City recreation partnerships



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

## Tucson Unified School District

### Series 1 Focus Group Results

February 18, 2016 TUSD Middle/K8

### Executive Summary

#### Methodology

An interactive focus group was conducted on February 18, 2016. Independent third party moderators delivered the focus group, along with a technical expertise team who provided support for questions from the participants. This focus group is part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

This focus group was Part 1 of 3 in a Series of Focus Groups. Each series will be held for each education level: Elementary, Middle School/K-8 and High School. The objectives of the Focus Groups by series is as follow:

- FG Series #1 = Objectives/Approaches
  - The focus of this focus group session.
- FG Series #2 = Develop Options
- FG Series #3 = Prioritize/Phase Options
  - Provide Costs and Community Survey Results. Fit Options to anticipated bond amount.

Participants were debriefed on the intent of each of the 3 series and what their task was for Focus Group Series #1; Objectives/Approaches. Participants were then selected at random to break into groups to discuss each question and given an introduction of expectations of why they were there and how their participation would assist. A total of 6 members participated in the focus group, and they were broken apart into 2 groups of 3. Each group was assigned a team captain. That team captain annotated his/her group answers to each question on handouts with the questions.

Each question was presented, along with a synopsis to each group that had 5-8 minutes to discuss and record each answer. At the end of the focus group all questions were reviewed one-by-one with the moderator and all teams for the sole purpose of enhancing the overall process and if each question was asked and presented.

#### Synopsis

The teams asked very engaging questions to the moderators and the technical expertise team when it came to each question that was presented to them. The groups' communications were very interactive. The moderators made sure to make sure that the teams kept their questions and debate within their individual focus groups. We noticed that each team had their own way of arriving at each answer, including one team taking notes and providing more answers. Each of the focus groups had their own opinions to each question, which led to lively debate throughout.

In regards to maintenance needs, all groups felt that heating/cooling, health/safety, parking lots and building finishes were major priorities. Heating/cooling was listed as the number one in both groups. Health and safety were also a major part of their needs in regards to future maintenance. Both groups listed more answers and took notes to determine their answers.

Wireless technology and STEM, in one form or another, ranked highest amongst the respondents when asked for the top 5 building and/or site improvements that would best support the learning environment. Educational space responses included

answers such as a better capacity for digital libraries and other databases. All responses were in direct support of better educational facilities.

Participants had interesting responses when it came to the question of what improvements would you like to see if funding was limitless. Most felt that modern and renovated buildings were very important. A lot of the answers revolved around better space and aesthetics such as lights, outlets, fixtures, walls, painting etc. Both groups asked moderators and technical experts many follow-up questions in regards to this question.

When asked what feels more important at this time, improvements bond or maintenance override, both groups felt that a maintenance and improvements bond was more important. Group 2 explained that they would like to see more committee oversight and also have a checklist of priorities in order to determine what was important. They wanted to know how the bond would be spent and also felt that a maintenance override was not a good decision based on the district's past and a lack of trust. Both groups were split on the decision to support both.

Finally, there was minimal consensus between the respondents' answers when asked how to better encourage community partnerships and shared use of schools. However, both groups did agree that community outreach would play a big role in getting more community involvement.

### **Focus Group Questions Transcript**

#### **1. In regards to Maintenance, List what you think are the top 5 priorities**

##### Group 1

1. HVAC
2. SRPS/Sidewalls/Walkways- functionality and safety
3. Power supply- adequate and safe
4. Safety of grounds including playgrounds, athletic fields and common area
5. Plumbing
6. Upgrade and renovate both rooms
7. Floors
8. Busses

##### Group 2

1. Building Structures- HVAC Systems, Plumbing, Electrical Systems
2. Health and safety
3. Building finishing, stucco, paint, ceiling, water fountains, restrooms, hallways
4. IT Systems updated
5. The sites in general, parking lots, gate, lighting in the parking lots, pot holes

#### **2. List 5 building and/or site improvements that would best support the learning environment.**

##### Group 1

1. Capacity for digital libraries and other databases
2. Wireless w/ security necessities
3. STEM learning spaces in all schools
4. Enhance fine arts areas, make consistent for all schools
5. Collaborative learning spaces
6. Physical space that reflects pride in learning

##### Group 2

1. Science, Technology, Fine arts, Music rooms, Math labs or classrooms need upgrades
2. More fiber optics, more wireless, more power outlets throughout, fire marshal compliance
3. Libraries. Bring up to code the labs, playgrounds are infested with pests, no lines on fields
4. Window covers, curtains on stages and stages in cafeteria.
5. Fencing, lighting, power outlets, paint in the hallways, outside

**3. If funding was limitless, what building improvements would you wish for to transform teaching & learning environments?**

Group 1

- New and renovated buildings
- Murphy- Wilmot library-spaces, furniture, group learning spaces, quiet areas, glass
- Scenery to look at
- LEED Certified-eco-friendly buildings
- Community gardens → u food in cafeteria
- Digital libraries w/equipment at all schools
- More security- people and security features
- Welcoming environment that reflects pride in school
- State of the art technology

Group 2

- Secure modern building
- Better technical equipment
- Proper lighting, outlets, air condition, ventilation
- Proper space size room
- Better tables, chairs
- Carpeting, ceiling tiles
- Painting, wireless
- Functional aesthetically looking playgrounds
- Ochoa, Carrillo

**4. Which do you feel is most pressing at this time? And Why?**

- A. Maintenance & Improvements Bond  
B. Operations Override

- Would you support both an override and a bond?
- What information would improve your support?

Group 1

- Maintenance and Improvements Bond?
  - Would you support both? 2 out of 3 say both- Yes
  - 1 says bond

Group 2

- Maintenance and Improvements bond – push for improvements on pay
  - Would you support both? No
    - There needs to be committee, more details with specific oversight. Oversight committee have everything on a checklist, of priorities and much and when

**5. How do we encourage better community partnerships and shared use of Schools?**

Group 1





4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

- Better communication that is two- way
- Better partnerships w/community groups
- Organizing of resources as in Homer Davis Project
- Create and communication vision
- Engagement beyond the bake sale as in assessing talents of families and making use of them
- Conscious effort to reach out to community groups- as in rotary clubs
- Parenting classes- as in the brent connection
- Literacy classes for parents
- Schools open later for students to stay, have a meal, meet w/

#### Group 2

- Improve, playing fields, \lighting, more community outreach
- User friendly phone service
- Update and fix empty building
- Charge a fee if not left the way it was to be used when entering for use
- It all needs renovations people that rent get disappointed when they see run down buildings
- Partnership with City Of Tucson to help with maintenance of the playgrounds



4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

# Tucson Unified School District

## Series 1 Focus Group Results

### February 20, 2016 TUSD High/Alt. School

## Executive Summary

### Methodology

An Interactive Focus Group was conducted with parent and staff representatives of the TUSD High Schools on February 20, 2016. Independent 3<sup>rd</sup> party moderators delivered the focus group, along with a technical expertise team who provided support for questions from the participants. This focus group is a part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

This focus group was Part 1 of 3 in a Series of Focus Groups. Each series will be held for each education level: Elementary, Middle School/K-8 and High School. The objectives of the Focus Groups by series is as follow:

- FG Series #1 = Objectives/Approaches
  - The focus of this focus group session.
- FG Series #2 = Develop Options
- FG Series #3 = Prioritize/Phase Options
  - Provide Costs and Community Survey Results. Fit Options to anticipated bond amount.

Participants were debriefed on the intent of each of the 3 series and what their task was for Focus Group Series #1; Objectives/Approaches. Participants were selected at random to break into groups, discuss each question and give an introduction of expectations as to why they were there and how their participation would assist. A total of 16 members participated in the focus group, and they were broken apart into 4 groups (1 group of 3, 2 groups of 4 and 1 group of 5). Each group was assigned a team captain. The team captain annotated his/her group answers to each question on simple handouts.

Each question was presented, a synopsis of the question was presented and the group had 8-10 minutes to discuss and record each answer. At the end of the focus group, all questions were reviewed one-by-one with the moderator and all teams for the sole purpose of enhancing the overall process and to learn more about the responses.

### Synopsis

There was constant and varied interaction between participants of each of the 4 teams and the moderators and technical expertise team throughout the entire focus group. The interaction led to beneficial questions and unique discussions among the participants. Each group utilized different tactics to arrive at their responses, with two groups engaging in thorough discussions before writing down their answers; while the other two groups annotated their answers during their discussion.

The in-depth knowledge of high schools by all participants in this focus group yielded great results, including many improvements for high schools in TUSD. In regards to maintenance needs versus improvements priorities, there was significant answer correlation between groups. Most groups' felt that HVAC and roof maintenance needed to be made high priorities. There were 2 groups that felt window and door maintenance were needed and two groups that felt exterior environments, like landscaping and signage, were a priority.

Technology, in one form or another, was a highly ranked theme across multiple answers when asked for the top 5 building and/or site improvements that would best support the learning environment. Technology responses included answers such as computer labs and cyber cafes, Ethernet infrastructure, Wi-Fi and distance learning capabilities. All groups were supportive of technology. Security was also a high priority and groups specifically mentioned security cameras and electronic locks.

In regards to building improvements that could transform teaching and learning environments if funding was limitless, the answers varied significantly across all 4 groups. The only similar answers across the 4 groups were providing better support for extracurricular activities, improved exercise facilities, creating a better environment for group learning and improving fine arts buildings. Other answers included developing maker spaces for hands-on learning, more hands-on activities, creating first class basic classrooms and partnering with Pima Community College and business partnerships. Overall, this question invoked the liveliest discussion within groups and provided many unique answers and opportunities for TUSD.

When participants were asked which do you feel is most pressing at this time, either an improvements bond to improve buildings or a Maintenance & Operations override, 3 groups chose the bond and 1 group chose the operations override. However, all groups supported both a bond and an override, only varying the order in which they should be completed. There was thorough discussion during the results phase of this question. Two groups felt that community outreach or grass roots communication plans would be needed, regardless of which option was selected. All groups agreed that there needed to be a transparent process to show what each school will get and how previous bonds were executed.

There was little correlation between groups' answers when asked how to better encourage community partnerships and shared use of schools. 2 groups thought it would be beneficial to have a coordinator in charge of community use and 2 groups felt outside spaces should be utilized more for family and community activities. Other answers included more youth involvement, additional staff for after hours, active marketing for facilities usage and partnering with businesses/alum for speaking engagements and mentor programs.

Overall this focus group continually concentrated on technology and it was a common theme mentioned in all answers. This group felt technology was important in the high school environment so that students could be prepared for post-high school options. In the answer discussion phase, all groups discussed community and public outreach efforts in regards to facility sage as well as bond/override promotion. There was lively discussion and participation from all respondents.

### **Focus Group Questions Transcript**

#### **1. In regards to Maintenance, List what you think are the top 5 priorities**

##### Group 1

1. Efficiency of doors/windows to save money
2. Thermostat Issues- too hot/ cold in many classrooms
3. Roofing Systems- Upgrades due to leaks
4. Parking lots/ Re-surface/ Grounds
5. Locker Maintenance

##### Group 2

1. Basic Maintenance of existing facilities poor maintenance of classrooms
2. Outstanding Impressions- landscaping, attractive first impressions, signage, weeding
3. AC/Roofing
4. Well maintained venue where outsiders attend such as sporting events and concerts
5. Significantly improved staffing for maintenance/landscaping

##### Group 3



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

1. Roofs
2. Doors
3. Exterior Environments
4. HVAC
5. Windows

Group 4

1. Parking accessibility
2. Plumbing not leaking- possibly flooding
3. Roof leaks and can cause damage to the rest of buildings
4. Functioning furniture
5. Focus on conservation

**2. List 5 building and/or site improvements that would best support the learning environment.**

Group 1

1. More computer labs needed for online testing
2. Security cameras- not enough staff to physically monitor all areas
3. More cyber cafe's
4. Electrical upgrades/Ethernet Infrastructure for technology
5. Solar panel/alternate energy source

Group 2

1. Enhanced distance learning capacity
2. First class connectivity
3. Much more outdoor learning spaces
4. Security focused on access- Not enough oversight

Group 3

1. Locks
2. Wi-Fi
3. Cameras
4. Cafeteria
5. Library

Group 4

1. Repurposing space
2. Updating sports facilities- availability before to after school
3. Although some schools have infrastructure for Wi-Fi. Poor reception to connect to internet
4. 1985 computers
5. Update flooring, bathrooms, etc.
6. Security-cameras- not necessarily

**3. If funding was limitless, what building improvements would you wish for to transform teaching & learning environments?**

Group 1

- Maker spaces- collaborative process
- more hands on activities



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

- Sustainability gardens
- Activity specific spaces-rooms for music that are acoustically appropriate
- Limitless funding- teachers getting paid more appropriately and working proper hours for their
- Extra curricular activities
- Comfort

#### Group 2

- Basic classrooms need to be first class
- More conference rooms and team meeting spaces including a board room type space

#### Group 3

- Transform US campus into multi model, community grounded centers
- Public libraries
- Senior center
- Exercise facilities
- Pima community college
- Training centers
- Business partnerships
- Public transportation to encourage/facilitate mass meetings

#### Group 4

- Working Wi-Fi for all students with tablets
- Excite students
- Open spaces for group learning with areas for separate groups
- Fine art buildings with performance venues and digital media for arts
- Sports support with weight rooms and no participation fees uniforms

#### 4. Which do you feel is most pressing at this time? And Why?

- A. Maintenance & Improvements Bond
- B. Operations Override

- Would you support both an override and a bond?
- What information would improve your support?

#### Group 1

- Maintenance & Improvements Bond is the most pressing
  - Would you support both? Yes
    - Very specific info regarding the vision of the future of education to get bond passed
    - Specifics to pass bond
    - Pictures and info of past projects

#### Group 2

- Operations Override is the most pressing
  - Would you support both? Yes – if only one, override first
    - Grassroots movement

Group 3

- Maintenance & Improvements Bond is the most pressing
  - Would you support both? Yes – but priority is bond first, then override
    - What is each school going to get.
    - Every school has to get something

Group 4

- Maintenance & Improvements Bond is the most pressing – should do bond now to start getting benefits then operations override for teacher salaries and support personnel quicker.
  - Would you support both? Yes, bond first
    - Full information on needs for funds and where they will be used. Educating the public-targeted media
    - Open house at schools with a list of what will help that school
    - Majority speak out

**5. How do we encourage better community partnerships and shared use of Schools?**

Group 1

- More youth involvement
- More articulation of needs for community members- need a community coordinator who has time to support these efforts
- Use of buildings
- Use facilities to train parents in technology

Group 2

- Create culture of community sharing sports events, cultural events and facilities availability to neighborhood schools as community center
- Staffed for non hours/usage

Group 3

- Change facilities to make the most attractive to community @ large
- Active marketing
- Why should they come? Different audiences, business, seniors
- How do we engage senior community
- Reutilize outside spaces for family and community activity
- Make the spaces for something the community would miss- e.g. Reid park- picnic and play and community gathering areas

Group 3

- Pairing with Businesses and keeping in touch with recruiters, speakers, alumni pride, mentors
- Classes/ Programs available for homework, family interactions, open library
- Campus coordinators to keep in touch



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

**Tucson Unified School District**  
March 5<sup>th</sup>, 2016 TUSD Elementary Schools  
Series 2 Focus Group Results  
March 7<sup>th</sup>, 2016

**Executive Summary**

**Methodology**

An Interactive Focus Group was conducted with parents, teachers and staff of TUSD Elementary Schools on March 5<sup>th</sup>, 2016. Independent 3<sup>rd</sup> party moderators delivered the focus group, along with a technical expertise team who provided support for questions from the participants. This focus group is a part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

This focus group was Part 2 of 3 in a Series of Focus Groups. Each series will be held for each education level: Elementary, Middle School/K-8 and High School. The objectives of the Focus Groups by series are as follow:

- FG Series #1 = Objectives/Approaches
- FG Series #2 = Develop Options
  - The focus of this focus group session.
- FG Series #3 = Prioritize/Phase Options
  - Fit Options to anticipated bond amount.

Participants were debriefed on the intent of each of the 3 series and what their task was for Focus Group Series #2; Develop Options. Participants were then selected at random to break into groups to discuss each question and given an introduction of expectations of why they were there and how their participation would assist. They were divided into 2 groups of 4 and one group of 5 (of which one member of this group left early before voting could begin). Each group was assigned a team captain. That team captain annotated his/her group answers to each question on sheets that were provided by the moderators.

Each question was presented, a synopsis of the question was presented and the group had 10-15 minutes to discuss and record each answer. At the end of the focus group all questions were reviewed one-by-one with the moderator and all teams for the sole purpose of enhancing the overall process and if each question was asked and presented. Then respondents were asked to choose between the different facility funding scenarios.

**Synopsis**

This particular focus group was very well informed and understood what was being asked of them. Their discussions were precise and to the point. Focus group members were very engaged with the moderators and their individual groups. They had few overall questions about what was needed of them, which led to quick and direct answers,

In regards the overall group's view about how all bond dollars should be spread around the district, all 3 groups felt that all schools should see some benefit. There was much discussion that followed their reasoning behind this, which led to focused and lively debate.

When asked about the pros and cons of this question regarding how bond dollars should be spread, this particular focus group displayed interesting results. All 3 groups pros focused on making sure all schools saw some improvement to overall safety and maintenance needs get addressed. This particular group liked having more of an overall benefit than specific benefits to a few schools. The cons were more focused on determining which schools would need help first. Most said that without allocating the schools then it would be hard to understand which schools were in dire need. The overall pros of this question far outweighed the cons and the focus group was more determined on spreading bond dollars equally, making it an equitable situation based on need.

The focus group was then asked how they would determine the schools to receive focused improvements. This question yielded interesting results as well. Out of the three focus groups 2 groups answered. Their overall conclusion was that it was determining a formula and the highest needs necessary to prioritize how all schools received benefits.

The focus group was then asked three separate questions that included scenarios about how bond dollars would be used and which needs were the highest priorities. The scenarios were as follows:

1. Priority Facility Maintenance Repairs and some key Facility Improvements. (80%-20%)
2. Focus on top Facility Maintenance Repairs with as many Improvements/ Other Options as possible (50%-50%)
3. Focus on the top Facility Maintenance Repairs with Significant Improvements to some schools?

Scenario number 1 received the most first and second place votes thereby making it the top choice selected by the groups as their preferred spending scenario based on the fact that the money would significantly improve facilities and maintenance across all levels of schools. They believed the bond dollars should go to Elementary, Middle, and High Schools to improve student's space improvements and community space improvements. The focus group felt that by improving the spaces that it would bring about more community involvement and overall great benefits to student learning environments.

As for scenario number 2 the members of the focus group felt this was their 2<sup>nd</sup> favorite option because of the way the scenario had a 50/50 split for the spending budget. Most groups put the highest needs on Roofing, HVAC, and Tech. The groups also put a lot of emphasis on every grade level and all schools to make sure that everyone saw some benefit besides just maintenance.

When it came to scenario number 3, only one group's member all voted for this option and liked number 3's spending scenario based on the fact it still focused on top facility maintenance repairs. Much of their spending was still focused on overall repairs and school improvements. During the answer discussion phase, we found that all 3 groups faced the same challenge, determining which cuts should be made in facility maintenance and repairs.

The Elementary Focus Group proved to have very direct and heartfelt answers. They were passionate about their discussions and overall asked very few questions. It was clear that by discussion and gathering data from each member, all 3 groups wanted to spread bond dollars equally to all different grade levels for overall enhancement to the district of TUSD for many years to come.

### **Focus Group Questions Transcript**

#### **Should all bond dollars be spread equally around the district so....**

##### **Group 1**

###### **A. All schools see some benefit?**



This one

**B. Or should there be focused improvements? (Significant Improvements to some Schools)**

- **Discuss the Pros & Cons and indicate why you support one over the other.**

**Pros**

- All schools have needs regardless of area.

**Cons**

- There are many schools in disrepair

- **How would you determine the schools to receive focused improvements?**
  - A collaborative effort between the sites and district facilities department would determine priorities

Group 2

**A. All schools see some benefit?**

This one

**B. Or should there be focused improvements? (Significant Improvements to some Schools)**

- **Discuss the Pros & Cons and indicate why you support one over the other.**

**Pros**

- All schools get some benefit
- Equitable situations determine need
- Safety concerns can be addressed across the board
- Upgrades- on technology- need to address security
- Hopefully can address transportation

**Cons**

- Newer schools receiving more than they need- dependent on allocation formula
- Choosing B- How would you determine who would get money

- **How would you determine the schools to receive focused improvements?**
  - Need formula based on highest need
  - Setup a criteria of who and when
  - Equitable principal interviews for input

Group 3

**A. All schools see some benefit?**

This one

**B. Or should there be focused improvements? (Significant Improvements to some Schools)**

- **Discuss the Pros & Cons and indicate why you support one over the other.**

**Pros**

- Address the absolute needs in schools
- Lose enrollment in schools
- Don't care if not your neighborhood school

**Cons**

- Condition of would determine amount of funding yet they will all be addressed
- Learning conditions first

**SPENDING PRIORITIES**

Group 1

**1. Priority Facility Maintenance Repairs and some key Facility Improvements. (80%-20%)**

Elementary (Same \$ Per School \$510,00 Per)	\$25M
Middle School	\$11M
High School	\$5M

**2. Focus on top Facility Maintenance Repairs with as many Improvements/ Other Options as possible (50%-50%)**      **3 green dots**

High School	
• Roofing	\$70M
• HVAC	\$55M
• Security	\$5M
• Special Systems	\$3M
• Plumbing	\$3M
• Doors & Hardware	\$6M
• ESS	\$3M
• Playground	\$2M
• Tech	\$8M
• Transportation	\$3M
• Elementaries	\$50M
• MS	\$22M
• HS	\$10M

**3. Focus on the top Facility Maintenance Repairs with Significant Improvements to some schools?**

1. Roofing
  2. HVAC
  3. Plumbing
- Total:\$110M

- Improvements/21<sup>st</sup> Century



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

• Elementary	\$50M
• MS	\$26M
• HS	\$10M
• Other	
• Reopening	\$17M
• Grade Realignment	\$7M

### Group 2

#### **1. Priority Facility Maintenance Repairs and some key Facility Improvements. (80%-20%)**

Student Space Improvements All Schools  
Community Space Improvements

**83 schools get \$493,975**

#### **2. Focus on top Facility Maintenance Repairs with as many Improvements/ Other Options as possible (50%-50%)**

Roofing	\$65M
HVAC	\$40M
Security	\$10M
Special Systems	\$2M
Plumbing	\$3M
Student Space	\$60M
Community Space	\$40M

#### **3. Focus on the top Facility Maintenance Repairs with Significant Improvements to some schools?**

Roofing	\$65M
HVAC	\$40M
Security	\$10M
Special Systems	\$2M
Plumbing	\$3M
Grade Realignment	\$22M
Elementary	\$49M
Middle K/8	\$23M
High School	\$11M

### Group 3

#### **1. Priority Facility Maintenance Repairs and some key Facility Improvements. (80%-20%)**

Student Space Improvements- Elementary	\$18.9M
Student Space Improvements- Middle School	\$11.7M
Student Space Improvements- High School	\$8.1M



4251 E. 5th St. Tucson, AZ 85711  
 520-323-3221  
 866-50-media

Outdoor Pavilion- Elementary \$2.3M

**2. Focus on top Facility Maintenance Repairs with as many Improvements/ Other Options as possible (50%-50%) 3 green dots**

Maintenance Repairs Elementary 70%	\$125.3M
Facilities Improvement Adjustment	
Outdoor Space- Elementary and Middle	\$13M
Community Space (E) 3 (M) 2 (H) 2	\$7M

**3. Focus on the top Facility Maintenance Repairs with Significant Improvements to some schools?**

Maintenance Repairs Elementary	\$125.3M
Grade Realignment	\$5M
Elementary School x4	\$20M
Middle School x3	\$24M
High School x3	\$45M



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

**Tucson Unified School District**  
February 29th, 2016 TUSD Middle Schools  
Series 2 Focus Group Results  
March 4th, 2016

## **Executive Summary**

### **Methodology**

An Interactive Focus Group was conducted with parents, teachers and staff of TUSD Middle Schools on February 29<sup>th</sup>, 2016. Independent 3<sup>rd</sup> party moderators delivered the focus group, along with a technical expertise team who provided support for questions from the participants. This focus group is a part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

This focus group was Part 2 of 3 in a Series of Focus Groups. Each series will be held for each education level: Elementary, Middle School/K-8 and High School. The objectives of the Focus Groups by series are as follow:

- FG Series #1 = Objectives/Approaches
- FG Series #2 = Develop Options
  - The focus of this focus group session.
- FG Series #3 = Prioritize/Phase Options
  - Provide Costs and Community Survey Results. Fit Options to anticipated bond amount.

Participants were debriefed on the intent of each of the 3 series and what their task was for Focus Group Series #2; Develop Options. Participants were then selected at random to break into groups to discuss each question and given an introduction of expectations of why they were there and how their participation would assist. This group was assigned a team captain. That team captain annotated his/her group answers to each question on sheets that were provided by the moderators.

Each question was presented, a synopsis of the question was presented and the group had 10-15 minutes to discuss and record each answer. At the end of the focus group all questions were reviewed one-by-one with the moderator and all teams for the sole purpose of enhancing the overall process and if each question was asked and presented. Then respondents were asked to choose between the different facility funding scenarios.

### **Synopsis**

There was in depth discussion and questions amongst this particular focus group. The moderators and technical experts were engaged with participants throughout the focus group to make sure the participants understood what was being asked. This led to lively debate between team members and their overall answers created a vision of what is necessary for the future of TUSD. This group took their time processing each answer amongst themselves to make sure that their final decision was unanimous.

The in-depth knowledge of all participants in this focus group provided significant results, including many improvements for all upcoming focus groups. This group's discussions and approach to questions led to future updates to upcoming phase 2 focus groups based on organization of questions and layout. Providing worksheets for each individual question instead of combining questions into one worksheet was a better overall decision that will be used in upcoming focus groups.



4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

In regards the overall group's view about how all bond dollars should be spread around the district, this particular group felt that all schools should see some benefit. This would mean dividing the benefits to all sites so that every site sees some overall improvement. The group chose this option because of how the overall priorities were listed.

When asked about the pros and cons of this question regarding how bond dollars should be spread, this particular focus group displayed interesting results. Their pros were that it would bring up the overall facilities to retain enrollment. This would allow each facility to keep up with current times and also help invest in low-income families. However, the group was concerned with where in the district the students were coming or going. How TUSD would keep up with charters. They mentioned certain people do not have the funds to travel and they wanted more information on the current priorities in facilities we have right now.

The group was asked how they would determine the schools to receive focused improvements? This question yielded interesting results. The group came up with the idea of having a rubric committee to determine how much money and they also stated it would be wise to invest in low deficient schools first as a priority.

The focus group was then asked three separate questions that included scenarios about how bond dollars would be used and which needs were the highest priorities. The scenarios were as follows:

1. Priority Facility Maintenance Repairs and some key Facility Improvements. (80%-20%)
2. Focus on top Facility Maintenance Repairs with as many Improvements/ Other Options as possible (50%-50%)
3. Focus on the top Facility Maintenance Repairs with Significant Improvements to some schools?

For scenario number 1 this group selected this as their preferred choice based on the possibility for more voter buy in. They believed the bond dollars should go to Facilities Priority's Maintenance Repairs, Transportation, Refurbishment, and Technology Hubs. This group believed that these upgrade choices helped more overall deficient schools.

As for scenario number 2 the members felt this was their 2<sup>nd</sup> favorite option because of the way they set up their 50/50 split. They decided that they would put the money into Maintenance Repairs, Student Space Improvements, Technology Hubs, CTE Infrastructure and Community Space Improvement

Scenario number 3 was this group's least favorite choice. They said they would use the money to go to Maintenance Repair and Middle and High School refurbishments. This focus group was more interested in having facility improvements to all schools and not just particular ones that needed focused improvements

Overall, this particular group's interaction was lively and had positive discussion. They spent time on each question so they could determine the best overall scenario for TUSD and the future.

### **Focus Group Questions Transcript**

#### **Should all bond dollars be spread equally around the district so....**

A. All schools see some benefit?

Yes divide benefits to all sites. Tie in all equipment

Because priorities are being listed

Bring to light the deseg. Insist to defuse it!

B. Or should there be focused improvements? (Significant Improvements to some Schools)

- Discuss the Pros & Cons and indicate why you support one over the other.

**Pros**

- Brought up to retain enrollment
- Keep up with the times
- Look up low income families- invest into these

**Cons**

- Where are students going or coming
- Charter more up to date
- People that do not have funds to travel
- Bonding capacity? How much?
- What are the priorities in Facilities we have now

- How would you determine the schools to receive focused improvements?
  - Rubric Committee for how money is being spent
  - Investing in low deficient schools first

**SPENDING PRIORITIES**

1. Priority Facility Maintenance Repairs and some key Facility Improvements. (80%-20%)  
3 orange dots

*2 of 5 liked this option because of more possibility for voter buy in*

Facilities Priority Maintenance Repairs	176M
Transportation	5M
Refurbishment (deficient schools)	28M
Technology Hubs (deficient schools)	11M

2. Focus on top Facility Maintenance Repairs with as many Improvements/ Other Options as possible (50%-50%)  
3 green dots

*2<sup>nd</sup> favorite option*

Maintenance Repairs	110M
Student Space Improvements (All levels E,M,H)	43M
Technology Hub	26M
CTE Infrastructure	6M
Community Space Improvement	43M

3. Focus on the top Facility Maintenance Repairs with Significant Improvements to some schools?

Maintenance Repair	110M
--------------------	------

**GEO**

Advertising  
& Marketing

4251 E. 5th St. Tucson, AZ 85711

520-323-3221

866-50-media

Middle	<b>5/23</b>	Refurbishment	40M
High	<b>5/11</b>	Refurbishment	75M





4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

## Tucson Unified School District

March 2nd, 2016 TUSD High Schools

Series 2 Focus Group Results

March 4th, 2016

### Executive Summary

#### Methodology

An Interactive Focus Group was conducted with parents, teachers and staff of TUSD High Schools on March 2<sup>nd</sup>, 2016. Independent 3<sup>rd</sup> party moderators delivered the focus group, along with a technical expertise team who provided support for questions from the participants. This focus group is a part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

This focus group was Part 2 of 3 in a Series of Focus Groups. Each series will be held for each education level: Elementary, Middle School/K-8 and High School. The objectives of the Focus Groups by series is as follow:

- FG Series #1 = Objectives/Approaches
- FG Series #2 = Develop Options
  - The focus of this focus group session.
- FG Series #3 = Prioritize/Phase Options
  - Provide Costs and Community Survey Results. Fit Options to anticipated bond amount.

Participants were debriefed on the intent of each of the 3 series and what their task was for Focus Group Series #2; Develop Options. Participants were then selected at random to break into groups to discuss each question and given an introduction of expectations of why they were there and how their participation would assist. They were divided into 3 groups of 3 and one group of 4. Each group was assigned a team captain. That team captain annotated his/her group answers to each question on sheets that were provided by the moderators.

Each question was presented, a synopsis of the question was presented and the group had 10-15 minutes to discuss and record each answer. At the end of the focus group all questions were reviewed one-by-one with the moderator and all teams for the sole purpose of enhancing the overall process and if each question was asked and presented. Then respondents were asked to choose between the different facility funding scenarios.

#### Synopsis

Each focus group displayed lively interaction amongst individuals and there was good debate. The moderators and technical experts were engaged with participants throughout the focus group to make sure the participants understood what was being asked. This particular group spent time on each question to make sure they were getting a clear message across of what they wanted for the future of TUSD. Each group utilized different methods of approach when coming to an agreement on each answer and some groups went into very thorough detail.

The particular group's overall understanding of each question led to them needing some help with each question based on current facts or examples. Moderators made sure to stay engaged and responded with good information on each subject. This helped each group understand what was being asked of them.

In regards to the overall group's view about how all bond dollars should be spread around the district there was a 50/50 split on the groups answers. 2 of the groups felt that there should be focused improvements to some schools while the other 2 groups were more concerned with all schools seeing some benefit from the bond.

When asked about the pros and cons of this question regarding how bond dollars should be spread, there were many reasons provided for each. Some groups talked about the benefits to the schools based on refurbishment and encouraging new enrollment while others put more stress on the funding behind it and satisfying the taxpayers. Most groups did not have to many cons based on the question. The groups that chose to give all schools some benefit mostly believed that no one particular school should receive an overall refurbishment. The groups that chose to do focused improvements said that the cons are the majority of under enrolled schools won't get much refurbishment and only get the bare minimum.

Each group was then asked how they would determine the schools to receive focused improvements? This question yielded interesting results. A majority of the groups said to look at growth and which schools were at capacity as being the most in need of focused improvements. Some however were curious about the possibility of somehow combining the options of all schools seeing some benefits or focused improvements to some schools. The overall main theme was focused on growth and expansion.

The focus group was then asked three separate questions that included scenarios about how bond dollars would be used and which needs were the highest priorities. The scenarios were as follows:

1. Priority Facility Maintenance Repairs and some key Facility Improvements. (80%-20%)
2. Focus on top Facility Maintenance Repairs with as many Improvements as possible (a few other options ok) (50%-50%)
3. Emphasis on the top Facility Maintenance Repairs with Other Options/ Focused Improvements. (50%-50%) (a few Facility Improvements are ok)

For scenario number 1, overall the focus groups were not overly concerned with this one due to limited flexibility however it was still considered a priority. Many of the groups made detailed lists that annotated their answers and their spending capacity. The top results were Student Space Improvements and Technology Hubs.

As for scenario number 2 this had the most overall total votes and was considered to be most important by the different focus groups. Many of the groups made detailed lists that annotated their answers and their spending capacity. Members felt this was their 1<sup>st</sup> pick because of the 50/50 split. They decided that they would put the money into Maintenance Repairs, HVAC, Roofs, and Security as some of their top choices and there was a strong diversity of selected facility improvements.

Scenario number 3 had good overall votes and was the focus group's overall second option. Most of the money in this particular scenario was spent on overall maintenance and refurbishments, which most groups agreed was necessary. Most would go to maintenance repair, like roofs and HVAC, and High School refurbishments. Many of the participants put emphasis on High School and Elementary schools for maintenance repairs and refurbishments as well. They liked this option again because of the 50/50 split which allowed the equal distribution of money.

Many groups went over their funding limits and then had to go back and decide which options were lower priorities and should be cut. This focus group was interesting because there was an even split of first place votes across all 3 scenarios. Scenario 2 was the most popular option when first and second place votes were combined, followed by scenario 3.

**GEO**

Advertising  
& Marketing

4251 E. 5th St. Tucson, AZ 85711

520-333-3221

866-50-media

Overall, this focus group had good discussion and was very engaged throughout the entire session. They made sure that all their data and answers were the best they could give based on their interaction amongst each other and the questions they had from moderators. Determining what was best for TUSD was their number 1 priority.

### Focus Group Questions Transcript

## **Should all bond dollars be spread equally around the district so....**

### Group 1

A. All schools see some benefit?

B. Or should there be focused improvements? (Significant Improvements to some Schools)

This one.

- Discuss the Pros & Cons and indicate why you support one over the other.

#### **Pros**

- Complete refurb of one school benefiting the whole student body and encouraging public access.
- Campus becomes show piece
- Community most enrolled go first, then analyze leftovers

#### **Cons**

- Majority of under enrolled don't get any refurb or bare minimum
- How would you determine the schools to receive focused improvements?
  - At capacity or performing schools

### Group 2

A. All schools see some benefit?

Yes

B. Or should there be focused improvements? (Significant Improvements to some Schools)



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

- Discuss the Pros & Cons and indicate why you support one over the other.

**Pros**

- All schools should receive funding for top health and safety issues
- If reopening schools
- All schools need additional electrical & Ethernet connectors
- All schools should have 21<sup>st</sup> century classrooms learning environment

**Cons**

- Majority of under enrolled don't get any refurb or bare minimum
- How would you determine the schools to receive focused improvements?
  - Those most in need of health and safety
  - Looking at district strategic plan
  - Where is growth occurring
  - What schools are overcrowding

### Group 3

A. All schools see some benefit?

B. Or should there be focused improvements? (Significant Improvements to some Schools)

Yes, this one

- Discuss the Pros & Cons and indicate why you support one over the other.

**Pros**

- Some schools have other funding sources that could be used
- More bang for buck if you approve certain schools
- Focus on programs that excel to attract students

**Cons**

- Why should I vote for it
- Deseg other factors would make appropriation difficulties
- How would you determine the schools to receive focused improvements?
  - Why can't it be a combo of A/B
  - Where are kids leaving- want to attract
  - Track records academically/ How you compare to neighboring competitive schools- facilities

- Demographics- Where is growth in 5 years?

## Group 4

A. All schools see some benefit?

Yes, this one

B. Or should there be focused improvements? (Significant Improvements to some Schools)

- Discuss the Pros & Cons and indicate why you support one over the other.

### Pros

- It would be as needed
- Satisfy all taxpayers

### Cons

- No one school gets a total redo

- How would you determine the schools to receive focused improvements?
  - Assessment of school to needs & significant
  - Baseline most defined to be significant improvements that will sustain in the long run

## SPENDING PRIORITIES

### Group 1

1. Priority Facility Maintenance Repairs and some key Facility Improvements. (80%-20%)

Student Space Improvement	8M
Technology Hub	12M
CTE Infrastructure	5M
Community Space	10M
Technology Hub- Middle School	6M

2. Focus on top Facility Maintenance Repairs with as many Improvements/ Other Options as possible (50%-50%)



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

### High School

- Roofing 70M
- HVAC 55M
- Security 7M
- Special Systems 3M
- Plumbing 3M
- Doors & Hardware 12M
- ESS 3M

### Elementary and Middle

- Playground equipment 1M
- Technology 8M
- Buses 3M
- Athletic Fields 2M
- Student Space Improvements 9M
- Technology Hub 13M
- CTE Infrastructure 6M
- Community Space 11M
- Grade Realignment 7M

### Middle School

- Outdoor Pavilion 7M

3. Emphasis on the top Facility Maintenance Repairs with Other Options/ Focused Improvements. (50%-50%) (a few Facility Improvements are ok)

Using FIS and ESS= ☺

This determines how much of the pie for 21<sup>st</sup> Century across all schools

Grade realignments- yes but question \$ amount

Wait to reopen Carson, etc

Possibly take 78 from Dietz and make Santa Rita 7-12

### Priority Main.

- Roofing 80M
- HVAC 55M
- Security 10M

### Group 2



4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

1. Priority Facility Maintenance Repairs and some key Facility Improvements. (80%-20%)

Student Space Improvements All Schools	25M
1 to 1 Computing vs Tech Hubs	
STEM Learning Centers	15M
CTR Infrastructure	10M
Space improvements Only In Schools	
We Are Will Not Be Closed	

2. Focus on top Facility Maintenance Repairs with as many Improvements/ Other Options as possible (50%-50%)

Energy Consumption	
Technology Infrastructure Upgrades Electrical Ethernet	
All Maintenance Repairs	179M
Tech Hubs	

3. Emphasis on the top Facility Maintenance Repairs with Other Options/ Focused Improvements. (50%-50%) (a few Facility Improvements are ok)

Questions about realignment and reopening schools

All Maintenance Improvements	179M
STEM Learning Centers	15M
CTA Infrastructure	10M
Student Space Improvements	25M

### Group 3

1. Priority Facility Maintenance Repairs and some key Facility Improvements. (80%-20%)

MS- Community Space Improv	15M
HS- Tech Hub	13M
HS- CTE Infrastructure	6M
HS- Community Space	11M

2. Focus on top Facility Maintenance Repairs with as many Improvements/ Other Options as possible (50%-50%)

Roofing	80M
HVAC	55M
Security	10M
Own budget we need to change district	

**GEO****Advertising  
& Marketing**

4251 E. 5th St. Tucson, AZ 85711

520-323-3221

866-50-media

to use business practices to opt 10% discount

### **Facilities Improvements 21<sup>st</sup> Century**

#### Elementary

- Student Space Improvement 21M

#### Middle School

- Community Space Improvements 15M
- Student Space Improvements 13M
- Technology Hubs 13M

#### High School

- Technology Hub 13M
- CTE Infrastructure 6M
- Community Space 11M

#### Other

- Santa Rita Grade Realignments 7M
- High School Refurbishment 21<sup>st</sup> Century Improvement 15M

3. Emphasis on the top Facility Maintenance Repairs with Other Options/ Focused Improvements. (50%-50%) (a few Facility Improvements are ok)

Roof	50M
HVAC	30M
Sec	6M
Special Systems	3M
Plumbing	3M
Doors	4M
ESS	3M
Playground	.5M
Tech	8M
Bus	1M
Elementary (4)	20M
Middle (2)	16M
High School (4)	60M
Grade Realignment	7M

## Group 4

1. Priority Facility Maintenance Repairs and some key Facility Improvements. (80%-20%)

Elementary Student Space Improvement	10.5M
MS SSI	10M
HS All to 1/2	19.5M



2. Focus on top Facility Maintenance Repairs with as many Improvements/ Other Options as possible (50%-50%)

Maintenance

• Roofing	60M
• HVAC	40M
• Security	6M
• Special Systems	3M
• Plumbing	3M
• Doors	6M
• ESS	3M
• Playground	.5M
• Tech	8M
• Buses	1M

Improvements

• E-SSI	11M
• E-Community Space	15M
• MS-SSI	10M
• MS-Community Space	10M
• MS-Multi-use Pavilion	6.5M
• HS-SSI	9M
• HS-Tech HUB	13M
• HS-CTE	6M
• HS-Community Space	11M

3. Emphasis on the top Facility Maintenance Repairs with Other Options/ Focused Improvements. (50%-50%) (a few Facility Improvements are ok)

6 High School Refurbs	90M
Grade Realignments	7M
Reopen 2 Schools	10M
1 Elementary School Refurb	3M
Roofing	50M
HVAC	50M
Plumbing	3M
Doors and Hardware	7M



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

## Tucson Unified School District

### March 9th, 2016 TUSD Advisory Board

### Series 3 Focus Group Results

March 9th, 2016

### Executive Summary

#### Methodology

An Interactive Focus Group was conducted with the TUSD Advisory Board on March 9th, 2016. Independent 3<sup>rd</sup> party moderators delivered the focus group, along with a technical expertise team who provided support for questions from the participants. This focus group is a part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

This focus group was Part 3 of 3 in a Series of Focus Groups. Each series will be held for each education level: Elementary, Middle School/K-8 and High School. The objectives of the Focus Groups by series is as follow:

- FG Series #1 = Objectives/Approaches
- FG Series #2 = Develop Options
- FG Series #3 = Prioritize/Phase Options
  - » The focus of this focus group session.

Participants were debriefed on the intent of each of the 3 series and what their task was for Focus Group Series #3; Prioritize/Phase Options. Participants were then selected at random to break into groups to discuss each question and given an introduction of expectations of why they were there and how their participation would assist. They were divided into 3 groups of 3. Each group was assigned a team captain. That team captain annotated his/her group answers to each question on sheets that were provided by the moderators.

The question was presented, a synopsis of the question was presented and the group had 10-15 minutes to discuss and record their answers. At the end of the focus group all questions were reviewed one-by-one with the moderator and all teams for the sole purpose of enhancing the overall process and if each question was asked and presented. Then there was lively discussion about bonds and how to market it to the community.

#### Synopsis

Overall, the advisory focus group offered great insight into future proceedings and the future of TUSD. Throughout the presentation there was many questions that were presented to the moderators. There was lively debate amongst the members about current approaches and many had input. Some members spoke about wording to future focus groups that would help develop new ideas and ways to get voters in the right mindset.

When asked the question about bonding capacity the groups all had similar responses. 2 out of the 3 groups choose to go with the option of spending \$300 million. They based this on the fact that voters may only get one opportunity. They also said voters need to know where each part of the bond is going. They felt that they could afford that amount because it is a very worthwhile cause. The other group chose \$240 million because they felt voters would support that amount. They said \$300



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

million was too much while \$180 million was too little to have any impact. Some groups said they would like to go even high than 300 million if possible

This group provided great insight and good feedback that will help in the upcoming focus groups to come. More questions will be developed for upcoming focus groups based on the discussions of this focus group. Their insightful thoughts were noted and discussed so that precise targeting and wording can be implemented, ensuring a good future for TUSD.

### Focus Group Questions Transcript

#### Group 1

- **\$180 Million**
  - \$49 per year for the average home (\$130,000)
  - \$4.09 per month
- **\$240 Million**
  - \$65 per year for the average home (\$130,000)
  - \$5.45 per month
- **\$300 Million**
  - \$82 per year for the average home (\$130,000)
  - \$6.82 per month

Which one do you support?

\$300 Million

Explain why.

- We could all afford it
- Bang for the buck
- Benefit outweighs cost

#### Group 2

- **\$180 Million**
  - \$49 per year for the average home (\$130,000)
  - \$4.09 per month
- **\$240 Million**
  - \$65 per year for the average home (\$130,000)

**GEO**

Advertising  
& Marketing

4251 E. 5th St. Tucson, AZ 85711

520-323-3221

866-50-media

- \$5.45 per month
- **\$300 Million**
  - \$82 per year for the average home (\$130,000)
  - \$6.82 per month

Which one do you support?

\$240 Million

Explain why.

- We believe 240M could be supported and have impact
- \$300 Million too much money
- \$180 Million not enough to make the difference the community would expect

### Group 3

- **\$180 Million**
  - \$49 per year for the average home (\$130,000)
  - \$4.09 per month
- **\$240 Million**
  - \$65 per year for the average home (\$130,000)
  - \$5.45 per month
- **\$300 Million**
  - \$82 per year for the average home (\$130,000)
  - \$6.82 per month

Which one do you support?

\$300 Million, but we all agree we would take what we can get. Have all three options ever been offered?

Explain why.

- We feel we only have one opportunity
- The voters need to know where each level is going to get them
- Override at same time may effect this
- Have the elements every been separated out- like other governments have done



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

**Tucson Unified School District**  
**March 16th, 2016 TUSD Elementary Schools**  
**Series 3 Focus Group Results**  
**March 17th, 2016**

**Executive Summary**

**Methodology**

An Interactive Focus Group was conducted with parents and staff of TUSD on March 16th, 2016. Independent, 3<sup>rd</sup> party moderators delivered the focus group, along with a technical expertise team who provided support for questions from the participants. This focus group is a part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

This focus group was Part 3 of 3 in a Series of Focus Groups. Each series will be held for each education level: Elementary, Middle School/K-8 and High School. The objectives of the Focus Groups by series is as follow:

- FG Series #1 = Objectives/Approaches
- FG Series #2 = Develop Options
- FG Series #3 = Prioritize/Phase Options
  - » The focus of this focus group session.

Participants were briefed on the intent of each of the 3 series and what their task was for Focus Group Series #3; Prioritize/Phase Options. Participants were then selected at random to break into groups to discuss each question and given an introduction of expectations of why they were there and how their participation would assist. The groups were divided up into 2 groups of 4 and one group of 3. Each group was assigned a team captain. That team captain annotated his/her group answers to each question on sheets that were provided by the moderators.

The question was presented, a synopsis of the question was presented and the group had 10-15 minutes to discuss and record their answers. At the end of the focus group all questions were reviewed one-by-one with the moderator and all teams for the sole purpose of enhancing the overall process and if each question was asked and presented. The group had focused debate and collected answers to the questions that were provided.

**Synopsis**

The Elementary School focus group was very involved and had great insight to offer about the bond scenario. The group was given a bond scenario where they had to choose a good plan between \$180 million, \$240 million, and \$300 million. They had to choose the one that they believed the voters would approve. There was mixed answers and also creative discussion that led groups to their decisions. 2 groups said they wanted to go with \$240 million, however one of those groups was creative and wanted to go for something more around \$270 million. Both groups agreed this would cover maintenance needs and allow schools to improve on certain areas. The group that chose \$300 million said that the facilities maintenance repairs are a priority and that they would want to distribute the rest to 21<sup>st</sup> century education and upgrades. All 3 groups had lively discussion and debate and all groups preferred the 21<sup>st</sup> Century Improvements to the Other Options.

When asked about their perception of bonds and how we can encourage community involvement this group had similar answers. The group did not ask many questions with moderators and kept their debate amongst themselves. Members of this focus group felt that there was a lack of trust within the district about how funds would be allocated. All three groups agreed that showing how the money would be allocated throughout the district would be a key point to emphasize in the bond campaign. They all felt that not being direct and understanding the wants versus needs in a campaign is something to be avoided overall.

Altogether, the breakdown of the specific dollar amounts helped the groups have a better understanding of what improved their opinions throughout each series of the focus groups. Having the continued transparency about the bond program as it develops, is something the group felt would help with future developments and community involvement with TUSD.

### Focus Group Questions Transcript

## Group 1

- **\$180 Million**
  - \$49 per year for the average home (\$130,000)
  - \$4.09 per month
- **\$240 Million**
  - \$65 per year for the average home (\$130,000)
  - \$5.45 per month
- **\$300 Million**
  - \$82 per year for the average home (\$130,000)
  - \$6.82 per month

#### **Which one do you support?**

\$240M-300M

\$270 Happy Median

Group is torn in half

#### **Explain why and what options you want included**

Only purchase/ improve what's needed

Ensure maintenance repairs completed first

Allow for each school to get what's absolutely needed

Capacity to go back for another bond if needed

Improve trust level- still lacking confidence in district from community

## Group 2

- **\$180 Million**
  - \$49 per year for the average home (\$130,000)
  - \$4.09 per month
- **\$240 Million**



Advertising & Marketing

4251 E. 5th St. Tucson, AZ 85711

520-323-3221

866-50-media

- \$65 per year for the average home (\$130,000)
- \$5.45 per month
- **\$300 Million**
  - \$82 per year for the average home (\$130,000)
  - \$6.82 per month

**Which one do you support?**

\$240 million @ \$5.45 per month

**Explain why and what options you want included**

Voter perception is not willing to vote for \$300 million

Everyone agrees on needing the \$198M for maintenance repairs to cover inflation plus whatever 21<sup>st</sup> Century Improvements we could fit in.

What's the district population/demographics going to look like in 10 years?

### Group 3

- **\$180 Million**
  - \$49 per year for the average home (\$130,000)
  - \$4.09 per month
- **\$240 Million**
  - \$65 per year for the average home (\$130,000)
  - \$5.45 per month
- **\$300 Million**
  - \$82 per year for the average home (\$130,000)
  - \$6.82 per month

**Which one do you support?**

\$300 million pack

**Explain why and what options you want included**

Difference between the three packages are negligible- only a 2.73 from 1<sup>st</sup> package.

Facilities Maintenance Repairs is a priority- Use the top priorities and max funding to improve all needs and then distribute the rest of funds equitable to 21<sup>st</sup> century.

### Group Discussion

#### Group 1

**What do you feel is the community's perception of a bond?**

Not sure- not from the area



4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

Poor

Individual- education supporter's vs. property tax

Hesitant- lack trust, use funds adequately

How to gain trust- spend money to gain confidence- only see money spent

**Does that differ from your perception?**

All pro education, anything to help

There's a social problem

**What should be emphasized in a bond campaign?**

Shortfall in state funding

Current conduction of TUSD facilities

Breakdown of where the money is going

Provide repairs slide

Specific in what will be repaired

Measureable benchmarks

Accountability of previous bond

**What should be avoided in a bond campaign?**

Generalities

Vagueness

No opportunity to shelf money

Nothing that can give a feeling/opportunity for manipulation

**What key information provided during the focus groups improved your opinion of a bond?**

Funding out how money will be used

Breakdown

People- neutral party

Actually hearing different opinions from TUSD stakeholders- feeling as though voices are heard

**Group 2**

**What do you feel is the community's perception of a bond?**

Confusion

Lack of knowledge

Fear of taxes. Impact vs Benefit

What is in it for me?

Personal Impact

Short- sightedness





4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

**Does that differ from your perception?**

We are informed  
We have to buy in  
Realize bonds are the financial vehicle of capitol improvements

**What should be emphasized in a bond campaign?**

Smaller #  
Transparency of what bond will pay for  
Balance (delicate)  
Show the benefits  
Show context of the monetary value of saving the \$

**What should be avoided in a bond campaign?**

Don't be too grim about state of TUSD schools  
Be realistic and hopeful  
Don't Involve charter schools  
Admin stay away from the campaign  
Use teachers and students

**What key information provided during the focus groups improved your opinion of a bond?**

Having the specifics \$ amounts w/ inflation built in.  
Cost impact on different amounts of bonds and the impact on taxes  
Shown what a 21<sup>st</sup> century learning environment can be

**Group 3**

**What do you feel is the community's perception of a bond?**

Lack of trust  
Where is the follow thru  
Changing sites without much information

**Does that differ from your perception?**

More transparency this year w/ facilities

**What should be emphasized in a bond campaign?**

The cost per month vs overall picture  
Purpose to promote academic achievement for all students  
Safety

**GEO**

Advertising  
& Marketing

4251 E. 5th St. Tucson, AZ 85711

520-323-3221

866-50-media

**What should be avoided in a bond campaign?**

Wants vs Needs

**What key information provided during the focus groups improved your opinion of a bond?**

Break down cost per month

Understanding what a capital bond was (separate pots of \$)

Continued transparency

Voices being heard



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

**Tucson Unified School District**  
**March 12th, 2016 TUSD Middle Schools**  
**Series 3 Focus Group Results**  
**March 15th, 2016**

**Executive Summary**

**Methodology**

An Interactive Focus Group was conducted with parents and staff of TUSD on March 12th, 2016. Independent 3<sup>rd</sup> party moderators delivered the focus group, along with a technical expertise team who provided support for questions from the participants. This focus group is a part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

This focus group was Part 3 of 3 in a Series of Focus Groups. Each series was held for each education level: Elementary, Middle School/K-8 and High School. The objectives of the Focus Groups by series are as follow:

- FG Series #1 = Objectives/Approaches
- FG Series #2 = Develop Options
- FG Series #3 = Prioritize/Phase Options
  - » The focus of this focus group session.

Participants were briefed on the intent of each of the 3 series and what their task was for Focus Group Series #3; Prioritize/Phase Options. Participants were then selected at random to break into groups to discuss each question and given an introduction of expectations of why they were there and how their participation would assist. Each group was assigned a team captain. That team captain annotated his/her group answers to each question on sheets that were provided by the moderators.

The question was presented, a synopsis of the question was presented and the group had 10-15 minutes to discuss and record their answers. At the end of the focus group all questions were reviewed one-by-one with the moderator and all teams for the sole purpose of enhancing the overall process and ensuring each question was asked and presented. The group had lively debate about bond options and their overall perception of a bond program for the community.

**Synopsis**

The Middle School focus group was very engaged and had a great amount of insight to offer. The group was given a bond scenario where they had to choose a plan between \$180 million, \$240 million, and \$300 million. They had to choose the one that they believed the voters would approve. Overall, members had a hard time deciding between the three scenarios. Some felt it was too much while others felt it was too little money being spent to fix the overall needs of the district. This particular group was very creative and had engaging debate that led them to a compromised answer. They decided on \$250 Million because they believed it would be enough to cover needs and would not cause tension in the district when it came to the community vote.

When asked about their perception of bonds and how we can encourage community involvement this group was very proactive in their answers. They spent time discussing and deciding which factors would play a key role in the overall



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

decision. The members felt that the overall perception of a bond was negative because too many voters are already skeptical about how the money is being spent. The group felt that moving forward and upgrading the districts schools should be the main focus of the bond campaign. Overall, they agreed that making sure people were aware of what was going to be in the bond campaign was a key factor in helping their perception. The group felt that having no transparency and not being overly greedy would be very important.

Overall, the focus group felt that a lot of the information provided throughout the various focus groups helped them understand more about the bond campaign. Making sure the district and residents of TUSD understood just how much needed to be done is going to play an important part in the final decision. The group offered great feedback on the future of TUSD and many generations to come.

### **Focus Group Questions Transcript**

- **\$180 Million**
  - \$49 per year for the average home (\$130,000)
  - \$4.09 per month
- **\$240 Million**
  - \$65 per year for the average home (\$130,000)
  - \$5.45 per month
- **\$300 Million**
  - \$82 per year for the average home (\$130,000)
  - \$6.82 per month

#### **Which one do you support?**

(2) \$300M

(1) \$240M

#### **Explain why and what options you want included**

We would like \$250M if possible. This is because of not having deseg funding. We see if we spend on the right needs for the district (schools). Improvements need to be made. \$240M covers all facility and maintenance needs it can also cover the improvements to schools themselves

## **Group Discussion**

### **Group 1**

#### **What do you feel is the community's perception of a bond?**

That bonds now have become the way of schools raising funding for capitol Improvements and Facilities and Maintenance. Look at bottom line of property tax increase and its effects

#### **Does that differ from your perception?**

No



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

**What should be emphasized in a bond campaign?**

On moving toward the next generation of teaching and upgrading the district to meet those needs. Accountability and proper due diligence with bond oversight

**What should be avoided in a bond campaign?**

Avoid the perception of no transparency, placing too much blame on outside factors; economic or political

**What key information provided during the focus groups improved your opinion of a bond?**

The numbers and state of the district buildings are programming ideals.

## **Group 2**

**What do you feel is the community's perception of a bond?**

Outrageous increases. What does the schools spend the money on. Why don't they close some school? Why do they need more money if the government gives them money?

**Does that differ from your perception?**

From a parent of a child in school I see the need for the schools to be repaired. I see that things need repairs.

As an employee we need lots of repairs I drive through the parking and lights are out. The asphalt is full of potholes. Paint is a need. Power outages.

**What should be emphasized in a bond campaign?**

A clear plan of what is going to be entailed. Explain a lot of the who, what, where, when, why the people of the community have. Show results send out notices to people in the community aware of what there tax dollars have been doing. Advertise the accomplishments

**What should be avoided in a bond campaign?**

Asking for more than allocated. Not being clear on what they are spending on. Not answering the 5 W's to the people. Not showing what the money is being spent on as something that should be avoided.

**What key information provided during the focus groups improved your opinion of a bond?**

What the purpose of it is and how its going to be spent.



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

### **Group 3**

#### **What do you feel is the community's perception of a bond?**

They would have to pay more money in taxes for their homes.

#### **Does that differ from your perception?**

Yes, because I know that it will help fix up and keep cost down for buildings.

#### **What should be emphasized in a bond campaign?**

Pictures of schools or more details of what exactly needs to be done to the schools of choice

#### **What should be avoided in a bond campaign?**

High priced contractors but not the low. One. Not ask for so much money at one time.

#### **What key information provided during the focus groups improved your opinion of a bond?**

High priced contractors but not the low one. Not ask for so much money at one time.



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

## Tucson Unified School District

March 14th, 2016 TUSD High Schools

Series 3 Focus Group Results

March 16th, 2016

### Executive Summary

#### Methodology

An Interactive Focus Group was conducted with parents and staff of TUSD on March 14th, 2016. Independent 3<sup>rd</sup> party moderators delivered the focus group, along with a technical expertise team who provided support for questions from the participants. This focus group is a part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

This focus group was Part 3 of 3 in a Series of Focus Groups. Each series was held for each education level: Elementary, Middle School/K-8 and High School. The objectives of the Focus Groups by series are as follow:

- FG Series #1 = Objectives/Approaches
- FG Series #2 = Develop Options
- FG Series #3 = Prioritize/Phase Options
  - » The focus of this focus group session.

Participants were briefed on the intent of each of the 3 series and what their task was for Focus Group Series #3; Prioritize/Phase Options. Participants were then selected at random to break into groups to discuss each question and given an introduction of expectations of why they were there and how their participation would assist. The groups were divided into 4 groups of 3. Each group was assigned a team captain. That team captain annotated his/her group answers to each question on sheets that were provided by the moderators.

The question was presented, a synopsis of the question was presented and the group had 10-15 minutes to discuss and record their answers. At the end of the focus group all questions were reviewed one-by-one with the moderator and all teams for the sole purpose of enhancing the overall process and if each question was asked and presented. The group had lively debate about bond options and their overall perception of a bond program for the community.

#### Synopsis

The High School focus group was involved and had engaging feedback throughout the discussion. Each group was given a bond scenario where they had to choose a good plan between \$180 million, \$240 million, and \$300 million. The groups were asked to discuss which options they felt would be the best spending scenario for the voters. 3 out of the 4 groups chose \$300 million and 1 group chose 240 million. They came to this decision based on the fact that there is much to be done in the district and the groups felt it would take the maximum amount to fix and improve current conditions. Although most of the groups agreed on a higher amount they still agreed that they would take whatever they could get in order to restore facilities at TUSD.

When asked about their perception of bonds and how we can encourage community involvement this focus group had much to say and took their time coming up with detailed answers. Each group felt that overall perception of the bond was not

favorable. Many talked about transparency and overall community skepticism of the bond. All 4 groups however, did state that they understood the need for the bond and that their views differed from the community's perception. Members felt that community involvement was a key factor that needed to be emphasized throughout the campaign. There was great debate and many suggestions about how to utilize different forms of media to spread the word. The only way to get everyone involved was to relate it to the community and the working people in positive, understandable ways.

Overall, this group believed they had positive change throughout each series of focus groups based on the information that was presented to them. It helped them determine where TUSD's greatest needs were and how to handle each individual aspect. There was positive interaction throughout and great feedback was provided.

### **Focus Group Questions Transcript**

## **Group 1**

- **\$180 Million**
  - \$49 per year for the average home (\$130,000)
  - \$4.09 per month
- **\$240 Million**
  - \$65 per year for the average home (\$130,000)
  - \$5.45 per month
- **\$300 Million**
  - \$82 per year for the average home (\$130,000)
  - \$6.82 per month

#### **Which one do you support?**

\$300M

#### **Explain why and what options you want included**

Facilities Maintenance & Fields Improvements

No on other options

21<sup>st</sup>- Yes but questions and teaching CTE

Student space improvements could also serve as a community space.

## **Group 2**

- **\$180 Million**
  - \$49 per year for the average home (\$130,000)
  - \$4.09 per month
- **\$240 Million**
  - \$65 per year for the average home (\$130,000)
  - \$5.45 per month
- **\$300 Million**
  - \$82 per year for the average home (\$130,000)





4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

- \$6.82 per month

**Which one do you support?**

\$300M

**Explain why and what options you want included**

The decision to fix/improve each school needs to fit a vision (strategic plan)  
Not just changing a space. The decision needs to be based on need  
All of facilities Maintenance  
\$60M Facility Improvements  
\$40M Focused Improvement

### Group 3

- **\$180 Million**
  - \$49 per year for the average home (\$130,000)
  - \$4.09 per month
- **\$240 Million**
  - \$65 per year for the average home (\$130,000)
  - \$5.45 per month
- **\$300 Million**
  - \$82 per year for the average home (\$130,000)
  - \$6.82 per month

**Which one do you support?**

\$300M

**Explain why and what options you want included**

Facilities Maintenance Repairs  
21<sup>st</sup> Century Facilities Improvements

### Group 4

- **\$180 Million**
  - \$49 per year for the average home (\$130,000)
  - \$4.09 per month
- **\$240 Million**
  - \$65 per year for the average home (\$130,000)
  - \$5.45 per month
- **\$300 Million**

- \$82 per year for the average home (\$130,000)
- \$6.82 per month

**Which one do you support?**

\$240M

Most of the facility maintenance & improvements  
Security, technology focus and community space improvements (middle schools)

**Explain why and what options you want included**

\$180- we would have to request money again in approx. 3-4 years

\$300- tough to swallow- \$82 is nothing but 300M is what people will focus on

- Newspaper headline will say "300 million" not \$82 per year
- Presidential election turnout could adversely affect
- Thoughts about outsourcing Buses/Transportation- buses used a few hours in AM/PM, not for months in summer. Could be privatized?

## Group Discussion

### Group 1

**What do you feel is the community's perception of a bond?**

Skeptical, don't see the need, distrust the district, bonds can be misunderstood, confusing, people don't understand the specific needs such as HVAC, people don't understand the 21<sup>st</sup> century school vs "my school in 1955 was good enough for me"

**Does that differ from your perception?**

We agree that improvements are very necessary to the future growth of district

TUSD needs to continue to educate the public on the needs and benefits, and be one voice for this improvement

**What should be emphasized in a bond campaign?**

Importance of 21<sup>st</sup> century ed. To students and community

Specifics of facilities improvements that affect education and the community

**What should be avoided in a bond campaign?**

Careful to not paint an extremely grim picture- celebrate the accomplishments of the schools -> but how far could students go if....?

**GEO**

Advertising  
& Marketing

4251 E. 5th St. Tucson, AZ 85711

520-333-3221

866-50-media

Board needs to unanimous about this- no dissenting voice

**What key information provided during the focus groups improved your opinion of a bond?**

Board should be coupled with override to support the tech improvements

Extent of the need for health and safety improvement

Recognizing need for improved student space

## **Group 2**

**What do you feel is the community's perception of a bond?**

Not positive

What have they done for me lately

How will we advertise this? -Future, Future, Future!

**Does that differ from your perception?**

Yes- were educators

**What should be emphasized in a bond campaign?**

What (Ownership)

Life span & how each age group will benefit -> very visual ->

Hope- how will improvements translate into my positive vision for my children, for the people of Tucson

Visual! Specific ads targeting various communities Rising up, K-12- how will improving buildings translate to hope for the future

**What should be avoided in a bond campaign?**

Infighting -> needs to start @ the grassroots

**What key information provided during the focus groups improved your opinion of a bond?**

Sharing ideas

Narrowing needs

Understanding how will \$ be spent

Strategic Plan

What could be possible!- Dreams

## **Group 3**



4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

**What do you feel is the community's perception of a bond?**

Will worry specify Tax increase -> benefit  
Lack of personal exposure (may not have kids currently @ TUSD)

**Does that differ from your perception?**

Yes  
We are invested and more aware of the need

**What should be emphasized in a bond campaign?**

Positive marketing  
Need the fluff  
There is community benefit  
Positive correlation between the impact of the bond and how it actually improves our overall community

**What should be avoided in a bond campaign?**

Negative marketing  
Finger pointing

**What key information provided during the focus groups improved your opinion of a bond?**

How detailed impact cost was  
Info detailing need in \$ amounts

**Group 4**

**What do you feel is the community's perception of a bond?**

\$300 M is too high- skeptical  
Transparency of previous & current bond protects is difficult to find accessible  
Are these focus groups representative of district population  
TUSD wastes money- fat cats

**Does that differ from your perception?**

We value education- Need to expand to other people- So want higher bonds

**What should be emphasized in a bond campaign?**

Promote Pat bond accomplishments



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

#### Learn from recent Pima county Bond Failures

- Minimize hearings- People are too busy to attend
- Advertise on TV, etc
- Make is specific & exciting
- Specific project descriptions
- Stream on youtube
- Encourage/ Working parents
- Cost Of Business

#### **What should be avoided in a bond campaign?**

Impersonal Impact – Too much technical stuff

Make it personal – Your kid will be helped

#### **What key information provided during the focus groups improved your opinion of a bond?**

Project cost information

Didn't appreciate full costs across the district



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

**Tucson Unified School District**  
 March 14th, 2016 TUSD Superintendents Student Advisory Council  
 Series 3 Focus Group Results  
 March 28th, 2016

**Executive Summary**

**Methodology**

An Interactive Focus Group was conducted with the Superintendent's Student Advisory Council of TUSD on March 14th, 2016. Independent 3<sup>rd</sup> party moderators delivered the focus group, along with a technical expertise team who provided support for questions from the participants. This focus group is a part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

Participants were briefed on the intent of the focus group. Participants were grouped by high school to discuss each question and were given an introduction of expectations of why they were there and how their participation would assist. There were 9 groups out of the 11 schools represented at the focus group which equated to 81%. Each group was assigned a team captain. That team captain annotated his/her group answers to each question on sheets that were provided by the moderators.

The survey and question were presented, a synopsis of the question was presented and the group had 10-15 minutes to discuss and record their answers. At the end of the focus group the surveys were collected and all questions were reviewed one-by-one with the moderator and all teams for the sole purpose of enhancing the overall process and ensuring each question was asked and presented. This particular focus group had very interesting perspectives coming from students who understand and go to school day in and day out.

**Synopsis**

The Superintendent's Student Advisory Council provided very good insight on current conditions of school's and what improvements they would like to see implemented. Each individual member was presented with a survey that asked questions on current conditions and whether or not they supported the current infrastructure, safety and technology. They also were asked about priorities of specific parts of education and what is necessary for a school district to function. The group overall had very similar priorities and answers to the survey.

In the survey, the majority of students felt that the conditions of schools do not support technology, infrastructure and safety. They felt that many improvements were needed. Most members of the group felt that STEM, High Academics/College Prep, and CTE were their highest priorities when it came to student learning. Lower ranking priorities included Physical Education, Fine Arts and Project Based learning. Students were asked to address which parts of education were important in supporting a facilities master plan. In this question students felt that Basic Education, School Facilities Maintenance and Security were of high importance while Playgrounds, Student pick-up/drop off, and Energy Efficiency were not as important at this time. A commonality amongst all students when asked about what facility improvements were they most familiar with, were the need for better HVAC and bathrooms. The groups were very diligent in their answers and took time to come to their results.

The 9 groups of the Superintendent's Student Advisory Council were given a question that asked if funding were limitless what would they spend the money on. The groups really enjoyed this question. It gave them a chance to be creative and decide what they would do for schools across the district. Results from this question proved to be interesting. Every single



4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

group mentioned the need for better HVAC, cafeterias, collaborative and student spaces, cyber café style areas, and especially bathrooms. They all spoke about the needs of each of these key points and how it would improve their learning overall.

The students took the focus group very seriously and provided great feedback. There was great discussion and they were very engaged throughout the presentation. Overall, the focus group provided useful results that will be used for the future of TUSD.

### **Focus Group Transcription**

#### **Group 1**

If funding was limitless, what building improvements would you wish for to transform teaching & learning environments?

*Please keep in mind all of the schools you went to (E, M/K-8, H)*

Better food, more varied kitchen utilities.  
Cybercafé/student lounge.  
A study room for students with no 1<sup>st</sup> or 6<sup>th</sup> periods.  
A weight room in the north gym (Catalina). Better water fountains.  
Better heating/cooling, better windows.  
Improvements of the outside eating areas.  
Improvement of JV basketball field/tennis courts.  
Better culinary utilities, bigger kitchen.  
More appealing/inviting wall décor. More accessible Wi-Fi

#### **Group 2**

If funding was limitless, what building improvements would you wish for to transform teaching & learning environments?

*Please keep in mind all of the schools you went to (E, M/K-8, H)*

Better Bathrooms and everything that goes with it  
Nap rooms  
Slides  
Actual grass, not weeds  
Pools, Way better swim teams  
Better desks tables and chairs  
Paint, walls, just redo all of the schools to make sure everyone feels safe and comfortable  
A very home environment  
New lockers, New storage, New everything  
Airports, planes, big thing big wheels  
Metal statues of me Tanner with a bear pelt  
Discussions area for yelling at each other in a controlled area  
Wifi  
Puppy center for relaxing. Maybe cats for those strange people

### **Group 3**

If funding was limitless, what building improvements would you wish for to transform teaching & learning environments?

*Please keep in mind all of the schools you went to (E, M/K-8, H*

Create a student union  
More seating during lunch  
Create a cyber café  
A bigger cafeteria  
Bridges from building to building  
Common areas for all levels of school  
Shade outside  
Teachers being able to self control room temperature  
Microsoft enhanced school district  
Water fountains  
Better bathrooms  
Wi-fi for students like USD, they have it on the bus!!  
Parking lots!!  
Private study room like the U of A

### **Group 4**

If funding was limitless, what building improvements would you wish for to transform teaching & learning environments?

*Please keep in mind all of the schools you went to (E, M/K-8, H*

It is essential for all schools to provide:

- A eco friendly/efficient environment
- More artistic outlook
- More furniture
- Modern decoration
- Unlimited computer access
- A study room w/computers and desks
- Swimming floors
- Dryers and washing machine
- Life skills class
- Student aid program
- Field trips
- Disciplinary officer
- Study abroad programs
- Bilingual Teachings
- Farming: Agriculture learning

### **Group 5**



**GEO**

Advertising  
& Marketing

4251 E. 5th St. Tucson, AZ 85711

520-323-3221

866-50-media

If funding was limitless, what building improvements would you wish for to transform teaching & learning environments?

*Please keep in mind all of the schools you went to (E, M/K-8, H*

If funding was limitless, we would transform the technology for ex: free accessible wifi:  
General maintenance of the schools: paint, stair wells, better desk, school environment, upgrade bathrooms!  
Plumbing, roof, supplies.  
Windows, create schools to be more modern.  
Improve bells

### **Group 6**

If funding was limitless, what building improvements would you wish for to transform teaching & learning environments?

*Please keep in mind all of the schools you went to (E, M/K-8, H*

Large gym to fit both Rincon and UHS  
Improved library w/ two stories, private study rooms and improved technology  
Improved parking lots  
Mpr  
Heating and cooling  
More places to display student art

### **Group 7**

If funding was limitless, what building improvements would you wish for to transform teaching & learning environments?

*Please keep in mind all of the schools you went to (E, M/K-8, H*

New roofs, Heating and cooling  
New cafeteria as well as new gym  
New technology  
New bathrooms  
Better PE Equipment such as a pod  
Locker- rooms  
Transportation

### **Group 8**

If funding was limitless, what building improvements would you wish for to transform teaching & learning environments?

*Please keep in mind all of the schools you went to (E, M/K-8, H*

Better chairs and desks in classrooms and libraries, more comfort  
 Everyone gets a laptop or provide better computers in schools  
 Better PA systems and sound systems for pep assemblies  
 Fixed heating a cooling  
 Better plumbing  
 Free wifi  
 More and better maintenance and security  
 More supplies for student council and other art classes  
 Better CTE Funding  
 Smell better in classes/Bathrooms  
 Better gardening (Wetlands)

**Group 9**

If funding was limitless, what building improvements would you wish for to transform teaching & learning environments?

*Please keep in mind all of the schools you went to (E, M/K-8, H*

Study session rooms (Write on the whiteboards)  
 Better bathrooms/more bathrooms  
 Air conditioning  
 Not waiting heating and cooling  
 Research like at U of A  
 Better vans for transportation  
 Better managed, Bigger parking Lots  
 Signage/ Hallways

**Focus Group In-Meeting Survey Results**

**1. Do you feel the conditions of school buildings and building systems support education? “Excellent” (5) to “Poor” (1)**

1=9% 2=24% 3=39% 4=24% 5=3% (Avg= 2.88)

**2. Do you feel schools have the technology infrastructure and devices needed? “Excellent” (5) to “Poor” (1)**

1=12% 2=30% 3=33% 4=18% 5=6% (Avg= 2.76)

**3. Do you feel schools provide a safe & secure environment? “Excellent” (5) to “Poor” (1)**

1=12% 2=15% 3=12% 4=33% 5=9% (Avg= 3.12)

**4. How important are the following in providing a 21<sup>st</sup> century education?**

Rank by priority – “Highest Priority” (9) to Lowest Priority (1)

A. STEM (Science Technology Engineering & Math)

- 1=12% 2=6% 3=3% 4=3% 5=3% 6=6% 7=18% 8=18% 9=30% (Avg=6.42)
- B. Project-based Learning
  - 1=3% 2=3% 3=15% 4=18% 5=21% 6=15% 7=12% 8=12% 9=0% (Avg=5.15)
- C. Physical Education / Interscholastic Activities
  - 1=12% 2=9% 3=24% 4=21% 5=18% 6=6% 7=6% 8=0% 9=3% (Avg=3.85)
- D. Fine Arts
  - 1=0% 2=3% 3=18% 4=24% 5=24% 6=21% 7=6% 8=0% 9=3% (Avg=4.64)
- E. CTE (Career & Technical Education)
  - 1=0% 2=9% 3=6% 4=12% 5=9% 6=18% 7=27% 8=6% 9=12% (Avg=5.88)
- F. High Academics / College Prep
  - 1=6% 2=3% 3=6% 4=0% 5=3% 6=12% 7=21% 8=24% 9=24% (Avg=6.79)
- G. Global Studies and Dual Language
  - 1=3% 2=6% 3=18% 4=9% 5=12% 6=18% 7=18% 8=9% 9=6% (Avg=5.30)

**5. What is the best part of TUSD schools?**



**6. What is the biggest challenge for TUSD schools?**



**7. Please rank the following issues that you feel are important to address for the Facilities Master Plan and possibly a bond.**

Rank by priority – “Highest Priority” (10) to Lowest Priority (1)

- A. Playgrounds/fields/athletics  
1=15% 2=15% 3=15% 4=15% 5=6% 6=3% 7=9% 8=12% 9=0% 10=6% (Avg=4.21)
- B. 21<sup>st</sup> century education (as described in question 6)  
1=9% 2=6% 3=3% 4=15% 5=9% 6=6% 7=12% 8=9% 9=15% 10=12% (Avg=5.88)
- C. Student pick-up/drop off  
1=9% 2=12% 3=21% 4=9% 5=9% 6=12% 7=6% 8=9% 9=6% 10=3% (Avg=4.52)
- D. Energy efficiency and reduced operating cost  
1=3% 2=9% 3=12% 4=15% 5=12% 6=6% 7=21% 8=6% 9=12% 10=0% (Avg=5.21)
- E. School facilities maintenance  
1=6% 2=6% 3=3% 4=12% 5=3% 6=12% 7=12% 8=15% 9=15% 10=12% (Avg=6.27)
- F. Busses/Transportation  
1=0% 2=12% 3=12% 4=6% 5=21% 6=15% 7=3% 8=18% 9=9% 10=0% (Avg=5.30)
- G. Security of students and staff  
1=0% 2=3% 3=12% 4=6% 5=21% 6=15% 7=3% 8=18% 9=9% 10=0% (Avg=6.00)
- H. Basic education  
1=0% 2=9% 3=6% 4=3% 5=6% 6=9% 7=15% 8=6% 9=21% 10= 24% (Avg=6.94)
- I. Technology  
1=3% 2=12% 3=15% 4=6% 5=12% 6=3% 7=3% 8=12% 9=18% 10= 12% (Avg=5.79)
- J. Other  
1=15% 2=0% 3=0% 4=3% 5=0% 6=3% 7=3% 8=0% 9=0% 10= 0% (Avg=4.10)

**8. What facility improvements are most needed at the schools you are familiar with?**

*Please indicate which school(s) need the improvement(s)*

High School  
Tucson  
Vehicles  
Restrooms  
Technology  
Doorsclassrooms  
Stalls  
Roofs  
Maintenance  
Security  
ACBlinds  
Gym



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

**Tucson Unified School District**  
March 29th, 2016 TUSD Leadership Open House  
ILT/BLT Presentation  
April 6th, 2016

**Executive Summary**

**Methodology**

An open house presentation was conducted with the TUSD Leadership Teams on March 29th, 2016. Independent 3<sup>rd</sup> party moderators delivered the presentation, along with a technical expertise team who also provided support for questions from the participants. This open house is a part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

Participants were briefed on the intent of the presentation and what their task was for questions and scenarios that followed. Participants were then asked to go around to different stations that displayed scenarios to rank them based on their views. Each participant was asked to annotate their answers on handouts that were given to them for each scenario. They were asked to rank each scenario from best to worst and also give the pros and cons of each of them. There were 32 members of the TUSD Leadership Team that participated in the open house.

The scenarios were presented, a synopsis of the scenarios was presented and the participants had 25 minutes to record their answers. At the end of the open house all scenarios were collected and were annotated in a database. There was very lively interaction with each of the scenarios and participants asked many questions throughout.

**Synopsis**

Overall, the TUSD Leadership Teams offered great insight into future proceedings and the future of TUSD. Throughout the presentation the participants were focused and engaged on the information that was presented to them. When it came time to the live scenario questionnaire the members were urged to spread out amongst the 6 different spending scenarios and rank each by priority accordingly. The averages were ranked on a 1-6 scale with lower averages being better than higher ones. The members took their time and carefully answered each question.

Each of the 6 scenarios of the Facility Master Plan presented to the members all had different possible spending options and outcomes. For scenario number 1, the groups were presented with the option of \$180 million dollar bond with all of it going to facilities repairs. Some common pros were that it hits the immediate needs and it is less expensive for the community. The cons were mostly centered on how it would not cover the maintenance needs that were needed for all schools and that it was too little money. Scenario number 1 averaged at a 5.13 out of 6.

As for scenario number 2, the participants were presented with \$180 million bond of which allocated \$135 million for facilities repairs and \$45 million for facilities improvements. The pros were mostly about it offering the majority of the facility improvements and as for the cons, members felt that it did not address all of the facility needs in the long term. The average for scenario number 2 was a 4.14 out of 6.

When it came to scenario number 3, participants had the option of a \$240 million bond of which allocated \$195 million for facilities repairs and \$45 million for facilities improvements. A lot of the pros were centered on meeting technology, HVAC,

and immediate needs. The major con for a lot of members was how little it offered in improvements like playgrounds and also still needing more facility improvements. Scenario number 3 averaged a 3.38 out of 6.

As for scenario number 4, the participants were presented with a \$240 million bond of which allocated \$160 million for facilities repairs and \$80 million for facilities improvements. The groups felt that this was good overall for taxpayers and met the needs for facilities. Participants again felt playground funding was low and also that not everything would be covered. This scenario averaged a 2.96 out of 6.

Scenario number 5 was the participant's number 2 choice. This option was for a \$300 million bond of which allocated \$200 for facilities repairs and \$100 million for facilities improvements. Their pros had a lot to do with maintenance needs, technology upgrades, and overall improvements. The average for this scenario was 2.46 out of 6. In this scenario the cons were more concerned with money and how the district would select the schools to receive upgrades.

Finally, scenario number 6 was the group's number 1 choice. The scenario was for a \$300 million bond of which allocated \$160 for facilities repairs and \$140 million for facilities improvements. The participants felt that this scenario addressed all the needs of the district and provided significant funding for all areas. However, their main concern was getting the voters to approve it because of the higher cost. Scenario number 6 averaged at a 2.28 out of 6.

This group of participants provided great insight and good feedback on understanding which scenarios voters would be more likely to approve. More questions will be developed for upcoming meetings and open houses. Scenario number 6 was this groups overall main choice because it provided enough money to cover all the maintenance needs and improve all schools across the district. Their insightful thoughts were noted and discussed so that precise targeting and wording can be implemented, ensuring a good future for TUSD.

**Focus Group Questions Transcript**

**Scenario Number 1**

**Average: 5.13**

<b>Scenario 1- \$180 Million Bond</b>		
<b>\$180 Million for Facilities Repairs</b>		
<b>Pros</b>	<b>Cons</b>	<b>Priority Rank</b>
	No long term improvements	
Might be more acceptable for community	Doesn't take care of need	6
	Not enough total no school 21st century	6
Takes care of maintenance needs	Will not address improvements to school facilities	4
Public may support if sold along with knowledge of lack of regularly state funding for maintenance	Would only be enough to fix what we have but not much that the public would notice	6
Hits the immediate needs	Technology needs to be explained what infrastructure. Confusing - Public may think about computers	2
\$ And for tax payer	Bear Minimum - Nothing for community space - No enhancements for future innovative space	1
Much needed improvements	Doesn't cover all that is needed	6
Safe move - voters might go for it	Just not meeting 21st century learning	6
Facilities repairs will take priority	No money is allocated to facilities improvements	6
Could meet facilities needs	No facilities improvemtns would have a harder time getting public support	6



4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

Emphasize that this just fixes immediate repairs, etc.	Be more descriptive for "Security" & "Technology"	5
Small amount. More likely to pass. Nice focus on \$4.09 per month	Does not accurately explain how the tax amount increases for properties valued in excel of \$200,000. Provide more info about how would be used - public hesitant to give \$ w/o great detail about what will be done. Explain technology is not an upgrade.	5
Cost	No site improvements	1
	Explain what will cover in specific areas - security technology	6
	Does not include facility improvements. Need technology equipment	5
Less expensive = easier for public to agree	Doesn't do enough	4
Higher playground amount	No improvements	6
Addresses some of the immediate needs. May be easy sell to taxpayer due to cost.	Does not address any improvements.	6
\$4.09 per month. Facilities repairs only	Facilities repairs only	6
	Does not do enough to improve facilities	6
\$	No tech or educe improvements	6
Enough to cover facilities repairs	No facility Money	5
Small amount of \$ per month	No "what's in it for me"	6
49 yr. 4.09 mo. 180 mil repairs	No improvements	6
Best possibility of passing election. Transportation allocation ok	Four dollars	5
4.09 per mo.	No facility improvement	6
No sticker shock for community. Signal to the community that we are only focusing on greatest deficiency	No consideration for facility's improvements. Only a band-aid.	3
Nice roof over unimproved learning space. Little public appeal	Nothing for education	6
Takes care of base needs as far as infrastructure. Might be easy sell to Tucson community.	Does not address infrastructure needs	6
\$2million on playgrounds. Boohoos! We need it!	Too low funding	5
	No academic support	6

### **Scenario Number 2**

**Average: 4.14**

<b>Scenario 2- \$180 Million Bond</b>		
\$135 for Facilities Repairs, \$45 Million for Facilities Improvements		
<b>Pros</b>	<b>Cons</b>	<b>Priority Rank</b>
	Small \$ on improvement. No technology \$ on repairs. Lowest \$ amount for both areas	
Meets some of the immediate needs. Offers some facilities improvements. Lowest cost to taxpayer.	Doesn't come close to solving problems. Will require another bond very soon	5
Best possibility of passing election.	Fewer dollars. Short on playgrounds. Short on transportation.	5



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

Adds at least some moneys to school space	Short of what the district needs	5
		3
May be most acceptable to public because asks for least amount of money	Doesn't cover the needs of the schools not enough \$ in the facilities repair for all the effort to roll out the bond.	6
This lesser amount may be something public would be willing to support	Is this enough to make significant difference in facility conditions?	5
Facilities repairs are covered but include only immediate needs	Facilities improvements money may not be enough	5
More base need. Starting to focus on both repairs and improvements.	Not enough funding to bring out facilities to where they need to be.	4
Address immediate needs and school improvements	No technology support	3
Much more reasonable for taxpayer. Have facilities improvements. We need to include this. Will help all schools.		2
	Not all will be covered. Not all improvements will be covered. Less money for both repairs and improvements	5
49yr 4.09 mo. 135rep 45 imp. Better than #1 with no improvements	Minimal repairs	5
	No playground. Too focused on repair. Does not improve district	6
	Does not meet school needs	6
Facilities repair with facilities improvements. 4.09 per month for family	The \$ will be spread thinly. Bare minimum. Will the improvements even be seen/recognized?	5
		2
	Vague on student details. Not enough \$. Feels like we wouldn't get much bang for the buck.	5
4.09 per mo.	Minimal repairs. No technology	5
Cost to homeowners manageable	Compared to #1 - why is technology no longer listed? Is it now included in the facilities improvements?	4
Less cost to taxpayer	No technology. Minimal improvements to sites.	1
	What does HVAC mean? How many schools have roofing issues?	5
Offers facility improvements	Does not include technology. Not enough facility improvements.	3
Lower dollar amount probably more likely to pass general public. Includes improvements	Lower dollars	2
Improvements. Monthly \$ fund	Not enough \$ for repairs - in 5 years we will be looking for more money. No community enhancements	2



The combination of repairs and improvement. May be suitable to the taxpayers	Does not cover what the district needs. Will force district to go to another bond sooner than later.	5
Balanced	Short for buses	2
Meets basic needs	Leave out facility improvements	3
Some improvements	1 million in playgrounds	6
	Does not allow for enough to address academic support.	5

**Scenario Number 3**

**Average: 3.38**

<b>Scenario 3- \$240 Million Bond</b> \$195 for Facilities Repairs, \$45 Million for Facilities Improvements		
<b>Pros</b>	<b>Cons</b>	<b>Priority Rank</b>
Roofing	Kitchen equipment is not included. Plumbing 1m. Lease buses?	
Meets immediate district needs	Very small investments in improvements	4
Good total - Community good combo		1
Best overall to address needs but keeps cost down		3
		1
Enough to cover repairs	Lower funds for facilities improvements	4
	Again HVAC - Plumbing?	4
\$5.45 per mo. Focus on repairs	Minimal facility improvements	4
School facilities improvements. Roofing. HVAC.	Playground low. Plumbing Low. Technology low.	4
More repairs can be made. Additional student space	Does not address the improvements needs of district.	4
		3
More for HVAC. More on security	Still low playground equipment	3
Addresses facilities needs. Improve schools - look & Feel		2
	Clearly define "student space"	4
Is this sufficient to cover facilities repairs? If so, seems ok. Hard to know what to prioritize for critical (absolutely necessary repairs)	Worse on repairs & doesn't project forward with student and educational learning needs	4
	Limited \$ for education focus.	5
\$5.45 month. Focus more on repairs. Facilities improvements	\$5.45 Spread thin	2
Really addresses immediate needs. Easy monthly \$ (not too high)	Vague on what improvements are for students (need some examples on the board)	4
More reasonable in terms of cost per month for taxpayer. Would help us get crucial facilities repairs done (HVAC etc.)	Half less on facilities impartments than scenario 4	5
Better than options 1 & 2	Does not include computer equipment	4
	Not enough in improvements for schools to see a real difference	4
A little less cost to the taxpayer.		
65 yr. 5.45 mo. 145 rep 45-imp tech 4m. More HVAC & roofing	Less improvements than #4	2
Funding more in line with last bond that was successful. Dollar figure appropriate to what is needed	Facility improvement is not enough to address our needs	5
\$195M on facilities repairs will be enough	Will need more money for facilities improvements	3

\$ For facilities is good. Monthly money and on taxes	Facilities improvement doesn't include community space. Not enough \$ for improvements to bringing classes to 21st century.	3
Good compromise on tax rate	Short on playgrounds	3
Would be enough to make a noticeable difference.	May be enough (but not sure) for public support.	5
Balanced	Not enough for schools	3
Incorporates technology	Weak on facility improvements, to instructional space.	4
HVAC & Roofing. Technology. 45m improvements not just repairs	Playground only 1mil. - Need to increase	1

**Scenario Number 4**

**Average: 2.96**

<b>Scenario 4- \$240 Million Bond</b> \$160 for Facilities Repairs, \$80 Million for Facilities Improvements		
<b>Pros</b>	<b>Cons</b>	<b>Priority Rank</b>
This provides the best scenario of all the options - a happy medium	Needs more information about how the money will be spent. The public is hesitant to give carte blanche to money acquired through taxes on bonds.	
More money will be spent on improvements	Repairs will need additional funding sooner	
Provides for most immediate needs	Small investment in facilities improvements	3
Good compromise on tax rate	Short on playground	4
Good total	May be too much in bottom half	2
Enables TUSD to offer minimal expansion at sites for specialty space. Would give \$ to upkeep the HVAC that were given to us by state but no dollars given to maintain.	Not enough to address playground equipment. Also need to consider grounds needs.	3
Enough to cover repairs	Not covers all repairs. Less money for improvements. Not all improvements covered	2
Elec. Syst IM tech 5.45/mo 65 yr Good Balance		1
	Same issues with presentation	3
Lower monthly cost. Doesn't feel "too big"	Feels vague on what the students will get. Might be good to show more pictures here with this one.	3
	For all: different immediate needs. Fact: some for all?	4
Monthly \$ amount good	No community space improvements. Limited amount for improvements. Bear minimum to voter facilities improvements.	3
School improvements	Compare to #3. Is there enough to cover repairs for facilities? No technology support	4
HVAC is a huge plus (65mil). Security needs (seem high) are great. Student space improvements.	Playground equipment seems low	4
Covers a wide range of repairs. Increased funding for improvements. Brings district closer to per school districts as fast as facilities.	Tough sell for voters. (But worth the try!)	2
	Not enough improvement \$	5
\$5.45 per month. Focus more on improvements. Facilities repairs	\$5.45 month spread thin	1
This scenario provides the best balance for our needs and our efforts to stay ahead. I think we can sell this to our community	A bit of sticker shock for community	6
\$5.45 per monk learning space	0 technology listed in. 0 CTE infrastructure	3
\$80 mill improvements HVAC Roofing	Playgrounds low Electrical low	2
Good balance between repairs and improvements	Not able to do all repairs	2
Like that improvements are more heavily weighted -	Unclear if the facilities dollar amount is efficient to cover the	3

seems to be more balanced with both needs	needs of the district.	
Comprehensive. What would this look like at my school?	"Technology" is not listed - on some scenarios and not on others. Why?	3
Balanced - school and facilities. Mid range in cost	Higher than minimum (180 mil)	1
Affordable tax increase. Takes care of facility repair	Weak on facility improvements. Nether to do with instructional space. Technology updates.	5
Facilities improvements. 80 million improvements	Playground only \$1 mil. Want more \$ to playground equipment's	2

**Scenario Number 5**

**Average: 2.46**

<b>Scenario 5- \$300 Million Bond</b>		
\$200 for Facilities Repairs, \$100 Million for Facilities Improvements		
<b>Pros</b>	<b>Cons</b>	<b>Priority Rank</b>
Immediate Repairs (\$200m). More money for immediate needs.	Less \$ for facilities improvement (\$100m). Less for long term	
Resolves most immediate needs	Cost will be hard to sell	1
Balanced	Not as much for schools	5
More facility repair	Less facility improvement. 40 million difference	2
Perfect combo. Covers everything	300 m maybe asking for too much	3
Able to do most of the repairs		1
Technology support needed. Fixes facilitation with need repair. Track and field. Technology hub		1
I assume the increase in the dollar amount the increase in the number of schools and issues can be repaired and improved	What would public support be for this amount? Unclear what the breaking point is for voters.	2
Lots of repair capacity.	Getting voters to agree. May not need all the repair funds	6
More flexibility. Would cover what we don't know for years to come.	Less on 21st century. I think public would like to see more spent on security regardless of the situation. Parents care about their kids - not so much about roofs (although we do). Perhaps this - security - could be a major focus when presenting to parents. It's our best way to get them on our side for the bond.	2
Covers the needs for 10 years. Only enough money for facilities repairs	Does not include enough money for 21st century facilities improvements.	2
Facility needs met	No outdoor relief for MS. Actual cost for taxpayer?	2
As a taxpayer the \$82 per year is very doable. Enhancement ideas are attractive.	How will schools be selected? Unclear. Need an emphasis on how these improvements impact the skills that our students leave school with that will impact and enhance a better / more productive Tucson politically, socially, economically, culturally (make connections clear) because many people don't have children in TUSD schools but need to understand they are impacted.	1
More items that would be noticeable improvements	Challenge to get public to approve this large amount	1



4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

Provides a cushion for facility, security & areas for academic. Brings schools closer to 21st century.		2
Appropriate list of improvements. Unfortunately due to past budget shortfalls we need this kind of funding to keep our facilities current.	Cost is too high. Concern that voters will not approve bond due to sticker shock. Focus on the lessons of the recent county bond failure.	3
All tech maintenance done \$ for improvements. Elementary schools include improvements to community space.	Lack of community improvements for high school and middle school	6
Added track and field repairs facilities with most needs		1
Mechanical issues addressed fully	Might be too high for tax payers and people without kids	1
More funds. Addresses all areas	Least likely to pass election	1
Comprehensive	Does not address under enrolled sites.	2
Highest funds. Facilities repairs and improvements. Multiple repairs at 100%	Concerned general public would not pass due to dollar amount. Playground low	4
Covers needs for most repairs	Not enough for facilities improvements. Less affordable for taxpayers. Hard to pass.	2
100 million improvements security & technology	\$1million for playground too low	3
Much repairs. Improvement	Tough sell for voters. Sues not provide shaded area for students.	5
Facility repairs expanded list. Facilities improvement	\$6.82 per month	4
300m 82yr 6.82 mo. 200m rep 100m improve. Most repairs	Highest cost.	3
HVAC & security	Playground seems low. Track and filed repair is 10x playground?	2
\$6.82 per mo. All facility repair covers us for 10 years of repairs	No all facility improvements	1

**Scenario Number 6**

**Average: 2.28**

<b>Scenario 6- \$300 Million Bond</b>		
\$160 for Facilities Repairs, \$140 Million for Facilities Improvements		
<b>Pros</b>	<b>Cons</b>	<b>Priority Rank</b>
	No technology \$	
Meets minimum immediate district needs	Allows for significant improvements but will be hard sell due to cost	2
Great if public will support	Cost	4
Addresses both structural and instructional needs	Might be hard to get by Tucson community	1
160 facilities. 140 improvements	1 million for playgrounds	4
6.82 per mo. Tech hub. Meet - use outdoor pavilion. Common space. Immediate needs - roofing HVAC security. All facilities	Not all on facility repairs (40 mil less). Covers only needed repairs for now.	2
Costs	Again _ "technology" is missing. Define how this will be covered under the facilities improvement area.	1
Every school will get something. Key repairs will be addressed	Cost to tax payers.	1
MA gets no down space. All get shared space	Concern about which schools don't get needs met. Trade off? Paying for old bond step.	1
Would give district the most \$ (300 million). Everyone would get something.	Less proportion on facility repairs. Expensive on top of paying last bond.	2
Like the emphasis on facilities improvement. This is the scenario that most meets our need.	Cost too high. Sticker shock for community,	3
Covers all. More facilities improvements	Hard to pass	4

\$ For improvements. To attract students we need to upgrade our facilities to the 22 century	Only enough \$ for basic facilities repairs. No track & field repairs	5 2
Provides the district much need improvements and repairs. Offset cuts from the state.	May be a hard sell to the public (but worth the try!)	1
Facilities repairs may need additional money	Enough money to cover 21st century school & facility improvements	1
We need the improvements provided in this scenario	Getting voters to agree	1
Eye appeal since high amount of facilities improvements	Concerned general public would not pass due to dollar amount	3
Significant funding available for both facilities repairs and facilities improvements. HVAC & security. Increase student space capacity!	Playground seems low	1
Best option for district. Like the breakdown of \$6.82 per month - would emphasize that	Least likely to be approved. Provide more information about how money will be spent - such as roofing should change from ("immediate needs)" to "recounting for _ schools and reroofing for schools)"	3
Includes everything needed	This is the best scenario but not sure public will	1
Best proposal. Addresses facilities & academics		1
Lots of \$ in the student spaces	Not every mechanical need will be addressed	2
Facilities Repairs. Facilities Improvements. Expanded List	\$6.82 per month	3
Cost is reasonable. Enhancements are great. Love the CTE infrastructure	Doesn't address all of the existing facilities to keep up - so some things are sacrificed such as track & field. No clarity / specifics on how schools are selected or what schools are selected.	2
300m. 82yr. 6.82 mo. Most improvements. 160 rep. 140 imp. Most improvements	No tech	4
Great support to school & technology.	Compared to #5. Need more money for facilities. No field & sport	3
Best balance of funds to repair & improved - in all the scenarios, seems to be middle road w/ \$	Unclear	1
More funds. Addresses all areas	Least likely to pass election	2
Would provide funding that would make a difference in children's lives.	Will the public support?	2
		5
Covers everything	Too many in non-needs for schools. 300m maybe asking for too much	4
Take care of what needs to be done	Price	1



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

## Tucson Unified School District

TUSD Open Houses  
April 16<sup>th</sup> and April 20<sup>th</sup> 2016  
April 25<sup>th</sup>, 2016

### Executive Summary

#### Methodology

Two open houses were conducted for the Tucson Community on April 16th and April 20th at Pueblo High School and Catalina High School. Independent 3<sup>rd</sup> party moderators answered questions from participants and provided scenarios for each individual to complete, along with a technical expertise team who also provided support for questions from the participants. These open houses are part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district's five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

Participants were briefed on the intent and were told what their task was for questions and 6 scenarios that followed. They were then asked to listen to a presentation explaining TUSD's intent and were presented with specific funding scenarios. They were asked to rank each scenario from best to worst and also give the pros and cons of each of them. There were 16 participants total between the 2 open houses that completed response documents. There were other visitors who did not fully participate.

The participants had to record their answers to each scenario from the presentation. At the end of the open house all scenarios were collected and were annotated in a database. There was very lively interaction with each of the scenarios and participants asked many questions throughout.

#### Synopsis

The participants of the open houses offered very valuable feedback and great responses to help determine the Future of TUSD. There was great discussion and the group asked many questions so they could get a better understanding of how to help with the future children of TUSD. Moderators were engaged with the participants and found great insight on many of the different scenarios that were presented.

Overall, members ranked Scenario #6 as their overall favorite choice. This scenario was for a \$300 million dollar bond with \$160 million for facilities repairs and \$140 million for facilities improvements. Most participants felt this was the best scenario because it provided the most for every aspect of TUSD improvements. They also felt that it would have the hardest time getting approved by voters because of the higher cost.

Scenario number 5 was the participant's number 2 choice. This option was for a \$300 million bond of which allocated \$200 for facilities repairs and \$100 million for facilities improvements. Their pros were mostly about how this scenario addressed the facilities needs and repairs. It allotted a good split for what was needed. Cons were that it was too costly to voters and that some areas where the money was being allocated were unnecessary.

As for scenario number 4, the participants were presented with a \$240 million bond of which allocated \$160 million for facilities repairs and \$80 million for facilities improvements. They ranked this as their number 3 choice. The participants felt that this was good overall for taxpayers and would more than likely pass amongst voters. They highlighted the facilities improvements in this scenario. For the cons they felt that the way the money was divided up was again not the best for certain areas and there was less for technology funds.



4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

When it came to scenario number 3, participants had the option of a \$240 million bond of which allocated \$195 million for facilities repairs and \$45 million for facilities improvements. The participants ranked this as their number 4 choice. A lot of the pros were centered on the break down between facilities repairs and facilities improvements. Members also felt that this would likely pass with voters. However, the major con for a lot of members was how little it offered in improvements and not enough description on exactly what would happen with improvements at each site.

As for scenario number 2, the participants were presented with \$180 million bond of which allocated \$135 million for facilities repairs and \$45 million for facilities improvements. They ranked this as number 5 for their overall choice. The participant's pros were mostly about how little it would cost to the taxpayers. They felt it did cover the repairs for the schools. The cons were how little it met improvement needs and that down the line it might come back to voters for more money.

For scenario number 1, which was the group's least important priority at number 6, the groups were presented with the option of \$180 million dollar bond with all of it going to facilities repairs. The groups ranked this as their lowest priority. The common pros were that it hits the immediate needs and it is less expensive for the community. For the member's cons, they felt that having nothing for improvements was not very desirable and it would not sufficiently meet the needs for the district.

These open houses provided great insight into TUSD's future by having participants express how they felt the community would respond to each potential scenario and what would pass amongst community voters. Scenario number 6 was this group's overall main choice because it provided enough money to cover all the maintenance needs and improve all schools across the district.

### Open House Questions Transcript

Name	Email Address	Child in tusd?	Affiliated school(s)	Job Title	Place of Employment	1st Choice Scenario	2nd Choice Scenario	3rd Choice Scenario	4th Choice Scenario	5th Choice Scenario	6th Choice Scenario
Kathy Sisler	Katherine.sisler@tusd1.org	No	Borman	Principal	TUSD	6	5	4	3	2	1
Ryan Robinson	Ryan.Jamesrobinson@gmail.com	No	N/A	Teacher	TUSD	4	3	2	7	6	5
Kristy Esquerra	kristy.esquerra@tusd1.org	No	Hallinger K-8, Tucson	Teacher Mentor	TUSD/ CIPIDA	6	5	4	3	2	1
Rani Olson	rani.olson@tusd1.org	No		TUSD Project Specialist	TUSD Food Sources	6					1
Emily Kittle Morrison	ekmorrison2@msn.com	No	Dooler	Retired	Retired						
Ronni Kotwica	paloverdena@gmail.com	No	Catalina	President Palo Verde	Retired						
Susie D Teller	coldsdt@yahoo.com	Yes	Holladay	Parent	volunteer at Holladay				3	2	1
Laura Grijalva	slgrijalva@msn.com	Yes	Rincon HS/Roberts/N	Maintenance Supervisor	Grijalva Realty					1	2
Jennifer Sue Bond	jbonds@cox.net	No	Catalina High School Foundation		Retired	6	4	5	3	2	1
Russell Doty	russelldoty@cox.net	Yes	Gridley & Sabino	Asst Principal	TUSD-Sabino						
Marylka Pattison	marylkamp@yahoo.com	No									
Alice Roe	alicer@dakotacom.net	No		Not Employed	N/A	6	5	4	3	2	1
Jorge Leyua	tucsonazusa@msn.com	Yes	Sabino	Retired		5	6	2	1	3	4
Pete Querrero	pete.querrero@pascuayaqui-nsn.gov	Yes	Dodge, Van Buskirk	Education Director Pyt	Pascua	6					1
Fred Upbind	alfred.urbina@pascuayaqui-nsn.gov	No	Walú/Relo/Pueblo/Lav	Attorney General	Pascua Yaqui Tribe						1
Teyaka Booker	mz-teyaka@yahoo.com	Yes	Kellard/Borman Elem	Parent	N/A	5	6	3	1	2	4

**GEO**Advertising  
& Marketing

4251 E. 5th St. Tucson, AZ 85711

520-333-3221

866-50-media

<b>Scenario 1</b>	<b>Pros</b>		<b>Cons</b>
Kathy Sisler			
Ryan Robinson	Lowest cost with clear immediate needs		Lacks ways for students would immediately benefit from improvements
Kristy Esquerra			Depends on particular sites w/ most needs. No focus on Facilities Improvements
Rani Olson			
Emily Kittle Morrison			
Ronni Kotwica			
Susie D Teller	Tech Hubs. Facilities Improvements		Technology Hubs
Laura Grijalva	Least Expensive. Would this address most repairs needed?		No Improvement Funds
Jennifer Sue Bond	Low enough \$ level to pass		Only repairs nothing w/in school
Russell Doty	A good start		Does not appear to be enough
Marylka Pattison	Lowest tax increase 4 m. All repairs and no improvements		\$49 + tax. 2million playground equipment. 7 " buses
Alice Roe			
Jorge Leyua	Lowest cost. Could go back to voters in a few years after district has demonstrated performance. Focus on Facility Repairs good		Sufficient to meet needs? Min Improvements will Minimally impact education. Will force new bond in the future?
Pete Querrero	low cost \$49/ year \$4.09/ mon		Minimum repair work. No facilities improvements
Fred Upbind			
Teyaka Booker			
<b>Scenario 2</b>	<b>Pros</b>		<b>Cons</b>
Kathy Sisler			
Ryan Robinson	Low cost Impact on students at a larger level		Lacks clear differentiation from #1 on what student space options are here but not in 1
Kristy Esquerra	Breaks up Facilities Repairs and Facilities Improvements. All schools need both for improvements		





4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

Rani Olson			
Emily Kittle Morrison	Fewer Repairs		More Improvements
Ronni Kotwica			
Susie D Teller	Facilities Improvement		Less for Facilities
Laura Grijalva	Low level \$ amount for bond. Good mix of repair and classroom improvement		What happened to doors & hardware?
Jennifer Sue Bond	Low level \$ amount for bond. Good mix of repair and classroom improvement		no door repair but this was one of the main repair needs
Russell Doty	"		"
Marylka Pattison	Lowest tax increase. 2 m buses. 1 m playground Equipment		\$49 45 M improvements
Alice Roe			
Jorge Leyua	Lowest Cost. Could go back to voters.		Sufficient to meet needs? Min Improvements will minimally impact education. Will force new bond in future. Insufficient facilities repairs funds compared to scenario 1. Prob Insufficient facilities improvement funds to make an impact district w/out equal improvements to all schools
Pete Querrero			
Fred Upbind			
Teyaka Booker			
<b>Scenario 3</b>	<b>Pros</b>		<b>Cons</b>
Kathy Sisler			
Ryan Robinson			
Kristy Esquerra	Like the break down between Facilities Repairs and Facilities Improvement. People will be able to see results in classrooms unlike roofing. Classrooms need to have better lighting		
Rani Olson			
Emily Kittle			



4251 E. 5th St. Tucson, AZ 85711  
520-333-3221  
866-50-media

Morrison			
Ronni Kotwica			
Susie D Teller	Repairs		
Laura Grijalva			
Jennifer Sue Bond	\$240 Inexpensive		Not
Russell Doty	Appears to be the most likely to pass		Facilities Improvements need to list specific Improvements at each site.
Marylka Pattison	1 M Playground		8 M busses. 45 M Improvements
Alice Roe			
Jorge Leyua			
Pete Querrero			
Fred Upbind			
Teyaka Booker			
<b>Scenario 4</b>	<b>Pros</b>		<b>Cons</b>
Kathy Sisler			
Ryan Robinson			
Kristy Esquerra	Important- better lighting means a more welcoming environment. Less headaches in students & teachers from those fluorescent lights		
Rani Olson			
Emily Kittle Morrison			
Ronni Kotwica			
Susie D Teller	Doors/Hardware. Facilities Improv. Elem to receive less \$ than Middle/High School.		35m more for Facilities Improvements. Plumbing only 2 million
Laura Grijalva			
Jennifer Sue Bond	\$240 almost same as passed before. \$545 per month!. Good blend		
Russell Doty	Appears to be most likely to pass		
Marylka Pattison			80 m improvements. 8 m busses
Alice Roe			



Advertising & Marketing

4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

	Best balance between Facilities & Improvements. Space Improvement funds should be sufficient to make meaningful impact		Need technology funds?
Jorge Leyua			
Pete Querrero			
Fred Upbind			
Teyaka Booker			
<b>Scenario 5</b>	<b>Pros</b>		<b>Cons</b>
Kathy Sisler			
Ryan Robinson			
Kristy Esquerra	Like the split up of Facilities/Schools Repairs Imp. Individuals are able to see the results right away (classrooms, pavilions technology)		
Rani Olson			
Emily Kittle Morrison			
Ronni Kotwica			
Susie D Teller	Fac Improvements school fairly allotted \$		Too much \$ for space 1
Laura Grijalva	This addresses the most toward existing facilities that need repair and still address improvements realistically		
Jennifer Sue Bond	\$300 good repair coverage		
Russell Doty	This plan appear to be most inclusive of all needs		
Marylka Pattison			10 m busses. 100 m improvements
Alice Roe			
Jorge Leyua	Most extensive improvements good for education		Highest cost to voters. "Padded", unnecessary projects?
Pete Querrero			
Fred Upbind			
Teyaka Booker			

Scenario 6	Pros		Cons
Kathy Sisler			
Ryan Robinson			
Kristy Esquerra			
Rani Olson	We don't value education, as a state, the way we need to for guiding students into forward thinking leads to tackle as current and future challengers, as a nation & community. We need improvements and repairs and I would argue that the spaces we lean in speaks volumes to how we place value. Clearly repairs are high priority. Improvements will set the stage for		This plan needs to be marketed and celebrated to gain buy-in early an. The largest con I can see is not marketing this well & early enough as & clearly with a public who reacts only to stricken-shock
Emily Kittle Morrison	Only 2 lattes a month. 1 pk of cigarettes. 1 6 pk of beer. 60 where the Pro Voters Are. 60 where the Pro Voters Are. NPR, PBS, AZ Illustrated, Letters to the editor		
Ronni Kotwica			
Susie D Teller	Facilities Improvements. Larger bond, more \$ to allot to buildings		I feel the building should be up to par before we upgrade space/tech
Laura Grijalva			
Jennifer Sue Bond	\$300		
Russell Doty			I would like to see a comparison of what is or is not included in each plan. 1 comparative sheet
Marylka Pattison			8 m busses. 140 m improvements
Alice Roe			
Jorge Leyua	Most extensive Improvements. Good for education		Highest cost to voters. "Padded", unnecessary projects? Track and field repairs sounds super famous. Multi-use outdoor Pavilion sounds superfluous at this time. No technology funds



4251 E. 5th St. Tucson, AZ 85711  
 520-323-3221  
 866-50-media

Pete Querrero	Best Scenario! Go far as much as we can get. We need to sell this idea. Education is important. It is to the Tribe!		Don't sell TUSD Short!
Fred Upbind			
Teyaka Booker			



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

# TUCSON UNIFIED SCHOOL DISTRICT

May 11<sup>th</sup>, 2016 TUSD Community Leadership Meeting  
May 24<sup>th</sup>, 2016

## Executive Summary

### Methodology

TUSD, Geo & Associates and Swaim & Associates hosted a meeting with prominent community leaders and media representatives from throughout the City of Tucson on May 11<sup>th</sup> at Mary belle McCorkle Academy of Excellence K-8 School. This school was chosen to host the event because it is a prime example of the potential that can be achieved with successful bond campaign.

This meeting was part of TUSD exploring a Facility Master Plan to identify facility improvements and funding sources needed to support its long-term strategic plan. This is an integral part of the district’s five-year, 25-point strategic plan and will set the stage for success in this district for years to come.

The goal of the meeting was to share information with the attendees about the ongoing Facilities Master Plan efforts and the accompanying community outreach. Geo & Associates initiated the meeting and invited all attendees while TUSD and Swaim provided expertise and background about the FMP. After the moderators provided a brief background and shared the different bond scenarios, there was a lively group discussion with participation from the entire group. This was a useful interactive and educational meeting and focus group with interaction from all parties involved



There were 18 that confirmed attendance and 16 community leaders that participated in this meeting. Only 2 people did not show up, which proved to be a great showing for this event and they all had interest in participating in the future. Participants provided their own unique views and perspectives on the information that was provided and the comments were enlightening.

### Meeting Participation

89% Attended

11% Absent

## Synopsis

Overall, the community leaders offered great insight into future proceedings and the future of TUSD. Throughout the presentation the participants were focused and engaged on the information that was presented to them. When it came time to begin the discussion, members were urged to voice their opinion and respond to 4 discussion topics. It was difficult to get participants to answer the discussion topics in the order they were presented but we did gather valuable feedback on all areas of discussion.



### **Emphasis on repairs, improvements or both?**

When asked if the bond scenarios should emphasize repairs, improvements or both, the majority of participants said that immediate needs should be addressed first and foremost. Their opinion of emphasizing on repairs with fewer improvements shows that they understand the dire conditions of TUSD schools and facilities. There were some participants who felt both should be emphasized but no participant mentioned that improvements be emphasized. That being said, many participants commented on the outstanding quality and aesthetics of the McCorkle school which led us to believe that improvements would be an interest if funding was more readily available.

### **What amount will the community support?**

When asked what bond amount the community would support, participants gave wide-ranging answers. By show of hands 14 of 16 felt that there would be support for a larger bond amount of 300 million. They felt it would take significant time and effort convincing the community to support any bond. The others felt that in the current political climate, the community wouldn't support any bond amount. Overall the participants felt a bond was a necessity for the district but the majority did not think it would be a good idea to attempt a bond during this election cycle.

***“Overall the participants felt a bond was a necessity for the district but the majority did not think it would be a good idea to attempt a bond during this election cycle”***

### **How best to inform about the benefits of a bond?**

When asked how best to inform about the benefits of a bond, participants mentioned 1-on-1 and small meetings as the best methods of communication, similar to the meeting that they were participating in. Others mentioned that honesty and straightforwardness about where the money was going, as well as highlighting the successful oversight of past bond campaigns. Other ideas that were mentioned were positive media, open communication and clear language on the ballot. All participants made it clear that a 3<sup>rd</sup> party full-scale marketing campaign would be beneficial and necessary to the passing of a bond campaign due to the negatively perceived PR image.

### **Recommendations on how a bond can succeed.**

When asked for recommendations on how a bond can succeed, many participants said the ultimate route to success would be waiting until next year or hosting a special election similar to Prop 123 (Although a special election is not permissible for a bond election). They thought a presidential election would cast a negative light on a bond and it would be easier to pass in a non-presidential year due to a smaller turnout and vastly more informed voters. They also mentioned the significance of Prop 123 and its effect on a potential bond. They stated that sharing the impact of a good education system on property values would be beneficial to its success while avoiding much talk about tax increases. Overall, participants believed the community needs this bond but they just need to be convinced.

# GEO

## Advertising & Marketing

4251 E. 5th St. Tucson, AZ 85711  
 520-323-3221  
 866-50-media

### Funding Scenarios and Response Charts

#### Facilities Master Plan

TUCSON UNIFIED SCHOOL DISTRICT

##### Financing Scenario #1

**\$180 Million Bond**  
 - \$49 per year for the average home (\$130,000)  
 - \$4.09 per month

##### \$180 Million - Facilities Repairs

• Roofing - Recoating & Select Replacements	\$52 Million
• Heating & Cooling - Replace Poorly Functioning Equipment	\$72 Million
• Security - Fencing, Burglar Alarm, Secure Front Entry	\$18 Million
• Special Systems - Fire Alarm, Public Address & Repairs	\$8 Million
• Plumbing - Replace Old Fixtures	\$2 Million
• Doors / Hardware - Replace Worn Hardware & Damaged Doors	\$12 Million
• Playground Equipment / Fields	\$5 Million
• Technology - Power & Access	\$4 Million
• Transportation - Replace Buses	\$7 Million
<b>Total</b>	<b>\$180 Million</b>



#### Facilities Master Plan

TUCSON UNIFIED SCHOOL DISTRICT

##### Financing Scenario #2

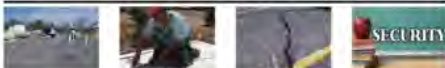
**\$180 Million Bond**  
 - \$49 per year for the average home (\$130,000)  
 - \$4.09 per month

##### \$135 Million - Facilities Repairs

• Roofing - Recoating & Select Replacements	\$46 Million
• Heating & Cooling - Replace Poorly Functioning Equipment	\$64 Million
• Security - Fencing, Burglar Alarm, Secure Front Entry	\$16 Million
• Special Systems - Fire Alarm, Public Address & Repairs	\$3 Million
• Playground Equipment / Fields	\$4 Million
• Transportation - Replace Buses	\$2 Million
<b>Total</b>	<b>\$135 Million</b>

##### \$45 Million - Facilities Improvements

• Elementary Schools (49) - Student Spaces	\$21 Million
• Middle Schools / K - 8 Schools (23) - Student Spaces	\$14 Million
• High Schools / Alternative Programs (15) - Student Spaces	\$10 Million
• Music Rooms, Science Labs, Project Classrooms	\$45 Million



#### Facilities Master Plan

TUCSON UNIFIED SCHOOL DISTRICT

##### Financing Scenario #3

**\$240 Million Bond**  
 - \$65 per year for the average home (\$130,000)  
 - \$5.45 per month

##### \$195 Million - Facilities Repairs

• Roofing - Recoating & Select Replacements	\$55 Million
• Heating & Cooling - Replace Poorly Functioning Equipment	\$71 Million
• Security - Fencing, Burglar Alarm, Secure Front Entry	\$23 Million
• Special Systems - Fire Alarm, Public Address & Repairs	\$8 Million
• Plumbing - Replace Old Fixtures	\$2 Million
• Doors / Hardware - Replace Worn Hardware & Damaged Doors	\$12 Million
• Playground Equipment	\$5 Million
• Technology - Power & Access	\$4 Million
• Transportation - Replace Buses & Improve Facilities	\$6 Million
• Electrical - Replace Electrical Service Gear & Panels	\$2 Million
• Track & Field Repairs	\$5 Million
<b>Total</b>	<b>\$195 Million</b>



#### Facilities Master Plan

TUCSON UNIFIED SCHOOL DISTRICT

##### Financing Scenario #4

**\$240 Million Bond**  
 - \$65 per year for the average home (\$130,000)  
 - \$5.45 per month

##### \$160 Million - Facilities Repairs

• Roofing - Recoating & Select Replacements	\$46 Million
• Heating & Cooling - Replace Poorly Functioning Equipment	\$63 Million
• Security - Fencing, Burglar Alarm, Secure Front Entry	\$18 Million
• Special Systems - Fire Alarm, Public Address & Repairs	\$8 Million
• Plumbing - Replace Old Fixtures	\$2 Million
• Doors / Hardware - Replace Worn Hardware & Damaged Doors	\$9 Million
• Playground Equipment	\$5 Million
• Transportation - Replace Buses & Improve Facilities	\$8 Million
• Electrical - Replace Electrical Service Gear & Panels	\$1 Million
<b>Total</b>	<b>\$160 Million</b>

##### \$80 Million - Facilities Improvements

• Elementary Schools (49) - Student Spaces - Music Rooms, Science Labs, Project Classrooms	\$21 Million
• Community Spaces - Dining & Library	\$12 Million
• Middle Schools / K - 8 Schools (23) - Student Spaces - Music Rooms, Science Labs, Project Classrooms	\$13 Million
• Community Spaces - Dining & Library	\$12 Million
• High Schools / Alternative Programs (15) - Student Spaces - Music Rooms, Science Labs, Project Classrooms	\$9 Million
• Community Spaces - Dining & Library	\$10 Million
• Career & Technical Education - Building Systems Connections	\$3 Million
<b>Total</b>	<b>\$80 Million</b>





# GEO

## Advertising & Marketing

4251 E. 5th St. Tucson, AZ 85711  
 520-323-3221  
 866-50-media

### Facilities Master Plan

TUCSON UNIFIED SCHOOL DISTRICT

#### Financing Scenario #5

**\$300 Million Bond**  
 - \$82 per year for the average home (\$130,000)  
 - \$6.82 per month

**\$200 Million - Facilities Repairs**

• Roofing - Recoating & Select Replacements	\$51 Million
• Heating & Cooling - Replace Poorly Functioning Equipment	\$70 Million
• Security - Fencing, Burglar Alarm, Secure Front Entry	\$23 Million
• Special Systems - Fire Alarm, Public Address & Repairs	\$8 Million
• Plumbing - Replace Old Fixtures	\$2 Million
• Doors / Hardware - Replace Worn Hardware & Damaged Doors	\$12 Million
• Playground Equipment	\$5 Million
• Technology - Power & Access	\$7 Million
• Transportation - Replace Buses & Improve Facilities	\$10 Million
• Electrical - Replace Electrical Service Gear & Panels	\$2 Million
• Track & Field Repairs	\$10 Million
<b>Total</b>	<b>\$200 Million</b>

**\$100 Million - Facilities Improvements**

• Elementary Schools (49)	
- Student Spaces - Music Rooms, Science Labs, Project Classrooms	\$21 Million
- Community Spaces - Dining & Library	\$25 Million
• Middle Schools / K - 8 Schools (23)	
- Student Spaces - Music Rooms, Science Labs, Project Classrooms	\$13 Million
- Community Spaces - Dining & Library	\$13 Million
• High Schools / Alternative Programs (15)	
- Student Spaces - Music Rooms, Science Labs, Project Classrooms	\$9 Million
- Community Spaces - Dining & Library	\$13 Million
- Career & Technical Education - Building Systems Corrections	\$6 Million
<b>Total</b>	<b>\$100 Million</b>



### Facilities Master Plan

TUCSON UNIFIED SCHOOL DISTRICT

#### Financing Scenario #6

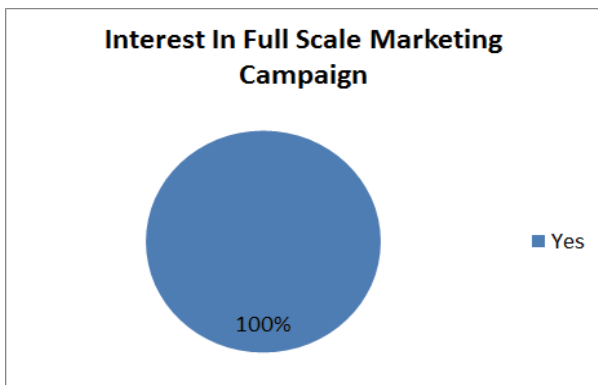
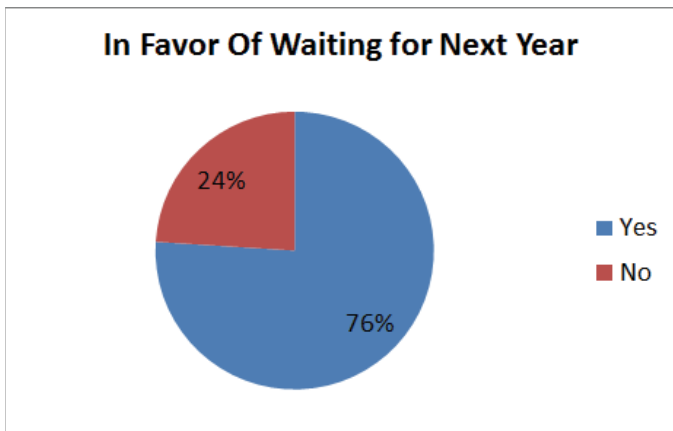
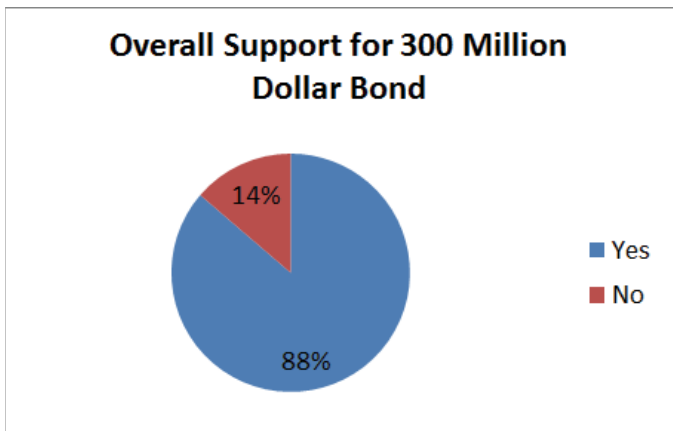
**\$300 Million Bond**  
 - \$82 per year for the average home (\$130,000)  
 - \$6.82 per month

**\$160 Million - Facilities Repairs**

• Roofing - Recoating & Select Replacements	\$46 Million
• Heating & Cooling - Replace Poorly Functioning Equipment	\$63 Million
• Security - Fencing, Burglar Alarm, Secure Front Entry	\$18 Million
• Special Systems - Fire Alarm, Public Address & Repairs	\$8 Million
• Plumbing - Replace Old Fixtures	\$2 Million
• Doors / Hardware - Replace Worn Hardware & Damaged Doors	\$9 Million
• Playground Equipment	\$5 Million
• Transportation - Replace Buses & Improve Facilities	\$8 Million
• Electrical - Replace Electrical Service Gear & Panels	\$1 Million
<b>Total</b>	<b>\$160 Million</b>

**\$140 Million - Facilities Improvements**

• Elementary Schools (49)	
- Student Spaces - Music Rooms, Science Labs, Project Classrooms	\$21 Million
- Community Spaces - Dining & Library	\$31 Million
• Middle Schools / K - 8 Schools (23)	
- Student Spaces - Music Rooms, Science Labs, Project Classrooms	\$13 Million
- Community Spaces - Dining & Library	\$13 Million
- Technology Hub - Collaborative Student Area w/Access to Computers	\$13 Million
- Multi-Use Outdoor Pavilion - Covered Court & Classroom	\$13 Million
• High Schools / Alternative Programs (15)	
- Student Spaces - Music Rooms, Science Labs, Project Classrooms	\$9 Million
- Community Spaces - Dining & Library	\$10 Million
- Career & Technical Education - Building Systems Corrections	\$5 Million
- Technology Hub - Collaborative Student Area w/Access to Computers	\$12 Million
<b>Total</b>	<b>\$140 Million</b>





4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

# TUCSON UNIFIED SCHOOL DISTRICT

## Community Wide Online Digital Survey 2

May 2, 2016 to June 1, 2016

### Final Executive Summary of Results

#### Methodology

The following results are based on a community survey directed towards members of the Tucson community interested in sharing their voice about the TUSD Facilities Master Plan and potential bond. This survey was used to gain insight on feedback that could lead the District to a bond program. The facilities survey was distributed through a radio PSA campaign, an online digital advertising campaign and hosted at the TUSD Future website. The survey first went live on May 2, 2016 and initially ran through May 26, 2016. It was decided that the survey would be extended through June 1, 2016.

The digital survey was created through collaboration between TUSD, Geo & Associates and Swaim & Associates to gather suggestions and feedback. During the initial phases of the survey, many people were visiting the survey page but not completing the survey due to length and language. The survey was adjusted early on to make it more user-friendly by removing questions about ethnicity and income. These adjustments decreased response time by over 3 minutes and caused a massive increase in completion percentage

#### Participant Metrics to Date

Impressions: 2,073,414  
Survey visits: 1471  
Completed surveys: 541  
Completion Percentage: 36.8%

#### Completion

- |                      |                 |                             |
|----------------------|-----------------|-----------------------------|
| • PCs & Laptops: 447 | Completion: 60% | Avg. Time to Complete: 5:41 |
| • Tablets: 9         | Completion: 14% | Avg. Time to Complete: 6:04 |
| • Smartphones: 85    | Completion: 13% | Avg. Time to Complete: 5:50 |

#### Zip Code Breakdown

Undisclosed: 105	85711: 40	85718: 18	85746: 20
85701: 7	85712: 28	85719: 40	85747: 12
85705: 23	85713: 26	85730: 14	85748: 14
85706: 14	85714: 8	85735: 3	85750: 11
85708: 4	85715: 12	85743: 15	85756: 6
85710: 31	85716: 45	85745: 36	85757: 9

#### TUSD Parent Data

Children in TUSD: 132 (24%)  
No children in TUSD: 409 (76%)

#### Synopsis

The community survey results to date indicate a strong statistical sampling of 541 community respondents. It is important to note that when reviewing respondents answer percentages, the average should be reviewed as well as the top 2 or 3



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

most common answers. For example, if the respondent's answers were an average of 3 and the second and third largest percentages were a 2 and 1 out of 5, then the overall perception would be "poor" on that answer, not "average".

The most important statistics gathered from this survey are support for bond, preferred bond amounts and whether or not the participant has a child in TUSD. The support for bonds and proposed bond amount questions are important because they give the district an idea of the best path to getting a bond passed. The question about whether or not the participant has a child in TUSD schools is important because we are trying to gather data on the standard Tucson voters who may not have a reason to support TUSD.

Out of 541 total respondents, 76% do not have a child in TUSD. This shows a relatively broad sampling of participants from all areas of the Tucson community. Getting perspectives from non-TUSD affiliated community members was one of the main objectives of this survey and it is a huge positive that 76% was achieved with 409 respondents. To know that there was still 84% support for a bond with such a large number of respondents outside of TUSD is a positive sign for a future bond initiative. However, approximately 63% of survey visitors chose not to take or not to finish the survey and it is possible that many of these may not support a bond. We have no way of knowing how many of these participants are registered voters. It is for this reason that we recommend, if the bond goes forward, conducting further digital research of registered Tucson voters.

As we discovered in our previous surveys and meetings, many of the participants in this survey either supported the highest bond amount available or a middle-of-the-road amount.

### **20% of participants supported the largest bond amount of \$360 million**

These are the parents and community members who strongly support education.

### **28% supported \$180 million and 22% supported \$240 million**

The participants who voted for these bond amounts are the community members who want to see improvements in education but don't want to overextend themselves with tax increases.

### **16% of participants would support no bond amount**

This is by far the largest opposition TUSD has faced, to-date, on the bond measure and it is made up of community members who will not support any tax increase regardless of the current state of education.

### **13% supported the \$300 million bond amount**

These participants were parents and community members who support education but were hesitant to support the highest level of tax increases.

### **84% of participants at least supported one of the bond amounts**

### **82% support districts like TUSD using bonds to make up for state funding cuts**

The rest of the survey questions provided enlightening results and overall, achieved positive responses:

### **93% of respondents said it was very important (5 out of 5) with an average rating of 4.91**

When asked if the success of public K-12 education is important to our community.



4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

**73% said there is a large benefit (5 out of 5) with an average rating of 4.66**

When asked how much improvement to school facilities would benefit the overall community.

**70% said there is a large affect (5 out of 5) with an average rating of 4.57**

When asked how the quality of schools affects property values:

**26% said it was somewhat important (3 out of 5) and 26% said it was very important (5 out of 5) with an average rating of 3.33**

When asked if it was important to be able to use TUSD for private or community functions. This is not an important issue to these respondents.

**66% said it was very important (5 out of 5) with an average rating of 4.55**

When asked how important it is to repair school buildings and systems to reduce operating and maintenance costs for TUSD.

**79% said it was very important (5 out of 5) with an average of 4.73**

When asked how important it is to have quality technology in TUSD schools.

**92% said it was very important (5 out of 5) with and average of 4.91**

When asked about the importance of a safe and secure environment at TUSD schools.

**59% said it was very important (5 out of 5) with and average of 4.42**

When asked about the importance of improving student spaces to support collaborative project based learning.

**60% said the funding should be balanced (3 out of 5) with an average rating of 3.03. With the remaining 40% of participants, a slight majority preferred spending more on repairs than improvements**

When asked how TUSD should use the money if voters approved a bond, the majority of participants supported balancing the funding between repairs and improvements.

**69% of respondents who answered this question said Proposition 123 would not handle the education funding issues facing Arizona schools**

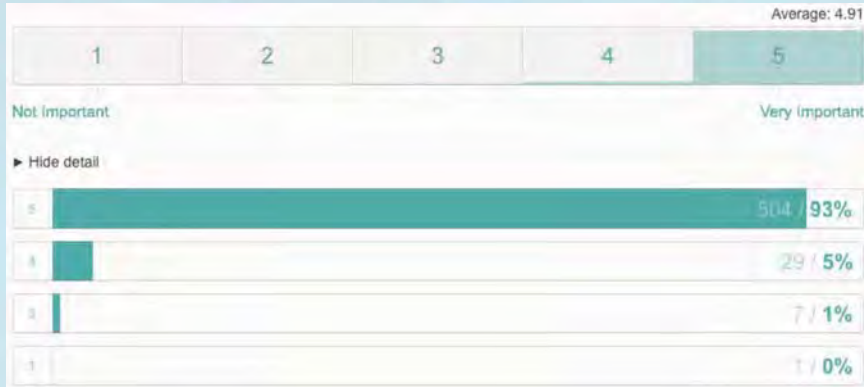
During the survey, Arizona Proposition 123 was passed and this question was added to address Prop. 123; was answered by 502 out of 541 respondents.



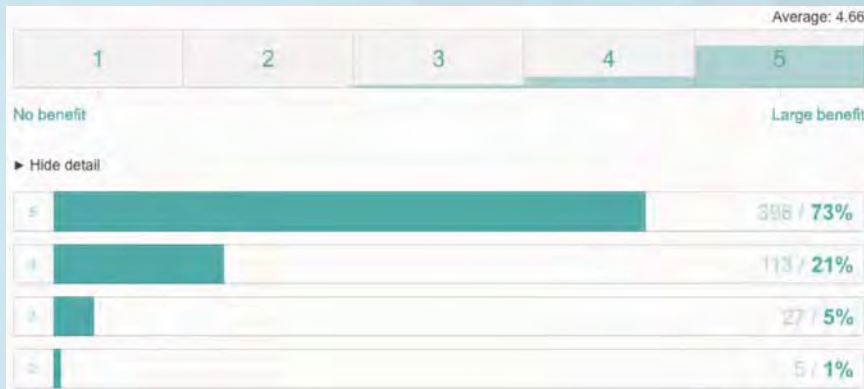
4251 E. 5th St. Tucson, AZ 85711  
 520-323-3221  
 866-50-media

## Results Charts

### 1. To what degree is the success of public K-12 education important to our community?



### 2. How much do you think improvements to school facilities benefit the overall community?



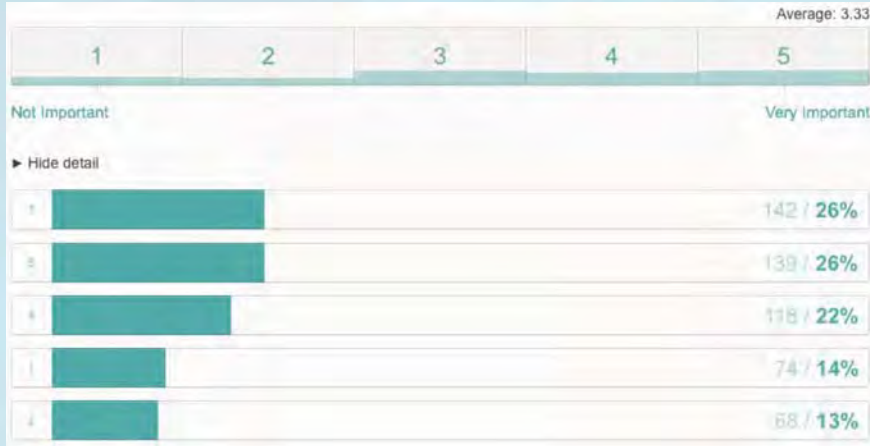
### 3. How much do you think the quality of schools affects property values in your neighborhood?





4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

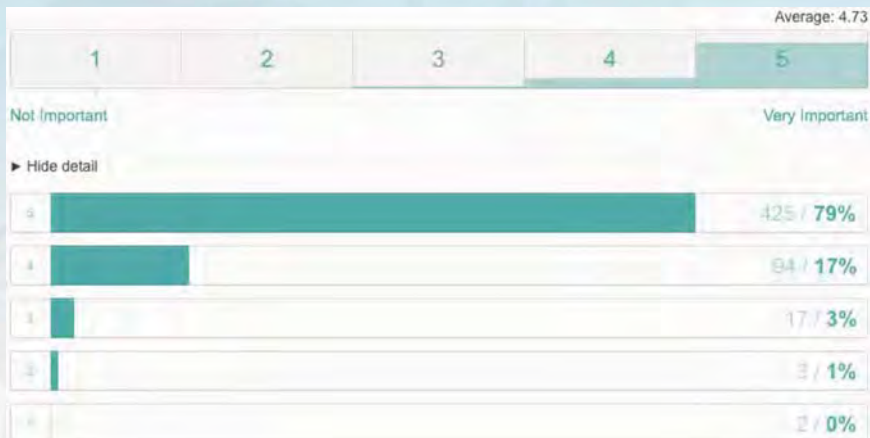
**4. How important is it for you to be able to use TUSD schools for private or community functions?**



**5. How important is repairing school buildings and systems to reduce operating and maintenance costs for TUSD?**



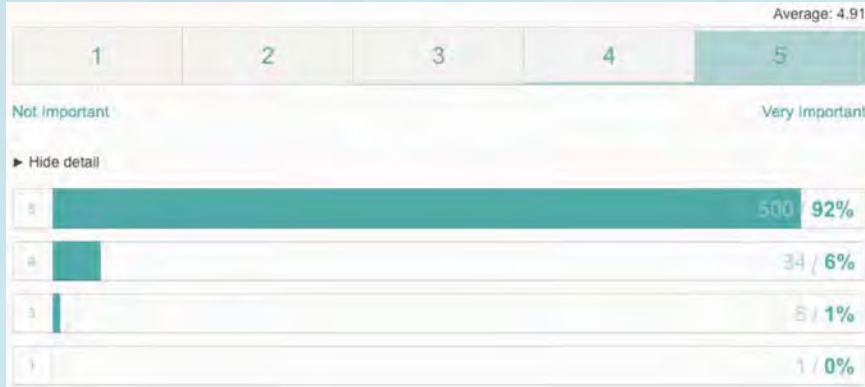
**6. How important is having quality technology in TUSD schools?**



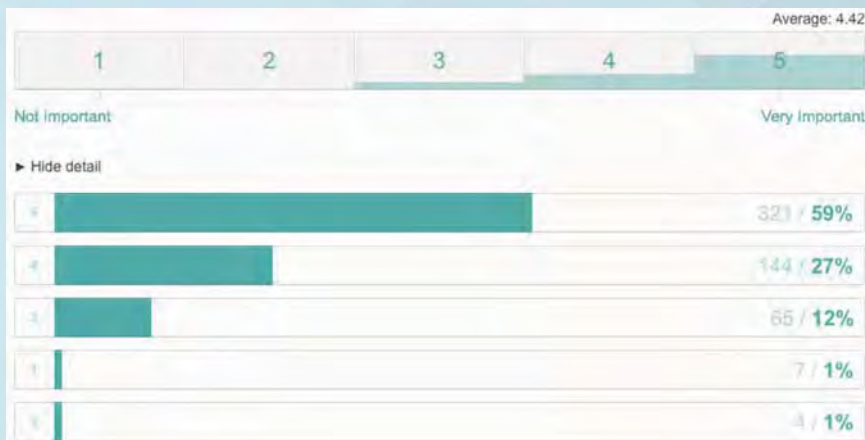


4251 E. 5th St. Tucson, AZ 85711  
 520-323-3221  
 866-50-media

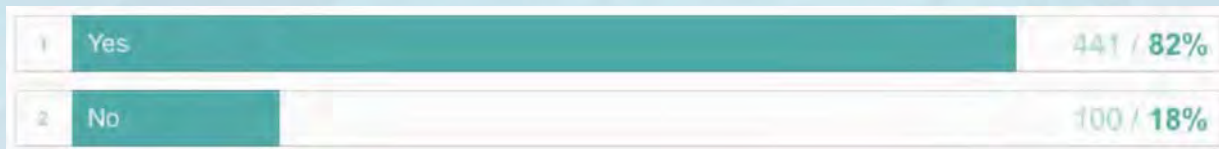
**7. How important is having a safe and secure environment in Tucson Unified schools?**



**8. How important is improving student spaces to support collaborative project based learning in TUSD?**



**9. With 98 million in state funding cuts since 2008, do you support districts like TUSD using bonds to make up for cuts?**



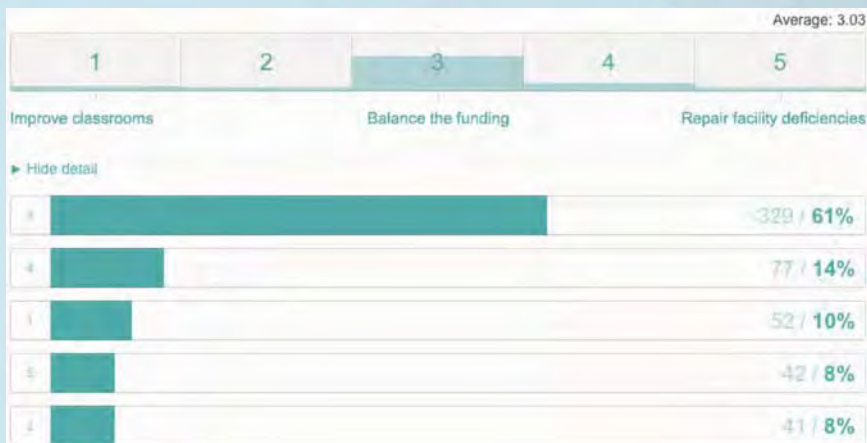


4251 E. 5th St. Tucson, AZ 85711  
520-323-3221  
866-50-media

**10. If TUSD were to begin a bond initiative, how much would you support to improve TUSD schools?**  
*All property tax values are based on Tucson’s average home value of \$130,000*

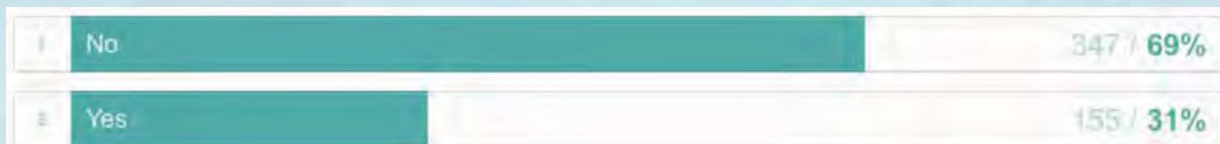


**11. If voters approve a bond, how should TUSD use the funds?** (1 indicates all funds be used for “Improving classrooms” and 5 indicates all funds be used to “Repair facility deficiencies.” Choosing 2,3,4 would indicate a balance)



**Additional Question**

**12. Will the passage of Proposition 123 handle the education funding issues facing Arizona schools?**





Sai Associates Architects

Sai Aia Co

Tucson, A

Thin SM T Lannin Inc

Thin Start Lan Co

Chandler, A

Facilities Management Group

Florida Co

Phoenix, A

Tucson Unified is where  
Students love to Learn  
Teachers love to Teach  
and People love to Work  
We are Team TUSD



# **EXHIBIT 25**

**TUSD RFI #(s): 699, 700, 754, 756-757, 759-760, 797, 799, 802, 809-812, 814, 829, 866-876, 880-882, 884, 888, 890**

**Estimated TUSD Staff Time: 75 hours**

**Attachment(s): Agenda – LSC-12.11.15; Liz Hoover Resume; DAEP Transition Plan Power Point; Revised VIII.2 Appendix1516; ECactivitiesbyschooletc; Dual Language Stipends 12.14.16 Updated 2; Dual Language Stipend 1.18.17; RP PD for LSCs 121115**

**RFI #880:** Please provide confirmation that formulas applied to determine scores relating to FCI conditions were not altered as a result of the “small structure changes” referred to above, but, rather, that the FCI was updated to reflect the conditions of structures following the “changes.” (See Annual Report at IX-349.)

*District Response:* Confirmed. The structure changes were all cosmetic and scores were checked before and after to make sure they had not changed.

**RFI #881:** Appendix IX-2, titled “FCI Formatting changes,” cites as a “**FORMATTING CHANGE[] MADE,**” “Removed all MAGNET references in each, as we do not have a clear listing of the schools that still qualify as magnet programs per the law.” Please describe what is meant by this statement, including what is referred to by the word “each”, what “law” is being referenced, what changes caused magnets to potentially no longer “still qualify” as a magnet, and whether and to what extent the removal of “MAGNET references”, affected FCI scores and or Multi-Year Facilities Plan priorities.

*District Response:* “Law” refers to the USP court order. “Each” refers to any school that had “Magnet” as part of the school name. The word “Magnet” was removed from the site name. This allows the Facilities division to focus on the scores and not so much on the site names and whether we have their magnet status listed correctly, as it has no relevance to the condition of the facilities. This had zero impact on the actual scores.

**RFI #882:** Please state when (or over what period) the FCI was “updated” “to reflect the current conditions of each site.” (Annual Report at IX-349.)

*District Response:* The FCI scores can be updated at any time that the District makes a change to a site. It is a living document. However, the USP requires that we review and update the FCI scores biennially, so there was a focused review by the Architecture and Engineering Department between December 2015 and February 2016.

**RFI #884:** Mendoza Plaintiffs are not aware of any “District Master Facilities Plan” (“DMFP”) being called for by the MYFP. Please describe why the District developed the DMFP, including how it is “part of the MYFP,” when it was developed, when the “assessments performed while developing” it were performed, and how the DMFP relates to the MYFP.

*District Response:* The MYFP is not related to the DMFP in any way. The DMFP was an effort by the District to compile a list of repairs that need to be completed across the District over the next ten years and is completely independent of the MYFP. HVAC, Roofing and Special Systems were assessed as part of the project at every school between September 2015 and February 2016. Even though the District Master Facilities Plan was

**TUSD RFI #(s): 699, 700, 754, 756-757, 759-760, 797, 799, 802, 809-812, 814, 829, 866-876, 880-882, 884, 888, 890**

**Estimated TUSD Staff Time: 75 hours**

**Attachment(s): Agenda – LSC-12.11.15; Liz Hoover Resume; DAEP Transition Plan Power Point; Revised VIII.2 Appendix1516; ECactivitiesbyschooletc; Dual Language Stipends 12.14.16 Updated 2; Dual Language Stipend 1.18.17; RP PD for LSCs 121115**

a separate effort to raise bond awareness for our community, it is not to be confused with the FCI or the MYFP. Note, the District felt it would be prudent to take advantage of the assessments that were completed as part of that project to make sure the conditions were reflected in the FCI as well.

**RFI #888:** Please identify each appendix to the Annual Report which reflects the above-cited revision to the FCI.

*District Response:*

- Appendix IX - 718F1, IX.C.1.d – MYFP
- Appendix IX - 719F2, IX.C.1.a. FCI Formatting Changes
- Appendix IX - 720F3, IX.C.1.b FCI Analyses 2015-16

**RFI #890:** Given that the Technology Condition Index (“TCI”) apparently was finalized no later than at the same time as the MYFP ( which includes both the FCI and the ESS) since both bear February 2015 dates (see, e.g. Appendix IX-1 (MYFP) with a February 27, 2015 file date and the Technology Plan including TCI (Doc. 1778-1) filed with the Court on February 27, 2015), when was it that the District determined to revise the communication category weight in the FCI because of the existence of the TCI?

*District Response:* Generally, the FCI scores are updated when major repairs or construction is completed. In 2015-16, there was a focused effort to review and update the scores. The Facilities Department would normally touch base with the Technology Department to update the technology scores. It was at this time that the Technology Department and the Facilities Department realized it was redundant, since it is already tracked by the TCI in much more detail. TUSD redistributed the technology weights in the FCI to eliminate redundancy.

This question was answered in November 2016 in correspondence in review of the annual report. When the District created the Facilities Condition Index (FCI) the District did not have a Technology Condition Index (TCI) so communications systems were added as a category to be evaluated. When the District developed the TCI, it included a category titled “technology communications systems” to evaluate communications systems. Thus the communication category in the FCI was duplicative of the newly-created category evaluated in the TCI and the District reduced the category weight of the communication category from 15% to 5% (the remaining 5% reflects the facilities-related facets of communication rather than those related to technology infrastructure). The

# **EXHIBIT 26**

TUCSON UNIFIED SCHOOL DISTRICT  
GOVERNING BOARD  
AGENDA FOR REGULAR BOARD MEETING\*

TIME: June 14, 2016  
4:00 p.m.

PLACE: Multipurpose Room  
Duffy Community Center  
5145 East Fifth Street  
Tucson, Arizona 85711

CALL TO ORDER

ACTION ITEM

- 4:00 p.m.
1. Schedule an executive meeting at this time to consider the following matters:
    - A. Personnel issues pursuant to A.R.S. §38-431.03 (A)(1); legal advice/instruction to attorney pursuant to A.R.S. §38-431.03 (A)(3) and (A)(4)
      - 1) Administrative appointments, reassignments and transfers
        - Deputy Superintendent, Teaching and Learning
        - Assistant Director, Exceptional Education
        - Principal – Magee, Valencia, Booth-Fickett-Math/Science, Erickson, Van Buskirk, Wright
      - 2) Non-Renewal of a Probationary Teacher
    - B. Personnel issues pursuant to A.R.S. §38-431.03 (A)(1); legal advice/instruction to attorney pursuant to A.R.S. §38-431.03 (A)(3) and (A)(4)
      - 1) Superintendent's Evaluation [**this is an option for the Board if needed during the discussion of the Superintendent's Evaluation in Public meeting**]
    - C. Legal Advice/Instruction to Attorney pursuant to A.R.S. §38-431.03 (A)(3) and (A)(4)
      - 1) Fisher-Mendoza

RECESS REGULAR MEETING

RECONVENE REGULAR MEETING – appx. 5:30 p.m. Multipurpose Room  
Duffy Community Center  
5145 East Fifth Street  
Tucson, Arizona 85711

5:30 p.m. PLEDGE OF ALLEGIANCE

Agenda for Regular Board Meeting

June 14, 2016 – 4:00 p.m.

Page 2

INFORMATION ITEMS

2. Superintendent's Report
3. Board Member Activity Reports

CALL TO THE AUDIENCE *(Pursuant to Governing Board Policy No. BDAA, at the conclusion of the Call to the Audience, the Governing Board President will ask if individual members wish to respond to criticism made by those who have addressed the Board, wish to ask staff to review a matter, or wish to ask that a matter be put on a future agenda. No more than one board member may address each criticism.)*

STUDY/ACTION

4. 2016 Facilities Master Plan

ACTION ITEM

5. Final Report on Superintendent Goals and Superintendent Evaluation

STUDY/ACTION ITEM

6. Superintendent Pay for Performance Award for 2015-2016

CONSENT AGENDA\*\*

7.
  - a) Salaried Critical Need and Replacement Hires
  - b) Hourly Critical Need and Replacement Hires
  - c) Salaried Separations
  - d) Hourly Separations
  - e) Requests for Leave of Absence for Certified Personnel
  - f) Requests for Leave of Absence for Classified Personnel
  - g) Contracts for members of the Superintendent's Leadership Team for the 2016-2017 School Year
  - h) Intergovernmental Agreement between the Arizona Board of Regents, University Of Arizona and Tucson Unified School District for the Purpose of Providing Instructional and Transitional Support to TUSD Students Enrolled in Project FOCUS, with Authorization for the Superintendent to Execute the Agreement

Agenda for Regular Board Meeting

June 14, 2016 – 4:00 p.m.

Page 3

- i) Lunch Price Increases for Paying Lunch Program Participants for the SY 2016-2017 as Required by Public Law 111-296 Section 205 "Equity in School Lunch Pricing" for the National School Lunch Program
- j) National School Lunch Program Agreement Between Tucson International Academy and Tucson Unified School District, Effective August 2016, with authorization for the Food Services Director to serve as the Designated Official
- k) Approval to use Cooperative Contracts for Procurements \$250,000 and above
- l) Approval for Sole Source Purchase Designations \$250,000 and above
- m) Approval to Modify Contract Dates - Request for Proposals (RFP) 15-48-19 – Office Machine Cost per Copy
- n) Approval to Purchase Curriculum Materials/Supplemental Curriculum Materials in excess of \$250,000
- o) Approval to Purchase Computer/Technology Equipment using Cooperative Contracts that will exceed \$250,000
- p) Fiscal Year 2016-2017 Expenditures for Automotive Parts
- q) Fiscal Year 2016-2017 Postal Expenditures
- r) Fiscal Year 2016-2017 Expenditures for Sun Tran Bus Passes
- s) Fiscal Year 2016-2017 Transportation Additional Services Expenditures
- t) Fiscal Year 2016-2017 Expenditure for Compressed Natural Gas (CNG)
- u) Fiscal Year 2016-2017 Utility Expenditures
- v) Reauthorization of the Change Funds for High Schools, Middle Schools and Food Services for FY 2016-2017
- w) Reauthorization of the Change Funds for Legal Services, Financial Services and School Safety-Key Control for FY 2016-2017
- x) Reauthorization for the Worker's Compensation Accounts for FY 2016-2017
- y) Reauthorization for the State and Federal Payroll Tax Withholding Account for FY 2016-2017



Agenda for Regular Board Meeting

June 14, 2016 – 4:00 p.m.

Page 4

- z) Reauthorization for the Miscellaneous Revenue and Food Services Fund Clearing Accounts for FY 2016-2017
- aa) Reauthorization for the Payroll Direct Deposit Account for FY 2016-2017
- ab) Reauthorization for the Revolving Fund and Designation of Custodian for FY 2016-2017
- ac) Reauthorization for the Student Activity and Auxiliary Fund Bank Accounts for FY 2016-2017
- ad) Reauthorization for the Vendor Electronic Funds Clearing Account for FY 2016-2017
- ae) Reauthorization for the Market Rate Savings Account for FY 2016-2017
- af) Approval the Revised Extracurricular Activities Fees Schedule Including Authorization for Principals to Waive the Fees in Case of Hardship – Last Approved on September 8, 2015
- ag) Approval of Purchase/Renewal of Liability, Property, Pre-Paid Legal, Automotive, Workers' Compensation and other services from the Arizona School Risk retention Trust/The Arizona School Alliance for Workers' Compensation, Inc.
- ah) 2016-2017 School Year Renewal of Employee Benefits Medical and Pharmacy Plans
- ai) Award Request for Proposals (RFP) No. 16-50-C20 – Financial Advisor and Investment Banking Services (Investment Banking Services Award only)
- aj) Award of Request for Proposals (RFP) 17-01-21 – Outside Legal Services
- ak) Award of Request for Proposals (RFP) 17-13-21 – Consultant Services for Systemic Approach to Building Instructional Expertise and Instructional Leadership
- al) Award of Request for Proposals (RFP) 17-16-21 – District Web Solution
- am) Award of Invitation for Bids (IFB) 17-09-21 – Steel and Specialty Metals, As Needed
- an) Award of Invitation for Bid (IFB) 16-74-17 – Tucson High Magnet School Chiller #4 Replacement

Agenda for Regular Board Meeting

June 14, 2016 – 4:00 p.m.

Page 5

- ao) Minutes of Tucson Unified School District Governing Board Meetings
  - 1) Regular Board Meeting, May 10, 2016
  - 2) Special Board Meeting, May 24, 2016
- ap) Acceptance of the Summary of Student Activity Funds for the Period of July 1, 2015 through April 30, 2016
- aq) Ratification of salary and non-salary vouchers for the period beginning April 1, 2016 through April 30, 2016
- ar) Non-Renewal of a Probationary Teacher
- as) Schedule a Special Meeting of the Governing Board on Monday, June 20, 2016, at 5:30 p.m.

RECESS REGULAR MEETING

PUBLIC HEARING – Proposed Performance Based Compensation Plan Portion of 2016-2017 Classroom Site Fund Plan Under A.R.S. §15-977 (Proposition 301)

\*\*Speakers during this portion of the Public Hearing will abide by the rules governing Call to the Audience at Board meetings with the exception that each speaker will be allowed 2 minutes.

\*\*REF: Governing Board Policy Code No. BDAA – *Procedures for Governing Board Members*

RECONVENE REGULAR MEETING

ACTION ITEMS

- 8. Performance Based Compensation Plan (Prop. 301) for School Year 2016-2017
- 9. Administrative Appointments, Reassignments and Transfers – Deputy Superintendent, Teaching and Learning
- 10. Administrative Appointments, Reassignments and Transfers – Assistant Director, Exceptional Education
- 11. Administrative Appointments, Reassignments and Transfers – Principal, Magee Middle School
- 12. Administrative Appointments, Reassignments and Transfers – Principal, Valencia Middle School
- 13. Administrative Appointments, Reassignments and Transfers – Principal, Booth-Fickett Math/Science Magnet School

Agenda for Regular Board Meeting

June 14, 2016 – 4:00 p.m.

Page 6

14. Administrative Appointments, Reassignments and Transfers – Principal, Erickson Elementary School
15. Administrative Appointments, Reassignments and Transfers – Principal, Van Buskirk Elementary School
16. Administrative Appointments, Reassignments and Transfers – Principal, Wright Elementary School
17. Approval and Textbook Adoption: PK-12 Mathematics

STUDY/ACTION

18. Court Ordered Teacher Diversity Plan

GOVERNING BOARD POLICIES

Action

19. Governing Board Policy IHAMB – Family Life Education (revision)

ACTION ITEM

20. Resolution Regarding Family Life Education

**FUTURE AGENDA ITEMS (A board member may propose future agenda item(s), with limited discussion. The discussion should center around the purpose of placing the item on the next most appropriate agenda for consideration and action as necessary. Ref: Governing Board Policy BEDBA)**

10:00 p.m. ADJOURNMENT

ADJOURNMENT

- One or more Governing Board members will/may participate by telephonic or video communications.
- Names and details, including available support documents, may be obtained during regular business hours at the TUSD Governing Board Office.
- Persons with a disability may request a reasonable accommodation, such as a sign language interpreter, by contacting Translations/Interpretations Services at 225-4672. Requests should be made as early as possible to arrange the accommodation.
- Upon request, TUSD will provide a certified interpreter to interpret Governing Board meetings whenever possible. Please contact Translations/Interpretations Services at 225-4672 at least 72 hours prior to the event. Every effort will be made to honor requests for interpretation services made with less than 72 hours' notice.
- Previa petición, TUSD proporcionará un intérprete certificado para interpretar la agenda de las reuniones de la Mesa Directiva o de proporcionar los servicios de interpretación en la reuniones de la Mesa Directiva cuando sea posible. Favor de contactar los Servicios de Traducción/Interpretación al teléfono 225-4672 cuando menos 72 horas antes del evento. Se hará todo lo posible para proporcionar los servicios de interpretación realizados con menos de 72 horas de anticipación.
- If authorized by a majority vote of the members of the Governing Board, any matter on the open meeting agenda may be discussed in executive session for the purpose of obtaining legal advice thereon, pursuant to A.R.S. 38-431.03 (A)(3). The executive session will be held immediately after the vote and will not be open to the public.

# **EXHIBIT 27**

**TUSD RFI #(s): 699, 700, 754, 756-757, 759-760, 797, 799, 802, 809-812, 814, 829, 866-876, 880-882, 884, 888, 890**

**Estimated TUSD Staff Time: 75 hours**

**Attachment(s): Agenda – LSC-12.11.15; Liz Hoover Resume; DAEP Transition Plan Power Point; Revised VIII.2 Appendix 1516; ECactivitiesbyschooletc; Dual Language Stipends 12.14.16 Updated 2; Dual Language Stipend 1.18.17; RP PD for LSCs 121115**

**RFI #880:** Please provide confirmation that formulas applied to determine scores relating to FCI conditions were not altered as a result of the “small structure changes” referred to above, but, rather, that the FCI was updated to reflect the conditions of structures following the “changes.” (See Annual Report at IX-349.)

*District Response:* Confirmed. The structure changes were all cosmetic and scores were checked before and after to make sure they had not changed.

**RFI #881:** Appendix IX-2, titled “FCI Formatting changes,” cites as a “**FORMATTING CHANGE[] MADE,**” “Removed all MAGNET references in each, as we do not have a clear listing of the schools that still qualify as magnet programs per the law.” Please describe what is meant by this statement, including what is referred to by the word “each”, what “law” is being referenced, what changes caused magnets to potentially no longer “still qualify” as a magnet, and whether and to what extent the removal of “MAGNET references”, affected FCI scores and or Multi-Year Facilities Plan priorities.

*District Response:* “Law” refers to the USP court order. “Each” refers to any school that had “Magnet” as part of the school name. The word “Magnet” was removed from the site name. This allows the Facilities division to focus on the scores and not so much on the site names and whether we have their magnet status listed correctly, as it has no relevance to the condition of the facilities. This had zero impact on the actual scores.

**RFI #882:** Please state when (or over what period) the FCI was “updated” “to reflect the current conditions of each site.” (Annual Report at IX-349.)

*District Response:* The FCI scores can be updated at any time that the District makes a change to a site. It is a living document. However, the USP requires that we review and update the FCI scores biennially, so there was a focused review by the Architecture and Engineering Department between December 2015 and February 2016.

**RFI #884:** Mendoza Plaintiffs are not aware of any “District Master Facilities Plan” (“DMFP”) being called for by the MYFP. Please describe why the District developed the DMFP, including how it is “part of the MYFP,” when it was developed, when the “assessments performed while developing” it were performed, and how the DMFP relates to the MYFP.

*District Response:* The MYFP is not related to the DMFP in any way. The DMFP was an effort by the District to compile a list of repairs that need to be completed across the District over the next ten years and is completely independent of the MYFP. HVAC, Roofing and Special Systems were assessed as part of the project at every school between September 2015 and February 2016. Even though the District Master Facilities Plan was

**TUSD RFI #(s): 699, 700, 754, 756-757, 759-760, 797, 799, 802, 809-812, 814, 829, 866-876, 880-882, 884, 888, 890**

**Estimated TUSD Staff Time: 75 hours**

**Attachment(s): Agenda – LSC-12.11.15; Liz Hoover Resume; DAEP Transition Plan Power Point; Revised VIII.2 Appendix1516; ECactivitiesbyschooletc; Dual Language Stipends 12.14.16 Updated 2; Dual Language Stipend 1.18.17; RP PD for LSCs 121115**

a separate effort to raise bond awareness for our community, it is not to be confused with the FCI or the MYFP. Note, the District felt it would be prudent to take advantage of the assessments that were completed as part of that project to make sure the conditions were reflected in the FCI as well.

**RFI #888:** Please identify each appendix to the Annual Report which reflects the above-cited revision to the FCI.

*District Response:*

- Appendix IX - 718F1, IX.C.1.d – MYFP
- Appendix IX - 719F2, IX.C.1.a. FCI Formatting Changes
- Appendix IX - 720F3, IX.C.1.b FCI Analyses 2015-16

**RFI #890:** Given that the Technology Condition Index (“TCI”) apparently was finalized no later than at the same time as the MYFP ( which includes both the FCI and the ESS) since both bear February 2015 dates (see, e.g. Appendix IX-1 (MYFP) with a February 27, 2015 file date and the Technology Plan including TCI (Doc. 1778-1) filed with the Court on February 27, 2015), when was it that the District determined to revise the communication category weight in the FCI because of the existence of the TCI?

*District Response:* Generally, the FCI scores are updated when major repairs or construction is completed. In 2015-16, there was a focused effort to review and update the scores. The Facilities Department would normally touch base with the Technology Department to update the technology scores. It was at this time that the Technology Department and the Facilities Department realized it was redundant, since it is already tracked by the TCI in much more detail. TUSD redistributed the technology weights in the FCI to eliminate redundancy.

This question was answered in November 2016 in correspondence in review of the annual report. When the District created the Facilities Condition Index (FCI) the District did not have a Technology Condition Index (TCI) so communications systems were added as a category to be evaluated. When the District developed the TCI, it included a category titled “technology communications systems” to evaluate communications systems. Thus the communication category in the FCI was duplicative of the newly-created category evaluated in the TCI and the District reduced the category weight of the communication category from 15% to 5% (the remaining 5% reflects the facilities-related facets of communication rather than those related to technology infrastructure). The

# **EXHIBIT 28**

TUCSON UNIFIED SCHOOL DISTRICT  
GOVERNING BOARD  
AGENDA FOR SPECIAL MEETING\*

TIME: May 23, 2017  
4:00 p.m.

PLACE: Multipurpose Room  
Duffy Community Center  
5145 East Fifth Street  
Tucson, Arizona

4:00 p.m. CALL MEETING TO ORDER

ACTION

1. Schedule an executive meeting at this time to consider the following matters:

A. Personnel issues pursuant to A.R.S. §38-431.03 (A)(1); legal advice/instruction to attorney pursuant to A.R.S. §38-431.03 (A)(3) and (A)(4)

1) Administrative appointments, reassignments and transfers

- Principal, Catalina High School
- Principal, Blenman Elementary School
- Principal, Erickson Elementary School
- Principal, Johnson Primary School
- Principal, Mission View Elementary School
- Principal, Ochoa Elementary School
- Principal, Warren Elementary School
- Principal, Whitmore Elementary School
- Principal, Roskrige Bilingual K-8 Magnet School

B. Student matters pursuant to A.R.S. §§15-342, 15-521, and 15-843; A.R.S. §38-431.03 (A)(2) (consideration of records exempt by law from public inspection); legal advice/instruction to attorney pursuant to A.R.S. §38-431.03 Subsections (A)(3) and (A)(4)

1) Hearing Officer's Recommendation

C. Discussions or consultations with designated representatives of the public body in order to consider its position and instruct its representatives pursuant A.R.S. §38-431.03 Subsections (A)(5)

1) Negotiations with employee organizations

D. Discussion or consultation with the attorneys of the Governing Board in order to consider its position and instruct its attorneys regarding the Governing Board's position regarding pending litigation pursuant to A.R.S. §38-431.02 (A)(4)

1) Fisher-Mendoza, etc. v. TUSD, et al.



Special Board Meeting  
May 23, 2017 – 4:00 p.m.  
Page | 2

- E. Legal Advice/Instruction to Attorney pursuant to A.R.S.§38-431.03 (A)(3) and (A)(4)
  - 1) Governing Board Office Staff, Organizational Chart, Hiring Process, Application Process – Requested by Board Member Rachael Sedgwick

ACTION ITEM

MOTION AND VOTE TO RECESS SPECIAL MEETING TO EXECUTIVE SESSION

RECESS SPECIAL MEETING TO EXECUTIVE SESSION

ACTION ITEM

MOTION AND VOTE TO RECESS EXECUTIVE MEETING AND RECONVENE MEETING – approx. 5:30 p.m.

Multipurpose Room  
Duffy Community Center  
5145 E. Fifth Street

5:30 p.m.

PLEDGE OF ALLEGIANCE

INFORMATION ITEMS

- 2. Superintendent's Report
- 3. Board Member Activity Reports

CALL TO THE AUDIENCE (20 Minutes) *(Pursuant to Governing Board Policy No. BDAA, at the conclusion of the Call to the Audience, the Governing Board President will ask if individual members wish to respond to criticism made by those who have addressed the Board, wish to ask staff to review a matter, or wish to ask that a matter be put on a future agenda. No more than one board member may address each criticism.)*

CONSENT AGENDA

- 4. Approval for Expenditures in Excess of \$250,000 for Professional Development Services
- 5. 2017-2018 School Year Renewal of Employee Benefits
- 6. Approval of Confidential Settlement Agreement and Release (Case #17C-DP-038-ADE)

ACTION ITEMS

- 7. Superintendent Search – Advertisement Posting for Position of District Superintendent
- 8. Superintendent Search – Superintendent Candidate Screening Committee

Special Board Meeting  
May 23, 2017 – 4:00 p.m.  
Page | 3

9. Superintendent Search – Superintendent Selection/Search Timeline
10. Administrative appointments, reassignments and transfers – Principal, Catalina High School
11. Administrative appointments, reassignments and transfers – Principal, Blenman Elementary School
12. Administrative appointments, reassignments and transfers – Principal, Erickson Elementary School
13. Administrative appointments, reassignments and transfers – Principal, Johnson Primary School
14. Administrative appointments, reassignments and transfers – Principal, Mission View Elementary School
15. Administrative appointments, reassignments and transfers – Principal, Ochoa Elementary School
16. Administrative appointments, reassignments and transfers – Principal, Warren Elementary School
17. Administrative appointments, reassignments and transfers – Principal, Whitmore Elementary School
18. Administrative appointments, reassignments and transfers – Principal, Roskrige Bilingual K-8 Magnet School
19. Contracts for Administrators, Psychologists and Research Project Managers for the 2017-2018 School Year
20. Approval to Purchase Technology Equipment using Cooperative Contracts in Excess of \$250,000
21. Charge to Audit Committee – Requested by Board Clerk Mark Stegeman
22. Audit Committee Appointment(s) – Requested by Board Clerk Mark Stegeman

STUDY/ACTION ITEMS

23. Strategic Planning for University High School – Requested by Board Clerk Mark Stegeman

Special Board Meeting  
May 23, 2017 – 4:00 p.m.  
Page | 4

24. Governing Board Policies BBAA – *Board Member Authority and Responsibility*, BCA – *Board Member Ethics*, BDAA – *Procedures for Governing Board Members*, BEDB – *Board Meeting Agenda Posting and Organization*, BEDBA – *Board Meeting Agenda Preparation*, BGA – *Policy Authority*, BGF – *Suspension-Repeal of Policy*, and BHD – *Board Communications with the Public and Media* (revise and consolidate) – Requested by Board Clerk Mark Stegeman
25. Scholastic Balanced Literacy Framework K-5 Professional Development Package

#### INFORMATION ITEMS

26. Update on Magnet Schools – Carrillo K-5 Magnet School
27. FY 2016-2017 Budget Update
28. November 2017 Bond – Survey Update and Draft Election Packet Language
29. Exceptional Education Program Plans – Requested by Board Member Rachael Sedgwick

#### STUDY/ACTION ITEM

30. Code of Conduct Draft Update to the Governing Board

10:00 p.m. MOTION AND VOTE TO ADJOURN OR EXTEND SPECIAL BOARD MEETING

#### ADJOURNMENT

- One or more Governing Board members will/may participate by telephonic or video communications.
- Names and details, including available support documents, may be obtained during regular business hours at the TUSD Governing Board Office.
- Persons with a disability may request a reasonable accommodation, such as a sign language interpreter, by contacting Translations/Interpretations Services at 225-4672. Requests should be made as early as possible to arrange the accommodation.
- Upon request, TUSD will provide a certified interpreter to interpret Governing Board meetings whenever possible. Please contact Translations/Interpretations Services at 225-4672 at least 72 hours prior to the event. Every effort will be made to honor requests for interpretation services made with less than 72 hours' notice.
- Previa petición, TUSD proporcionará un intérprete certificado para interpretar la agenda de las reuniones de la Mesa Directiva o de proporcionar los servicios de interpretación en la reuniones de la Mesa Directiva cuando sea posible. Favor de contactar los Servicios de Traducción/Interpretación al teléfono 225-4672 cuando menos 72 horas antes del evento. Se hará todo lo posible para proporcionar los servicios de interpretación realizados con menos de 72 horas de anticipación.
- If authorized by a majority vote of the members of the Governing Board, any matter on the open meeting agenda may be discussed in executive session for the purpose of obtaining legal advice thereon, pursuant to A.R.S. 38-431.03 (A)(3). The executive session will be held immediately after the vote and will not be open to the public.
- The order of items on this agenda may be modified during the meeting at the discretion of the Board President or upon a motion to amend the order of business which is approved by a 2/3 vote of the Board.