Cubberley Community Advisory Committee

Briefing Book

November 21, 2012
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Revised November 28, 2012

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Recommendation
Staff recommends that the City Council approve the Guiding Principles for the Cubberley Policy Advisory Committee and the Community Advisory Committee (CAC) appointed by the City Manager and PAUSD Superintendent.

Background and Discussion
On May 8, 2012, the Palo Alto Unified School District (PAUSD) approved the draft Guiding Principles without amendments. As Council is aware, the draft Guiding Principles were revised and forwarded by Council to the Policy Advisory Committee (PAC) composed of Council Members Yeh, Shepherd and Klein; and Board Members Mitchell and Townsend. The PAC met on April 20, 2012 and prepared the draft presented to the PAUSD School Board. The draft is now before the Council for final approval and is as Attachment A.

The PAUSD School Board also suggested an additional member of the CAC in the “Other Community Members” category. Brian Carilli was suggested to the City Manager and Superintendent and has been added to the draft CAC list.

Timeline
Once Council approves the final Guiding Principles and all suggestions for the CAC
members have been made, Staff will poll the CAC for a convenient meeting time the 3\textsuperscript{rd} or 4\textsuperscript{th} week of May.

Attachments:

- Attachment A: Final Draft Cubberley PAC Guiding Principals (DOC)
- Attachment B: PAUSD Board Packet 5.8.12 Action Item 9 (PDF)

Prepared By: Steve Emslie, Deputy City Manager

Department Head: James Keene, City Manager

City Manager Approval: James Keene, City Manager
Cubberley Policy Advisory Committee  
City Manager and PAUSD Superintendent Community Advisory Committee

Guiding Principles  
Approved by the Board of Education Agenda May 8, 2012  
Draft for the Palo Alto City Council May 14, 2012

The Cubberley Policy Advisory Committee (PAC) consists of two Palo Alto Unified School District (PAUSD) Board members appointed by the School Board President and three City Council members appointed by the Mayor. The PAC shall be the primary advisor to the Council and the School Board on issues related to the lease and possible re-use or joint use of the Cubberley campus.

The Cubberley Community Advisory Committee (CAC) is jointly appointed by the City Manager and Superintendent, and shall represent a cross section of Cubberley, neighborhoods, schools and citywide representatives. The CAC shall review Cubberley background and history and provide the PAC with community input including but not limited to possible re-use scenarios, alternative lease arrangements, site plan configurations, possible funding plans, identification of joint use opportunities and compatible standards.

1. The City and PAUSD recognize that our citizens have substantial investments, both emotional and financial in the Cubberley Campus, and shall work to reach decisions for the benefit of our entire community.

2. The Committees shall maintain open and transparent processes at all times, and members of the public shall be invited to all meetings. The CAC shall complete a final report. PAC and CAC meetings shall be audio-recorded with minutes completed for the PAC, and notes completed for the CAC. (Costs of minutes shall be cost-shared by the City and PAUSD).

3. Documents, architectural drawings and other written communication provided to the Committees shall be made available to the general public as soon as possible.

4. The City and PAUSD recognize that Cubberley is a major cultural, educational, recreational and non-profit resource, very important to the community’s health and vitality.

5. Acknowledging that each entity has different regulations and governing legislation, the City and PAUSD shall seek to work cooperatively to explore all practical joint-uses of the Cubberley campus for both educational and community services.

6. The City and PAUSD have ownership interests in portions of the campus: PAUSD owns 27 acres and the City owns 8 acres. The parties may consider relocation of
their ownership interests within the site to facilitate optimal site layout and efficiency.

7. The City Manager and PAUSD Superintendent shall jointly prepare a project budget for 2012/13, with costs shared equally between the City and PAUSD.

8. While the Policy Advisory Committee planning shall occur as cooperatively as possible, the City Council representatives and the PAUSD Board Members shall retain independent recommending authority should consensus not be reached.

9. Maintaining the quality of PAUSD schools is a significant community value, and planning for a growing population is essential to maintaining educational excellence and the overall health and well-being of our community.

10. Cubberley programs enrich the community and criteria shall be developed to prioritize and/or retain existing uses as well as assess prospective new uses.

11. The City and PAUSD recognize that joint-use could result in stronger educational and cultural programs provided more efficiently.

12. The City Council and PAUSD representatives on the Policy Advisory Committee shall report, not less often than every other month, to their respective bodies on Cubberley planning activities.

13. The City and PAUSD shall work to continue community access to Cubberley to the extent possible. Recreation facilities provided at the Cubberley campus produce important services benefitting the community at large.

14. The residential neighborhoods surrounding Cubberley shall be considered in determining the compatibility of possible changes on the Cubberley campus.

15. Transportation issues and access to and within Cubberley shall be considered in determining possible options including improved bicycle and pedestrian facilities.

16. All recommendations shall be mindful of the dynamic short-, mid-, and long-term forces impacting the PAUSD and City.
BOARD OF EDUCATION

PALO ALTO UNIFIED SCHOOL DISTRICT

TO:      Board of Education
FROM:    Kevin Skelly, Superintendent of Schools
SUBJECT: Cubberley Community Advisory Committee Composition and Cubberley Policy Advisory Committee Guiding Principles

STRATEGIC PLAN INITIATIVE
Governance and Communication

BACKGROUND
A process for discussing the Cubberley site began in November of 2011. The plan is to achieve consensus on a vision for the future of the Cubberley site one year prior to the City's current lease expiration in December 2014. The process involves forming three groups: a Technical Advisory Committee (TAC) made up of executive staff from PAUSD and the City; a Community Advisory Committee (CAC) to be appointed by the City Manager (with recommendations from the School Superintendent); and a Policy Advisory Committee (PAC) composed of three City Council members (Yeh, Shepherd and Klein) and two PAUSD members (Mitchell and Townsend).

Note: At the last meeting, conceptual site plans were presented and discussed. This part of the item from the last meeting has been removed.

COMMUNITY ADVISORY COMMITTEE (CAC)
The CAC is intended to represent a cross section of Cubberley, neighborhoods, schools and city-wide representatives. The members are appointed by the City Manager, with input by the Superintendent of Schools. They will provide the PAC with community input. A listing of the proposed membership as of May 3, 2012 is attached. The Board is asked to approve this list for consideration by City Council on May 14, 2012.

GUIDING PRINCIPLES
A draft set of Guiding Principles (GPs) for use by the PAC and CAC has been developed. The GPs are intended to reflect community values of transparency ensuring that the public is invited to meetings and offered opportunities to interact with both groups. In addition, the Guiding Principles set up very broad objectives to clarify that the process is intended to be collaboration between the City and the School district, emphasizing joint use of the facilities where possible. A discussion regarding these GPs took place at the PAC meeting on Friday, April 20, 2012 and the PAUSD Board meeting on April 24, 2012. Staff has provided an updated version of the Guiding Principles based on Board input and recommends approval. These Guiding Principles are scheduled for consideration by the City Council at its May 14, 2012 meeting.

PROCESS AND TIMELINE
The City's Cubberley lease expires in December 2014. At that time, the lease may be extended an additional 5 years upon mutual consent of the City and the District. The City's schedule assumes providing
the District notice of its intentions regarding renewal of the lease at the end of 2013 to provide the District with one year’s notice prior to the lease expiration. The first meeting of the CAC was anticipated to be in early May and there will be approximately 12 months of meetings. As mentioned, the PAC had their first meeting on Friday, April 20.

As discussed above, the CAC and PAC are scheduled to meet over the course of 2012 concluding their recommendations in 2013. This timeline allows the Council to engage in lease negotiations with the School District two years prior to the expiration of the lease in 2014. The timeline anticipates a decision on the lease by the end of 2013, providing a one-year notice period if either party decides to not exercise the 5 year option to extend the lease.

RECOMMENDATION
The Guiding Principles and Citizen’s Advisory Committee composition, as attached, are recommended for approval.
Cubberley Policy Advisory Committee
City Manager and PAUSD Superintendent Community Advisory Committee

Guiding Principles
Draft for Board of Education Agenda May 8, 2012

The Cubberley Policy Advisory Committee (PAC) consists of two Palo Alto Unified School District (PAUSD) Board members appointed by the School Board President and three City Council members appointed by the Mayor. The PAC shall be the primary advisor to the Council and the School Board on issues related to the lease and possible re-use or joint use of the Cubberley campus.

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<table>
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<tr>
<th>Group</th>
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<th>Last Name</th>
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<td>Jim</td>
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<td>Community/Arts &amp; Services</td>
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<td>Thom</td>
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<td>Park and Rec Commission</td>
<td>Greg</td>
<td>Tanaka</td>
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<td>Other Community Members</td>
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<td></td>
<td><strong>Brian</strong></td>
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## CUBBERLEY COMMUNITY ADVISORY COMMITTEE — PROBLEM STATEMENT

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<tr>
<th>Community</th>
<th>Facilities</th>
<th>Schools</th>
<th>Finances</th>
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<tr>
<td>Need to work in a willing partnership to determine the best use of Cubberley's 35 acres to serve the entire community.</td>
<td>There is a significant growing list of deferred maintenance needs.</td>
<td>Need to maintain the revenue stream from the Cubberley lease by continuing the lease for 5 years.</td>
<td>Should the lease be renewed, and if yes on what terms?</td>
</tr>
<tr>
<td>How should City's acres be used? A 5 year lease extension must include plans for short/medium term maintenance with a commitment to plan longer term.</td>
<td>How can negotiation of new lease/covenant terms mitigate costs to PA and incorporate commitments to current and medium, term upkeep and future cooperation?</td>
<td>Need to determine a site for a new middle school ... if one is not to be located at Cubberley, the lease could be continued for 10 years.</td>
<td>City and School finances have changed since original lease/covenant.</td>
</tr>
<tr>
<td>Which programs currently housed at Cubberley should be retained? Which should remain there and which will need alternate locations?</td>
<td>What is the potential for joint City / School use and how can collaboration/cooperation between PA and PAUSD be fostered in the short term to secure adequate long term investment/planning?</td>
<td>How can/should Foothill rental space be replaced?</td>
<td>Need to determine potential for shared maintenance costs.</td>
</tr>
<tr>
<td>The community values the services provided at Cubberley. The community recognizes that the PAUSD will likely not be ready to plan a school at this point, but this will not stop planning for traffic and parking and building at least some facilities to meet community needs.</td>
<td>A significant infrastructure investment would be needed to extend the life of the buildings at Cubberley.</td>
<td>If the site is not needed for a middle school during this period, what lease arrangements between the City and the PAUSD would be mutually beneficial and acceptable?</td>
<td>$18M in capital improvements needed for the site. How could this be funded?</td>
</tr>
<tr>
<td>How should City's 8 acres be used? The Cubberley site provides a unique opportunity for Palo Alto and PAUSD to work to work together to plan a creative colocation of community and school services for highest and best use of this last-of-its-kind property.</td>
<td>Current facilities are an inefficient use of the site.</td>
<td>Absent a better understanding of future PAUSD needs, will the City need to independently determine the future of its 8 acres — would this require giving up on innovative/cost saving ideas for joint use?</td>
<td>Need to determine potential for cost recovery from rentals. Should rental rates be increased?</td>
</tr>
<tr>
<td>Can the community — the City and PAUSD — work together and collaborate to make this happen?</td>
<td>Uncertainties associated with PAUSD future use create a barrier to planning for investment in new construction.</td>
<td>How can the City determine a construction plan without clarification of the PAUSD long term needs?</td>
<td>How can the City determine a construction plan without clarification of the PAUSD long term needs?</td>
</tr>
<tr>
<td>Ideally, could the Cubberley site provide a location for multi-generational, multi-cultural, multi-disciplinary program to serve the entire community?</td>
<td>To what degree can the site be used effectively to meet both community and school needs during this period?</td>
<td></td>
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<tr>
<td>The City lacks sufficient alternative facilities / real estate to accommodate the services currently provided at Cubberley.</td>
<td>The PAUSD wants the flexibility of keeping the entire 35 acres unencumbered for future school use.</td>
<td>The PAUSD is unwilling to give unrestricted rights to even portions of Cubberley beyond 2025 (or at most 2030) because of potential need for a full high school.</td>
<td>Will there still be community-serving uses on the site?</td>
</tr>
<tr>
<td>This is the last sizable space in the City proper for redevelopment ... to maximize flexibility and for future use, multi-story facilities should be considered.</td>
<td>A full high school would conflict with and displace key community uses, especially playing fields and the gyms.</td>
<td>School buildings must meet higher building code standards.</td>
<td>How will the City / PAUSD fund needed new construction and / or remodeling — and on-going maintenance?</td>
</tr>
<tr>
<td>The PAUSD wants the flexibility of keeping the entire 35 acres unencumbered for future school use.</td>
<td>Traffic and transit support facilities would also be impacted and require careful planning.</td>
<td>PAUSD does not see a need to remove existing buildings.</td>
<td>To use all 35 acres, the PAUSD must purchase the City's 8 acres.</td>
</tr>
<tr>
<td>General obligation bonds would generally need 30 year amortization — thus, community uses would have to be available for 30 years.</td>
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### Years 0 - 5

- Need to work in a willing partnership to determine the best use of Cubberley's 35 acres to serve the entire community.
- How should City's acres be used? A 5 year lease extension must include plans for short/medium term maintenance with a commitment to plan longer term.
- Which programs currently housed at Cubberley should be retained? Which should remain there and which will need alternate locations?

### Years 5 - 15

- The community values the services provided at Cubberley.
- The community recognizes that the PAUSD will likely not be ready to plan a school at this point, but this will not stop planning for traffic and parking and building at least some facilities to meet community needs.
- How should City's 8 acres be used? The Cubberley site provides a unique opportunity for Palo Alto and PAUSD to work to work together to plan a creative colocation of community and school services for highest and best use of this last-of-its-kind property.
- Can the community — the City and PAUSD — work together and collaborate to make this happen?
- Ideally, could the Cubberley site provide a location for multi-generational, multi-cultural, multi-disciplinary program to serve the entire community?

### Years 15 - 30

- The City lacks sufficient alternative facilities / real estate to accommodate the services currently provided at Cubberley.
- This is the last sizable space in the City proper for redevelopment ... to maximize flexibility and for future use, multi-story facilities should be considered.
- The PAUSD wants the flexibility of keeping the entire 35 acres unencumbered for future school use.
- General obligation bonds would generally need 30 year amortization — thus, community uses would have to be available for 30 years.
Appendix H - Working Paper on Cubberley Site

Why This Document?
Throughout the life of the Commission, Cubberley has stood out as the “elephant in the room.” Until very recently, we have been ambivalent about whether to expend any time and energy on a very complex and politically charged issue, other than gathering infrastructure needs related to the site. We were also unsure whether the Council even wanted any advice from us on the matter.

However, recent events have changed that dynamic. On June 27, the Council indicated its intent to explore selling the City’s 8 acres at Cubberley to the Foothill-DeAnza Community College District, and later reversed that decision when the Palo Alto Unified School District (PAUSD) board formally indicated its intent to reuse the site for a school. At the Commission’s July 18 workshop with the City Council, several Council Members asked questions directly related to Cubberley.

Since the Council and the PAUSD are unlikely to come to any decisions on Cubberley prior to our final report, and since decisions related to Cubberley could have a significant impact on infrastructure plans and financing, a number of us felt it was too important to address in a limited manner. Mark Harris, Jim Olstad, and Ray Bacchetti agreed to put together an issue paper covering the key elements of the Cubberley situation as a means to facilitate a discussion by the Commission regarding Cubberley. Even if the Commission ultimately decides not to make any recommendations regarding Cubberley, at least 17 city residents will be well versed on the Cubberley situation and could individually provide input to the Council at the appropriate time as he or she desired.

Background and Context of the Cubberley Situation
Substantial budget pressures were being experienced by the PAUSD due to a variety of circumstances starting in the late 1970s and early 80s, including

- passage of Proposition 13 in 1978.
- declining PAUSD enrollment and revenue during the post–Baby Boom era.

In response to that stressed financial situation, the PAUSD closed several schools and sold some existing school sites in order to help sustain its educational programs at the level the community expected. This included the closure of Cubberley in 1979 and the City’s acquisition of Terman in 1981, among the sale and/or closure of other sites.

The City realized that the PAUSD was one of the City’s major assets and its decline would have severely negative impacts on the City as a whole, not the least of which would have been a decrease in general property values. The City and the PAUSD also recognized that sites once sold would never again be available for school use should the trends reverse in the future.
In 1987, the City put Measure B on the ballot with the intent to create a 5 percent utility users tax (UUT) that would be used primarily to fund lease payments by the City to the PAUSD for unused school sites (Cubberley being the premier site) of about $4.0 million annually, with $2.7 million applicable to Cubberley. In 1989, the City and PAUSD entered into what is known as the Lease and Covenant Not to Develop Agreement (Cubberley Lease), which covers a variety of complex clauses including lease arrangements at Cubberley and other sites.

At the time the original lease negotiations were taking place, the City was in a relatively good position in terms of financial capacity as compared to the PAUSD’s circumstances. The Lease and Covenant Not to Develop arrangement had the benefit of providing a major injection of operating budget money to the school district, while providing corollary benefits to the City such as preserving open space and playing fields, providing childcare sites and protection from liability for new infrastructure requirements (how ironic!) had these sites then been sold and developed.

Flash forward nearly 25 years and the respective financial situations and site needs have changed dramatically.

Here are a few of the key developments that make the situation very different today:

- The PAUSD is now a Basic Aid District, which essentially means that local property tax revenue far exceeds the amount of revenue the State is required to provide the district in excess of “basic aid” – a very small amount per student. Although property tax revenue has been somewhat affected by the recent financial crisis, PAUSD has not seen the reductions that many other California school districts have encountered and is likely poised to see property tax increases in excess of inflation for the foreseeable future. Property taxes are budgeted to provide about 73 percent of the PAUSD’s general fund revenue in 2011–12, or about $114 million out of a $159 million budget. The remainder is accounted for as follows:
  
<table>
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<tr>
<th>Source</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Federal funds</td>
<td>3 percent</td>
</tr>
<tr>
<td>Local income</td>
<td>5 percent</td>
</tr>
<tr>
<td>Lease revenue</td>
<td>6 percent</td>
</tr>
<tr>
<td>Parcel tax</td>
<td>7 percent</td>
</tr>
<tr>
<td>State income</td>
<td>6 percent</td>
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</table>

- The district has received approval from the voters for more than $500 million (Measure B in 1995 and Measure A in 2008) and a $600 parcel tax (Measure A in 2010) generating about $11–12 million annually, or about 7 percent of its annual operating budget. In addition, parents provide gifts in excess of $2 million annually through the foundation Palo Alto Partners in Education (PiE).
Enrollment has recovered dramatically since its low in about 1990, to the point that the district is now reopening sites: most recently, Garland is slated to reopen in several years, and the Board recently expressed an intent to reuse the Cubberley site in the near future for a secondary school (which halted the Council’s efforts to negotiate an offer to sell the City-owned 8 acres at Cubberley to Foothill-DeAnza College).

Thus, the current respective financial and enrollment conditions related to the Cubberley Lease are substantially different than they were 22 years ago when the City and the PAUSD entered into it. Financially, the City has been grappling annually with the issue of balancing the General Fund operating budget as well as meeting the ongoing capital assets/infrastructure needs of the community (pressures which were the impetus for the formation of our Commission).

The City’s current option on the Cubberley Lease expires by its stated terms at the end of 2014, and the City must notify the PAUSD by December 31, 2013, if it intends to renew the lease for another five years.

Now is the time for the Commission to provide input regarding the lease agreement as it relates to infrastructure.

**Key Elements of the Cubberley Lease as They Relate to Infrastructure and Infrastructure Financing**

**Cubberley Lease Payment.** In the current 2011–12 operating budget, the City is obligated to pay $4.60 million in lease payments for Cubberley (section 2.1 of the lease). Those payments are escalated each year at an agreed upon inflation factor currently estimated at 3 percent. This payment covers the 27 acres leased from the district, not the 8 acres the City now owns as a renegotiated consequence of the swap for the Terman site approved in 2002.

**Childcare Sites.** The Lease Agreement also includes City payments to the PAUSD for onsite childcare at 12 elementary school sites. In 2011–12, the City will pay $0.675 million for the combined 12 sites including utilities costs. The City contracts with Palo Alto Community Childcare (PACC), a nonprofit provider independent from the City, to operate the 12 sites. PACC pays the City approximately $100,000 in rental payments and utilities reimbursement. The childcare lease also runs concurrent with the lease term and will end if the lease is not extended by mutual consent of the City and the PAUSD in 2014. Without any information to the contrary, we assume that this arrangement will be renewed even if the current Lease Agreement is not. If this were not the case, the City would have an additional net slightly in excess of $0.5 million dollars annually to use for other purposes.

**Covenant Not to Develop.** An additional $1.78 million expense is budgeted for 2011–12 with a similar 3 percent inflation factor for succeeding years.
the Cubberley Lease agreement, it is a section (2.2) that is separate from the
Cubberley payments but clearly under the grand lease arrangement. The sites
included in the original covenant are Ohlone, Jordan, Jane Lathrop Stanford,
Garland, and Greendell. The Lease agreement allows for sites to reopen without
reducing the covenant payment as long as new elementary schools are substituted,
which has happened over the lease term as PAUSD reopened schools due to
increased enrollment. Section 4.1 indicates that the purpose of the covenant is “to
prevent further burden on the City’s infrastructure and in order to preserve a
substantial amount of the City’s remaining open space.” If the lease is not renewed,
the covenant payments expire as well.

This clause now appears to be obsolete given the district’s recently expressed intent
to reopen existing sites. Further, there is no current plan for any sites to be sold for
development, and the district has just recently purchased additional property at 525
San Antonio Road. Ironically, the $1.78 million annual covenant payment (from
the City to the PAUSD) directly or indirectly puts a burden on the City’s
infrastructure budgeting because these funds are not available to support
infrastructure needs including Cubberley maintenance.

These “reversed financial circumstances” clearly need to be addressed during the
Cubberley Lease option considerations/negotiations process.

Key Elements Regarding Cubberley Not Embedded in the Lease

City Ownership of 8 Acres. Through a separate but related agreement, in 2002
the City obtained title ownership of 8 acres of the Cubberley site in a swap
exchange for the Terman site, which the City had previously acquired through a
lease/purchase arrangement it created in 1981. These 8 acres were the focus of
recent Council actions related to Foothill-DeAnza’s offer to purchase the site.

Although the City has the right to develop the 8 acres, as it deems appropriate, until
September 1, 2022, the school district has the right-of-first-refusal on the sale by
the City of these 8 acres to another party. After that the City has an unencumbered
right to sell the 8 acres, if it decides to do so. Of course, the City and the district
can renegotiate a sale back to the district at any time.

Given recent actions by both governing bodies, it is unclear as to what the next-or-
ultimate disposition of the property will be. The City could retain it and develop it
for its own purposes, or sell it at market value estimated at between $15 and $28
million. The recent purchase of the 2.6 acres at 525 San Antonio by the school
district for $8.5 million would indicate a current market value of approximately $26
million.
Revenues and Expenses at Cubberley Outside the Lease Obligations. Current revenue at Cubberley is $2.54 million annually composed of the following elements:

- Foothill-DeAnza lease $0.93 million
- Property rental (artists, nonprofits, etc) 0.52
- Hourly rental (events, use of theater, etc.) 1.02
- City office rental 0.07

Annual expenses total $2.21 million including routine annual maintenance costs of about $330,000. Thus, the Cubberley complex is showing a net positive cash flow of about $300,000 (excluding the lease-and-covenant payments expense).

Tenants at Cubberley are being heavily subsidized in their rental payments. When considering the annual lease payments, the City is paying the school district approximately $4 per square foot for the building space it leases. However, it is generating less than $1 per square foot in rental income.

Planned CIP and Deferred Maintenance. As discovered through our Commission’s infrastructure investigations, this maintenance liability – not included in the above figures – cumulatively totals about $18.8 million through 2036, with $10.2 million scheduled between now and 2016. Public works indicates that optimal maintenance expenditures should be about $800,000 versus the $330,000 currently expended. This projected aggregate maintenance liability has several implications.

First, the revenue and expense statement as typically presented to the Council – most recently in the slide presentation at the June 27, 2011, meeting – is incomplete in that it does not include these ongoing maintenance expenses. These real maintenance costs should be acknowledged and represented in future reports.

Secondly, the City should neither continue nor consider expending this level of maintenance money into the facility until the long-term use or disposition of Cubberley is resolved. The City should spend only what is needed to keep the facilities operational and safe.

Conclusions
The conditions that created the original need for the Cubberley Lease agreement have changed dramatically and are no longer in play today. With our City struggling to meet the financial requirements of the General Fund, let alone catching-up and keeping-up with the maintenance of the City’s overall infrastructure demands, now is the appropriate time for the school district to re-establish its management and financial responsibilities of and for the Cubberley site.

The Cubberley Lease agreement, with its associated amendments, has accomplished what it set out to achieve more than 20 years ago. It has preserved valuable public space and kept it maintained and available for public use and
enjoyment. In addition, it has provided the PAUSD with more than $125 million in operating cash to date, and will provide approximately $150 million in total cash infusion by the end of the current lease arrangement in 2014, if it is not terminated or amended prior to this date. Finally, it has preserved these sites for the district for its future use as and when necessary (which is apparently the case now).

As we indicated earlier, the PAUSD’s financial situation has improved dramatically over the past 20 years: with the passage of major bond issues for reconstruction and improvements to school facilities, generous community support through contributions to Palo Alto PiE, passage of a sizable parcel tax, and the attainment/surpassing of Basic Aid status. The district is in a strong financial position to finance its operations without all of the subsidies provided by the City through the Cubberley Lease Agreement.

The residents and businesses, through the City government, have contributed significantly to the restoration and financial strength of the district. With strong reserve balances and more than three years of payments left on the current lease option, the district should have sufficient time and financial resources to plan for a smooth transition to clear ownership.

**Recommendations**

The City should, at a minimum, decline to renew the Cubberley and non-development portions of the Lease and Covenant Not to Develop agreement in order to free $6.1 million (net of rental revenue) annually (in current dollars) and avoid a substantial portion of the upkeep expenditures of $18.8 million (in current dollars) through 2036. Indeed, it would be mutually beneficial for the City and the school district to begin discussions now on any potential new lease agreements related to childcare facilities or other noneducational uses, the transition of the 27 acres back to school district management, and clarification on the final disposition of the City’s 8 acres.

The $6.1 million operating expense savings represents potential annual cash availability to the City that could be reassigned to several infrastructure problem-solving applications. *Example 1:* If these funds were committed to a new issue of certificates of participation, it could finance a 30-year, $100 million debt obligation, sufficient to finance a new Public Safety Building and replace two fire houses. *Example 2:* If the funds were used to rebuild an Infrastructure Reserve, it could enable forward funding of new or renovated City assets, accommodating unexpected infrastructure costs without disturbing the ability of the City to keep up routine infrastructure maintenance needs, enable the raising of existing infrastructure quality (e.g., condition of streets, parks, and sidewalks), or any number of other real property redevelopment initiatives (including repurposing other existing infrastructure assets).

Regarding the 8 acres of Cubberley that the City owns, it is important to evaluate the best use of the parcel in relation to the future needs of the community. Historically,
there has been a secondary school campus on these 8 acres and the adjoining 27 acres owned by the school district. This may not be the same use going forward. Indeed, the school district should have considerable flexibility in the design of a middle school and/or high school campus on its 27 acres, together with the school district’s adjacent property at the former Greendell school site and the property recently purchased at 525 San Antonio.

Therefore, we encourage the City to evaluate potential alternatives for the highest and best use of its 8 acres on Middlefield Road, including the possibility of developing a variety of “community center” resources that could provide services to residents. In the event this process does not result in an approved plan for new City infrastructure on its 8 acres, then it may be preferable for the City to pursue sale of the land, either to the school district or to another purchaser. The City is presently bound by the school district’s right-of-first-refusal until September 1, 2022. In any event, the City should request a clear indication from the school district concerning its interest in the 8 acres.

Until the final disposition of the Cubberley site is determined, the City should spend only the minimum amount of funds necessary to keep the site safe and operational for the tenants occupying it. Major expenditures in facilities upgrades will be wasted if a major portion of the site is later razed to construct a new educational facility at Cubberley.

Respectfully submitted,
Mark Harris
Ray Bacchetti
Jim Olstad
November 30, 2011

References
1. Lease and Covenant Not to Develop Between the City of Palo Alto and Palo Alto Unified School District dated September 1, 1989
2. Amendment #1 to the Lease and Covenant Not to Develop dated July 21, 1999
3. Amendment #2 to the Lease and Covenant Not to Develop dated August 13, 2002
4. Background on the Utility Users Tax prepared by Lanie Wheeler dated May 2010
5. City Manager’s Report #1866 (Direction on the Submission of Letter of Interest to Foothill College Regarding new Educational Center at Cubberley Community Center) and associated Power Point Presentation prepared by Deputy City Manager Steve Emslie for the Council Meeting of June 27, 2011
6. Various conversations and e-mail correspondence with City senior staff members Steve Emslie, Lalo Perez, Phil Bobel, and Joe Saccio regarding the Lease and Covenant Not to Develop from July through October 2011
7. Accuracy of the working paper information verified by City senior staff members Steve Emslie, Lalo Perez, and Phil Bobel

◆ ◆ ◆
School Needs Subcommittee Documents
PROBLEM STATEMENT
School Needs Subcommittee

1. PAUSD desires a 5 year lease - 2015-2019
2. If an alternative non-Cubberley middle school location is found, the Subcommittee believes PAUSD could accept a 10 year lease extending to 2025.
3. PAUSD is unable to give unrestricted rights to all or even portions of Cubberley beyond 2025 (2030 at most) because of the potential need for a new high school
4. PAUSD highly values the flexibility of keeping the entire 35 acres unencumbered for ultimate academic use. The Subcommittee believes the district would object to the city constructing facilities on the 8 acres it nominally owns that could not be used for future academic purposes.

Demographics
Palo Alto demographic projections over the coming 30 year (2015-2045) are highly uncertain. Major demographic influences include: California economy; Silicon Valley expansion/recession; ABAG housing requirements and City's response; PAUSD reputation attracting new students. Because these influences cannot be reliably projected beyond even 3-5 years, only the most general projections can be used beyond that. PAUSD's policy is to use a 2% long-term growth rate. Regardless whether that rate is most appropriate, the Subcommittee believes it is not realistic to expect PAUSD to use any other rate for its decision making.

High School
A 2% long term growth rate, along with existing policy for maximum high school size, implies a new high school likely will be needed between 2030 and 2040. Also under existing policies, a comprehensive high school likely would require the full 35 acres of Cubberley. Gunn and Paly have 50 and 44 acres respectively. While a high school designed in 2035 is unlikely to be identical to existing PAUSD high schools, it is not possible today to confirm that space needs would be significantly less nor to begin designing that future high school.

Middle School
In the shorter run, PAUSD anticipates needing to begin work on a new middle school as early as 2020. PAUSD is looking for a location other than Cubberley for a new middle school but unless and until one is found, the district must preserve the flexibility to use Cubberley. Jordan and JLS middle schools have 19 and 26 acres respectively. The location of the new middle school is expected to be confirmed by the end of the 2012-13 school year.

Elementary School
PAUSD is planning for a 13th elementary school by 2017. Current options being considered are Garland and Greendell/S25 San Antonio with no expected impact of the 38 acre Cubberley site. Plans will be firmed up during the 2012-13 school year.

Future Cubberley building density
Some new PAUSD facilities are 2 story structures. However, if and when PAUSD takes over the current Cubberley site, there is expected to be a strong economic incentive to retain much of the existing single story structures and layout rather than scraping the site and designing a new layout from scratch.

Joint use community facilities
PAUSD’s 2008 Measure A funds an extensive list of district facility needs. As of September, 2012, the district has committed 52% of the bond's $358M. Overall, Measure A funds the district's construction needs through approximately 2020. PAUSD would entertain Cubberley joint use concepts from the city but does not have "needs" that it would currently place on the table.

Facilities Maintenance
PAUSD administration believes the existing Cubberley structures are generally suitable for PAUSD use in their current form and desires them not to significantly deteriorate prior to the site being turned over to the district in the future. The Subcommittee believes the substantial uncertainty in turnover date (2030-2040?) and uncertainty in whether/how the facilities would actually be reused will make it difficult for the district to justify jointly funding maintenance.
## Palo Alto Unified School District Property

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<th>Site</th>
<th>Street Address</th>
<th>City, State, Zip</th>
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<th>Grade Level</th>
<th>Enrollment</th>
<th>Students per Acre</th>
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**Subtotal** | **82.1** | **5649** | **73** |

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<th>Site</th>
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**Subtotal** | **51.8** | **2679** | **52** |

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**Subtotal** | **93.9** | **3749** | **40** |

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**Total** | **275.0** | | |
Community Needs Subcommittee Documents
What’s Special About the Cubberley Community Center?

Cubberley provides an irreplaceable public, comprehensive community facility that reflects our community values.

1. Cubberley is our last large (35 acres), undeveloped (non-parkland), publicly owned space.

2. Palo Alto has wisely chosen to disperse our public buildings to make offerings walkable, bikeable, and transit-oriented, a City of Palo Alto Land Use & Community Services policy as laid out in the Comprehensive Plan. Cubberley in the south and Lucie Stern in the north offer many classes and programs meeting this goal; youth and teen programs at Ventura and Mitchell Park add even more balance for many non-drivers. (Note that the new Mitchell Park community center simply replaces its original community spaces).

3. The Cubberley site provides a unique opportunity for PAUSD and the City to plan a creative co-location of community services and school(s) that could work together to make this valuable public property a treasured part of our community for all ages.

4. It is essential to appreciate what is provided now at Cubberley in order to judge what can best be offered going forward. Staff has recently surveyed current tenants, and the Community Needs Subcommittee has interviewed many of the following significant Cubberley groups.

• **The Arts:** 22 Artists in Residence currently have studios. Co-location yields benefits to community and to artists; this model is being copied in locations around the world. Three Resident Dance Programs have studios plus several small companies share spaces, providing a complementary community and a variety of classes for all ages and abilities. Music groups include Palo Alto Chamber Orchestra, Peninsula Women’s Chorus, Peninsula Piano School, Palo Alto Philharmonic, and El Camino Youth Symphony. Theater programs and camps round out the Cubberley arts programs.

• **Sports & Recreation:** Outdoor Sports – Four softball fields and four soccer fields allow spring, summer, and fall youth leagues to practice and play Monday - Saturday. Adults use the fields heavily on Sundays. Tennis courts are used heavily at all hours. The football field and track are used regularly for soccer, football and jogging. Indoor Sports and Fitness – Foothill and the City offer a wide array of sports and fitness classes for all ages and abilities. Foothill is not building a new gymnasium at its new location and would like to maintain a presence at Cubberley after moving to its new site.

• **Senior Programs:** Avenidas is interested in increasing opportunities for seniors and combining Senior Wellness programs with the existing Stroke and Cardiovascular programs as well as Senior Friendship Day and other senior social activities.

• **Education:** Preschools and after-school care – Such care provides for early learning and enables parents to work, confident that their children are thriving. Private schools, tutoring and continuing education -- Foothill College, the City, and the School District all offer classes, many of which are adult education classes.

• **Community Organizations:** Friends of Palo Alto Library, Wildlife Rescue, spiritual groups and others. Rooms can be rented for meetings, retreats, and special occasions.
CUBBERLEY FACILITIES AVAILABLE FOR RENT

http://www.cityofpaloalto.org/civicax/filebank/documents/30337

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<td>M-4 Activity Room</td>
<td>1900</td>
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LUCIE STERN COMMUNITY CENTER

<table>
<thead>
<tr>
<th>Space</th>
<th>Size</th>
<th>Resident Price</th>
<th>Non-resident Price</th>
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<tbody>
<tr>
<td>Stern Ballroom</td>
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<td>Community Room</td>
<td>45 x 25 feet</td>
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<tr>
<td>Fireside Room</td>
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<tr>
<td>Outdoor Patio</td>
<td>70 x 90 feet</td>
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<td>Kitchen</td>
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NEW MITCHELL PARK LIBRARY & COMMUNITY CENTER

Community Center Portion

<table>
<thead>
<tr>
<th>Space</th>
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<tr>
<td>Tech Lab</td>
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<tr>
<td>Matadero Room (Office Classroom)</td>
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<tr>
<td>Oak Room (CBO Classroom)</td>
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<td>Adobe Room (Art/ECR Classroom)</td>
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<tr>
<td>El Palo Alto Room (Multipurpose room)</td>
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<td>&quot;The Drop&quot; (Teen Center/Game Room)</td>
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Library Portion

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<tr>
<th>Space</th>
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<tbody>
<tr>
<td>Midtown Room (Program room)</td>
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<td>Ventura Room (Computer room)</td>
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<tr>
<td>Barron Park Room (Group study room)</td>
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<td>Palo Verde Room (Group study room)</td>
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<td>Fairmeadow Room (Group study room)</td>
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<td>Greenmeadow Room (Group study room)</td>
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<tr>
<td>&quot;Teen Zone&quot;</td>
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VENTURA COMMUNITY CENTER

Multi-purpose event room, with kitchen, suitable for rental
### ART CENTER

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<tr>
<th>Space</th>
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<td>Auditorium</td>
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<td>Courtyard</td>
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<td>Kitchen</td>
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<td>Meeting Room</td>
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<td>Sculpture Garden</td>
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<tr>
<td>Lobby</td>
<td>77</td>
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Cubberley Master Plan 1991  
Palo Alto Community Centers

Cubberley Community Center
4000 Middlefield Road, Palo Alto. Operated by the City of Palo Alto since 1990, the center includes space for community meetings, seminars, social events, dances, theater performances, music rehearsals and athletic events. Outdoor space includes tennis courts, soccer, softball and football fields.
E-mail: cubberlkey@cityofpaloalto.org.
Hours: Mon-Thu 8:30 a.m.-6:30 p.m.; Fri 8:30 a.m.-5 p.m.

Lucie Stern Community Center
1305 Middlefield Road, Palo Alto. Designed by Birge Clark and built in 1934, this Spanish Mediterranean-style complex is home to the City of Palo Alto’s Recreation Department and two theaters. Rooms are available for rent for meetings, weddings, receptions and parties.
Hours: Mon-Fri 8:30 a.m.-5 p.m.

Mitchell Park Community Center
3800 Middlefield Road, Palo Alto. Closed for construction through 2012.

Ventura Community Center
3990 Ventura Court, Palo Alto. Home to Palo Alto Community Child Care, as well as Sojourner Truth Infant-Toddler Program and the Palo Alto Family YMCA's Ventura Activity Center (during school year) and Heffalump and Country Day School.
Hours: Mon-Fri 8 a.m.-5 p.m.

Oshman Family JCC - Taube Koret Campus for Jewish Life
3921 Fabian Way, Palo Alto. The OFJCC is a multi-use facility with programs and services for all ages and for singles and families. Fitness center, double-court gymnasium, indoor and outdoor pools, preschool, meeting rooms and a Cultural Arts Hall.

Chinese Community Center of the Peninsula
470 Anton Court, Palo Alto. Activities located at Cubberley Community Center, 4000 Middlefield Road. A service-oriented, nonprofit center that provides senior community-service work, family-oriented services, and information and referral services since 1968. English and Cantonese. Co-sponsors activities with City of Palo Alto Recreation Department.
E-mail: info@chinesecommunitycenter.com

Source:
http://www.paloaltoonline.com/cgi/pao_search_fab.cgi?Section=resources&Category=community%20centers
Palo Alto Online Database last updated: Monday, August 20, 2012.
### Additional Music & Art Resources

**Art For Well Beings**
2800 West Bayshore PA  [www.artforwellbeings.org](http://www.artforwellbeings.org)
Art for Well Beings (AFWB) offers art classes especially welcoming people with special needs. AFWB is open to the public. Drop-in or sessions are available. All materials provided. Please call to register or visit website for more information.

**Art with Emily**
402 El Verano Ave. PA  [www.artwithemily.com](http://www.artwithemily.com)
Emily Young teaches mixed-media, multi-cultural art lessons for children at her fully equipped studio in Palo Alto. Individual lessons or small group classes available.

**Art Works Studio**
595 Lincoln Ave. PA  [www.artworkspaloalto.com](http://www.artworkspaloalto.com)
Art Works Studio offers a variety of fine-art classes for kids, as well as summer camps.

**Children's Music Workshops**
P.O. Box 60756, PA  [www.Alisonsmusiclessons.com](http://www.Alisonsmusiclessons.com)

**International School of the Peninsula (ISTP)**
151 Laura Lane, PA  [www.istp.org](http://www.istp.org)
Join ISTP for after-school programs for preschool, elementary and middle-school students. Classes include French cooking, Asian cooking, chess, science, robotics, Chinese dance, art and craft, gymnastics, soccer and multi-sports. For a complete list of classes, visit the Website.

**Midpeninsula Community Media Center**
900 San Antonio, PA  [www.communitymediacenter.net](http://www.communitymediacenter.net)
The Media Center offers classes every month in a wide range of media arts, including publishing media on the Web, pod casting, digital editing, field production, TV studio production, Photoshop for photographers, citizen journalism, and autobiographical digital stories. One-on-one tutoring is also available.

**Music with Toby**
[www.tobybranz.com](http://www.tobybranz.com)
Toby Branz offers private voice and violin lessons in Palo Alto. She received her master's degree from the San Francisco Conservatory of Music in 2010 and a postgraduate diploma in 2011.

**New Mozart School of Music**
305 N. California Ave., PA  [info@newmozartschool.com](mailto:info@newmozartschool.com)
New Mozart provides private lessons on all instruments for all ages and early-childhood music classes for children 2-7 years of age.

**Opus1 Music Studio**
2800 W Bayshore Road, PA  [www.musicopus1.com](http://www.musicopus1.com)
Opus1 Music Studio is offering private and group music lessons for all kinds of instruments to aged 2 and up. Beginners to advanced level.

**Pacific Art League**
688 Ramona St., PA  [www.pacificartleague.org](http://www.pacificartleague.org)
Art classes and workshops by qualified, experienced instructors for students from beginners to advanced and even non-artists. Classes in collage, oil painting, portraits and sketching, life drawing, acrylic or watercolor and brush painting. Sculpture. Registration is ongoing.

**Palo Alto Art Center**
1313 Newell Road, PA  [www.cityofpaloalto.org/enjoy](http://www.cityofpaloalto.org/enjoy)
Classes and workshops for children and adults in ceramics, painting, drawing, jewelry, book arts, printmaking, collage and more. Register online or stop by the Art Center for a class brochure.
## Cubberley Community Center
### Rental Room Users

<table>
<thead>
<tr>
<th>Tenants</th>
<th>Room</th>
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<tbody>
<tr>
<td>Acme Education Center</td>
<td>L1</td>
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<tr>
<td>Artists Studios (23)</td>
<td>E,F,U</td>
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<td>California Law Revision</td>
<td>D2</td>
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<tr>
<td>Cardiac Therapy</td>
<td>G8</td>
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<tr>
<td>Children’s Pre-School Center</td>
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<tr>
<td>Dance Connection</td>
<td>L5</td>
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<tr>
<td>Dance Visions</td>
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<td>Foothill College Administration</td>
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<td>Friends of the PA Library - FOPAL</td>
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<tr>
<td>Good Neighbor Montessori</td>
<td>K3</td>
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<tr>
<td>Hua Kuang Chinese Reading</td>
<td>H4</td>
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<tr>
<td>Mitchell Park Library (Temp)</td>
<td>Aud</td>
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<td>Office of Emergency Services</td>
<td>D4</td>
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<td>Wildlife Rescue</td>
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<tr>
<td>Zohar School of Dance</td>
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<table>
<thead>
<tr>
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<tr>
<td>AYSO Soccer</td>
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<td>PAV</td>
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<tr>
<td>Basketball/Volleyball Camps</td>
<td>Gyms</td>
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<tr>
<td>Keys School</td>
<td>Gym</td>
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<tr>
<td>Palo Alto Table Tennis Club</td>
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<td>Senior Table Tennis</td>
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<tr>
<td>Palo Alto Tennis Club</td>
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<tr>
<td>SVK Self Defense</td>
<td>G4</td>
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<tr>
<td>Taijiquan Tutelage</td>
<td>M4</td>
</tr>
<tr>
<td>Traditional Wushu Association</td>
<td>Aud</td>
</tr>
<tr>
<td>YMCA Basketball League</td>
<td>Gyms</td>
</tr>
<tr>
<td>Special Olympics</td>
<td>Gyms</td>
</tr>
<tr>
<td>National Junior Basketball</td>
<td>Gyms</td>
</tr>
<tr>
<td>Palo Alto Midnight</td>
<td>Gyms</td>
</tr>
<tr>
<td>Performance Science Training Institute</td>
<td>G4</td>
</tr>
<tr>
<td>Palo Alto Elite Volleyball Club</td>
<td>Gyms</td>
</tr>
</tbody>
</table>

### Dance

| Academy of Danse Libre                       | G6   |
| Belly Rumba with Sol                         | G6   |
| Congolese Dance with Regine                  | G6   |
| Friday Night Ballroom Dancers                | Pav  |
| Red Thistle Dancers                          | G6   |
| Saturday Night Ballroom Dancers-Zumba        | G4   |
| Shiva Murugan Temple                         | Theatre|
| Shri Krupa Dance Company                     | Theatre|

### Educational

| Bay Area Arabic School                       | B2   |
| Dutch School                                 | A3   |
| Grossman Academy                             | A2   |
| Kumon Math and Reading                       | A7   |
| Museo Italo Americano                        | A3,6 |
| PAUSD Adult School                           | A2   |
| PAUSD Post Graduate program                  | A2   |
| PA Art Center                                | H6   |

### Music

| El Camino Youth Symphony                     | M4   |
| Foothill Jazz                                | M2   |
| Palo Alto Chamber Orchestra                  | M1/Theatre|
| Palo Alto Philharmonic                      | H1/Theatre|
| Peninsula Women’s Chorus                     | M2   |
| Peninsula Piano School                       | M7   |
| Foothill Symphonic Wings                     | Theatre|
| Heritage Music Festival                      | Theatre|

### Other

| BA Amphibian/Reptile Society                 | H6   |
| Bay Area TheaterSports                      | H1, H6|
| Christ Temple Church                        | H1   |
| Liga Hispanoamericana de Futbol              | A2   |
| National Traffic Safety Institute            | B3   |
| Palo Alto Mediation                         | Any  |
| Senior Friendship Day                        | M4   |
| Vineyard Christian Fellowship                | Theatre, A & M rooms|
| Commonwealth Club                            | Theatre|

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| Red Thistle Dancers                          | G6   |
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| Shri Krupa Dance Company                     | Theatre|

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| Grossman Academy                             | A2   |
| Kumon Math and Reading                       | A7   |
| Museo Italo Americano                        | A3,6 |
| PAUSD Adult School                           | A2   |
| PAUSD Post Graduate program                  | A2   |
| PA Art Center                                | H6   |

### Music

| El Camino Youth Symphony                     | M4   |
| Foothill Jazz                                | M2   |
| Palo Alto Chamber Orchestra                  | M1/Theatre|
| Palo Alto Philharmonic                      | H1/Theatre|
| Peninsula Women’s Chorus                     | M2   |
| Peninsula Piano School                       | M7   |
| Foothill Symphonic Wings                     | Theatre|
| Heritage Music Festival                      | Theatre|

### Other

| BA Amphibian/Reptile Society                 | H6   |
| Bay Area TheaterSports                      | H1, H6|
| Christ Temple Church                        | H1   |
| Liga Hispanoamericana de Futbol              | A2   |
| National Traffic Safety Institute            | B3   |
| Palo Alto Mediation                         | Any  |
| Senior Friendship Day                        | M4   |
| Vineyard Christian Fellowship                | Theatre, A & M rooms|
| Commonwealth Club                            | Theatre|
### WHO PROVIDES WHAT SERVICES IN PALO ALTO

**DRAFT 10-03-12**

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>ART CENTER</th>
<th>CUBBERLEY</th>
<th>LUCIE STERN</th>
<th>VENTURA</th>
<th>AVENIDAS</th>
<th>PAUSD ADULT ED</th>
<th>MITCHELL PARK</th>
<th>JCC</th>
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<td>Computer Skills/Lab</td>
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** Rinconada Pool


Oshman Family JCC - Taube Koret Campus for Jewish Life, 3921 Fabian Way [www.paloaltojcc.org](http://www.paloaltojcc.org/)

Private Music & Art Classes

Art For Well Beings
2800 West Bayshore Road, Palo Alto
artforwellbeings.org
Offers art classes especially welcoming people with special needs. AFWB is open to the public.

Art with Emily
402 El Verano Ave., Palo Alto
www.artwithemily.com
Mixed-media, multi-cultural art lessons for children. Individual lessons or small group classes available.

Art Works Studio
595 Lincoln Ave., Palo Alto
www.artworkspaloalto.com
Offers a variety of fine-art classes for kids, as well as summer camps.

Children’s Music Workshops
P.O. Box 60756, Palo Alto
www.Alisonsmusiclessons.com
Kids music classes and private lessons for guitar, piano and voice. Music for special-needs children too.

Community School of Music and Arts at Finn Center
230 San Antonio Circle, Mountain View
www.arts4all.org
Classes year-round in music, visual and digital arts for ages 14 months to adult. Vacation and summer camps, one- and two-day arts workshops offered throughout the year. Private lessons also offered.

International School of the Peninsula (ISTP)
151 Laura Lane, Palo Alto
www.istp.org
After-school programs for preschool, elementary and middle-school students. Classes include French cooking, Asian cooking, chess, science, robotics, Chinese dance, art and craft, gymnastics, soccer and multi-sports.

Kindermusik with Wendy
Mountain View
www.kindermusik.com
Group music classes for children ages birth to 7 and their caregivers. All classes include singing, instrument play, movement, musical games, and home materials, and aim to develop the whole child through music.

Lingling Yang Violin Studio
Palo Alto
linglingviolin.blogspot.com
Private violin instructions to children 7 and up and adults for all levels.
Manzana Music School
Barron Park Neighborhood, private home, Palo Alto
www.manzanamusicschool.com/
Private and group lessons for children and adults on guitar, violin, banjo, mandolin, fiddle, vocal, arranging, and music theory.

Midpeninsula Community Media Center
900 San Antonio Road, Palo Alto
www.communitymediacenter.net
Classes every month in a wide range of media arts, including publishing media on the Web, pod casting, digital editing, field production, TV studio production, Photoshop for photographers, citizen journalism, and autobiographical digital stories.

Mountain View-Los Altos Adult School
333 Moffett Blvd., Mountain View
www.mvlaae.net
Offering: Beading, ceramics, chorus, digital photography, drawing, guitar, Ikebana, orchestra and painting.

Music with Toby
www.tobybranz.com
Private voice and violin lessons in Palo Alto.

Music Within Us
2483 Old Middlefield Way, Suite 150, Mountain View
www.themusicwithinus.com
Classes, workshops, and individual sessions using techniques drawn from the fields of life coaching, mindfulness-based meditation, yoga, deliberate practice, group facilitation, sound healing and music improvisation.

New Mozart School of Music
305 N. California Ave., Palo Alto
www.newmozartschool.com/
Private lessons on all instruments for all ages and early-childhood music classes for children 2-7 years of age.

Opus1 Music Studio
2800 W Bayshore Road, Palo Alto
www.musicopus1.com
Private and group music lessons for all kinds of instruments to aged 2 and up. Beginners to advanced level.

Pacific Art League
688 Ramona St., Palo Alto
www.pacificartleague.org
Classes in collage, oil painting, portraits and sketching, life drawing, acrylic or watercolor & brush painting, sculpture.
Private Dance Classes

**Bayer Ballet Academy**
2028 Old Middlefield Way, Mountain View
www.bayerballetacademy.com
Classical Russian ballet.

**Beaudoin's School of Dance**
464 Colorado Ave., Palo Alto
www.Beaudoin's-Studio.com
Tap, ballet, ballroom and jazz dance classes available for children and adults. Special classes for boys, seniors.

**Brazilian Dance**
Lucie Stern Community Center Ballroom, Palo Alto
www.cityofpaloalto.org/enjoy
Brazilian dance for ages 16-99

**Center for Movement Education**
www.movement-education.org
CMER offers both introductory one-day workshops to explore what dance/movement therapy is about, as well as a selection of comprehensive Alternate Route Training Courses for professional development in becoming a dance/movement therapist.

**Dance Connection**
4000 Middlefield Road, L-5, Palo Alto (Cubberley)
www.danceconnectionpaloalto.com
Graded classes for preschool to adult with a variety of programs to meet every dancer's needs. Ballet, jazz, tap, hip hop, boys program, lyrical, Pilates and combination classes are available for beginning to advanced levels.

**DanceVisions**
4000 Middlefield Road, L-3, Palo Alto (Cubberley)
www.dancevisions.org
Nonprofit community dance center, offers classes from age 3 to adult. Classes range from modern to hip hop, lyrical, Pilates, jazz, ballet, and contact improvisation, as well as providing a performance showcase.

**Uforia Studios**
819 Ramona St., Palo Alto
www.uforiastudios.com
Specializes in dance (Zumba, Hip Hop, Bollywood, Hula Hooping).

**Zohar Dance Company**
4000 Middlefield Road, L-4, Palo Alto (Cubberley)
www.zohardance.org
Offers classes to adults in jazz, ballet and modern dance.
Neighboring Community Centers

Sunnyvale Community Centers
http://sunnyvale.ca.gov/Departments/CommunityServices/CommunityCenters.aspx

Community Center, located at 550 East Remington Drive

The Sunnyvale Community Center is a unique recreation complex which includes a Creative Arts Center, Performing Arts Center, Indoor Sports Center, general Recreation Center and an Arboretum Complex.

Use of the Sunnyvale Community Center is for City-sponsored community recreation activities in which anyone may participate. However, there are also accommodations to fit almost every need by private groups from small meeting rooms that can be used by as few as 15 people, to state-of-the-art, Internet-ready conference rooms that can seat 300 guests or clients. A large meeting could be held in the 200-seat theatre, a team building session in the Indoor Sports Center or a wedding reception in one of the fully equipped banquet facilities.

The Sunnyvale Community Center boasts a 200-seat theater, which has a fully rigged and lighted stage that can accommodate plays, recitals and concerts. The theatre hosts two resident theatre companies: California Theatre Center (adult professional theatre company), and Sunnyvale Community Players (volunteer community theater organization).

Programs and Activities

Senior Center
The Community Center campus also includes the brand-new Sunnyvale Senior Center, which hosts educational, recreational and cultural activities for adults 50 years and older. The Senior Center also includes several rooms, including a large ballroom and a professional kitchen that can be rented for large events.

After School Recreation Programs
The majority of after-school programs are conducted at elementary and middle school sites in Sunnyvale or at the Sunnyvale Community Center.

Summer Recreation Programs
The City of Sunnyvale also offers a wide variety of recreation, sports, arts and enrichment activities and camps for children and teens during the summer months. For middle school and high school-age teens, there is a summer recreation volunteer program designed to provide young people with the opportunity to develop leadership and job skills. Swim classes and drop-in swim at local pools are available for children and adults.

Activities for Adults
Year-round programs for adults range from adult sports leagues and drop-in gym programs to pottery and other visual and performing arts classes.

Therapeutic Recreation Program
The Therapeutic Recreation Program promotes the development of new leisure skills, increases self-esteem and social skills. The program provides information and referral services and participates in cooperative recreational programs with other cities for special events. We provide social recreation programs for individuals with all types of disabilities and all levels of functioning.

Greenbelt Stroll
Hike, swim, play tennis, picnic in the park -- enjoy 2.7 mile-long stretch of the John W. Christian Greenbelt.

Columbia Neighborhood Center at 785 Morse Avenue 3.5 miles from the main Community Center

The Columbia Neighborhood Center (CNC) is located at 785 Morse Avenue in Sunnyvale (not far from Fair Oaks exit from 101) 3.5 miles away from the main Sunnyvale Community Center. It was developed to provide social, recreational and educational services for north Sunnyvale residents. This collaborative project between the City of Sunnyvale, Sunnyvale Elementary School District, Advanced Micro Devices, Sunnyvale residents, and numerous community agencies was formed in the fall of 1994, concurrent with the opening of Columbia Middle School. The CNC, located on a 25-acre site, includes the AMD Sports and Service Center building, Columbia Middle School, and the Sunnyvale Preschool Center. The CNC is open to all community residents and provides a variety of services and activities year round, seven days a week, including evenings.
Cupertino


Quinlan Community Center located at 10185 Stelling Road, .3 miles from the Sports Center

Built in 1989 and opened to the public in 1990, this 27,000 square foot facility has won numerous awards for its innovative design. It is centrally located on Stelling Road near Stevens Creek Boulevard and enjoys views of the Cupertino foothills and beautiful Memorial Park right out its back door.

The Quinlan Community Center is home to the City of Cupertino's Parks & Recreation Department, the Cupertino Historical Museum, as well as serving as a sub-station for the Sheriff's Department. The art of the Cupertino Fine Arts League lines the walls throughout the building.

The Quinlan Community Center is a multi-use building, offering classrooms for Parks & Recreation classes, as well as a variety of other rooms available to rent for your business or personal needs. The Cupertino Room features a full caterer's kitchen and can accommodate up to 275 people in a banquet format, or up to 300 people for an event with theater-style seating, making it an ideal spot for weddings, receptions, corporate seminars or meetings. The Social Room can accommodate up to 80 people, ideal for smaller gatherings like birthday parties, baby showers or even an employee retreat. The attached patio provides a quiet spot to relax and enjoy a bit of fresh air or to slip out for a stroll around the park.

Community Hall located at 10350 Torre Avenue 1.2 miles from the Sports Center

Community Hall will wow you and your clients with its beautiful cherrywood paneling, stylish seating, and theatrical lighting. Elegant, ascending windows stretch toward the ceiling and fill the facility with light. Double glass doors on the north and south sides of the building open onto stately brick patio spaces.

The facility also offers state of the art audio/visual equipment for all your technological needs. Two six-foot by eight-foot mounted screens present the opportunity for dynamic presentations, certain to make an impression. Laptop connections are available throughout. A plasma flat screen in the elegant reception lobby adds ambiance to your event while keeping patrons informed. Worried about technology set-up and operation? Our staff assistants are present throughout your event to help.

Community Hall can also be transformed into an elegant banquet facility for wedding receptions or parties. Tables and chairs can be arranged in a variety of ways, one of which is sure to be perfect for your event.

Cupertino Sports Center located at 21111 Stevens Creek Blvd

The Cupertino Sports Center features 17 tennis courts, a fitness center with LifeFitness and Star Trac strength training equipment, LifeFitness and Hoist free weights, LifeFitness and Star Trac bikes and treadmills, LifeFitness ellipticals, Techno Gym Waves, Precor AMT’s, 2 racquetball courts, complete locker room and child watch facilities. The resident tennis professional offers private and group lessons, pro shop and Friday Night social drop-in tennis programs.

Cupertino Senior Center located at 21251 Stevens Creek Blvd 1 block from Sports Center

The Cupertino Senior Center is the perfect place to meet people and enrich your life. We are Cupertino’s hub for activities, information and services that are specifically geared toward active adults 50 years and older.

Cupertino Teen Center located at 21111 Stevens Creek Blvd

The Teen Center is a new facility with all of the latest gaming equipment and cool features that teens enjoy. Take your pick from a game of pool, foosball, air hockey, pin ball, Xbox 360, Wii, PSII, five computers, board games, two big screen TV's, movies, and more! The Teen Center also has a kitchenette which includes: refrigerator/freezer, microwave, toaster oven, two (2) large tables, and fifteen (15) chairs. It can be rented for parties or special occasions for $200 / 3 hours.
Saratoga

http://www.saratoga.ca.us/cityhall/rec/facility_and_park_reservations/facilities/cscenter.asp

Joan Pisani Community Center located at 19655 Allendale Ave

The perfect location for your next gathering at affordable prices. We can accommodate 15 to 300 guests for your wedding, reception, party or meeting. Garden patio, large multipurpose rooms and kitchen facilities are available one year in advance. Non profit groups receive 50% discount, Residents of Saratoga receive a 10% discount.

Preschool, Youth Art & Enrichment

- Saratoga Community Preschool, My First Art Class
- Youth Oil Painting: Public Speaking, Pre-public Speaking
- Music Together, Vocal Performance, Magic, Clay, Piano Games, Beginning Guitar

Youth & Teen Health & Fitness

- Archery, Jr. Rock Climbing, Fencing, Squash, Shotokan Karate, Gymnastics, Just 4 Kicks Soccer, Lil’ Sluggers, Deep Cliff Golf, Atherton Lacrosse, Ice Skating, Hockey, Tennis
- Dance Force, April Paye
- Karate, Fun Fun Fundamentals
- Saratoga School of Dance: Ballet, Tiny Tots Dance, Ballet/Tap, Boys Tap Dance, Tap

Teen & Community Programs

- Driver’s Ed, CPR, Youth Oil Painting, Beg. Guitar

Adult Health & Fitness

- Jacki Sorensen Aerobics, Hula Hoop, Jazzercise, Baby Boomers Fitness, Ergo Fitness Workshop
- Deep Cliff Golf classes, Adult Tennis
- Cook Your Buns, Eating for Vibrant Health
- Saratoga School of Dance: Tap, Latinizmo, Folk Dancing, Zumba
- Ballroom, African Dance, Belly Dancing, Ladies Latin

Adult Arts & Enrichment

- Ikebana, Adult Oil Painting, Beading
- Landscaping Design, Chocolate Truffles, Free Your Voice, Take a Tour of Italy, Chinese Painting

Saratoga Senior Center, adjacent to the Saratoga Community Center.

The Senior Center serves as a vital resource for seniors and older adults in the Saratoga community, offering over 35 activities and classes, as well as other services, trips, and special events, programs and activities. Wellness screenings, Speakers, the Opportunity to build friendships, as well as a caregivers’ support group.

Warner Hutton House, located at 13777-A Fruitvale Ave, around the corner from Community Center

This charming & romantic 1896 Queen Anne house includes a garden patio with an inviting gazebo. It is the ultimate setting for your small, intimate garden wedding, and is perfect for small parties, elegant socials or business retreats. The house and garden have a 30 to 80 person capacity. Includes full service kitchen.

Saratoga Prospect Center, located at 19848 Prospect Road, 3.1 miles from Community Center

The Saratoga Prospect Center (formerly the North Campus) offers an attractive site for business meetings, wedding receptions, parties, and seminars. Facility Rental Discounts (one discount allowed per rental): Non profit groups receive 50% discount.

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<th>Grace Building Main Room</th>
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includes kitchenette facility

includes kitchenette facility

includes kitchenette facility

Full service catering kitchen

Hardwood dance floor

Mountain View
Community Center located at 201 S Rengstorff Ave in Rengstorff Park
http://www.ci.mtnview.ca.us/city_hall/comm_services/recreation_programs_and_services/facilities_and_reservations/reservations.asp

When the Community Center is not being used for Recreation classes* and City events, it is available for private rental. Our building is the perfect location and facility for that special party or meeting.

Located in Rengstorff Park, the Center provides a relaxing setting along with professional, friendly service. Trees, turf and beautiful plants abound in the park and facilities. You will find a skate park, pool, BBQ areas, tennis courts, playgrounds, and a natural grass play area in this beautiful park.

- Rooms for rent include the Auditorium (capacity 200), Lower Social Hall (capacity 100), Rooms 2 and 3 (capacities 40and 60)
- Preschool programs
- Classes are for Tot & Preschool, Youth & Teen, Adults & Seniors

Gym Rentals – shared facilities with open middle schools

The City of Mountain View has two great gymnasium facilities that are available for rent Monday-Friday, 5:30 pm to 10:00 pm and 8:30 am to 4:00 pm on weekends. Both gymnasiums are divided into two sides/courts (half gym) for $50R/$63NR an hour, or one full gym for $111R/$139NR an hour and are ideal for activities such as basketball or volleyball. The auxiliary rooms are great for many activities including dance and exercise classes. The auxiliary room is available for $121R/$126 an hour.

- Mountain View Sports Pavilion at 1185 Castro St, 1.9 miles from Community Center
- Whisman Sports Center at1500 Middlefield Rd, 1.4 miles from Community Center

Senior Center located at 266 Escuela Avenue, .7 miles from Community Center

Game Room -- Billiards tables, table tennis, puzzles and more!

Classes & Workshops -- Classes include exercise, arts & crafts, dance, music and enrichment! Also, sign up for free workshops on various topics.

Special Events -- Special events year-round for all to enjoy including a Summer Picnic and Holiday Gala!

Exercise Room -- Equipped with treadmills, elliptical trainers, free weights, stationary bikes and more!

Social Services -- Blood pressure and Alzheimer's screenings, legal assistance and health insurance counseling are offered.

Travel Program -- Expand horizons with trips both locally and further afield.

Mountain View Center for the Performing Arts, 500 Castro Street 1.9 miles from the Community Center
http://www.ci.mtnview.ca.us/mvcpa/mvcpa.html

Intelligently designed with state-of-the-art technology, the Center is perfectly suited for its stated goal—to host a comprehensive performing arts program for a culturally diverse community.

Historic Adobe Building, located at 157 Moffett Boulevard 1.5 miles from Community Center

The restored Adobe Building, located at 157 Moffett Boulevard, maintains its rustic charm while offering modern conveniences to make any event one to remember. It is available for a variety of events ranging from weddings to corporate meetings and boasts the following amenities.

The Rengstorff House and gardens in Shoreline Park are available for rental daily except during our public hours, (Sunday, Tuesday and Wednesday, 11 a.m. to 5 p.m). Included in the rental fee is the use of the entire first floor of this historic Victorian home. The maximum capacity of the house using only the indoor areas is 49 people. Using both the indoor and outdoor areas, the house and grounds can accommodate up to 150 guests and is wheelchair-accessible. The gracious dining room and three lovely parlors, all decorated with classic period décor, open up to brick patios surrounded by manicured lawns, blooming flowers and natural areas.

Menlo Park
Burgess Park, 700 Alma St

Originally a part of the Dibble Hospital Facilities and purchased in 1948, Burgess Park is one of the first City-owned recreation areas in Menlo Park.

Arrillaga Family Recreation Center adjacent to Burgess Park

The picturesque Arrillaga Recreation Center offers room rentals for both residents and non-residents. This center, complete with full kitchen and ample parking, presents a relaxing setting and is surrounded by a park. Arrillaga Family Recreation Center offers seven rooms for rent of various sizes (680 square feet to 2,378 square feet) including 2 dance studios to accommodate a variety of activities from weddings to birthdays and even corporate events.

Arrillaga Family Gymnasium adjacent to Burgess Park

Facilities include basketball, volleyball, and badminton courts for drop-in, youth, and adult leagues. The gym is rented 6 mornings per week for health and fitness classes.

Arrillaga Family Gymnastics Center, 501 Laurel Street adjacent to Burgess Park

10,000 sq ft gymnastics room, multipurpose room and exercise room. Menlo Park Gymnastics currently has a girl’s competitive team, which has been very successful in competition. The new facility has the space and equipment to develop a boy’s competitive program and gives the City the ability to host competitions and demonstrations. Future program plans include classes in Rhythmic Gymnastics, Circus skills and cheerleading. In addition to the developmental gymnastics equipment, the new gym has an 1800 sq ft pre-school area with an adjacent toddler restroom.

Onetta Harris Community Center, 100 Terminal Ave by the Belle Haven Pool, 3.6 miles from Burgess Park

The OHCC offers rentals for Menlo Park residents and non-residents. The center features a multi-purpose room, kitchen, gymnasium, computer lab, fitness center, conference room, pre-school room, and two classrooms. Additionally, the OHCC is home to various City of Menlo Park programs and special events which have included, Multi-Cultural Days, Teen Dances, Camp OHCC, Game Nights, Career Fairs, Holiday Celebrations, Community Classes, and Meetings.

Senior Center

The Menlo Park Senior Center located at 100 Terminal Ave, Menlo Park, CA 94025 next to the Belle Haven Pool, Onetta Harris Community Center, Beechwood School, and the newly renovated Kelly Park. The Senior Center offers rentals for Menlo Park residents and non-residents. The center features a Lobby, Ballroom, Community Room, Imagination Room, Computer Lab, and Poolside Patio. Additionally, the Senior Center is home to various programs and special events which have included Luncheons, Receptions, BBQs, Picnics, and Fiestas.

Teen Services

Menlo Park Community Services Department has programs geared for teens. All programs are set up so teens will be with others of the same age and same grade. We offer a series of programs focusing on everything from sports and adventure, to education and career development.
Shari Furman set up a very informative visit to the Sunnyvale Senior Center, which is a stand-alone building but part of a larger community center complex. Lead by Gerard, who had also worked in San Jose and San Carlos. Open to 50 and older. 20-25% of users are nonresidents. The building is a Senior Center 8-6 M-F and 10-2 on weekends, but multi-use on evenings and weekends. For example yoga classes may be held there in evening. 23000 sq feet, one story

A main theme is that the nature of senior services has shifted, with the trend for more exercise/wellness classes. On space, preference is for flexible rooms that can have different purposes

2800 paid members. Annual membership fees: Basic is $25, Premium (access to fitness equipment room and offsite table tennis) $29. Daily use fee is $5. Non resident fees are $39/$45. Members receive a $5 discount on classes. Note fees last year were $15 and $19; though considerable complaint about raising fees, no fall off in membership occurred after the increases. 1200 unduplicated users of fitness facility per year. Center now attempts full cost recovery-- have lost much in City funding, so attempting to be cost neutral to city. Try to balance free and fee-based activities. Lectures are generally free; most classes are fee-based. Fees earn about $80k, classes earn about $40k.

Partners as much as possible with other service providers. Some of their Art programs are done by Adult Ed, which is eligible for County/State subsidies. Foothill/deAnza does adaptive exercise class, with similar subsidy. (Some senior services provided at Columbia Neighborhood center are for lower socio-economic seniors, and are part of a facility that seeks to serve families in the neighborhood. Those classes have lower fees, a attract a lower socioeconomic group. ) To avoid confusion in registration, those classes do not appear in the City’s brochure; Adult Ed and Foothill/DeAnza market and register for their classes. Some exercise classes are held in nearby buildings, part of the same complex. Fee for 1 per week 9 week Zumba class is, for example, $34.

Library visits 2x per month; El Camino Hosp. comes 1x per week; Pamf sends speakers; El Camino Health Library provides resources.

Variety of services- lectures, classes, lunch available, lounge, fitness equipment room, computer room, billiard room, art room, art boutique, chatting room, small rooms for privacy

Food- Cafe serves a lunch M-F; $5.50 member/$8.50 non-member. Current deal with food provider is that provider gets an office, a full service kitchen for use in catering; first 30 meals are provided free to SC and cost $4 each above 30. Had lost City subsidy of $30,000 which changed price structure; still this year lunch is cost neutral. Four applicants qualified for the RFP; 3 submitted application. New RFP every 3 years.

Fitness Room- Cardio and weight resistance equipment. Had been about 60 per day, now 100 visitors per day. Small room- 900 sq. ft. Formerly had a part time staff, then volunteers now none. Many of the volunteers were themselves working out when supposed to be volunteering; all (except 1 or 2 who still come) “walked out” when told they could not use equipment during volunteer time. There was an insurance/workers comp issue involved. Currently, per insurance requirements, the room is locked and members allowed entrance to use only after: some training on equipment, watching a DVD that demonstrates how to use equipment. To allow many members to use and because 20 min is sufficient to maintain cardio fitness, each piece of equipment has a 20 minute limit; self policed; users put name on list for equipment to establish time and wait list.

Computer Room- Small with 8 computers. Group had originally wanted 30 computers in larger room, but when it was explained that having a dedicated use would make the large room unable to be used for other functions, and at various times of day, the supporters understood. The room is open 5 hours per day, and well used. There is not a need for waitlists for computer use. In past year have seen a surge in skype use. Some instruction is given for those who want to learn how to use email. Retired engineers help with hardware and software issues. Members can bring in laptops or desktops for free help.

AV room- Used for films on Friday nights and for lectures. Film screenings were much more popular 5 years ago; Now attendance may go as low as 5-10. Not likely to be there in a few years

Consulting Rooms- One of their more more unique features. 4 rooms used for a variety of services where more privacy is need. Blood pressure clinic 2 per week; health insurance counseling; 20 minute free meetings with lawyers who provide this service pro bono; etc.
Large Room- Divisible into 3 rooms by partitions. Some part used for classes, lunch served in one part. Special Events- hold 10 per year. Room is often rented on weekends for weddings/events; reg hourly rate is $175 but premium rate for weekends is $300 per hour. Total room size 4300 sq feet

Boutique- at front entrance; most centers have discontinued boutique, but it seems to work at this center; artists receive space and utilities; MOU with City that 10% of revenue goes to City.

Art room- Have art classes and areas to work. When he arrived, art was 70% of classes and exercise 30% but surveys and subsequent usage have reversed those proportions. Art classes are also offered in other parts of Community Center, but at different level. There is now more demand for health maintenance than for art.

Chat room- This is a use that is likely on way out over time. It was requested by the former center’s most frequent users, a small room where they socialize with some greater degree of privacy. Users are small group of women > 85 who do not want to be home alone.

Lounge- Open area with sofas and chairs, where can get cup of coffee or tea, and read paper, play cards, or talk. Pretty well used.

Billiards- They do have a room with several billiards tables, which is not something he would install, and is somewhat of a luxury in that the space can only be used for billiards. Limits space to one service.

Games- Do not offer Bingo (despite some requests) -- a church down the street does that; chess and cards are pretty flat line; Ma Jong is increasing

Travel- Separate handling of travel which is full cost recovery. They have several day trips each month (sample fees $59-117) by bus that leave from SC, and an “extended trips” abroad arranged differently.

Users- Sunnyvale population is 144,000, of which SC has eligible population of 30,000 people (>50 years) and currently serves 3000. Most are older than 50, but some people in 50’s may come to a lecture on how to care for more elderly parents. Users must be able to use facility “independently” or bring assistance. Wheelchairs, and walkers are fine, but where they have had problems is mental issues, ability to engage. Not able to handle Alzheimer's patients. If a person is unable to communicate well or to keep up with a card game, for example, then the other participants will tell staff. All rooms are equipped with “T Loop” a system that facilitates appropriate automatic tuning of hearing aids.

Out-of-town users- during the summer, SC sees 50-150 seniors, mostly, East Indian, in who are visiting local family and prefer to have some activity during day when family may be busy.

Transit- They do not have shuttles to bring users to SC. Some senior residences bring users in vans. Local nonprofits and volunteers also provide transit- Road Runners, Heart of Valley, etc. No VTA routes were created for the center, but it is just off El Camino, and is therefore well served by VTA. Maybe 3 bikers a day.

Homeless- is a major challenge. Not aware of all details, but know that sleeping in vehicles is a problem. Some people sneak in to use SC restrooms for a shower-- SC restrooms do not have showers. Other building, Indoor Sports Facility does, has had some unhoused population issues.

Pool is offsite.

Success- Lots of planning and listening to users and potential users. Had focus groups and other meetings. Recommend having separate meetings for public-at-large and shareholders, otherwise, the stakeholders tend to drown out the public-at-large. Recommend having stakeholder gathering in one large room with groups of tables so that stakeholders get to give input and listen to input of other stakeholders. Gathered comparisons of what other cities are doing, and what is available nearby (YMCA, private providers like gyms and cardio circuit facilities in strip malls, nonprofits) He will sent us matrix with analyses. Lots of input gathered, but staff made final decisions. The analysis of other services available is ongoing, not just for original design of space.

Tips - Gets lots of input. Have space flexible to use for variety of services and be able to change as demand changes. Monitor demand. Seniors want to maintain mental and physical health. Look at Santa Clara, newer facility, beautiful, two stories so have more space; warm pool on site.

Staffing- 4 full time staff; one part time 30hrs wk; one part time care manager- 20 hr per wk; 220 + volunteers

Youth involvement/ interaction- Youth who volunteer are generally in summer; do work in kitchen or assist with computer, or perhaps entertainment, such as group of youth who play violins. (Also mentioned re youth that the most successful collaborative educational programs with elderly and youth are at more jr college level, or SF
State where have some voc ed for nursing; and further noted that Palo Alto person recruits some SC members to be literacy coaches).

History: Center was approved by Council in summer 1998, in response to group campaign for center. Senior services previously had 7000 sq feet, at a 25000 sq ft multipurpose community center at former school site that was being vacated when school district raised rent. Advocacy group had wanted only senior uses in the building, but compromised with council vote to allow rental and use of facility nights and weekends.

Users generally report that while they want wellness, they did not want SC to be like a membership gym, where someone would tell them to work out; did not want a 24 hour feeling. Like having lounge.
Impact of the Aging Baby Boom Population on Palo Alto’s Social and Community Services

White Paper for Discussion
November 2006
Introduction

This study endeavors to assist Palo Alto’s City government, local nonprofit agencies, and the community at large in understanding some of the impending impacts of a rapidly changing demographic environment driven by the aging of the Baby Boom Generation. These evolving trends will result in dramatic differences in the characteristics and needs of our residents, and these changes will undoubtedly have an impact on policies, programs, services and practices within our community.

This analysis was initiated by the Community Services Department of the City of Palo Alto and was undertaken by a Task Force of community leaders and service provider agencies. The study does not claim to be scientific or scholarly. Instead it is a surface exploration of the issues and a call to action proclaiming that now is the time to understand and plan for the inevitable.

The White Paper purposely focused on lifestyle issues including education, recreation, health, fitness, leisure and social services. It does not attempt to delve into medical, emergency preparedness, safety and consumer services. These are concerns that demand their own stage.

Need for the Study

There are many reasons why it’s important to understand the future lifestyle and social service needs of this burgeoning population including financial, community planning, transportation and social service implications. It is imperative that we begin planning for these now, before they overwhelm the resources of many of our public and non-profit service providers.

Palo Alto’s population profile has already begun to transform due to significant demographic and social trends:

- The aging of our population with the impending passage of the massive Baby Boom generation into the elder cohort, and
- The increasing longevity of the population due to medical advancement and healthier lifestyles.

Given these facts, one of many reasons for initiating a planning strategy is articulated in research conducted by the National Research Center Inc. (NRC) of
Boulder, Colorado. The NRC analyzed data from 9000 surveys of older adults. The study made a direct correlation between the number of community “strengths”, defined as physical health, outlook on life, and social and family connections, with the number of hospitalizations, institutionalizations and accidents. In short, the study determined that if a community can provide its people the opportunity to “age well” it can save untold hardship and millions of dollars in unnecessary costs.

A second key reason for the study is to begin to identify the resources and opportunities that will come with our aging population. By anticipating the future needs of employers and public agencies, and through appropriate recruitment and training techniques, a new workforce may be discovered, bringing with it wisdom and experience not previously seen in previous generations of elders.

The goal of this paper is to attempt to describe some very real social issues and opportunities, identify some of their impacts and begin a dialogue on how best to find appropriate solutions.
Executive Summary

It’s no secret that America is graying. Newspaper, television, magazines, government and scholarly reports tell us that the first wave of the Baby Boom generation is now entering into their retirement years and that we are on the threshold of a major shift in demographic characteristics. In the next thirty years our nation’s “senior” population will double due to the sheer size of the Boomer generation and, thanks to medical and health advancements, will live longer than any previous generation.

But what about Palo Alto? What will the impacts be to our community and social service delivery systems? Do we need to prepare for these impacts, and if so, what do we need to prepare for? Can we be a community that is “elder friendly”? These are just some of the questions that prompted a nine month examination of this issue by a Task Force of City and nonprofit community and social service providers.

What was discovered in many ways mirrors the national landscape. Boomers will live longer, be more active, have more money to spend, and hold great political clout. Our future population will not only be older – but they will also think differently than past generations. If anything, they will be more socially and culturally engaged, healthier, have increased mobility and be more independent.

How will Palo Alto be impacted? From input provided through a community visioning meeting and a community-wide survey, the thoughts and concerns of some 400 Palo Alto Boomers can be summarized as follows:

- **Boomers want to live independently as they age and the concept of a “senior friendly” environment, especially with regards to mobility, is especially important.**

- **There is a deep desire to be engaged in community and social activities and have a variety of learning opportunities.**

- **Palo Alto Boomers want to stay involved, for either lifestyle or financial reasons, through volunteerism or continued part or full-time employment.**
• Our Boomers want to remain physically and mentally active and healthy, well into their elder years.

Also, a key finding that could greatly impact the Palo Alto community is that 80% of our Boomers say they are planning to stay in Palo Alto as they age. If true, in the next twenty years, and given the fact the Palo Alto is generally considered residentially built-out, the percentage of our older population will outpace all other demographic segments, creating a scenario where upwards of 40 percent of our total population will be 55 years of age or older. Consequently, the service delivery implications may be challenging, especially when you consider the fastest growing population segment will be those age 85 and older. This group will require an unequaled level of support services, placing great demand on public and private support agencies.

Another key factor is whether our Palo Alto based agencies are prepared to meet the service delivery impacts brought on by the aging of the Boomer generation. Palo Alto is currently blessed with outstanding services for older adults including those provided by Avenidas, La Comida, Palo Alto Family YMCA, and the Albert J. Schultz Jewish Community Center (JCC). But are these institutes prepared to meet the challenges of the future? Avenidas, Palo Alto’s largest, full service provider for older adults, has already found its assets strained by the needs of the changing population. Both the JCC and YMCA have unused capacity (the JCC will expand services when it moves to a new campus in 2009), but both organizations indicate the need is increasing. The La Comida nutritional program is at capacity and already requires more space and staffing resources. And, although providing a full spectrum of adult lifestyle activities, the City of Palo Alto devotes a very small percentage of its community services budget to older adult programs.

Of course, with change comes opportunity. Our Boomers will possess the highest educational level of any past generation, and as revealed through our survey, they have a desire to continue to work and volunteer in the community. With appropriate training and through creation of policies and education to end “age discrimination”, the harnessing of this intellectual and skilled labor force could truly be beneficial for the entire community.

This White Paper suggests strategies to meet the projected impacts and make the best of the opportunities that are before us. Where we go from here is up to our community, and over the next few years our government, nonprofit and business sectors will need to better understand the unique needs of this burgeoning generation and answer the questions:
- Given a strained financial environment, is there a way to better distribute our public resources to meet the needs of our Community?

- What changes do we need to make in the City’s physical attributes that will allow people to age well and safely?

- What planning must happen now to meet the anticipated social and community service needs 10, 20 and 30 years from now?

- How can we best use the human resources that come with the numbers, experience and education of the Boomer population?

This study calls for the development of a strategic plan to address these questions and to determine the opportunities inherent with the aging of the largest generation in America’s history. We, as a community, must begin to find answers to these questions now because these inevitable and dramatic demographic changes are happening - now

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Current Population Trends

The Boomers Are Coming!

The 76 million ‘Baby Boomers’ born between 1946 and 1964 represent the largest birth cohort ever in the United States. The first of the Boomers turned 60 this year and by 2030 all surviving Baby Boomers will be between the age of 66 and 84 and will represent one of every five Americans\(^1\). America’s Boomers make up 27.5% of the population, have an estimated annual spending power of $2.1 trillion, and comprise 45.8 million households with average spending of $46,000 per household.

\(^1\) Excerpt from the State of California “SB 910 Strategic Plan for an Aging California Population”, 2003
Palo Alto is already experiencing the profound impact of this “graying of America” trend. Between 1990 and 2000, as a result of the out migration of young adults and the aging of Boomers, the Palo Alto population of 45-60 year-olds increased from 17.5% to 22% of the total population. Indeed, the middle age and senior populations are the only segments in our community that have grown significantly over the past thirty years.

As the Boomers continue to age, they will cause the senior percentage of the population to grow even more dramatically. Between 2000 and 2030, Palo Alto’s population of older adults (age 55 and above) could more than double to over 36,000. Because the total population of the City is unlikely to double over this timeframe, we can expect a significantly higher percentage of older adults in our community.

These projections assume no out migration, as no statistics are available. However, in our survey of 323 local Boomers, 80% reported that they intend to stay in Palo Alto when they retire. If this percentage is anywhere close to reality, we could expect the senior population of Palo Alto to be approximately 36,200 by 2030, which represents a 113% increase.

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2 Excerpt from “City of Palo Alto Community Profile”, July 2005
The next senior population will be more ethnically diverse as well. At present, about 80% of the Palo Alto senior population is Caucasian and 11% Asian. Over the next thirty years, an increasing percentage of this population will be Asian and, to a lesser extent, Hispanic. (Note: Projections extrapolated from U.S. Census data) Our community must adapt its services to appeal to the different needs and interests of these groups.
Differences Between Generations

Within the older adult population, it is important to distinguish between the “young-old” (those less than 75 years of age), the “old” (75 to 84 years of age), and the “old-old” (85 years of age and older) and to plan for a more ethnically diverse older population.

The California Policy Research Center at the University of California expects the average life expectancy to be 81 years of age by 2020. In 1980 the mortality rate was 73 years. Because of this increased longevity, the greatest growth will be among the oldest Palo Altans, the “old-old” seniors. By 2040, this group will represent more than one quarter of the city’s older residents, up from one in ten in 2000. The “old-old” population will outnumber the “young-old”. Old-old seniors will need the most supportive services and practical help and is likely to have the lowest incomes, placing great demand on the city and those organizations that provide services to them.

![Palo Alto’s Older Adult Population from 2000 to 2040](chart)

Within the “young-old” group, the very definition of “old” is likely to change in coming years. This group will be more mobile and healthier. Its changing expectations, discussed below, will alter our thinking about what is meant to be “old” or a “senior”. Chronological age will become less of a determining factor in what one considers “old”. Instead, functional ability is likely to become more of a determinant, and may become a more relevant criterion for eligibility for public benefits and demand for services. In this way, older adults will be less likely to seek out services and activities designed for others of the same age, and
more likely to participate in activities with people – of all ages - who are similarly mobile and healthy.

The cultural differences between those born in the period 1911 to 1945, and the Baby Boomers born after 1945, are striking, and help us predict how the interests, expectations, and desire for services will change as Palo Alto’s Baby Boomers age.

Many of those currently over the age of 60 served in World War II, may have witnessed the Great Depression, and through their labors created the booming economy of the 1950’s and the rise of the middle class. Their experiences taught them the value of hard work, self-sacrifice, discipline and team spirit. This generation learned to rely on the government and has an expectation that the government will take care of them. Indeed, Social Security gave this generation unprecedented economic security, and they were the first to experience mass retirement and transition to a period of life dominated by leisure. This generation is conservative, risk-averse and conformist.

The Baby Boomer generation, on the other hand, grew up in a period of unprecedented prosperity and unlimited horizons. They disdain authority and traditional values, and prize their individuality. Boomers want to have it their way, have it now, and enjoy the experience. William Novelli, Executive Director of AARP describes them this way:

“Basically, boomers like to have fun... They are looking for the new experience. They want to create their own experiences, because in this “been there, done that” world of today, they are often bored, and searching for novelty.”

Boomers do not associate age with disease and disability; indeed, they have every reason to expect to live longer and healthier than their parents. But they do not take their health for granted and, for them, wellness is very important. This generation wants fitness activities, recreational resources, nutrition, and information about preventative health care and healthy living. But for this very same reason, Boomers tend to be in denial about - and generally are not planning for – the reality that in their latter years they may well experience disability and chronic disease. Undoubtedly, an increasing number of the “old-old” will need supportive services such as in-home care and adult day care to remain in their homes.

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The needs and expectations of Boomers will be diverse, and they will demand choices. This is not likely to be a generation that seeks out - at least in the short run - the institutions and services that have served their parents so well. Terms like “senior centers” and “old age homes” are quickly becoming obsolete and are being replaced with terms like intergenerational centers and asset-based aging.

There are other differences between Boomers and their parents. They “see retirement as a transition; not a termination.”4 AARP research has shown that 8 in 10 Baby Boomers plan to work at least part-time. Of that percentage, 35% of them will work mainly for interest and enjoyment, and another 17% would like to start their own business. Given the very high cost of living in this area, many local Boomers will be motivated to work to augment their income to make it possible to remain in the area. Boomers expect to need more money during retirement, and plan to spend it to enhance their lifestyles.

There are also indications that as Boomers seek to remain productive in their retirement years they will turn to volunteering and civic engagement in large numbers. Our survey of Palo Alto Boomers confirms this national trend. In answer to the question “When you have more free time, what do you want to do with it?” 42% of the respondents answered that they want to volunteer in the community.

It will be a challenge to the service sector to offer volunteer work that gives Boomers new experiences, the opportunity to work independently and, above all, many choices. If local institutions are successful in engaging Boomers in community work, they will be greatly rewarded as Boomers direct their considerable talents and energies to addressing some of the community’s problems.

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Local Survey

Palo Alto’s Boomer Landscape

Although there has been much information disseminated on the demographics and characteristics of Boomers on a national and state scale, there is relatively little information describing the characteristics of Palo Alto’s aging Boomers. In order to understand what these Boomers’ needs and concerns are, three methods of obtaining information were used by the study Task Force; a community input event, a written questionnaire, and a survey instrument.

Community Input Event

The Task Force hosted a “Community Visioning Meeting” where residents of Boomer age were asked to participate in a two-hour discussion led by noted facilitator, Diana Schlott. The public meeting was designed to give participants an opportunity to share their perspectives in an open and engaging environment. The meeting was held on May 11, 2006 at the Art Center Auditorium and 48 Palo Alto residents participated.

Following an introduction as to why the meeting was being hosted, and a brief presentation on the history of 20th century generations, the participants were divided into small discussion groups. Each group was given two questions to discuss and report out on. Groups were then asked to develop consensus on the top five answers for each question. The questions asked were:

A. What are the services and programs that you’re presently using that you’ll need more of in the future?
B. What new services may be required in order to allow you to age well?

Due to time limitations, participants were also requested to complete a written questionnaire that asked:

1. Are you planning to stay in or near Palo Alto when you retire?
2. If you’re planning on moving to another location in your next phase of life, what would make you stay in Palo Alto?
3. When you have more free time, what do you want to do with it?
4. If you knew you’d live to be 100 years old, what would you do differently?
Our Community Talks: Concerns and Desires

Group discussions were lively and a great many ideas and themes emerged. The following summarizes the most prevalent themes that surfaced from the dialogue:

- **When asked to identify the services and programs that Boomers are presently using that they will need more in the future, a variety of services and programs were identified. The five major themes, in order of priority, that dominated the discussion where:**

1) **Social, Cultural and Leisure Activities**
   Examples cited most frequently were travel; activities at night for adults/seniors; activities for widows/widowers; creative arts classes; book clubs; Stanford Lively Arts; inter-generational interaction; dance groups; poetry nights; art and theater events; open microphone; and increased social gathering points.

2) **Parks and Recreational Services and Facilities**
   Within this theme the most mentioned uses were activities that draw people to parks; lawn bowling; Tai Chi; playgrounds for seniors; senior and community centers; a golf club for Boomers; and sports leagues for seniors.

3) **Senior Designed Community/Social Services**
   Examples cited included buddy systems for walking, hiking and exercise; quality Police, Fire and EMT services; food closets; outreach for shut-ins; social services targeted at aging; walk-able neighborhood shops and services; universal housing concepts; and vibrant downtown neighborhoods.

4) **Education and Library Services**
   Some of the specific services and programs identified as important were readings clubs; technical classes; quality library facilities and programs; Palo Alto Adult School; City-sponsored special interest classes; Stanford continuing studies; and Foothill College.

5) **Information and Referral Services**
   Examples for information and referral programs included continued communication about programs for adults; easy, single point access to information on caregivers; technology services; Medicare advice; tax preparation

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5 A set of accessibility features such as zero-step entrances, wide interior doors, and accessible bathrooms.
assistance; and the need for a Palo Alto-based website for volunteer opportunities and services.

Other themes included health care/in home services, and health and fitness programs.

➢ The next question asked participants to think about their future. When asked to identify “What new services may be required in order to age well” the themes that gathered the most responses were:

1) Transportation
By far, a transportation and mobility theme resonated the most with the group. Examples cited included a “safe ride” program; bike sharing; more bike paths; car sharing; mass transit that gets “closer to home;” opportunities for electric wheelchairs to use bike lanes; more public transportation; increased frequency of the City and Stanford University shuttle; transportation to distant parks; a cross-town trolley on Middlefield Road; and the need for volunteer drivers in lieu of para-transit services. Much discussion was devoted to keeping ones’ independence, whether or not an automobile was available.

2) Social, Cultural and Leisure Activities
Also ranking very high in interest was social, recreational and leisure activities including references to intergenerational activities, connectivity, social support groups, interest-based activities vs. age-based activities, more daytime activities, senior related activities, and social integration. Participants abhorred the idea of isolation and loneliness, and in general, wanted to be active and share life experiences with others.

3) Parks/Recreational Facilities and Programs
Examples cited for new services for parks and recreation facilities included “younger” senior centers (a blending of adults and elders); more locations for Avenidas; libraries as combined community centers; multi-generational community centers; senior-friendly camping sites; additional off-leash dog areas and trails; more recreational services like the YMCA; and recreational membership fees reduced for those 50 plus.

4) Senior Designed Communities/Social Services
Within this theme some of the ideas that emerged were identifying homebound individuals in case of emergencies; “assisted living without walls”, farmer’s markets in additional areas of town; more home care services, meal delivery services; programs to address loneliness and isolation; transitional services;
neighborhood access to shopping and services; and centers for basic services located throughout town.

5) Education and Libraries
Some of the examples characterizing this theme included learning new languages, educational programs about health and welfare, life-long learning classes, providing a “living history” with Boomers presenting their histories in schools, teaching, mentoring and training opportunities for older adults, the provision of larger print books at well-designed libraries facilities.

Outside of the five themes noted above, housing, assistive living and health and fitness programs were also concepts that emerged during discussion.

Participants were also asked to complete a written questionnaire:

1. When asked the question, “Are you planning to stay in or near Palo Alto when you retire?” 76% of participants said they planned to stay in their present home.

2. When asked “If you’re planning on moving to another location in your next phase of life, what would make you stay in Palo Alto?” the two factors most frequently cited were affordability and better public transportation.

3. For the question “When you have more free time, what do you want to do with it?” the focus was on travel, volunteering, lifelong educational opportunities, spending time with friends and family and staying mentally and physically fit.

4. When views on the question “If you knew you’d live to be 100 years old, what would you do differently?” were solicited, the major themes that emerged were keeping in better mental and physical health, and saving more money for retirement.

It’s noteworthy that throughout most of the discussion, Boomers wanted us to know that they did not want to be “pigeon holed” when it came to the provision of services. In other words, Boomers want choices and the opportunities to participate in most activities according to interests, not age.
A Community Survey

The method used to collect quantitative data was through the use of a survey instrument. Due to funding limitations, the survey was not of scientific design, but was meant to build upon and test the information gathered at the community visioning meeting. The survey was made available in hard copy and through the Internet using the Web tool, Web Surveyor. The survey was advertised through newspapers, email “blasts,” and through newsletters to the constituents of our participating Task Force organizations.

323 surveys were received over a six-week period from Palo Alto resident “Boomers.” To ease the completion of the survey, participants were asked to prioritize specified service themes, which included:

- **Career/Volunteer Opportunities**: full/part time jobs, job banks, career placement, volunteer listings, etc.
- **Civic Engagement Opportunities**: including running for office, board and commission work, advocacy, inter-generational exchanges, political activism, etc.
- **Education & Libraries**: opportunities for advanced degrees, life-long learning, classes and workshops, library facilities and services, collections, reading clubs, lectures, book mobiles, etc.
- **Housing & Assisted Living**: affordable housing, more housing options, assisted care facilities, in-home care services, day-care programs, home repair services, etc.
- **Financial Assistance & Planning**: senior/low income discounts, financial information & referral, financial planning services, financial counselors, etc.
- **Health & Fitness Opportunities**: health clubs, yoga & other fitness classes, nutritional programs, gyms, aquatics, par-courses, senior sports leagues, in-home fitness services, etc.
• **Information & Referral Services:** health, social services, emergency services information services, more information distribution points, one stop shopping for information, life counselors, etc.

• **Parks & Recreation Facilities:** urban and open space parks, enhanced community center facilities, senior centers, athletic fields & facilities, golf course, meeting rooms, etc.

• **Senior Designed Communities:** walk-able neighborhoods, support groups, neighborhood services, universal design concepts, etc.

• **Social, Cultural & Leisure Activities:** theatre, arts, special events, social gatherings, travel, clubs, etc.

• **Transportation:** public transportation alternatives, safer roads and pedestrian access, shared transportation, bike lanes, shuttle services, etc.
The 323 survey participants were fairly divided between older Boomers, born between 1946 and 1955 (58%), and those born between 1956 and 1964 (42%). It should be mentioned that this outcome was significantly different from the participation at the community input meeting where 83% represented the first decade of the Boomer generation.
Survey data and community meeting input were quite similar when asked if Boomers planned on staying in Palo Alto after retirement. Eight out of ten of our Boomers said they planned to continue residing in Palo Alto, echoing data from many previous surveys that predict “Aging in Place” will continue to be the preferred choice of older adults. The data also suggests that housing turnover will slow, making it more difficult for younger families to move into an already built-out city. This phenomenon may also have serious impacts on living arrangements, housing services, and result in an increased need for local elder care, support services and assisted living.
When we asked Boomers to look at their lifestyle needs of today, and begin to project their needs into the near-term future, four themes were clear priorities. Data suggests that Boomers are presently engaged in and will continue to find a priority in leisure activities; health and fitness; park and recreation facilities; and life-long learning and library-based services. This does not come as a surprise, as mentioned earlier, Boomers are individualistic, looking for new experiences and wanting to be fit and healthy enough to experience them.
In this question we asked participants to look into the future. The mindset is indeed different than the pronounced themes from the previous question. As opposed to education and socializing being a top priority, when Boomers contemplate the idea of “getting old” they are more interested in better forms of transportation and staying healthy. Many consider the ability to drive as the last vestige of independence and the survey confirms that Boomers want to continue their independence, car or no car. The survey also implies that the need for more health and fitness programs, continued opportunities for socialization and education, and the ability to age in their own homes as priorities for our aging populous.
Surprisingly, although transportation continues to rank relatively high, the themes that make up lifestyle and education are seen as the most valuable of services. Note that this outcome was expressed different at the community input meeting where transportation was proposed as the highest priority, followed closely by fitness, cultural and educational opportunities. This data does confirm that the provision of a variety of educational, social and lifestyle
programs and services are essential to how Boomer’s perceive the concept of “Aging Well.”

The survey instrument also asked for written comments for the question, “When you have more time, what do you want to do with it?” Hundreds of comments were provided, and the predominant themes, prioritized by the number of times each concept was mentioned, were:

- Volunteering
- Travel
- Reading
- Fitness (swimming, golf, running, bicycling, etc.)
- Education
- Spending more time with family
- Enjoying the outdoors
- Attending and learning about art and cultural activities and presentation

Additionally, the survey asked for general comments. Although it’s impractical to provide all of the comments offered, the following quotes represent some of the individual thoughts provided by our participants:

“Us Boomers will stay active and want places to go dancing, to dinner, theatre, at affordable prices.”

“… the cost of housing and living in this city are the most critical variables for seniors AND young folks. If seniors want to be near family but younger generations can’t afford to live in the Bay Area – we will have to leave!”

“Transportation for people who can no longer drive their own car would be my top priority.”

“Services for seniors in Palo Alto tend to be viewed as assistance for the aged (aged 75+). There doesn’t seem to be anything for active, healthy, people in their 60’s and early 70’s.”

“Retired, or partially retired, PA residents could be hired for short term projects. They might be willing to work for lower wages to offer their expertise to the City. Perhaps you should maintain a registry of residents
with expertise who would be available for City or nonprofit projects at reduced rates?"

“I’d like to see a moratorium on new services so that new taxes and fees can be avoided... so I can afford to continue living in Palo Alto in retirement.”

“Provide exercise and recreational programs at reasonable rates or free of charge.”

“Those of us that are at the end of the Baby Boom have paid extremely high prices to afford our homes. . . . We tend to have children later in life . . . . We are going to be very strapped for cash and retiring before our kids graduate from college.”

“The three most important things to consider: public safety, education and health care.”

“I have been retired now for less than a year and have been surprised to see how many current retirees take advantage of travel, cultural and education services. Planning for the huge influx of Baby Boomers who are retiring will be good for Palo Alto and its citizens.”

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Inventory of Palo Alto Service Assets

Palo Alto is fortunate to have a wide variety of civic and nonprofit agencies providing programs and services to meet the needs of older adults. These agencies provide a wide range of services from recreational opportunities to social services. The following summarizes the programs and services of each agency and tries to provide some perspective as to the present and future capacities each program in terms of staffing and facility levels.

Avenidas

**Services:** Avenidas is a full-service older adult center. It offers a wide range of programming including classes in creative arts, personal interest, and health and fitness. Its service range also includes special events, personal health services, counseling and support, case management, adult day health care, transportation services, volunteer care giving outreach, social clubs, handyman service and volunteer placement.

**Budget:** Avenidas’ total budget committed to older adults is $3.7 million funded in part with $420,000 from the City.

**Capacity:** On average Avenidas’ staffing capacity\(^6\) ranges between 75 to 100% depending on the program while its space capacity is similar. In almost all of its program areas, Avenidas is seeing increased participation and is over capacity in case management and transportation services. There is little doubt that the program continues to grow and to meet the demand it will require more facility space in the not-so-distant future.

Albert L. Schultz Jewish Community Center

**Services:** This center, presently located on the Cubberley Community Center campus, focuses on classes, clubs, health and fitness activities and special events for older adults. The agency also offers information and referral services to its members.

**Budget:** Total current annual budget dedicated to older adult services is $80,000.

**Capacity:** The program does have space capacity for increased participation with programs utilizing 25% to 75% of the available space; however staffing is at 100% capacity for almost all services. Note that in 2009 the JCC will have a new

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\(^6\) Staffing and facility capacity have been evaluated by each agency in terms of their ability to meet the perceived needs of their clients for various services. 100% staffing capacity, for example, means that the agency is currently using all of the staff resources it has available for the service or program. 25% space capacity would mean that the program has the facility capacity to increase programming by 75%.
location in south-east Palo Alto and with it increased capacity for both staffing and program.

**City of Palo Alto**

**Services:** The City of Palo Alto offers few programs focused at older adults. It runs a golf course with “senior” reduced fees, a senior softball league, and the Senior New Year’s Eve Day Bash. Of course, the City also offers a very rich scope of activities and services for adults of all ages including thousands of acres of parks and trails, branch and full service libraries, theaters, community and interpretive centers, aquatic facilities and a full range of art and recreational classes and special events. Palo Alto also provides a shuttle service that offers no-cost transportation on specified routes. Palo Alto does grant, through its Human Services Resource Allocation Program, approximately $500,000 to nonprofit agencies providing older adult services, with Avenidas receiving the largest share.

**Budget:** Funds committed by the City for senior programming is approximately $550,000.

**Capacity:** Use and staffing capacities range between 50% and 100% depending on the program, with library services are running at full capacity in both staffing and facility levels.

**Community Association for Rehabilitation (CAR)**

**Services:** Located in South Palo Alto, CAR is one of the few local providers of aquatic therapy for older adults.

**Budget:** The total budget dedicated to older adults is $414,000.

**Capacity:** Space and staffing are not at capacity, but the program continues to grow.

**La Comida De California, Inc.**

**Services:** La Comida serves over 130 noon time meals to seniors on a daily basis.

**Budget:** Total budget is $235,000.

**Capacity:** Capacity for space and staffing is maxed out, but the need is increasing.

**Palo Alto Adult School**

**Services:** The Adult School offers a mix of classes of adults ranging from creative arts, languages, computer instruction, and health and fitness. It does offer older adults exercise classes in assisted living situations.

**Budget:** The total budget for older adult programming is $67,000.
**Capacity:** The program is at capacity for staffing level, but has a small amount of space capacity within its personal interest classes.

**Palo Alto Family YMCA**

**Services:** While not offering personal interest classes, the program does offer health and fitness activities, personal health services, special events, lectures, food and nutrition programs, social clubs and a therapeutic exercise program.

**Budget:** Both space and staffing capacity is about 50% and participation is increasing in all programs.

**Capacity:** Total budget dedicated for older adults is $1.8 million.
Meeting Future Needs

Defining the Challenge

The conclusions found in this paper are not solutions, but suggestions on how to move forward and perhaps build upon our existing strengths to provide an environment that will meet the concerns and allow all Palo Altans the opportunity to “Age Well”.

The prominent findings of this study are as follows:

**Most Boomers want to live independently as they age and the concept of a “senior friendly” environment, especially with regards to mobility, is very important.**

Fortunately, some areas of Palo Alto have neighborhoods that are relatively “walk-able”, but to be truly “senior-friendly”, public and private sectors should explore alternative methods for transportation that allow independence without the use of automobiles. Improved, more flexible and more convenient public transit should be developed to give older drivers viable alternatives to their own car – and to reduce the number of cars on the roads.

**Some suggested strategies to help prepare for this scenario:**

- Actively promote alternative means of transportation including wider City and Stanford University shuttle routes; volunteer drivers; and shared transportation resources.
- Design infrastructure improvements that support safe use of alternative modes of transportation including pedestrian, bicycle, electric carts, and shuttles. Some examples include replacing old street signs with new, larger signs with larger fonts, widening sidewalks, more defined lane dividers, and creating well-marked pedestrian crossings.
- Provide a network of transportation services that meet older adult needs, such as linking the City’s shuttle service to current and future forms of transit.
- Encourage the location of essential services such as grocery stores and pharmacies in neighborhoods, within walking distance.
A desire to be engaged in community and social activities and have a variety of learning opportunities are strong factors in the way our Boomers want to live out their lives.

The need for continuing educational and cultural activities will increase over time. In the next 5-10 years, the greatest demand will be for “lifestyle” activities and services: educational programs; fitness activities; and leisure and travel programs. Many local organizations that offer these programs exist now and have the capacity for some growth. But it will take a concerted community effort to meet the increased demand at affordable cost.

**Some suggested strategies to help prepare for this scenario:**
- Assemble a task force to assess the need for new and augmented facilities to meet future programming needs.
- Provide information that’s easily found about City and community life-long learning resources.
- Encourage a variety of affordable, culturally appropriate and language diverse learning opportunities.
- Co-mingle public facilities with commercial locations to provide easier access to services and products.
- Facilitate dialogue between all local public and non-profit entities to provide programs for a variety of learning abilities and delivery methods.
- Provide activities and facilities that foster contact with all segments of the population like intergenerational centers or library/community center combinations.

**Palo Alto Boomers want to stay involved either through volunteerism or continued part or full-time employment.**

Boomers, either to stay socially connected and engaged or to augment retirement funds, have clearly articulated the desire for volunteer and employment opportunities. Some have implied that a new career is not out of the question, and the idea of mixing work, leisure and education has been a prominent theme emerging from our discussions and survey data. The importance of this resource cannot be taken lightly. With change comes opportunity, and it will be important to find ways to expand the contributions of older adults in later life.
This human resource is untapped and, if used correctly, it can be a force for social good.

**Some suggested strategies to help prepare for this scenario:**

- Promote, through new policies and education, the elimination of age discrimination in the workplace.
- Actively encourage older adult involvement in elected and appointed office and in policy development and advocacy. For example, use someone like former Mayor Jim Burch as an excellent role model for community involvement during ones’ latter years.
- Create a job database and listing of employment and employment training opportunities for older adults in city and community publications.
- Develop employment policies designed to retain and recruit older adults. These policies should recognize the flexibility and independence Boomers are seeking in their lives.
- Provide incentives to businesses and organizations who promote policies to hire and retain older workers and volunteers.

**Most Palo Alto Boomers want to remain in Palo Alto for the remaining years of their lives.**

Boomers will live longer and remain in their homes longer, and as they approach the “old-old” stage of life, the demand in programs will shift to supportive services including in-home care, practical help, transportation alternatives, and assisted living.

**Some suggested strategies to help prepare for this scenario:**

- Review of the Comprehensive Plan to identify possible solutions to close the gap in housing supply and demand, including the type of housing required, affordability of ownership and rentals, and locations that could provide easily accessible services (within walking distance).
- Provide funding mechanisms for affordable home renovation and repair programs for low income senior households.
- Continue to provide training and technical assistance to City building inspectors on accessibility requirements.
Encourage the development of universal, accessible, user-friendly housing.

Palo Alto Boomers want to remain physically and mentally active well into their elder years.

The concept of being socially and physically active and involved in one’s community can only work if the individual is healthy and fit enough to participate. Medical costs continue to escalate, and it can only benefit our community if older adults are proactive about their fitness and mental wellbeing.

Some suggested strategies to help prepare for this scenario:
- Provide expanded opportunities and facilities for recreation related activities for all levels of fitness, age and disabilities.
- Increase the distribution points for fresh produce and wholesome food products.
- Increase the capacity to support hunger and nutritional programs for older adults.

Meeting the Challenge

The challenge before us is three-fold:

- How do we develop a plan that readies our community to support the dramatic shift the number of older people, especially as Baby Boomers enter into the latter phases of life?
- Can new resources be found or existing resources be redistributed to better handle the anticipated impacts?
- How do we, as a community, make the best use of the intellectual and labor resource that will come with the aging of Palo Alto?

It is this Task Force’s recommendation that our community undertake the development of a strategic plan for aging in Palo Alto. The plan should focus on achievable and meaningful near and long-term strategies to ease the impacts of the population shift as well as discover ways to use the opportunities that come with it.
Although City of Palo Alto staff, in partnership with the Task Force of service providers, initiated this study, it will take a concerted effort from elected and appointed officials, service providers, community leaders, the business community and older adults themselves to find the solutions that work for the entire community. Addressing these challenges will require leadership and vision and it is the hope of the Task Force that this brief analysis will prompt our community towards building its strengths thus providing an environment that will allow all Palo Altans to “Age Well”.

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Acknowledgements

The Task Force
This analysis was initiated by the Community Services Department of the City of Palo Alto and was undertaken by a Task Force of community leaders and service provider agencies.

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Avenidas
Albert J. Schultz Jewish Community Center
City of Palo Alto
    Community Services Department
    Library Department
Community Association for Rehabilitation
Council On Aging Silicon Valley
Human Resources Commission
La Comida De California
Page Mill YMCA
Palo Alto Adult School
Palo Alto Family YMCA
Parks and Recreation Commission
Stevenson House
50 Plus Fitness Association

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Center for Civic Partnerships, “Perspective on Aging Well”, 2006

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County of Santa Clara, “Community for a Lifetime, Ten Year Strategic Plan” 2005

NC Center for Creative retirement Planning Committee, “NCCCR and The Boomer Generation”, 2005


Vision: How to Best Utilize the Cubberley Site and Honor the City’s Interests and the District’s Interests Beyond 5 Years

The time frame and professional support allocated to the CCAC are inadequate to allow for the comprehensive study needed for a detailed recommendation. However, the Community Needs Subcommittee believes that we have enough information to work towards creation of a viable plan over the next 5 years for the community interests on the Cubberley site while respecting the needs for flexibility for the District to open and operate a comprehensive high school or other schools as they are needed.

The Community Needs Subcommittee Believes:

1. The Community values the services and opportunities currently available at the Cubberley Community Center.
2. The Community values the high quality schools in our District and wants to make them even better.
3. It is possible and desirable to plan a Cubberley campus that would support an ongoing Community Center and allow for the eventual design and construction of a school or schools to meet PAUSD’s needs as they develop.
4. A more efficient use of the space in the future would allow more efficient use of the space as both City and District needs grow. This is the last large under-developed publicly owned space in town and it must be used wisely.
5. The redesigned Cubberley campus should be
   • Multi-generational with programs from preschool through seniors
   • Multi-cultural to reflect, meet the needs of, and provide a gathering place for our growing and increasingly diverse population
   • Multi-disciplinary to support programs such as sports, health, music, art, dance, science, and technology throughout our community
   • Lively and fun
   • Flexible for the changing needs of the City and the School District.
6. The creative and productive synergy provided by co-locating community and school district use at Cubberley would more than make up for a smaller footprint for a school.
7. Short term savings cannot be allowed to prevent seeking the best long term solution for this site.
8. This community has the imagination and drive to surmount the many hurdles ahead to achieve this vision.
**Additional points:**

**Potential New Services at Cubberley**

- Avenidas has proposed a potential Senior Wellness Program including new classes and programs plus the current Stroke and Cardiovascular Programs. They also suggested a new therapeutic pool to replace Abilities United’s aging facility.
- Bathrooms adjacent to fields.
- More services for seniors.
- Multi-age eating area.
- Reading room.
- Display space for artists of all ages.
- Farmers’ market including cooking demonstrations and cultural shows.
- Wheelchair-accessible trail surrounding fields with occasional trees, benches, par course items, or children’s play structures (similar to Greer Park). Eventually link to trails in Mitchell Park.

**Priorities for Selecting Future Tenants at Cubberley**

- Tenants should be selected depending on how well they fulfill our vision of a community center that is multi-generational, multi-cultural, multi-disciplinary, lively and fun, and flexible for changing needs.
- Decisions between similar users should be made with input from outside judges. The juried selection process developed for selecting artists could be a good model.
Facilities
Subcommittee
Documents
Problem Statement
Facilities Subcommittee

Presented 10/3/12

Short Term

1. PAUSD needs revenue that the City is challenged to afford under current budgetary constraints.
2. Significant infrastructure costs have been deferred and will start catching up with us.
3. It is unclear whether we can fill vacancies left by Foothill College (3 years out). If not, red flag re: lost revenue (~ $1 million).
4. The City needs to start planning in the short term for continuation of services with likelihood of at least some future lost space.
5. Negotiation of a lease and/or covenant in the short term should reflect commitments to current and medium term upkeep and future cooperation.

Overarching Medium and Long Term

1. The District is clear about its desire to reclaim some, and ultimately all, of the Cubberley site for school use, while the City lacks sufficient other real estate to accommodate the services currently provided at Cubberley.
2. The current architectural use of the site is extremely inefficient. The ratio of usable space to circulation space is very poor and to maintain these buildings in the current configuration for whatever use is a great waste of valuable land.
3. Cubberley offers a tremendous opportunity to design visionary programming and facilities that can bring our community together, serving students, families and neighbors for years to come. Delaying or foregoing plans for such a resource carries substantial opportunity costs that should not be underestimated.
4. This is the last sizable space in the city for redevelopment and to maximize its flexibility and use, the practicality of multi-story facilities should be considered.
5. District uncertainty about the type of facilities needed, (full high school or not, middle school or not, elementary school or not) as well as the chance they’ll want to use existing structures, creates a barrier to planning for investment in new construction at Cubberley for either community or shared use.
   • If reuse of existing facilities is a realistic option for the PAUSD, scraping space before then for community or shared use could severely limit District flexibility or increase costs for future school use.
6. Sharing space between community needs and school use offers many advantages for both parties, but also poses some significant facilities challenges, including:
   • Inconsistent architectural standards
• Incompatibilities
• Security issues
• Scheduling issues
• Parking
• Traffic demand management (bus, car, bicycle and pedestrian)

7. To the extent community services are displaced, what off-site locations can be repurposed for community use?

Medium Term

1. Significant additional infrastructure investments would be required to extend the life of current buildings (bare minimum requirements have been identified by IBRC).
2. PAUSD may need some portion of the site, while community needs persist. Can use of the site be sufficiently maximized to meet both needs?
3. Under both 2 and 3, above, how will support facility needs change (e.g., safe and convenient access and parking for all modes of transportation: automobile, bicycle, pedestrian and transit, restrooms, etc.)?

Long Term

1. Even with significant shared use of current facilities, a comprehensive high school would likely conflict with community use of the site.
2. Field and gym use will be particularly impacted, even with new construction – you can’t build up for those facilities.
3. Shared use with a high school of any size will dramatically increase the need for support facilities (parking, safe automobile, bicycle, pedestrian and transit access, food services, etc.).
4. Given fluctuations in enrollment and community needs, any new facilities will have to accommodate flexible programming/use.
5. Given high demand on the site, any construction will require careful planning of transitions.
MORE THOUGHTS RE CUBBERLEY FACILITIES

General

Facilities are places where programs and services occur.

The program/service needs should drive the requirement for facilities.

Facilities may be specialized - e.g. a swimming pool, or general purpose--e.g. a multipurpose room. Facilities often serve several purposes even though they are somewhat specialized--e.g., a theater may be suitable for music, lectures, drama, but not ballroom dancing or exercise. A multipurpose room with a simple stage may serve for all of these events in a more limited way.

Facilities require financial support by the sponsoring organization--for staff, utilities, operations, and maintenance, as well as for original construction and furnishing. The cost elements of a particular program/service at a multipurpose facility sometimes are buried within overall facility costs, so that the true program/service cost is not readily available. The overall cost of a program/service at a specialized facility often is more readily discernable.

City of Palo Alto (CPA) Comprehensive Plan: Community Services Element

Programs, and the facilities to support them, should conform to the CPA comprehensive plan when possible. Palo Alto policy has been to provide geographical diversity of services. Currently there are three CPA facilities comprising a network of community centers--Lucie Stern in northern Palo Alto, a small community center adjacent to the Mitchell Park Library (center and library currently being reconstructed, center size about 15,000 sq. ft. including courtyard), and a much larger Cubberley Community Center in southern Palo Alto (buildings alone about 176,000 ft. sq.).

Chapter 6 of the CPA Comprehensive Plan is titled Community Services and Facilities. A background report [“Community Services Background Report”, dated 7/21/09] was intended to amend that portion of the Comprehensive Plan. Following issuance of the background report, a series of community service element stakeholder meetings were held. Five (5) summaries of those meetings are available on the CPA website. As a result, recent changes were made to Chapter 6 [Reference: CSE Narratives, Chapter 6, 30 pages].

Chapter 6 covers schools, libraries, parks, community facilities, performing and cultural centers, as well as police and fire services and facilities. Services/programs for all include recreation, lifelong learning, and arts. Services and programs for specialized populations--children, youth, seniors, and disabled--also are covered. For example, in the prior plan, Policy C-22 called for flexible functions at community facilities. Policy C-24 covered reinvesting in aging facilities and avoiding
deferred maintenance. Program C-19, in support of C-24, covered improvement plans at facilities, including a Cubberley Master Plan. The new version of Chapter 6 reorganizes the policies and programs, but covers the same elements.

Page 16 of the 7/21/09 Background Report notes some important challenges that do or could apply to the Cubberley site, abstracted below:

♦ The Cubberley Community Center is largely owned by the PAUSD and is therefore dependent on PAUSD needs.

♦ The Parks and Recreation Department has identified a lack of sufficient playing fields. The need for playing fields is highest on weekdays between 3pm and 6pm, and on weekends.

♦ Gym space and daycare center capacity are inadequate to meet existing demand.

♦ The Community Services Department needs to develop improved cost-recovery strategies to reduce the draw on the general fund for programs and services.

Note: Efforts have been made here in recent years to increase cost-recovery, including some policy priorities, I think. Check with Rob deGeus for elaboration.

♦ The City will need to respond to the unique recreation needs of the aging Baby Boomer Generation.

The needed facilities spelled out are: playing fields, gym space, and daycare center. The recreation needs of the aging population are not spelled out—typically they might include simple exercise classes and yoga, swimming, dancing, light recreational activity like Ping-Pong, billiards, shuffleboards, bocce ball and horseshoe courts, etc. Some of the aging population also needs mental stimulation—that can be provided by lectures, films/broadcasts, computer classes, social network classes, and other adult education. Some of these needs are currently supplied by Avenidas (partially supported by CPA) at its center in downtown Palo Alto. Most of the aging population recreation/stimulation needs could be provided in large or small multipurpose rooms, gyms, classrooms, lecture halls, auditoriums, and well-equipped audio-visual rooms. Services that include arts and crafts might require specialized equipment in dedicated rooms—pottery making, kilns, machine and shop tools for wood and metal sculpture, jewelry making, painting, such as at Little House in Menlo Park, or as currently exist in some of the Cubberley individual art studios.

In addition to the needs identified in the Background Report, the Cubberley
Community Advisory Committee (CCAC) recently heard directly from the community regarding its needs. CCAC held a public forum on 11/8/2012 to provide an update on its progress, and to invite community responses. The facilities, where vocal community groups reported shortages, were: playing fields, gym space, and childcare. These shortages have not yet been analyzed or quantified adequately to direct program planning. Speakers at the forum also supported a continuing need for existing art, music, and dance programs. Again, a full analysis or quantification is lacking. One non-resident pointed out that she, and other non-residents who used Cubberley and other community facilities, supported the CPA economy via dining and shopping in Palo Alto.

CCAC also had community response at the 11/14/2012 CCAC meeting. Five (5) cooperating community groups requested a wellness center that would house and integrate their separate programs--Cardiac Therapy Foundation [medically supervised rehabilitation and information programs, Peninsula Stroke Association, REACH (Foothill program for post-stroke recovery), Abilities United (formerly CAR) [aquatic rehabilitation/therapy at the Betty Wright Swim Center], and Avenidas (needs more space for health and wellness programs for older adults and seniors).

In addition to Chapter 6 of the CPA Comprehensive Plan, and the Background Report to amend it, the Land Use and Transportation Elements of the Comprehensive Plan also provide some policies and programs that relate to community centers and services:

   POLICY L-61:
   Promote the use of community and cultural centers, libraries, local schools, parks, and other community facilities as gathering places. Ensure that they are inviting and safe places that can deliver a variety of community services during both daytime and evening hours.

   PROGRAM L-68:
   To help satisfy present and future community use needs, coordinate with the School District to educate the public about and to plan for the future use of school sites, including providing space for public gathering places for neighborhoods lacking space.

   POLICY L-64:
   Seek potential new sites for art and cultural facilities, public spaces, open space, and community gardens that encourage and support pedestrian and bicycle travel and person-to-person contact, particularly in neighborhoods that lack these amenities.

   POLICY T-14:
   Improve pedestrian and bicycle access to and between local destinations, including public facilities, schools, parks, open space, employment districts,
shopping centers, and multi-modal transit stations.

Cubberley Community Center

Cubberley, as a former high school site leased and owned by CPA, was not designed or built as a community center. Consequently its existing facilities do not ideally conform to, or readily support, community services desired and envisioned in CPA’s comprehensive plan and its proposed amendment. Likewise, some existing programs/services at Cubberley may not conform to the CPA Comprehensive Plan/Amendment, but merely help support overall costs of the Cubberley Community Center. For example, California Law Review is a for-profit tenant, offering specialized classes not intended for the general community. Additionally, Cubberley lacks some facilities present in many community centers--e.g. a pool, a café, an exterior or interior courtyard with seating --that limit the services/programs that could be offered.

A Master plan for a Community Center at the Cubberley site (1/30/91) was developed. It covered the entire site--city owned as well as spaces and facilities leased by CPA. It utilized neighborhoods to provide services. Neighborhoods included were: athletics, childcare, dancers, education, hourly meeting facilities, music and theater, non-profit/community organizations, recreation (expanded MP, distinct from Gyms under athletics), visual art, and administration and gallery/CAFÉ. Some of the items in the master plan were not implemented, or were moved to spaces other than originally planned.

Most of the buildings and other facilities (track, fields, etc.) at the Cubberley site were completed by 1955. Some additional buildings (Pavilion, Theater, and others) were added in the early 1960s. The site was built to then-existing school standards. In general, the structures have stood up well during the past 57 years, by replacing and repairing roofs, etc., although it becomes increasingly expensive to maintain the structures. Modifications of structures for child-care services added after the site became a community center appear to have been built to lower, more temporary, standards.

The facilities, while usable to support some community services and programs, cannot be considered modern. For example, air conditioning is generally lacking throughout the site. Wired internet access is not available throughout the site. Some classrooms and lecture halls now used by Foothill College have been upgraded with more up-to-date audio-visual equipment than originally existed, but such improvements are inconsistent.

The Cubberley site is inefficiently used by modern standards. Existing buildings are mostly single story, per the 1950’s model of Palo Alto school architecture. The building layout results in long distances between some buildings, and is inconvenient for a Community Center. Some very long covered walkways give a foreboding tunnel effect.
Figure 1 (Brian’s pie chart, and listing of square footage of items) shows the overall space utilization. Existing buildings take up 175,500 sq. ft. (4.0 acres) of space, with circulation (covered walkways) taking up another 116,148 sq. ft., (2.7 acres). This 60/40 ratio is quite inefficient. Site open areas (spaces between and around buildings, amphitheater, etc.) take up 426,897 sq. ft. (9.8 acres), while 750 parking spaces take up 239,755 sq. ft. (5.5 acres) of the 35 total acres. The site also supports a football field/track, large playing fields for baseball, soccer, etc. and 6 tennis courts. The fields take up 566,280 sq. ft. (13.0 acres). The space use is very inefficient.

The city portion of the site (8 acres) is 348,480 sq. ft. Note that if all the building’s footprint areas were consolidated into one area, it would cover only 50% of the city portion. Even if the building areas and walkways were consolidated into one area (291,648 sq. ft.), it would only cover 84% of the city portion. Clearly, CPA could build a 2-story (or higher) new community center on less than half of its 8 acres.

Likewise, PAUSD could easily fit a comprehensive high school onto the remaining 27 acres, by more efficient use of the site. As one example, the parking spaces could be placed under the playing fields and tennis courts, freeing up 5.5 acres, effectively increasing the site to 32.5 acres, even while continuing to use inefficient single story classroom buildings.

PAUSD asserts that for its anticipated future needs of one or more schools at Cubberley, many of the existing buildings and other facilities could be directly reused, or modified for reuse, rather than scraped to the ground and built new. This view is not widely shared, nor consistent with technologically facilitated pedagogy. Obviously, room equipment such as smart boards, computers, wired or wireless internet access, etc. would need to be added for any future use, but basic building shells and interior structures might mostly be retained.

**Services/Programs at Cubberley Community Center**

The neighborhoods/services envisioned in the Cubberley Community Center Master Plan remain a good starting point to identify facilities for a Community Center in the near, mid, or far terms. Likewise, additional services/programs identified by the Community Needs and School Needs Subcommittees can help identify additional facilities that ought to be considered for the overall CPA/PAUSD Cubberley site.

All the facilities on the overall site should be shared to the maximum extent possible consistent with the separate needs of CPA for a community center and PAUSD for one or more schools. Sharing (new construction, operations, and maintenance) will result in the lowest overall cost to the residents of Palo Alto who support both CPA and PAUSD via taxes and fees.
Community and school services/programs can be provided in proactive or reactive modes. In proactive modes, most services are well defined, with identified budgets (or shares of the budget), priorities, locations, and responsibilities for execution. In reactive modes, many services are provided in response to events and citizen demands. The proactive mode tends to prevail for many school services/programs, whereas the reactive mode tends to prevail for many community services and programs. School districts necessarily provide a well-established, more focused, highly structured, and usually slowly changing set of educational services. Additionally those services must comply with state regulations and restrictions, and the accompanying bureaucracies and inertia. Community services are generally freer of state regulation and communities are more flexible than school districts in providing the type, quantity, and quality of services/programs. An advantage of the reactive mode is its flexibility and quicker adaptation to inevitable changes in needs and demands for services. A disadvantage of the reactive mode is that priorities among services often are not set. Then, when resources (funds, personnel, facilities) are reduced, cut entirely, or insufficient for competing demands among services, it becomes politically difficult to reduce, eliminate, or reallocate services. This has been true for California in recent years (closing parks, cutting school budgets, reducing CHP staff, deferring maintenance, etc.), as well as for CPA.

In identifying the future desired services/programs (and therefore the supporting facilities needed) at Cubberley, both CPA and PAUSD face problems of uncertainty and prioritization, in different ways. They also face funding problems for ongoing operations, and will need to have voters pass bonds for large-scale improvements at Cubberley.

**PAUSD Challenges**

PAUSD faces considerable uncertainty about what services/programs a high school of the future (about 2030) will provide, what kinds of students it will serve, and what should be the priorities. Certainly PAUSD will continue to offer the core academic subjects. Certain other services may be provided as well. First, there may be increasing demand for music, dance, performing arts, fine arts, and crafts often encountered in economically well-off, highly educated, largely professional areas like Palo Alto. Second, PAUSD may also have demand from Silicon Valley parents involved in science, engineering, industry, and business, for modern versions of vocationally oriented classes—such as software programming/web site design/blog construction rather than drafting; material sciences laboratories/preparation rather than casting/foundry/glassblowing; and electronic design/assembly/testing rather than machine-shop/woodshop/car maintenance and repair. There may be demand for radio/television/web broadcasting design, delivery, and operations in addition to school newspaper experience. Third, part of this demand will be driven by the perceived employment opportunities for some graduating students who do not go directly to college/university. The New Technology High School in Napa CA is a role model for the vocational types of services, and is in partnership in many ways with the surrounding business community. Fourth, PAUSD, known as a high-
performance academic district, may face a demand for less stressful academic tracks than those for college-bound students enrolling in advanced-placement courses. PAUSD is already trying to cope with stress-related student suicides (CPA participates in Project Safety Net directed at teen suicides). Note that the ABAG projections for growth of Palo Alto do not imply that all the growth will be for high-performing students from high-income parents. Fifth, especially for high school and perhaps even for junior high schools, technology advances such as remote computing, simple online courses, and even massive open online courses (MOOC) likely will affect schools of the future. The advances will impact the size and quality of teacher staff, the need for information technology support staff and equipment, very likely the size of classrooms and their technology, etc. It is possible that the physical space needed for a future high school could be much smaller than at Palo Alto HS or Gunn HS, if students take courses at home or in other remote locations, and merely show up for in-class tests or not at all.

Of course, even for the possible reduced size scenario, there will remain a need at schools for space for the non-academic side of middle and/or high-school-socialization, personal interaction, formation and interaction with small and large groups, etc. This cannot readily be quantified into facilities other than general gathering space and places where students can meet, interact, and work out their own problems and concerns. Spaces such as patios, courtyards, and hallways, gymnasiums, locker rooms, and sports/recreation areas will still be needed, even for a small future school.

As a result of these uncertainties, and the eventual prioritization needed to select services/programs while meeting budget constraints, PAUSD may want a different type of high school (and/or middle school) at Cubberley than now exists elsewhere in Palo Alto.

The impact of this uncertainty on shared facilities at Cubberley is somewhat clearer. If PAUSD decides to provide music, etc., then facilities for music, dance, performing arts, and perhaps fine arts and crafts, potentially can be shared during non-school hours. Many of these are now provided at the Cubberley Community Center (on a non-shared basis). Also, if CPA supports individual musicians, dance teachers and troupes, performing artists, fine artists, craftspeople (weavers, potters, glass artists, etc.) through below-market rentals of shared space, potentially PAUSD might utilize those individuals to teach, help teach, or demonstrate, those skills to students, supplementing its own teaching staff in an economical way.

If PAUSD decides to offer more vocationally oriented classes, sharing would be more difficult, but not impossible. That is because vocationally oriented classes tend to require specialized facilities, which are both less usable by the general community, and often require active supervision while in use. This implies higher user fees, and limited times due to availability of qualified supervisors. However, should PAUSD pursue this route, it might well be able to partner with local Silicon Valley firms for donated equipment, personnel to train students (and teachers), supervision, etc.
Partnering business firms would benefit from tax write-offs for donated equipment, direct access to qualified graduates, and good public relations. Such partnering again would be an economical way to supplement teaching staff.

Despite those challenges, PAUSD stands to benefit from financial and programmatic efficiencies by planning now for future shared use of the Cubberley site. Acreage is more than adequate to accommodate any future school use along with some community service presence.

**CPA Challenges**

In addition to the challenges listed earlier (see section City of Palo Alto Services/Programs), there are uncertain demographic factors. ABAG projections show CPA should expect significant population growth. PAUSD is estimating a 2% annual growth rate in student population out to 2030. The implication is that there will be a similar growth in overall population in CPA of 43% by then (i.e., \(1.02^{18}\)). It is anticipated there will be a proportional growth in demand for services and programs throughout CPA. However, most of this population growth is expected in southern Palo Alto, based on what has occurred in recent years. Therefore the demand for additional services at a local community center, i.e., Cubberley, may easily exceed 50% by 2030.

Another challenge is the lack of available land for more community services and programs. Palo Alto is largely built out, with little land available to CPA (or PAUSD) short of eminent domain proceedings. Indeed most of the recent population growth in Palo Alto has been in high-density residential developments (apartments, condos). A recent example is the Echelon development in the Charleston corridor. The 8 acres currently owned by CPA at the Cubberley site is probably the last large parcel of real estate left within the city limits for community services, short of converting existing parks and municipal facilities to that purpose.

Another challenge is revenue to support services/programs. CPA is already struggling to meet its budget. It is uncertain whether the projected growth in population will result in sufficient revenue growth to support growth-related expansion of existing services/programs at their present quantity and quality level, much less support additional services such as the senior recreation/stimulation needs or a wellness center.

Another challenge/uncertainty lies in recently proposed major development plans near downtown Palo Alto in exchange for a new municipal theater or possibly a municipal services center. This proposal would affect the need for a full theater facility at Cubberley, and/or revenue needed to pay infrastructure improvement bonds.

**Joint Challenge**
Both CPA and PAUSD will need to issue bonds for capital construction and maintenance of future facilities at Cubberley. Voter approval is far more likely if PAUSD and CPA cooperate and share the Cubberley site, demonstrating to voters that strong efforts have been made to provide the needed and desired services/programs, while minimizing overall costs for construction, maintenance, and operation.

**Opportunities**

The challenges provide opportunities. PAUSD has an opportunity to build a modern junior and/or high school on the Cubberley site. It has an opportunity to partner with CPA and other community organizations to minimize costs and improve instruction, as well as to be seen as more reactive and responsive to community needs. CPA has an opportunity to build a modern community center on the Cubberley site, while being more involved in meeting PAUSD needs. It also has an opportunity to be more proactive in identifying its policies and priorities for guiding current and future community services and programs.

Other opportunities arise for both PAUSD and CPA for more involvement with Stanford University. Stanford is not an explicit participant in considering the Cubberley site, but it certainly is an implicit one. Many of the PAUSD students come via Stanford staff and married students. Although Stanford has the greatest impact on nearby schools, such as Palo Alto H.S., its staff and students are spread all over Palo Alto, and development of the Cubberley site will affect them. Stanford can certainly inform PAUSD regarding anticipated technology and teaching changes that will affect future schools. Likewise recent newly constructed facilities at Stanford can inform the process of designing, constructing, and equipping school facilities at Cubberley, once the needs have been established. PAUSD already deals with Stanford regarding school sites and locations, and this arrangement could be expanded to help inform the process for the Cubberley site. Likewise, CPA can utilize the anticipated technology, and examples of facilities, for a future community center at Cubberley, as well as for some currently planned infrastructure improvements. One opportunity for Stanford University with CPA arises from Stanford Hospital being a premier hospital in terms of medical care. However, after patients are discharged, they often require extended rehabilitation and ongoing wellness services. Many of those patients live in Palo Alto and surrounding areas. Construction of a Wellness and Health Center at the Cubberley Community Center would facilitate patient recovery, while permitting Stanford Hospital and Health Services to readily follow up on long-term benefits of the treatments received by local patients. The new Affordable Health Care Act (“Obama Care”) likely will push all medical delivery systems in this direction.

**Impact on Facilities desired at Cubberley site**

It is clear that CPA and PAUSD will need facilities at the Cubberley site by about 2030, and perhaps sooner. Each entity will need facilities dedicated to its
own use. There is good potential for shared facilities as well, that could result in reduced operating costs and need for construction bonds for both CPA and PAUSD. The sharing may be done by time separation (TS--e.g. after school hours, or scheduled public use during school hours), or may be simultaneous (depending on PAUSD security needs for students).

Outlined below are some of the expected shared and sole use facilities, based on existing services/programs in PAUSD high schools and at Cubberley Community Center, along with some possible future services/programs discussed above. The internal equipment within the facility--computers, audio-visual equipment, smart boards, monitoring and surveillance equipment, etc. is not listed. It is anticipated that PAUSD computer systems, files, etc. would not be available to community users because of confidentiality and security concerns. However, scoreboards, timers and other equipment used for sports might be shared. In addition to facilities, costs for electrical and mechanical infrastructure, operation, and maintenance also could be shared.

**Shared Use**

- Parking (preferably underground)
- Maintenance yard (joint and adjacent sections)
- Equipment storage and Repair (joint and adjacent sections)
- Supplies delivery area/dock/storage area (joint and adjacent sections)
- Electric power, natural gas, water, fuel, sewage common entry/exit area
- Emergency electric power equipment
- Offices for maintenance and repair staff
- Kitchen
- Dining area (indoor and outdoor)
- Outdoor stadium and track (TS)
- Outdoor playing fields (TS)
- Tennis courts (TS)
- Restrooms for track, fields, courts (TS)
- School Gymnasiums (TS)
- Pool and aquatic facility (TS)
- Auditorium (TS)
- Theater (TS)
- Theater rehearsal/makeup/costume rooms (TS)
- Theater set storage, construction rooms (TS)
- Music Recital Room (TS)
- Music Practice Room (for band, orchestra) TS
- Dance Studio, if implemented (TS)
- Fine arts and craft spaces, if implemented TS
- Radio and television broadcast studios, if implemented (TS)
- Lecture rooms (TS)
- Language learning laboratories (TS)
- Some classrooms (TS)
Some audio-visual Rooms (TS)

In addition to facilities, it is anticipated that some staff could be shared as well, reducing overall operational costs for PAUSD and CPA. Staff that might be shared includes:

- Custodial
- Administrative
- Grounds and Maintenance
- Information Technology

**CPA Use**
- Gymnasiums (2 or more)
- Individual Artist studios
- Dance studio(s)
- Pre-School Child Care
- Multipurpose rooms
- Meeting Rooms
- Ballroom
- Lecture Hall
- Auditorium
- Some classrooms
- CPA administration
- Health and Wellness Center

**PAUSD Use**
- PAUSD administration offices--Principal, vice principal, other staff
- Information technology center and offices for staff
- Many classrooms
- Lecture halls
- Study halls
- Gymnasium locker rooms
- Teacher’s Offices
- Nurse/medical office
- Science Labs
- School Library
- Cafeteria
- Bicycle storage
- Student Lockers
- Student and Staff Restrooms
Cubberley Existing 35 Acre Land Use

- Fields & Tennis Courts
- Buildings
- Circulation *
- Parking
- Access Roads
- Site **

*Circulation: Covered walk, covered patios connecting buildings
**Site: Landscape, open court yards, amphitheater, outdoor main switchgear, etc.
Finance
Subcommittee
Documents
CCAC Finance Subcommittee Deliverable #1

Financial analysis of City and School District situation, especially as it relates to Cubberley revenues and expenses. Delivery date: October 1

Important Dates:

1955 – Cubberley is constructed

1979 – Cubberley closed as high school; PAUSD rents space to others

1987 – Utility User Tax is adopted by City voters

1989 – PAUSD leases the entire Cubberley facility to the City

2001 – City acquires ownership of 8 acres of Cubberley buildings in swap for developed property at Terman

December 2013 – Date by which City is to give notice if it does not intend to renew Cubberley lease for next 5 year option period (2014-2019)

August 2014 – Time at which City must submit to County Registrar of Voters ballot measure(s) to finance infrastructure improvements to be voted on at November General Election

The Lease and Covenant Not to Develop:

There are three components to the Lease and Covenant Not to Develop:
1. The lease of the Cubberley Facility – current cost in 2012-2013 = $4.6 million
2. The Covenant Not to Develop – current cost in 2012-2013 = $1.8 million
3. Payment for provision of space at each elementary school for child care – current cost in 2012-2013 = $640 thousand; utilities for child care spaces – current cost in 2012-2013 = $56 thousand

There is an annual CPI adjustment built into the document so that each component increases each year.
Cubberley Finances:

Aside from the lease payments, Cubberley has expenses for:

- General operating maintenance: $430,000
- Operations, not including mtce: $1,325,000

Cubberley generates revenues of:

- Tenant leases: $1,620,000
- Hourly rentals: $823,000
- Office space rental by City: $73,000

There is a net revenue from all these sources of approximately $760,000.

According to figures in the IBRC report, the City pays the School District $4/square foot in the Lease and Covenant Not to Develop and collects approximately $1/square foot in rental revenue.

The City has identified a minimum of $3.3 million of capital improvement costs over the next 5 year period:

1. $1.4 million in mechanical/electrical (0 on City buildings)
2. $1.1 million in electrical upgrades (750 thousand on City buildings)
3. $1.0 million in roofing projects (375 on City buildings)

Long term, the City has identified $18.8 million in infrastructure improvements that must be made at Cubberley. Of those, $8.4 million is on City Buildings and $10.4 is on School District Buildings. This would cover infrastructure improvements which would extend the life of the buildings for 25 years but most would need to be accomplished within 10 years. These improvements have not yet been funded.

Foothill College, the longest term and largest tenant, is scheduled to move to a new Sunnyvale campus sometime within the term of the next lease option period. Foothill represents a significant portion of the current tenant lease income.

General Financial Conditions of City and School District

The School District has an operating budget of $159 million. Of that, 6% or $9 million is from lease revenue, $7 million of which comes from the City. The operating budget contains three reserve funds:

1. The state-mandated “rainy day” fund
2. The basic aid fund; and
3. The budget cuts fund
Given recent actions by the State, the District has been using the budget cuts fund to balance its budgets. This fund is scheduled to be depleted in the 2013-2014 fiscal year. The School District is counting on robust increases in property tax revenue and the renewal of the Lease and Covenant Not to Develop to balance budgets for the 2014-2019 time frame.

The School District is anxious to hold onto the basic aid reserve because of persistent threats that the State will cut off the small amount of per pupil contribution that it sends to Palo Alto. This reserve would cover that gap for a number of years.

The School District is also concerned about the outcome of the November 2012 statewide election. There are two ballot measures which could significantly impact the finances of the District should either or both fail passage.

Major operating budget gaps are filled most often by school districts by going to the voters for approval of a parcel tax. The PAUSD last did so in 2010. Voters are currently paying approximately $613 per parcel per year. There is a cost of living adjustment built into the current parcel tax so that it increases each year. The current parcel tax will expire in 2016.

The School District has no permanent capital improvement budget. Instead when it needs to make significant improvements to buildings or construct new buildings, it must go to the voters to win approval to issue General Obligation Bonds.

The current bond measure does not contain any funds that can be used to make major improvements at Cubberley as all of the secondary school funds have been expended or encumbered.

As for ongoing maintenance, the General Fund transfers 2.5% of its budget ($4.1 million this year) to the District’s routine maintenance fund. The District also has a planned maintenance budget, coming from bond funds, in the amount of $2.1 million annually.

The City’s $152 million general fund budget currently and looking out to the future has a structural deficit. The Council balanced the 2012-2013 operating budget by instituting over $2 million in structural deficit reductions, over $3 million in one-time savings and by “borrowing” over $300 thousand from reserves. Future projections do not paint a rosier picture. The property tax increases that so heavily benefit the School District make up a small percentage of the City’s tax revenue. The Utility Users Tax which currently raises just short of $11 million annually is flattening as people shift from use of land line phones to cell phones (on which no tax is currently collected). Sales tax revenue has increased recently but is very dependent upon economic conditions.
In the Capital Improvement budget, the IBRC identified a backlog of deferred maintenance projects on the order of $40 million. The Commission also recommended that in order not to fall back into a backlog status, the City would need to budget $32 million annually to keep current. The IBRC also identified approximately $210 million in new infrastructure projects that need to be built. Neither Cubberley nor several other items the Council has discussed in recent times were included in this number.

Summary

There are potentially two remaining 5-year options on the Cubberley lease if mutually agreed upon by the City and the District. The deteriorating condition of some of the buildings and the need to invest in them are powerful factors in forcing the governmental agencies to clarify their mutual goals and interests in the property. The precarious nature of both agencies’ budgets requires that capital investment in the Cubberley site be well-planned, deliberate and suited to a long-term vision for the site.

Attachments:
1. Graph showing the trendline of Utility User Tax
2. Graph showing growth of Property Tax
3. Spreadsheet of current Cubberley revenues/expenses and projected capital expenses
4. Spreadsheet of projected revenues and expenses for Cubberley

Rev. 10/1/2012
I. Overview

This CCAC Finance Committee report reviews the existing agreement between the City of Palo Alto (City) and Palo Alto Unified School District (District) referred to as the Lease and Covenant Not to Develop (Cubberley Lease). Some background information and terms are reviewed followed by recommendations and considerations for actions going forward.

II. Lease Overview

The existing arrangement between the City of Palo Alto (City) and Palo Alto Unified School District (District) was put into place 1989 to address issues that were of concern to the Palo Alto community at that time. During the 1980s the District was selling off its parcels of land to raise capital to meet financial demands and the falling school enrollment seemed to support that trend. As land became more scarce, the community sought to prevent further District land sales fearing that future growth in student population would require additional schools and the increasing land scarcity would make that infeasible. The community developed a solution to the land sales, obtaining the District's agreement not to sell additional school properties and in turn the City would provide funds to aid in the District's financial problems. The City obtained funds to pay for the Cubberley Lease as well as other city improvements through a levied Utility Users Tax, to be collected by the City and paid to the District through the Lease and Covenant Not To Develop (Cubberley Lease).

The City and District agreed to enter into an agreement that is now the Lease and Covenant Not To Develop and contains the following major terms:

1) **Cubberley Lease Payment:** A City lease payment to the District for the use of the Cubberley property.
2) **Child Care Facility Lease Payment:** A City lease payment to the District for use of eleven (11) school facilities in order to provide child care services to the community.
3) **Covenant Not to Develop:** A City lease payment to the District in return for the District's commitment to not sell additional District owned land (including Ohlone, Garland, Greendell, JLS, and Jordan).
4) Lease payments are adjusted annually in line with Consumer Price Index changes.
5) The Lease and Covenant Not To Develop terms included one 15 year term (1/1/90-1/31/04), one City optional extension of 10 years (1/1/05-12/31/14) and two mutual optional 5 year extensions (1/1/14-12/31/18 and 1/1/19-12/31/23).

In 1998 the Cubberley Lease was amended to include an agreement to substitute two operating schools for the opening of one "covenanted" site. The list of Covenanted Sites was modified to exclude Ohlone and include Juana Briones and Walter Hays. The list of schools where child care was allowed by the City was expanded to include Ohlone and allowed for future expansion.

In 2002 the Cubberley Lease was amended to account for the land swap where 8 acres of the Cubberley site was deeded to the City in exchange for the District's reclamation of the Terman location and the Cubberley Lease Payment was accordingly reduced by $23,490 per month. The list of Covenanted sites...
was modified to exclude the Garland site and include Addison and El Carmelo sites. Also added at that time was a District Option to open a compact high school at the Cubberley site if necessary, agreeing to joint use of the gym, cafeteria, theatre, and fields with required 24 months notice.

At this time, the first of the two 5 year extensions is under consideration by both parties with a decision required by December 31, 2013.

III. Problem Statement

The following issues are a concern at this time regarding the above summarized lease.

1) District Needs
   The District has developed a dependency on the lease payment funds, comprising now approximately 4.4% of the District's annual budget as revenue. These funds also constitute approximately 4.6% of the City's annual budget as an expense.

2) Covenant Not to Develop Now Obsolete
   The lease includes a "Covenant Not To Develop" payment that was intended to safeguard District owned properties from being sold. It is the City's promise to pay the District in return for the District not selling its land. This is no longer an immediate issue as the school sites identified in the Covenant are now all in use.

3) Utility Users Tax
   During the campaign to pass the Utility Users Tax, it was advertised to the public as a District financial benefit, creating a belief by the Palo Alto community that one of the major beneficiaries of the tax funds collected is the District.

4) Lease Payments per Consumer Price Index vs. Utility Users Tax Revenue
   The Cubberley Lease calculates annual lease payment adjustments using the Consumer Price Index which has been steadily increasing over time. The Utility Users Tax revenue which depends on utility revenues and is used by the City for lease payments, has been leveling off and/or decreasing in recent years. This is an inconsistent correlation of income and expense for the City.

5) Future District Requirements are Vague
   The District is vague on specific dates for future use although clear, using current projections, that at some time in the 10-15 year time frame the site or a portion thereof may be necessary for school use.

6) Future City Requirements are Vague
   The City has not articulated clearly the community services necessary to remain on the Cubberley site and exactly how much of the site is required to support them.
IV. Lease Modification Options

The following recommendations for modifications to the lease are for the short term period, specifically related to the upcoming renewal of 5 year term (Jan 1, 2014 - Dec. 31, 2018). Mid-term and long-term recommendations are difficult to predict as they would pertain to the conditions and plans in place at that time.

Consideration should be given to renew the lease for 5 years to give the City and District time to plan for future renovations on the site. The following lease modifications may also be considered in the form of an addendum to the existing lease:

1. Recalculate the annual lease payments to align with the Utility Users Tax revenue trend rather than the Consumer Price Index.
2. Remove the Covenant Not To Develop payment as it is no longer pertinent to the current situation.
3. Have the District pay for its share of the projected capital improvements.
4. Have the District contribute to ongoing maintenance and repairs.
5. Increase the amount of child care space leased to the city on elementary schools sites along with a corresponding increase in child care facility lease payments.
CCAC Finance Committee Deliverable #3
Funding Options

1. Overview

This report summarizes funding options for the Palo Alto Unified School District (District) and the City of Palo Alto (City). Funding mechanisms are reviewed that are commonly used by the City and District along with a few others that might be potentials for future use. This is not a comprehensive review of all possible funding mechanisms. Three scenarios for the future of Cubberley facilities are proposed.

Funding mechanisms are methods used to generate revenue streams and/or raise capital. The use of the revenue and duration of the mechanism is determined at the time the mechanism is created and, in most cases, must be approved by voters. Income from the funding mechanisms can be used in basically two ways:

1) Ongoing revenue streams may be used directly to augment an operating budget or pay for supplemental services. Common funding mechanism examples of this type include parcel tax, property tax, utility taxes, etc.

2) Bonds are issued to raise large amounts of capital. In this case a new or existing revenue stream is designated to repay the bonds. Various restrictions apply. In most cases, capital raised is used for new development or capital improvements. Rule of thumb is that $1m/year of revenue for 30 years generates between $10m to $15m of borrowed capital depending on prevailing interest rates. The most commonly used bonds for the City and District are General Obligation Bonds.

2. Funding Mechanisms used by City & District

2.1 Parcel Tax

A parcel tax is a fixed annual tax per parcel of real property that generates an ongoing revenue stream. It requires a 2/3 voter approval. The duration of the tax varies, generally 5-20 years, and renewals can be approved by voters.

District Parcel Tax History:
2001 - Parcel tax $493 approved 75% generated $5.5m/year, expired 2011
2010 - Parcel tax $589 approved 79% generates $11.9/year expires 2016 (escalates 2% per year)

City Parcel Tax History:
There is currently no parcel tax collected by the city.

2.2 Utility Users Tax

A utility tax is a fixed percentage fee levied on city resident's utility or telephone bills. It requires a 50% voter approval. The duration is determined at the time of approval.

District History:
There is currently no Utility Users Tax collected by the District.

City Utility User Tax History:
1989 - Utility Users Tax of 5% approved over 50% generates $11m/year, no expiration

Version 1.0, 11/7/12
2.3 General Obligation Bonds
A general obligation bond (GOB) is a funding mechanism whose revenue stream is a property tax fee per $100,000 of assessed property value. The tax time frame can be anywhere up to 40 years. Historically it has been 30 years. A GOB generates revenue that can only be used for capital improvements. GOB requires a 55% voter approval for school districts and 2/3 voter approval for cities.

District Bond History:
1995 - "Building for Excellence" - $143m bond, tax rate of $35/$100,000 expires in 2024.
2008 - "Strong Schools" - $378m bond passed with tax rate of $44.50/$100,000 expires 2037
2012 - "Strong Schools" increase to $60/$100,000 due to recession to retain 30 year repayment

City Bond History:
2008 - "Measure N" - $78m bond passed with tax rate up to $28.74/$100,000 expires 2037

3. Other Funding Mechanisms for Consideration

3.1 Business License Tax
Tax levied on businesses to generate a revenue stream. Available to City. Majority voter approval required. In 2009 a ballot measure proposition by the city to tax businesses was defeated.

3.2 Sales Tax
Tax levied on sales revenue to generate a revenue stream. Available to City in 1/8% increments. Current restrictions limit maximum of 1% available to City. Majority voter approval required.

3.3 Mello-Roos Community Facilities District (CFD) Bonds
A Mello-Roos CFD is formed for a specific community need and requires the formation of a "territory". The territory can be any size, including a whole city, as long as all members benefit from the project funded by the bond. Debt repayment is from revenue collected as a property tax fee per $100,000 of assessed property long term (generally 30 years). The bonds generate capital that can be used for capital improvements and services. A CFD requires a two thirds vote of residents or property owners in the district.

3.4 Certificates of Participation Bond
A Certificate of Participation bond is a general credit of the issuing entity. It is not necessarily backed by a particular revenue source, but a new revenue source or reallocation of existing resources is necessary to support the cost of COP debt. A COP also requires the use of an existing asset as collateral for the debt.

3.5 Utility Revenue Bonds
A Utility Revenue Bond is repaid through Utility rates or charges to customers. Revenue streams from utilities cannot be used to fund General Fund operations or capital improvements.

3.6 Private Funding
Revenue sources may be available from private sources who are interested in participating in city improvements. These could be in the form of private financing, contributions, or participatory funding for joint use.
4. Cubberley Funding Scenarios

Given that no specific plan is in place for the Cubberley Facility and the only "known" requirement is that the District may need it in 10-15 years, planning options are wide open. Three scenarios with possible funding options are presented here for consideration.

4.1 No Development at Facility - Use Cubberley "As-Is"

Option 1 assumes that the City continues the Covenant Not to Develop and Lease for 10 years. After 10 years, the agreement terminates and the District can reopen the high school in the existing facilities. The City and District would have to renegotiate the use of the existing 8 acre parcel owned by the City on which a majority of the classroom space is located. Today the Cubberley Facility rental income covers its operating costs and routine maintenance so those costs are not considered a funding need over the next 10 years, although the loss of the Foothill lease around 2015 may be problematic. Downside is that after 10 years, no community services would be provided by the City.

**OPTION 1: No Change to Cubberley**

<table>
<thead>
<tr>
<th>Years</th>
<th>Need</th>
<th>Responsible Party</th>
<th>Funds Required</th>
<th>Funding Options</th>
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<td>Capital Improvements</td>
<td>City</td>
<td>$12.3m</td>
<td>Include in 2014 bond</td>
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<td>10+</td>
<td>Capital Improvements</td>
<td>District</td>
<td>$6.3m</td>
<td>Increase parcel tax and use on a &quot;pay as you go basis&quot; meaning accumulation of funds to build a project instead of creating debt - OR- issue new GO Bonds</td>
</tr>
</tbody>
</table>

4.2 Phased Re-Development - City 8 Acres First, District 27 Acres Later

Option 2 assumes that the City continues the Covenant Not to Develop and Lease for 5 years. In the meantime the City and District develop a Memo of Understanding (MOU) to develop joint use facilities on the Cubberley location. In the following 5-10 years, the City builds a Community Center with joint use in mind. After 10-15 years, the District rebuilds the high school. Costs are based on the $200m construction estimate provided by the architects and based on acreage split accordingly, $50m (25%) for City, $150m (75%) for District.

**OPTION 2: Phased Re-development**

<table>
<thead>
<tr>
<th>Years</th>
<th>Need</th>
<th>Responsible Party</th>
<th>Funds Required</th>
<th>Funding Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-5</td>
<td>Capital Improvements</td>
<td>City</td>
<td>$6m</td>
<td>Include in 2014 bond measure</td>
</tr>
<tr>
<td>5-10</td>
<td>Community Center (with joint use MOU)</td>
<td>City</td>
<td>$50m</td>
<td>Include in 2014 GO bond measure - or - COP through increase of the Utility Users Tax</td>
</tr>
<tr>
<td>10+</td>
<td>High School (with joint use MOU)</td>
<td>District</td>
<td>$150m</td>
<td>High School Bond in 2024 when &quot;BforE&quot; bond expires</td>
</tr>
</tbody>
</table>
4.3 One Time Re-Development - 35 acres at once

Option 3 assumes that the City continues the Covenant Not to Develop and Lease for 5 or 10 years. In the meantime the City and District develop a Memo of Understanding (MOU) to develop joint use facilities on the Cubberley location. After 5 or 10 years, the City and District together build a Community Center and High School with joint use in mind. Costs are based on the $200m construction estimate provided by the architects.

OPTION 2: One-Time Re-development

<table>
<thead>
<tr>
<th>Years</th>
<th>Need</th>
<th>Responsible Party</th>
<th>Funds Required</th>
<th>Funding Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-5</td>
<td>Capital Improvements</td>
<td>City</td>
<td>$6m</td>
<td>Include in 2014 bond measure</td>
</tr>
<tr>
<td>5-10</td>
<td>Community Center and High School (with joint use MOU)</td>
<td>City &amp; District</td>
<td>$200m</td>
<td>High School General Obligation Bond with optional funding from City</td>
</tr>
</tbody>
</table>

5. References

California Debt Issuance Primer

Partnership for Joint Use, Research Report by Jeffrey M. Vincent
### Appendix A: Funding Options (Financing Mechanisms)

* Note that GO and Mello-Roos bonds can be thought of as “revenue raising” instruments in that their approval by voters implements taxes to repay bond holders.

<table>
<thead>
<tr>
<th>Financing Vehicle/Instrument to Issue Bonds</th>
<th>Description</th>
<th>GME Requirement (Nov. 2012)</th>
<th>Vote Requirement</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Obligation (GO) Bond*</td>
<td>Property Tax based on % of assessed value</td>
<td>No</td>
<td>2/3</td>
<td>See accompanying chart for list of upcoming regular and mailed ballot election dates.</td>
</tr>
<tr>
<td>Certificates of Participation (COPs)</td>
<td>Similar to Revenue Bonds</td>
<td>No</td>
<td>N/A</td>
<td>Must have identified revenue stream for repayment e.g. new tax such as Business License Tax or increase in current tax such as sales tax.</td>
</tr>
<tr>
<td>Utility Revenue Bonds</td>
<td>Repaid from Utility Rates</td>
<td>No</td>
<td>N/A</td>
<td>Must have identified revenue stream for repayment. Utility bonds cannot be used to fund General Fund operations.</td>
</tr>
<tr>
<td>Mello-Roos District Bonds*</td>
<td>Special Tax Levy</td>
<td>No</td>
<td>2/3</td>
<td>Special Tax Levy used to repay bonds.</td>
</tr>
</tbody>
</table>
### Appendix B: Funding Options (New or Increased Taxes)

*General taxes can be coupled with an advisory measure expressing voters’ preference that tax be used for particular purpose. If the ballot language itself expressly limits use of tax to infrastructure or other specific uses, it becomes a Special Tax. Special taxes require a 2/3 vote, but need not be placed on a GME ballot.

<table>
<thead>
<tr>
<th>New or Increased Taxes to Support Financing Vehicles (e.g., COPs)</th>
<th>Description</th>
<th>GME Requirement (Nov. 2014)</th>
<th>Vote Requirement</th>
<th>Comments</th>
</tr>
</thead>
</table>
| Business License tax | Tax on businesses | Yes* | Majority | - Must be voted on at GME
- Currently, there is a 1.0% transactions and use tax in Santa Clara County. The cap on these taxes is 2%. (R&T 7251.1). Therefore PA has the capacity to impose a tax of up to 1%. Note these taxes may be imposed only in multiples of 1/8%. |
| 3/8¢ Sales Tax | General Tax | Yes* | Majority | |
| Utility Users Tax | Tax on utility charges | Yes* | Majority | |
| Parcel Tax (See comment) | Property tax based on flat rate per parcel | No | 2/3 | - Parcel tax cannot be pledged toward bond payments. Can be used to support programs and operating expenses. |
Appendix C: Comparison of GOB, Mello-Roos, and Parcel Taxes

Separate document attached provided by Jones Hall dated September 2012.
Finance Deliverable #3

Research existing joint use facilities in other communities for lessons learned and guidance for our effort.

Due Date: Oct. 19th

Outline/Process

• Gathered available documentation on Joint Use projects
• Choose 3 examples to study in depth – based on similarity to Cubberley
  – Wadsworth, Ohio High School & Community Campus
  – Emeryville, CA Center for Community Life
  – Livermore, CA School Upgrades, City Library & Youth Community Center
• Gathered data
  – Partners
  – Facilities (including sq. ft)
  – Total Cost and Funding Mechanisms
  – Implementation Timeline
• Common Threads and Lessons Learned
• References
Emeryville Center for Community Life

Partners:
• Emery USD
• City of Emeryville

Approx. 7.6 acres
115,100 sq. ft facility

Facility Overview
• 9-12 High School > 750 students
• K-8 Lower School
• School Multi-Purpose Room
• Admin for School & Community
• Community/School Library
• Community Pool
• Community Dance/Aerobic Space
• Community Multi-Purpose Room
• Community Amphitheatre
• 3 level design w Terraces
• Security Control Points
• Phase 2 –theatre, gym, classrooms

ECCL has Phase 2 plan and Defined Boundaries

Approx. 7.6 acres
115,100 sq. ft facility
Emeryville Funding and Timeframe

• Cost / Funding
  Phase 1: $80M (w/ $10M flex)
  – School will use a $48M 55% General Obligation Bond
  – City will provide $21M in State Redevelopment $s.

• Timeline
  – In planning for 10 years- program plan first issued in 2003
  – Currently on 3rd MOU
  – Approved the conceptual design March 2012
  – Move in date is currently estimated August 2015

ECCL is still in development and concern is being raised over the state commitment of redevelopment funds.
Facility Overview
- 9-12 High School (1629 students)
- Recreation Facility
- Senior Center
- Health & Wellness Center
- Outdoor and Indoor Pools
- Pediatrics and Dentistry
- Media / Public Library
- Existing Middle school on site (782 students)

Partners:
- Wadsworth Schools
- City of Wadsworth
- Public Library
- Private Health System

Approx 65 acres
450,000 sq. ft
Wadsworth Funding and Timeframe

• Cost / Funding - $105M
  – $65M from a General Obligation Bond by the Schools
  – $24M from Ohio Schools Facility Commission (37% of GOB)
  – $16M city commitment for Community Center
    • Partners and capital corporate campaign

• Timeline – 4 years !!
  – Presented to community in May 2008
  – Bond approval in November 2008
  – School opened in Fall 2012
  – Community Center opening scheduled for December 2012

Taking advantage of state funds available pushed the community to take action.

Livermore, CA

20 School sites

Partners:
• Livermore Valley USD
• City of Livermore
• Livermore Area Park & Recreation District

Facility Overview – 3 projects
• Modernize 7 of 20 schools
• Youth Community Center
  71,000 sq ft indoor
  45,000 sq ft aquatic center
• Civic Center Library
  56,000 sq ft
Livermore Funding and Timeframe

• Cost / Funding - $150M thru a General Obligation Bond led by the school
  - $110M for school upgrades
  - $20M Civic Center Library
    • LVJUSD received special legislation (EC 18104) authorizing joint use library to be built on
      other public entity land within 1 mile of site.
  - $20M Youth Community Center

• Timeline – 5 - 10 years
  - Two failed votes in the early ’90s (School Parcel Tax and Parks GOB)
  - 1975 Tax override set to expire in 2000 gave impetus for action
  - Community Survey March 1998
  - Bond approval in March 1999 (passed with 82% of the vote)
  - Library opened in 2004
  - Community Center opened March 2005
  - School funds exhausted June 2008

This joint effort was done primarily to save election expenses and to provide a compelling opportunity that voters would support.

7 Steps to Effective Joint-Use Partnership

1. Identify a local need that a joint use partnership might address
2. Identify essential joint use partners
3. Develop a positive, trusting relationship with partners
4. Build political support
5. Build a joint use partnership within the context of the local community
6. Formalize the partnership with an MOU
7. Foster ongoing communication and monitor the progress and impact
Type of Funding for Joint-Use Projects through School Districts

- **State General Obligation Bonds**: These funds are voted on by the entire state. They can be directed one or several areas such as education, transportation, and parks. As of June 2008, there was $1.3 million left from Prop. 47, $8.2 million from Prop. 39, and $5.5 million from Prop. 1D, for a total of $12.1 million. So not a strong prospect for us to pursue.

- **Local General Obligation Bonds**: School districts use these bond funds to match the state required contribution for school construction projects. Local bonds must be approved by 65% of the vote within the district. They are repaid using local property tax revenue. Local bonds have raised $41 billion in the past decade.

- **Developers Fees**: School districts are allowed to levy fees on new residential, commercial, or industrial developments for school construction projects. These fees can provide a moderate amount but vary significantly by community depending on local development.

- **Special Bond Funds**: Known as “Mello-Roos” Bonds, these funds allow school districts to form special districts to sell bonds for school construction projects. These bonds require 2/3 voter approval and are paid off by the property owners in the special district. These bond funds have produced $3.7 billion in the past 10 years.

Very little state money is available and PA isn’t a strong candidate so local options are our best bet.

Potential Challenges to Joint Use

- **Aligning Partnership Goals**: The long-term nature of the partnership requires parties to develop similar goals and objectives for the funding and management of the project.

- **Operations and Maintenance**: The hours of use, security, and cost maintenance should be addressed upfront to avoid confusion and misunderstandings.

- **Regulatory Constraints**: Construction projects have various levels of regulation depending on the community and the environment. The Field Act contains higher construction standards for school facilities. Therefore, if community centers and buildings are to be used by school districts, they must also comply with the Field Act. These types of differences should be reconciled among partners before the project advances.

- **Joint-Use Fund Restrictions**: Requirements set forth in SB 50 state that projects using state school construction funding must be on property owned by school districts.

- **Restrictions on Private-Public Partnerships**: There are currently limited opportunities for public-private joint use partnerships.

- **Long-Term Commitment**: School districts and their partners have stated concerns about joint-use projects and the long-term costs associated with them. Liability issues may also arise.
Major Takeaways

• Joint Use projects are being done all over in all forms
• It takes time to pull the projects together - Project of our scope...
  – 2-5 years in Ohio
  – 5-10 years in California
• Successful projects have communities that embraced them
  – Key tools used: Community surveys, Community advisory committees, community forums
• Funding comes from a variety of sources but typically the school takes the lead
  – Most successful examples have either outside funds they want to leverage or a transition in a local tax
• Significant up front work needs to be done on MOU or Joint Use Agreement to define structure of the project and the relationship of the entities involved

References

   http://citizensandschools.berkeley.edu/reports/C&ES_PHLP_2008_joint_use_with_appendices.pdf
   CASE 1: OPENING SCHOOL PLAYGROUNDS TO THE COMMUNITY: THE CITY AND COUNTY OF SAN FRANCISCO AND SF UNIFIED SCHOOL DISTRICT
   CASE 2: BUILDING NEW JOINT USE GYMNASIUMS: GARVEY ELEMENTARY SCHOOL DISTRICT AND THE CITY OF ROSEMEAD
   CASE 3: EXPANDING CHILDCARE OPPORTUNITIES: CLOVIS UNIFIED SCHOOL DISTRICT AND STATE CENTER COMMUNITY COLLEGE DISTRICT


4. California’s K-12 Educational Infrastructure Investments: Leveraging the State’s Role for Quality School Facilities in Sustainable Communities 2012
   http://citizensandschools.berkeley.edu/reports/CCS_2012_CA_K12_Edu_Infra_Exec_Sum.pdf

5. Primer on Joint Use

6. Emeryville Center of Community Life current website
   http://www.emeryvillecenter.org/

7. Wadsworth High School and Community Complex 2008-2012
CCAC FINANCE COMMITTEE DELIVERABLE #5
JOINT POWERS AUTHORITY

There are a number of options for the financing and operating of a joint use facility on the Cubberley campus. One of those options is to create a Joint Powers Agency or Authority.

A Joint Powers Agency (JPA) is an entity authorized to be created under Section 6500 of the California State Government Code (the “Joint Powers Law”) whereby two or more public entities can operate collectively. “Joint Powers” is a term used to describe governmental agencies that have agreed to combine their powers and resources to work on solving their common problems.

Joint powers are exercised when the public officials of two or more agencies agree to create another legal entity or establish a joint approach to work on a common problem, fund a project or act as a representative body for a specific activity.

The initials JPA can mean two different things. The first is Joint Powers Agreement, which is a formal, legal agreement between two or more agencies that want to jointly implement programs, build facilities or deliver services. Governmental agencies are called member agencies. One member agency agrees to be responsible for delivery of service on behalf of the other(s). A Joint Powers Agreement has no specified term but rather may be short-term, long-term or perpetual.

The second use of the initials is for Joint Powers Agency or Joint Powers Authority. In this case, the Joint Powers Law is used to establish a new, separate governmental organization created by its member agencies, but operating at the members’ direction. Typically, the JPA has numbers of officials from the member agencies on its governing board.

In the second case, the JPA is distinct from its member agencies. It has its own board of directors. Once created, the JPA has two types of powers: 1) it has the powers common to the member agencies which created it; and 2) it has the powers conferred on it by the California Legislature under Article 4 of the Joint Powers Law, including the power to issue bonds for public capital improvements. The term, membership and standing orders of the board of the JPA must be specified in the agreement. The JPA may employ staff and establish policies independent of the constituent agencies.

A JPA can be formed by action of the governing boards of the participating agencies; there is no public election needed.

JPA’s can be formed specifically to arrange capital financing by selling bonds. The bonds create the capital needed to finance construction of public facilities. In some instances the agency can issue revenue bonds which do not require a vote of the electorate. It is unclear whether a future Cubberley project would generate enough
revenue to be able to qualify to issue this kind of debt. It would be more likely that the improvements would need to be funded by the issuance of General Obligation bonds issued by either the school district or the City (not by the JPA) which in either case would require a public vote. Another alternative would be for the JPA to issue lease revenue bonds. Lease Revenue bonds are bonds where the proceeds are used to build or improve real property and where the property to be acquired or improved (and in the case of an asset transfer, an unrelated piece of real property) is leased to one or more member agencies. The payments to be made by the member agency(ies) under the Lease create a stream of revenue that serves as the security for the JPA’s Bonds.

Advantages and Disadvantages of a JPA:

Advantages:
- JPA’s are flexible and easy to form
- JPA’s may be more efficient than separate governments
- JPA’s have powers which are different from those of the school district and City, and those powers may be used to finance the construction of facilities; and purchase of equipment/
- A JPA for Cubberley would cover the entire area that would benefit from the construction and operation of a joint use facility
- A JPA for Cubberley might help attract either private capital or grants because it would show both agencies’ commitment to work together on a shared facility

Disadvantages:
- JPA’s require mutual trust
- JPA’s can be hard to keep together for the long-term
- JPA’s can be hard for the public to understand and may be perceived as another layer of government

Resources:

Section 6500 of the California State Government Code
### ANNUAL OPERATING BUDGET

Data from Lease & Covenant Revenues and Expenses (Budget 2013 column) and rounded

<table>
<thead>
<tr>
<th>OPERATING INCOME</th>
<th>INCOME</th>
<th>EXPENSE</th>
<th>Itemized</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long Term Leases</td>
<td>1,617,000</td>
<td></td>
<td>(Foothill = approx $930k, all other = approx $690k)</td>
</tr>
<tr>
<td>Hourly Rentals</td>
<td>823,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City Office Rental</td>
<td>73,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OPERATING EXPENSE</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cubberly Lease</td>
<td>4,600,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Covenant</td>
<td>1,830,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child Care</td>
<td>640,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child Care Utilities</td>
<td>56,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payments to PAUSD</td>
<td>7,126,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lease Management &amp; Maintenance</td>
<td>430,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-maintenance Operating</td>
<td>1,325,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operating Costs (Total)</td>
<td>1,755,000</td>
<td></td>
<td></td>
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</tbody>
</table>

**Annual Totals**

<table>
<thead>
<tr>
<th></th>
<th>2,513,000</th>
<th>8,881,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL NET</td>
<td>6,368,000</td>
<td></td>
</tr>
</tbody>
</table>

### LONG TERM CAPITAL IMPROVEMENTS

*Other Capital Improvement Projects (Budget 2013 Capital Budget) need to clarify if this is part of IBRC identified work*

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Auditorium Roof</td>
<td>250,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>250,000</td>
<td></td>
</tr>
<tr>
<td>Mechanical &amp; Electrical Upgrades</td>
<td>1,450,000</td>
<td>150,000</td>
<td>1,300,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Electrical Upgrades</td>
<td>1,150,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roof Maintenance</td>
<td>426,000</td>
<td>53,500</td>
<td>106,000</td>
<td>107,000</td>
<td>106,000</td>
<td>53,500</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Planned Improvements (5 year)</td>
<td>3,276,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

### LONG TERM MAINTENANCE (PER IRBC p. 146)

<table>
<thead>
<tr>
<th>Improvements (next 5 years)</th>
<th>10,200,000</th>
<th>2,040,000</th>
<th>2,040,000</th>
<th>2,040,000</th>
<th>2,040,000</th>
<th>2,040,000</th>
<th>2,100,000</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Improvements (years 5-10)</td>
<td>2,100,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improvements (years 11-25)</td>
<td>6,500,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>6,500,000</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>18,800,000</td>
<td>2,093,500</td>
<td>2,296,000</td>
<td>3,697,000</td>
<td>2,296,000</td>
<td>3,093,500</td>
<td>2,100,000</td>
<td>6,500,000</td>
</tr>
</tbody>
</table>

*
## COMPARISON OF GENERAL OBLIGATION BONDS, MELLO-ROOS AND PARCEL TAXES FOR CITIES

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>General Obligation Bonds</th>
<th>Mello-Roos CFDs*</th>
<th>Parcel Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vote Required?</td>
<td>Yes.</td>
<td>Yes.</td>
<td>Yes.</td>
</tr>
<tr>
<td>Qualified Electors</td>
<td>Registered voters residing in city.</td>
<td>Registered voters in district, if 12 or more voters reside in district. If fewer than 12 registered voters reside in district, vote is of landowners, one vote per acre.</td>
<td>Registered voters residing in city.</td>
</tr>
<tr>
<td>Boundary of Area to be Taxed</td>
<td>City.</td>
<td>Territory of district, as defined by city council. District could be entire city or a portion of city, including non-contiguous areas.</td>
<td>City.</td>
</tr>
<tr>
<td>Basis of Tax</td>
<td>Assessed value of property.</td>
<td>Any reasonable method except assessed value.</td>
<td>Fixed annual tax amount per parcel, which may escalate annually.</td>
</tr>
<tr>
<td>Method of Tax Collection</td>
<td>Annual property tax bill.</td>
<td>Annual property tax bill or direct billing.</td>
<td>Annual property tax bill.</td>
</tr>
<tr>
<td>Can Seniors be Exempt from Tax?</td>
<td>No.</td>
<td>Yes.</td>
<td>Yes, so long as there is a rational basis for the exemption.</td>
</tr>
<tr>
<td>Typical Use of Technique</td>
<td>Finance capital improvements.</td>
<td>Finance capital improvements and certain annual services.</td>
<td>Augment operating budget or pay for supplemental services.</td>
</tr>
</tbody>
</table>

* Community Facilities Districts
### Comparison of General Obligation Bonds, Mello-Roos CFDs, and Parcel Taxes for Cities

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>General Obligation Bonds</th>
<th>Mello-Roos CFDs*</th>
<th>Parcel Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Facilities Eligible for Financing</strong></td>
<td>Purchase or improvement of real property (purchase of land or construction of buildings).</td>
<td>Any facility with useful life of five years or more (including furnishings and vehicles).</td>
<td>Any purpose specified in the ballot, without limitation.</td>
</tr>
<tr>
<td><strong>Can Furnishings and Equipment be Financed?</strong></td>
<td>No.</td>
<td>Yes, provided the equipment has a useful life of five years or longer.</td>
<td>Yes, without limitation.</td>
</tr>
<tr>
<td><strong>Can Tax Revenues be Used for Purposes Other than Debt Service on Bonds?</strong></td>
<td>No.</td>
<td>Yes. Pay-as-you-go capital costs, administrative expenses, and limited services (set forth in the Act).</td>
<td>Yes. Any purposes authorized in the ballot measure, including operating expenses.</td>
</tr>
<tr>
<td><strong>Are Operating Expenses Eligible for Financing with Tax?</strong></td>
<td>No.</td>
<td>Certain municipal services, including police, fire, storm drainage, park, recreation, library, and hazardous waste removal services. Also, annual cost of administering the bonds and the district.</td>
<td>Yes. Most common use of parcel taxes is to supplement operating revenues to maintain current service level or improve level of service.</td>
</tr>
<tr>
<td><strong>Separate Authority Required to Issue Bonds?</strong></td>
<td>No.</td>
<td>No.</td>
<td>Yes. Typically, general fund lease revenue bonds or COPs authorized by city council, and proceeds of parcel tax levy “reimburses” the general fund.</td>
</tr>
<tr>
<td><strong>Type of Bond Sale</strong></td>
<td>Competitive sale only, unless charter city.</td>
<td>Negotiated or competitive sale.</td>
<td>Negotiated or competitive sale, depending on separate bonding authority used.</td>
</tr>
<tr>
<td>Characteristics</td>
<td>General Obligation Bonds</td>
<td>Mello-Roos CFDs*</td>
<td>Parcel Tax</td>
</tr>
<tr>
<td>-------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Debt Limit</td>
<td>Amount of bonds outstanding at any time cannot exceed 15% of total assessed value.</td>
<td>Value of property in the district subject to special tax must be at least three times the amount of outstanding bonds. Under certain conditions, the city council can approve an amount of bonds exceeding this limit.</td>
<td>No limitation for COPs or lease revenue bonds.</td>
</tr>
<tr>
<td>Bond Security</td>
<td>City’s unrestricted ability to raise property taxes to meet debt service requirements. Property tax is a lien on property. County has authority to foreclose on lien for payment of delinquent taxes.</td>
<td>Special taxes levied and secured by a lien on property. City has authority to initiate accelerated foreclosure on property for payment of delinquent taxes, so long as bonds have been issued by the district.</td>
<td>City’s general fund. There is no State law authority to pledge proceeds of parcel taxes to the payment of debt services.</td>
</tr>
<tr>
<td>Maximum Term of Tax Levy</td>
<td>As long as necessary to repay bonds authorized by voters.</td>
<td>As long as necessary to repay bonds or to pay directly for facilities authorized by voters. Final year of tax must be specified.</td>
<td>As specified in the ballot measure.</td>
</tr>
<tr>
<td>Maximum Term of Bonds</td>
<td>Up to 40 years.</td>
<td>Up to 40 years.</td>
<td>Generally, up to useful life of facility being financed.</td>
</tr>
</tbody>
</table>
## COMPARISON OF GENERAL OBLIGATION BONDS, MELLO-ROOS AND PARCEL TAXES FOR CITIES

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<thead>
<tr>
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<tr>
<td><strong>Election Date</strong></td>
<td>Statewide Election Dates*</td>
<td>Statewide Election Dates* or a special election on a date specified by the city council to occur between 90 days and 180 days following the adoption of the Resolution of Formation for the district.</td>
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</tr>
</tbody>
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*Election Code Section 1001**
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<tbody>
<tr>
<td><strong>Advantages</strong></td>
<td>• Simple method of taxation.</td>
<td>• Flexibility in determining tax rate and method of apportioning tax.</td>
<td>• Simple method of taxation.</td>
</tr>
<tr>
<td></td>
<td>• Familiar to voters.</td>
<td>• Finance facilities with bonds or directly by pay-as-you-go.</td>
<td>• No limitation on use of tax proceeds.</td>
</tr>
<tr>
<td></td>
<td>• Less time required to develop financing plan and put before voters.</td>
<td>• Wide range of items eligible for bond financing, including facilities, furnishings, and equipment.</td>
<td>• Can be used for facilities and annual service expenditures.</td>
</tr>
<tr>
<td></td>
<td>• Lower cost financing (lower bond interest rates and bond issuance costs).</td>
<td>• Can be used to pay for many annual, recurring services.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• If city has a large commercial property tax base, a large portion of tax burden could be borne by non-residential property.</td>
<td>• Ability to tailor tax and area to be taxed in a manner to enhance voter approval.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Provision for landowner vote if CFD has fewer than 12 registered voters.</td>
<td></td>
</tr>
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### COMPARISON OF GENERAL OBLIGATION BONDS, MELLO-ROOS AND PARCEL TAXES FOR CITIES

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<td><strong>Disadvantages</strong></td>
<td>• Citywide vote and supermajority approval required.</td>
<td>• Supermajority vote required.</td>
<td>• Citywide vote and supermajority approval required.</td>
</tr>
<tr>
<td></td>
<td>• Facilities eligible for bond financing are limited to real property improvements, such as the purchase of land and construction of buildings.</td>
<td>• More time required to develop financing plan and put before voters.</td>
<td>• Must have periodic elections to renew appropriations limit if used for operating expenses.</td>
</tr>
<tr>
<td></td>
<td>• Assessed value method of taxation spreads tax burden on basis of property value rather than by direct benefits received from facilities constructed with bond proceeds.</td>
<td>• Higher cost financing (higher bond interest rates and bond issuance costs).</td>
<td>• No independent authority to issue bonds—separate authority needed.</td>
</tr>
<tr>
<td></td>
<td>• All property owners in city pay additional tax.</td>
<td>• Unfamiliar to voters.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Bond financing technique only, no ability for pay-as-you-go.</td>
<td>• More complex method of taxation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Higher district formation costs and annual administration costs (need to hire a separate consultant).</td>
<td></td>
</tr>
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