

# 2004 Bond Program Final Report

## Tucson Unified School District

October 2014

### BOND FISCAL OVERSIGHT COMMITTEE

#### FINAL REPORT TO THE GOVERNING BOARD

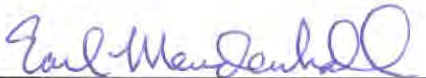
To the members of the Tucson Unified School District Governing Board:

The document that follows this letter outlines the successful completion of the District's commitment under the 2004 Bond Election approved by the voters for improvements to and construction of school facilities.

As part of the original plan and per the Board's direction, the BFOC was formed to provide an independent citizens' review of the expenditures of \$235 million for bond projects as set forth by the TUSD Governing Board. The Committee was composed of parents and community members from throughout the District. All meetings were open to the public and time was always made available for public comment. This format allowed for continuity and input from the individual schools and communities.

The BFOC would like to thank and commend the capable staff of the Architecture and Engineering, Operations, Legal, and Financial Departments. Their talent and dedication shepherded these projects to maximize the value of each dollar provided by the tax payers.


The Committee's dedicated review and approval of each project assured that each student, teacher, and staff member in the District has been touched in positive ways by the Bond improvements. It is with great pleasure that we celebrate with you the success of the 2004 Bond Program.



Earl Mendenhall, Chair  
Bond Fiscal Oversight Committee



David Ashcraft, Member  
Bond Fiscal Oversight Committee



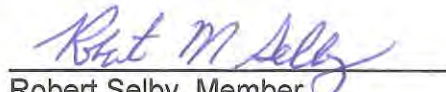
Donna Calvert, Member  
Bond Fiscal Oversight Committee



Vanessa Garrison, Member  
Bond Fiscal Oversight Committee



Daniel McDonald, Member  
Bond Fiscal Oversight Committee



Robert Selby, Member  
Bond Fiscal Oversight Committee

# Program Overview

On November 2, 2004, Tucson Unified School district (TUSD) voters generously authorized a bond issue allowing the district to borrow \$235 Million for critical capital improvements to district infrastructure. The successful election was the fruition of intensive work within all departments of TUSD, the Blue Ribbon Committee, and many supporters of the district. With the support of the Bond measure, TUSD voters entrusted the district with an exceptional opportunity to significantly improve all of the facilities and positively impact generations of TUSD students well into the future. This report documents the fulfillment of the commitments made to voters made in the Bond Pamphlet and Ballot.

## ***Project Timeline***

In the spring of 2004, the Blue Ribbon Committee determined that there were significant needs at TUSD facilities that could not be addressed with the existing funding and recommended that the district seek approval of bond issue. A substantial list of critical and potential projects was developed and vetted throughout the district and the community in the unusually short time available. On July 6, 2004, the TUSD Governing Board voted to support a list of items to be included in a \$235 Million Bond. The Governing Board also voted to include a M&O Budget Override and a Capital Budget Override on the November 2004 Ballot.

An independent group of district supporters worked very hard over the next few months promoting the many needs that the Bond and Overrides would address. On November 2, 2004, the Bond Issue passed with strong support, but both Overrides were defeated. The process required to sell TUSD's bonds went into motion. During this interim period, the Governing Board approved the initial group of community members to serve on an advisory committee to assure that the funds were used in a manner consistent with the promises made to tax payers. The First Bond Issuance occurred in February 2005.

Initial shovel ready projects that had been shelved due to a lack of funding were undertaken. Meanwhile, a group of architects were deployed to survey all of the district's schools, begin developing project details, and assure that all schools were fully reviewed with a level of detail not allowed by the initial bond election time line.

To further ensure that all schools were addressed appropriately and by priority need, a double review process was conducted. One large group comprised of support facility employees and departmental heads was divided into smaller groups that reviewed a list of schools based on the results of the architectural surveys. The result of that process was outlined in a priority chart. A second group comprised of BFOC members and educational leadership went through the same process. Both charts were then used in unison to establish the order in which renovations at schools would be scheduled.

## ***Program Delivery***

TUSD chose to manage the program utilizing in-house project managers and construction inspectors which has been standard operating procedure for the TUSD "Engineering" Department. Many of the processes used to manage the program were developed by staff at the outset of the process. The Engineering Department used procedures for prequalifying and selecting architects and engineers. The

procedures were designed to be equitable, thorough, and defensible. Three different construction contracting methods allowed by the state regulations were used in the program, depending on the nature of the project.

For larger, more complicated projects, the Construction Manager at Risk (CM@R) process was used. With this type of design and construction, the construction manager selected is typically brought into the project earlier in the design phase to provide input related to constructability, schedule, and estimating. Having cost estimates during the design phase allows the architect to refine the scope and design of the project to stay within, and maximize the budget. It is especially beneficial to have contractor input related to sequencing of work to minimize the disruption to schools during construction. There also tends to be fewer costly design changes during construction because of the additional input related to constructability during design.

For most projects in the early stages of the Bond Program, the hard bid method of Design-Bid-Build was used. This method of construction is typically awarded to the lowest bidder, resulting in lower initial construction contracts. The resulting cost savings were often countered with the initial cost of bid documents, quality of construction issues and change orders. An issue that developed in the first few years of the Bond was the fact that the Tucson area was experiencing a large housing boom. This situation resulted in a relatively low level of interest in bidding on TUSD bond projects. Projects only received one or two bids. At the same time, the general contractors were not getting much interest from subcontractors and often, even when projects were bid the subcontractors were not regularly attending to the needs of the project. It appeared the Bond Program was going to have a difficult time completing projects and getting the funding to stretch to the level needed. The district was forced in many cases to redesign and rebid projects.

The construction boom in the Tucson area ended with the downturn in the national economy and changes in state laws. The recession put pressure on the construction market, driving down bids and creating a new interest in TUSD bond projects.

The lower bids produced by this new competitive market allowed project managers to add value to projects. Typically school communities provided input, frequently through site councils, on prioritizing the additional work through the project approval process which was always under the watchful eyes of the BFOC. As a result, more projects were moving forward with needed improvements being incorporated into the projects.

The CM@R method was effectively used during this period. This contract method was used for the construction of Mary Belle McCorkle Academy of Excellence K-8, the Westside Transportation Center, and for the Tucson High Magnet School Improvements and Practice Gym projects.



*Tucson High Magnet School Practice Gym*

Several projects were completed under the Job-Order Contracting (JOC) method of construction procurement which is allowed under Arizona state law. TUSD staff was satisfied with the process, but felt the vendors' list was limited and, therefore, conducted an in-house selection. A group of well established contractors were selected to provide JOC services. This method of construction procurement allows for negotiations and scope adjustments as the project is developed. The assured quality of construction and quicker schedule inherent in this method, made JOC the most frequently used method.

## Projects

This Bond Program was one of the largest in district's history and was the first to require the bonds to be Class B Bonds. Class B Bonds have certain requirements, many of which have since been changed, including the elimination of computers and items deemed to fall under the same exception and limitation of Capital and M&O procurements in support projects unless those costs could be specifically related as a project cost.

Projects were developed through the needs identified at each school/site, the focal areas listed in the bond pamphlet, the available funds and lack of available funds. As a first time experience with a Class B Bond, a list of 42 categories was defined in the Bond Pamphlet, as follows:

PROJ. CODE	Project Code	BOND PROJECTS	ORIGINAL BOND BUDGET
A	4841	Classroom Construction and Renovation	\$38,095,896
B	4867	Construct Elementary, Middle, K12 Schools	19,234,104
C	4870	Land Purchase	2,400,000
D	4864	Performing Arts Renovation Project	13,750,000
E	4865	Science Classrooms	3,590,000
F	4866	Library Renovations & Expansion	2,050,000
G	4868	High School Physical Ed. Facilities	50,540,000
H	4869	High School Gyms, Elem. & Middle Fac.	20,030,000
I	4873	Art Academy Relocation	200,000
J	4847	Sidewalks, Driveways, Ramps	4,260,000
J	4850	Play Courts, Fencing, Ramada's	3,310,000
K	4848	Exterior Lighting	2,550,000
L	4849	Drainage, Erosion, and Irrigation	2,140,000
M	4879	Tucson High Parking Garage	3,000,000
N	4874	Transportation Facilities Upgrade	1,520,482
O	4880	Westside Transportation Facility (a)	3,739,518
P	4881	Land Westside Transportation Facility (a)	1,200,000
Q	4872	Wireless Telecom & Voice Over Internet	7,600,000
R	4882	Network Wireless Infrastructure	400,000
S	4842	Interior Upgrades	28,600,000
S	4858	ADA Restrooms	300,000
T	4843	Roofing	850,000
T	4844	Weatherproofing and Stucco	1,630,000
T	4845	Windows & Screens	240,000
T	4846	Exterior Lockers	170,000
U	4852	Air Conditioning Controls	2,190,000
V	4851	Plumbing	400,000
V	4853	Mechanical Equipment	3,290,000
V	4854	Elevators	200,000



W	4855	Card Access Security Systems	1,445,000
X	4859	Lighting Retrofit	1,945,000
Y	4860	Electrical Service Sections & Panels	1,040,000
Y	4861	Fire Alarms	770,000
Y	4862	Intercoms, Security, & Sound Systems	635,000
Y	4863	Electrical Wire & Teledata Cabling	320,000
Z	4856	Kitchen Hoods	245,000
Z	4857	Laundry Facilities	60,000
AA	4875	Replace Pavement at Winsett Compound	3,090,000
AA	4876	Replace Parking & Mech. Equip. at Admin.	2,890,000
BB	4877	LIRC Weatherproof & Paint	80,000
CC	4878	Upgrade data/telecommunications cabling	500,000
DD	4871	School Buses	4,500,000
		Bond Sub-Totals	235,000,000
<b>TOTAL AUTHORIZED BONDS</b>			<b>\$235,000,000</b>

As illustrated, several of the 42 categories were rather generic which resulted in the ability to invest bond funds at all schools. Some new learning spaces were constructed and existing spaces were renovated and modernized. Administrative and security improvements were constructed at many schools. The Bond Program also invested in upgrading building systems and improving the overall condition of facilities. Work included items such as fire alarm upgrades, heating, ventilation and air conditioning (HVAC) upgrades, intercom systems, clocks, boilers, interior upgrades and restroom renovations.

A major focus of the Bond was improvements to athletic facilities which at elementary, middle and high schools across the district. This included new running tracks at several schools, locker room upgrades, new bleachers and other improvements. Other notable improvements included new practice gyms at Cholla, Sabino, Sahuaro, Santa Rita and Tucson High Schools which addressed the need to be in compliance with Title IX. This bond item also included providing new or upgrading play courts such as tennis courts at high schools to play courts at elementary schools. Many playgrounds were renovated through the Bond Program with the upgrades focused on new play equipment, provision of safe play bays and addressing safety issues.



*Sahuaro High School New Athletic Facility*



*Sewell Elementary School New Play Equipment*



*Catalina High School Fine Arts (Auditorium) Renovations*

Another major category of the Bond was Performing Arts Facilities. Prior to 2004, the district started renovating the existing Performing Arts Centers at the district's high schools. This effort was critical to ensuring that these spaces could be used as educational facilities by providing safe, state-of-the-art performance centers. Palo Verde, Sahuaro, Sabino, Catalina, Pueblo, Cholla and Tucson High Schools joined previously upgraded high schools, Santa Rita and Rincon, in having excellent facilities for the Arts.

Two areas of concern in 2004 were transportation and traffic congestion.

One of the program's landmark projects was the Westside Transportation Facility, which was completed in 2013 after years of effort to construct a facility west of I-10 to complement the central and east transportation centers. The completion of the West Side Transportation facility has eliminated the need for TUSD buses to travel extra miles every school day, thus reducing costs in terms of fuel and time. The facility saves the district 475,000 miles, 73,000 gallons of diesel fuel, 35,000 labor hours. This equates to a savings of about \$700,000 each year, and lengthens the lifecycle of buses with the reduced mileage.



*Westside Transportation Center*

The bond fund set aside for transportation improvements proved to be beneficial when the Central Transportation Vehicle Maintenance facility was destroyed in a fire. While insurance covered the basic replacement cost, the bond funding enabled the district to renovate the facility to better meet future transportation needs. Five million dollars of bond funds was spent on buses, which leveraged

additional funding through other grants. Bond funds were also used to resolve parking issues at Tucson Magnet High School through the construction of a parking garage.

There were other opportunities to utilize bond funds in conjunction with other funding to leverage additional benefits to the district. As part of the effort to stimulate the economy, the American Recovery and Reinvestment Act (ARRA) provided funding for school improvement projects. ARRA funds were distributed through the School Facilities Board to address energy saving projects. TUSD capitalized on this program by running two bond funding projects that were then reimbursed by federal funds. Additionally, these projects and others focused on energy savings resulting in significant rebates to the district.



Mary Belle McCorkle, Principal Elizabeth Redondo 12/2011

Throughout this Bond, the district committed to implementing cost-effective, environmentally-friendly, and energy efficient design and construction strategies. TUSD took measures toward building sustainability into bond projects. The district's Manual of Standards was updated to require the use of sustainable elements such as high efficiency heating and cooling systems and low volatile organic compound (VOC) emitting paints. Most Notably, the district received the LEED Gold Designation for the sustainable elements incorporated into the construction of the Mary Belle McCorkle Academy of Excellence K-8 project.

Bond Funds also enabled the district to create more K-8 schools, reflecting best practices to optimize educational opportunities for TUSD students.

### ***Community View***

Questions have been raised regarding the need for TUSD to close schools yet at the same time continuing to construct new schools or add to existing schools. Most community members understood that the district population was shifting, which required accommodating students residing in newly developed geographic areas. The bond funding enabled the consolidation of additions and upgrades at our schools addressing the increased need.

Occasionally there was concern raised as to why we were building specific items such as gymnasiums and remodeling auditoriums instead of giving teachers pay raises; in the end however, most people understood that these bond funds were earmarked for specific items per the direction of the voters and we were not allowed to change those purposes.

The construction jobs that were created and/or continued provided a boost to the community keeping people employed so they in turn could support other business such as grocery stores, retail stores, and real estate.

### ***Public Impact – Community/Intergovernmental Relations***

Pima County Communities Putting Prevention to Work (CPPW), University of Arizona, and TUSD worked together. With this collaborative effort and funding, TUSD was able to implement walking tracks, exercise stations, and nutrition educational spaces at TUSD schools to promote healthy





eating and active living for TUSD students, staff, and the public.

Bond funds provided the upfront costs allowing TUSD to take advantage of much needed improvement to aging light fixtures at many schools. The positive aspect of this was that this money was returned to TUSD in the form of TEP rebates.

### ***Community Oversight and Involvement***

Public oversight and involvement was realized through the establishment of the Bond Fiscal Oversight Committee (BFOC). The committee met approximately every month and, along with staff, presented annual reports to the Board. The primary function of the BFOC was to guarantee fiscal and operational responsibility and integrity in the use of bond/override tax dollars to accomplish the goals of the program for the life of the bond.

Such monitoring and review provided a high level of accountability and transparency on behalf of TUSD to the citizens of the district. To provide regular communication, the district worked with Technology Services and Communications Departments to develop and maintain a website for the Bond Program as well as providing communication to citizens, schools and project managers. The website includes detailed information about the scope of work, budget and status of each project, monthly financial reports, and information related to the BFOC.

For more information about TUSD's Bond Program, go to:

<http://www.tusd1.org/contents/depart/efp/bond.asp>

### ***Significant Lessons Learned***

- While having categories for accountability purposes is useful, having too many categories was problematic because needs changed over time.
- The district needs to have a strong understanding of the lifecycle of equipment – i.e. HVAC, running tracks, play equipment. All items should be inventoried and quantified for lifecycle planning to inform future bond needs.
- A bond package designed in haste makes for a less effective bond. Bond planning must be adequate to ensure that all needs are equitably met and the community is both served and informed.
- Future bond money will be critical because of the lack of certainty of State funding. This explains several categories that were underestimated.
- All future bonds should have a community based Bond Fiscal Oversight Committee. The BFOC chair should be a community member of the committee rather than staff.
- The committee should be governed by by-laws and the current BFOC by-laws could be a template for any new committee.
- Ensure that all members of the committee and staff understand Arizona Open Meeting Laws.



- School site councils should be included in the identification and prioritization of categories and projects.
- Recognizing the community's significant investment, school site and central support staff should be provided with appropriate training and resources needed to maintain and protect bond improvements.
- A strategy should be designed to communicate the work of bond to the public.

## ***Direct Staff and Committee Members for 2004 Bonds***

### **Governance and Staffing**

#### **BOARD OF EDUCATION AND THE GOVERNING BOARD Tucson Unified School District No. One**

2004	Joel T. Ireland	President	12/31/2004
	Judy Burns	Clerk	12/31/2004
	Bruce Burke	Member	12/31/2006
	Adelita Grijalva	Member	12/31/2006
	Mary Belle McCorkle, Ed.D.	Member	12/31/2004
2005	Bruce A. Burke	President	12/31/2006
	Adelita Grijalva	Clerk	12/31/2006
	Judy Burns	Member	12/31/2008
	Joel T. Ireland	Member	12/31/2008
	Alex Rodriguez	Member	12/31/2008
2006	Adelita Grijalva	President	12/31/2006
	Alex Rodriguez	Clerk	12/31/2008
	Bruce A. Burke	Member	12/31/2006
	Judy Burns	Member	12/31/2008
	Joel T. Ireland	Member	12/31/2008
2007	Joel T. Ireland	President	12/31/2008
	Alex Rodriguez	Clerk	12/31/2008
	Judy Burns	Member	12/31/2008
	Bruce Burke	Member	12/31/2010
	Adelita S. Grijalva	Member	12/31/2010
2008	Alex Rodriguez	President	12/31/2008
	Adelita S. Grijalva	Clerk	12/31/2010
	Judy Burns	Member	12/31/2008
	Bruce Burke	Member	12/31/2010
	Joel T. Ireland	Member	12/31/2008
2009	Judy Burns	President	12/31/2012
	Mark Stegeman, Ph.D.	Clerk	12/31/2012
	Bruce Burke	Member	12/31/2010
	Miguel Cuevas	Member	12/31/2012
	Adelita Grijalva	Member	12/31/2010
2010	Judy Burns	President	12/31/2012
	Miguel Cuevas	Clerk	12/31/2012
	Bruce Burke	Member	12/31/2010
	Adelita Grijalva	Member	12/31/2010
	Mark Stegeman, Ph.D.	Member	12/31/2012
1-Jan through	Mark Stegeman, Ph.D.	President	12/31/2012
	Judy Burns	Clerk	12/31/2012

8/23/2011	Miguel Cuevas	Member	12/31/2012
	Adelita S. Grijalva	Member	12/31/2014
	Michael Hicks	Member	12/31/2014
8/23/2011 through 10/27/2011	Miguel Cuevas	President	12/31/2012
	Judy Burns	Clerk	12/31/2012
	(deceased 10/27/11)		
	Adelita S. Grijalva	Member	12/31/2014
	Michael Hicks	Member	12/31/2014
	Mark Stegeman, Ph.D.	Member	12/31/2012
10/27/2011 through 12/31/2011	Miguel Cuevas	President	12/31/2012
		Clerk	12/31/2012
	Adelita S. Grijalva	Member	12/31/2014
	Michael Hicks	Member	12/31/2014
	Mark Stegeman, Ph.D.	Member	12/31/2012
2012	Mark Stegeman, Ph.D.	President	12/31/2012
	Michael Hicks	Clerk	12/31/2014
	Miguel Cuevas	Member	12/31/2012
	Adelita S. Grijalva	Member	12/31/2014
	Alexandre Borges Sugiyama, Ph. D.*	Member	12/31/2012
	(*appointed 12/29/11 to fill Judy Burns' term)		
6/12/2012 through 12/31/2012	Miguel Cuevas	President	12/31/2012
	Michael Hicks	Clerk	12/31/2014
	Adelita S. Grijalva	Member	12/31/2014
	Mark Stegeman	Member	12/31/2012
	Alexandre Borges Sugiyama, Ph. D.	Member	12/31/2012
2013	Adelita S. Grijalva	President	12/31/2014
	Kristel Ann Foster	Clerk	12/31/2016
	Michael Hicks	Member	12/31/2014
	Cam Juárez	Member	12/31/2016
	Mark Stegeman	Member	12/31/2016



## Committee and Staff Dedication: Bond Fiscal Oversight Committee Members

Member Names	Date Appointed	Term Length
Art Aguilar	December 1, 2004	10 mo
Raul Aguirre	December 1, 2004	10 mo
David Ashcraft	July 29, 2008	6 Years 3 mo
Donna Calvert	February 20, 2007	7 Years 8 mo
Bill Cole	December 8, 2009	5 Months
Keith Day	May 27, 2008	2 Years 4 mo
Bill Estes	September 14, 2004	3 Years 8 mo
Frank Felix	November 1, 2004	2 Years 4 mo
Larry Finuf	November 1, 2004	11 Months
David Flowers	December 8, 2009	2 Years 7 mo
Vanessa Garrison	February 20, 2007	7 Years 8 mo
Gary Hardy	November 1, 2004	1 Year 9 mo
Robin Hiller	September 14, 2004	4 Years 2 mo
Lisa Howells	March 24, 2009	8 Months
Eugene Jones	October 5, 2004	3 Years 7 mo
Kevin Larson	October 5, 2004	3 Years 6 mo
Eddie Leon	September 14, 2004	3 Years 8 mo
Jan Leshar	September 14, 2004	1 yr 1 mo
Jim Lovelace	October 5, 2004	4 Years 11 mo
Terri Martinez	December 1, 2004	1 Year 8 mo
Daniel McDonald	March 24, 2009	5 Years 7 mo
Earl Mendenhall	June 7, 2006	8 Years 5 mo
Laura Pendleton-Miller	November 9, 2004	3 Years 5 mo
Martha Rothman	September 14, 2004	4 Years 3 mo
Robert Selby	March 24, 2009	5 Years 7 mo
Patricia Taylor	November 1, 2004	2 Years 2 mo
Bill Tilden	December 8, 2009	2 Years
Paul Vernon	July 6, 2006	7 Months
Rex Woods	October 5, 2004	2 Years 5 mo
Tom Zlaket	October 5, 2004	2 Years 5 mo

## TUSD Staff

Staff Name	Department Name (Department name during Bond duration)
Aristotle Andricopoulos	Architecture and Engineering
Vivian Arandules	Architecture and Engineering
Don Bailes	Architecture and Engineering
James Baker	Architecture and Engineering
Michael Bishop	Architecture and Engineering
Francis Cole	Architecture and Engineering

Tom Compton	Architecture and Engineering
Jessa Deauble	Architecture and Engineering
Rick Dorion	Architecture and Engineering
Dale Finrock	Architecture and Engineering
Nicole Fisher	Architecture and Engineering
Mylo Groen	Architecture and Engineering
Scott Holmes	Architecture and Engineering
Sue Heathcote	Architecture and Engineering
Marcus Jones	Architecture and Engineering
Ed Lees	Architecture and Engineering
Daniel Leonard	Architecture and Engineering
Al Lesperance	Architecture and Engineering
Mike Molina	Architecture and Engineering
Gina Pesqueira	Architecture and Engineering
Jose Riojas	Architecture and Engineering
Yolanda Rivera	Architecture and Engineering
Maria Romo	Architecture and Engineering
Donald Schmidt	Architecture and Engineering
James Sebastian	Architecture and Engineering
John Setford	Architecture and Engineering
Tom Smorra	Architecture and Engineering
Cynthia Sylvester	Architecture and Engineering
Ray Stoddard	Architecture and Engineering
Larry Toddy	Architecture and Engineering
Javier Velarde	Architecture and Engineering
Linda Wright	Architecture and Engineering
Art Wood	Architecture and Engineering
Wayne Barber	Electronics (Meeting Recording)
Paul Davis	Electronics (Meeting Recording)
Russell Hancock	Electronics (Meeting Recording)
Andrea Marafino	Communications (Meeting Recording)
Yousef Awwad	Finance
Pat Beatty	Finance
Bonnie Betz	Finance
Christina Cruz	Finance
Marisa Mandal	Finance
Adrienne Sanchez	Finance
Cliff Wadhams	Finance
Gillian Wettstein	Finance
Joan Ashcraft	Fine Arts
Sheila Bayze	Interscholastics

Herman House	Interscholastics
Bobby Johnson	Leadership
Judith Knight	Leadership
Patti Lopez	Leadership
Lorrane McPherson	Leadership
Roger Pfeuffer	Leadership
Beatriz Rendon	Leadership
Sam Brown	Legal
Nancy Coomer	Legal
Rob Ross	Legal
Nancy Woll	Legal
John Carroll	Operations
Stuart Duncan	Operations
Vivian 'Candy' Egbert	Operations
Rudy Flores	Operations
Jay Johnston	Operations
Jody Watkins	Operations
Tracy Winfield	Operations
Bryant Nodine	Planning
Debbie Edgell	Purchasing
Leon George	Purchasing
Mark Neihart	Purchasing
Kevin Oster	Purchasing
Ron Rogers	Purchasing
Kevin Startt	Purchasing
John Carroll	Superintendent
Elizabeth Fagen	Superintendent
John Pedicone	Superintendent
Roger Pfeuffer	Superintendent
H.T. Sanchez	Superintendent
Maggie Schaffer	Superintendent
John Bratcher	Technology Services
Guyton Campbell	Technology Services
Adele Edwards	Technology Services
Norma Galindo	Technology Services
John Gay	Technology Services
Lisa Long	Technology Services
Al Manzo	Technology Services



Brian McMaster	Technology Services
Bill Ball	Transportation
Ken Bolle	Transportation
Mike Johnson	Transportation (Transpar)
Paul Larson	Transportation (Transpar)
Tom Mulligan	Transportation
Ron Stacy	Transportation
Steve Verhoeff	Transportation
Chyrl Lander	Public Information Officer
Cara Rene	Communications
Mary Canty	Communications
Jes Ruvacala	Communications

# **Public Press Releases: Communications Department**

## **Bond Information by Gabrielle Fimbres**

### **2004 Bond Program: Smarter Schools, Stronger Students**



*Ochoa Elementary School Interior Renovations*

In a clear and unified voice, voters in 2004 charged Tucson Unified School District with the task of creating more vibrant, engaging and safer schools through a \$235 million bond program.

Nine years later, TUSD celebrates the successful completion of the 2004 Bond Program that gave voters exactly what they asked for.

Before putting the vote to taxpayers, committees surveyed every school in the district and compiled a highly-detailed list of projects and upgrades required for successful 21<sup>st</sup>-century learning.

From new, state-of-the art schools to cutting-edge science classrooms and fine arts facilities that inspire collaboration and creativity, the program has impacted every student and school in southern Arizona's largest district, with 51,000 students in 84 schools.

Critical in the process was stringent financial oversight to ensure that money was spent wisely and to the precise instructions of the voters.

"It's important to provide kids with the best facilities possible, and TUSD put their money in exactly the right place," said Lisa Preston, the mother of two sons at Catalina Magnet High School and a member of the Catalina Class of '93.

## **Bond Fiscal Oversight Committee**

To ensure that funds were spent in accordance with voters' wishes, a Bond Fiscal Oversight Committee was created, made up of volunteers who are not district employees. The citizen watchdog committee worked tirelessly to ensure that funds were properly spent.

"We have met the expectations of voters and stayed within budget," said Earl Mendenhall, a Tucson financial advisor who chairs the Bond Fiscal Oversight Committee.

"Out of the \$235 million, we can account for every dollar," Mendenhall said. "We have proven the stewardship."

He said the bond was approved because taxpayers were told exactly what they would get for the money, and had confidence that money would be properly spent because of the oversight committee.

The committee met monthly during the past nine years to review projects and ensure funds was properly spent in 42 categories – everything from new roofs and air conditioners to new schools, the creation of the West Side Transportation Center, and upgrades to athletic facilities throughout the district.

Setting the Bond Fiscal Oversight Committee on the right course was Tucson CPA Jimmy Lovelace, who chaired the committee for four years.

"The TUSD accounting department had to put up with me," Lovelace said. "I worked them diligently; making sure every dollar was accounted for and in accordance with the bond program. I put in an iron-clad reporting system and I made sure we were not going to go over budget. With every project I had them ensure the paper trail right down to the penny."

Fiscal transparency was critical at all stages of the bond program. All meetings were open to the public and all financial records are available online and in district offices.

"There was a high level of fiscal responsibility," Lovelace said. "This is what the voters approved and we did what they asked us to do. We all rolled up our sleeves and collaborated and got it done."

TUSD's Chief Financial Officer Yousef Awwad said the committee was "very tough, which is good. We don't want them to rubber-stamp anything. They are very picky in making sure this is exactly what the voters voted on."

Dan McDonald, an extension agent with Pima County Cooperative Extension, a program of the University of Arizona College of Agriculture and Life Sciences, has served on the committee since 2009.



“We wanted a game plan for how we would end on the dime,” McDonald said. “We certainly didn’t want to overspend and we didn’t want to leave money unspent. The bond money was spent in accordance to the bond and what the voters wished.”

He said the bond program “sent out a message that education is important to this community.”

### **Impact on the Classroom**

Lena Blackmon, a junior at University High School, takes her studies very seriously.

She said the expanded and upgraded science classrooms at UHS – paid for with \$344,739 in bond money – inspired her to do her best in Honors Biology and Advanced Placement Chemistry last year.

“It shows me that the administration and the adults honestly care about what we are learning,” said Blackmon, 15.

TUSD Board President Adelita Grijalva said every project was proposed, planned and carried out with students in mind.

“So many schools had renovations that were desperately needed to keep up with demand,” Grijalva said. “There were safety issues, and these funds were allocated by the district to bring our facilities up to high standards.”

She said the district was “very equitable across the board in making sure all schools were touched” by the bond program.

“I think we did a really good job of spending this money wisely,” she said.

### **District-Wide Improvements**

Overseeing the projects was TUSD Bonds & Architecture Supervisor Marcus Jones. Many of the projects helped bring schools up to standard, at a time when the state budget has failed to provide anticipated building-renewal funding, he said.

Many schools were in desperate need of new roofs, air conditioners and other renovations, Jones said.

“The average age of our schools is 60 years,” Jones said. “TUSD has been building schools for a long time – before Arizona was a state.”

Mendenhall, of the Bond Fiscal Oversight Committee, said the program kept construction companies in business and provided a boost to the local economy during the crash of 2008 and beyond.

“This bond money went farther because we got some very competitive bids on projects,” Mendenhall said. “There were companies that were just trying to keep the doors open. We got tremendous bang for the buck.”

TUSD’s Chief Financial Officer Awwad said the money went farther than expected due to a drop in interest rates.

“We took advantage of these lower interest rates to help our community because the local taxpayer is paying for this at the end of the day,” Awwad said. “We refinanced about \$40 million in bond money at the end of 2010 and we saved taxpayers about \$1.5 million in interest. Last year we refinanced another \$51 million and we saved another \$2 million in interest, totaling \$3.5 million in savings.”

Awwad said the \$235 million was spent wisely. “A lot of good work was done and none of the funds were spent on anything other than what was voted on.”

Taxpayer Rosie Gallegos, who lives next to the new West Side Transportation Center that was built with \$5,219,900 in bond money, kept an eye on that project by attending all neighborhood meetings.

“It was a good use of taxpayer money,” Gallegos said. “Anything that improves schools is a good use for our taxes.”

## **What is a Bond Program?**

Voters in 2004 approved the sale of \$235 million in bonds to pay for upgrades and new construction throughout the aging Tucson Unified School District.

So just how does a bond program work?

A bond program is a secondary tax levy paid for by local taxpayers. “It’s a way to lend and borrow money,” said Earl Mendenhall, a Tucson financial advisor who volunteered as the chair of the Bond Fiscal Oversight Committee.

“You go to the voters and ask them to borrow money and the school district issues bonds based on what the interest rates are in the marketplace,” Mendenhall said. “Investors – typically large investors, large pension plans, large companies that have money to invest – buy them.”

Revenue from the sale of the bonds serves as a loan. TUSD pays interest to investors and eventually repays the investment.

“Bond interest rates are the lowest they have been in over probably 50 years, and we were able to issue these bonds at an extraordinarily low interest rate, which allowed the dollars to go much farther,” Mendenhall said.

# New Science Classrooms Inspire Students in STEM

Lena Blackmon knows it's not enough to study science out of a book.

The University High School junior learns best through hands-on experiments conducted in top-notch science facilities that were upgraded through \$344,739 in bond funding.

A new science wing with three classrooms was built and seven existing science classrooms were upgraded, allowing more access to lab space and hands-on learning. The facilities are used by students at UHS and Rincon High School, which share a campus.

"It gets confusing to read about experiments and chemical reactions and it helps to see it happen with your own two eyes, especially in Advanced Placement Chemistry," said Blackmon, 15.

"I could see how magnesium and hydrochloric acid react to produce hydrogen gas and magnesium chloride," added Blackmon, who dreams of becoming a sustainability engineer.

Blackmon, who is helping to inspire middle school girls to seek careers in science, technology, math and engineering – or STEM – said excellent facilities "prepare you for the real world. You are using what the professionals are using."

Amy C. Cislak, assistant principal at UHS, said the upgrades allow outstanding teachers to teach to their potential.

"In order for us to maintain the best teachers we must provide them with the best facilities," Cislak said. "And when you have good facilities you show students you are taking them seriously."

The improvements were part of \$3,849,265 in upgrades to science classrooms throughout Tucson Unified School District through the 2004 Bond Program. Among high schools, science classrooms were upgraded at Cholla, Pueblo, Rincon, Sabino, Sahuaro and Santa Rita, in addition to UHS/Rincon.

For the United States to be competitive in the global marketplace, students must be inspired to excel in STEM subjects, said TUSD Science Program Coordinator Joan Gilbert.



*Santa Rita High School Science Classroom Renovations*

“We were able to expand science classrooms in K-12 through the Bond Program,” Gilbert said. “Great facilities allow the opportunity for more student-driven inquiry. We need to have space where kids work together in collaborative groups and have access to the tools they need.”

The bond funding allowed some middle school science programs to move out of portables where it was difficult to do hands-on experiments. Funding also provided for safety and chemical storage upgrades.

“It’s imperative that we create critical thinkers by engaging students in real-life science,” Gilbert said.

## Student Safety Priority No. 1

Keeping students safe is a top priority for Tucson Unified School District and the 2004 Bond Program.

TUSD spent more than \$3 million in bond funding to make schools safer. Among the projects:

- \$1,366,640 was used to upgrade fire alarms throughout the district.
- Card access security systems were installed in about 40 schools at a cost of \$1,254,510.
- More than \$415,000 was spent on security fencing at Lynn/Urquides Elementary and Doolen Middle schools

With recent school shootings, the district is working to make schools as secure as possible, said Director of School Safety Jeff Coleman.

Card access security systems allow schools to instantly lock all doors and to know if a door is opened. It also eliminates the need for mechanical keys.



*Doolen Middle School Security Fencing*

“When a key gets lost you can just turn off a user card,” Coleman said. “The other huge security element is that the doors are hooked up to a lockdown button. If something is wrong you can hit one button and lock all the doors. You are not running around locking doors so obviously it’s a huge safety improvement for the kids.”

The system includes cameras and intercom systems at entrances that cannot be seen from the office, allowing office staff to allow entry to approved visitors.

“Terrible things have happened around the country in the last few years and everybody wants to know what you are doing to prevent that,” Coleman said. Keeping doors locked is a critical component in school safety, he said.

Funding was also spent on wrought iron security fencing at Lynn/Urquides and Doolen to protect students during the day and prevent property crime after hours.

“We installed the fencing in an inner perimeter configuration so it secures the children in a lockdown situation,” Coleman said.

And it has drastically reduced crime.

“There was a lot of vandalism and theft at both sites – break-ins, stealing district property including computers and projectors and copper from the facilities,” Coleman said. “We have seen a huge reduction in property crime at both locations.

“The money was certainly well spent,” he added.

## **New Transportation Hub a Centerpiece of Bond Improvements**



*Westside Transportation Center*

Getting students to and from school safely and efficiently is a major responsibility for Tucson Unified School District, and \$9,749,143 in bond funding was spent on improving transportation in the district.

From new, energy-efficient buses to the recently completed West Side Transportation Center, TUSD expects to see hundreds of thousands of dollars in savings annually as a result of the improvements.



As part of the 2004 Bond Program, the district spent \$5,219,900 on the construction of the West Side Transportation Center, near West Valencia Road and South Camino de Oeste. Eighty buses assigned to the center will serve students on Tucson's west side.

TUSD Director of Transportation Paul Larson said the new facility will annually save the district 475,000 miles, 73,000 gallons of diesel fuel and 35,000 in man hours, with a savings of about \$700,000 each year.

All buses previously ran out of the East Side and Central Transportation Centers. Buses heading to the west side came from central Tucson, requiring extra fuel and crowding local streets.

The center was in the discussion and planning stages for years, but finding the right location was challenging, said TUSD Bonds & Architecture Supervisor Marcus Jones.

"We looked at more than 25 sites as possible locations," Jones said. The 10-acre site was developed in partnership with the Pascua Yaqui Tribe, with TUSD leasing the land.

"It's the perfect site for this facility, and members of the Pascua Yaqui Tribe welcomed us in their community and became part of our design team," Jones said. "It's been a great relationship."

Added Larson, "They blessed the land at the groundbreaking ceremony, and have been great partners."

TUSD also spent \$4,500,925 in bond funding on new buses, and with grants and other discounts, officials leveraged that into about \$7 million in vehicles. New drainage and asphalt were installed in existing transportation facilities, and potholes were filled.

Rosie Gallegos welcomes the West Side Transportation Center to her neighborhood.

The 30-year neighborhood resident said the land had been a prime spot for trash dumping "and people with no business there at all hours of the night."

She said TUSD ensured that the center blended in beautifully with the desert landscape.

"It is a very beneficial thing for the neighborhood," Garcia said. "TUSD and the construction company have been great to work with. They kept us informed every step of the way and I am happy to see it here."

## New Athletic Facilities Help Kids Stay Active



To battle obesity and improve the health of our children, Tucson Unified School District is committed to providing exceptional physical education and athletic facilities.

*Rincon High School New Track*

The district invested \$57,836,008 in bond funding – one of the largest ticket items in the 2004 Bond Program – to upgrade athletic and physical education facilities.

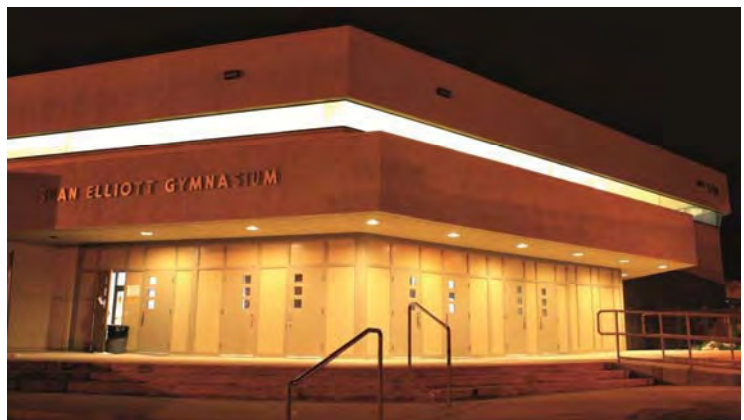
“When you are looking at educating the whole child, Herman House,

athletics play a significant role,” said Director of Interscholastics at TUSD.

House said bond money was spent wisely in upgrading the facilities.

“The community would be very pleased if they toured the facilities,” House said. “Research shows that students involved in extracurricular activities like athletics tend to do well in the classroom, and in our battle against obesity, it’s healthy activity.”

Among the highlights:



*Cholla High School Main Gymnasium Renovations*

- Practice gyms allowing for more practice time for teams and a full array of physical education offerings were built at Tucson High Magnet, Cholla, Sabino, Sahuaro and Santa Rita high schools.
- Air conditioning replaced evaporative cooling in the Pueblo gym.
- Tennis courts were resurfaced at nine high schools.
- Asphalt walking tracks were built in community partnerships at several schools.
- Outdoor volleyball courts were added at some middle schools and existing courts were refurbished.
- Playground equipment was installed and refurbished.
- A soccer field was built at Doolen Middle School in partnership with Fort Lowell Soccer Club and the City of Tucson.

“Upgrading facilities tells students that we are committed to helping them grow into healthy, vibrant, productive adults,” House said.

More than \$16 million in athletic and physical education facility upgrades were made at the district’s oldest high school – Tucson Magnet High.

Community groups were concerned with the condition of the school’s athletic facilities, with safety issues and outdated features. TUSD was committed to maintaining the historic integrity of Tucson High in the new construction.

Judy Jones, chair of the Tucson High Badger Foundation, was involved throughout the process.

"The new gym fits right in and the upgrades are benefitting students," Jones said. "It's outstanding. It's an incentive to the students and the teams have better morale with this great facility. We appreciate anything that benefits students and it makes graduates proud."

Dan McDonald, whose daughters are Tucson High graduates, served on the Bond Fiscal Oversight Committee. As an extension agent with Pima County Cooperative Extension, he is concerned about the health of our community.

He was impressed with the addition of a yoga room, spin classes and other offerings.

"Not every kid is interested in competitive sports," McDonald said. "Having alternatives available for kids is very important so they can be active, too."

## **Bond Helps Classrooms Go High Tech**

Imagine a classroom with no electricity, or one socket to power 30 computers.

Not much would get done.

A classroom with outdated technology infrastructure is equally as limiting to learning.

To provide students an opportunity to utilize the latest technology in the classroom, \$8,363,842 was spent by Tucson Unified School District through the 2004 Bond Program to make vital technology infrastructure upgrades.

More than \$7.5 million was spent in wireless telecom and voice over internet. An additional \$403,276 was invested in network wireless infrastructure and \$428,574 to upgrade data and telecommunications cabling.

"They are behind-the-scenes upgrades you can't see but they are critical in enabling the use of more technology," said TUSD Chief Information Officer John Gay. "It's a huge win for the district."

Through bond funding, the district used the latest and greatest technology in new schools as well as additions and upgraded facilities. Bond money was also used to update cabling in older buildings as part of the district's Information Technology Infrastructure Modernization Project.

"Cabling is like any technology – every now and then someone comes up with a better way to do it," Gay said. "The work that was done prior to 2004 used cabling that was state-of-the-art back in those days. But that cabling was extremely limited in the total band width or capacity of the cable."

Through the Bond Program, schools are now equipped with "the industry standard that allows you to move a lot more information through the pipe, so to speak, than you could with the earlier standard," Gay said.

“This technology upgrade is critical in the day-to-day functioning of students and teachers,” he added.

## Bond Funding Provides Facility Facelifts



*Roberts-Naylor K-8 First Impression*

Leaky roofs, failing air conditioners, unsafe flooring – these are all facts of life in aging schools that can make for dangerous conditions.

Tucson Unified School District spent \$58,892,714 to upgrade school facilities through the 2004 Bond Program. Among the many projects:

- More than \$27 million in interior upgrades
- New mechanical equipment totaling more than \$6 million
- More than \$5 million in sidewalks, driveways and ramps
- About \$3.5 million in roofing
- Nearly \$3 million in air conditioning controls
- Nearly \$2.2 million in drainage projects, erosion repair and irrigation systems
- Nearly \$1.2 million in library renovation and expansion
- Plumbing renovations of \$1.1 million
- More than \$300,000 to upgrade restrooms to Americans with Disabilities Act standards

Bond funding was critically important to these upgrades as TUSD officials – along with all Arizona public school officials – expected to receive state money from the Students First Initiative Building Renewal Fund.

But the state has failed to provide the anticipated \$12.5 million annual funding to TUSD for the last few years, and the district relied on bond money for greatly needed renovations, said TUSD Bonds & Architecture Supervisor Marcus Jones.

“We were able to do general renovations all through the district,” Jones said.

Some of the projects were expansive. About \$1 million was spent on a new roof at Soleng Tom Elementary, and numerous roofs were recoated to extend their life.

There was weatherproofing and stucco repair, installation of new windows and screens, new cooling towers and chiller repairs and other projects that will make schools more energy efficient, saving taxpayer dollars in utilities.

Among the 84 TUSD schools, 89.6 percent received interior upgrades through bond funding.

“Many of these elements make sure our kids are safe,” Jones said.

## **Upgraded Fine Arts Facilities ‘Awe Inspiring’**

As a student percussionist and conductor, performance is important to Branden Adams.

The 2013 Catalina Magnet High School graduate was stunned by recent renovations to his school's fine arts performance center, paid for through the 2004 Bond Program.

“The biggest improvement was the stage itself,” said Adams, 18, who was band president and drum captain. “Being able to perform on that stage when it opened for the first time was amazing. It blew my mind completely.”

The renovations were part of \$13,682,486 in upgrades to fine arts facilities paid for through bond funding, including renovations at Sahuaro, Palo Verde, Cholla, Sabino and Pueblo high schools. Facilities were also upgraded at some middle schools.

Adams called the upgraded sound and lights at Catalina's auditorium “amazing.”

“This is a professional environment now,” Adams said. “It is awe inspiring.”

His mom, Lisa Preston, who served as drum major at Catalina before graduating in 1993, said the upgraded auditorium, Little Theatre and band and music rooms – with a price tag of \$2,968,015 – “send a message that fine arts are really important to TUSD.”

“Students will benefit from these upgrades for years to come,” Preston said.

Catalina Principal Rex Scott said renovations maintained the historic character of the 826-seat auditorium.



“It looks just like it did in 1957, but the sound, lighting board, mixing board and stage are all state of the art,” Scott said. “It’s something we can all be proud of.”

Community arts groups, including UA presents, Sonoran Winds and others are so impressed with the facilities that they use them for performances, said TUSD Director of Fine and Performing Arts Joan Ashcraft.

“They find our new facilities quite excellent,” Ashcraft said.

She said students are motivated by better facilities.

“When kids get into high school they are very interested in continuing their work in the arts, whether they are performers or creators or want to be on the technical side,” Ashcraft said. “We have state-of-the-art equipment that’s being used nationally that our kids are learning on.”

Ashcraft said integration of the arts in learning “keeps kids in school, helps them collaborate and become creative problem solvers and critical thinkers – all that we want in our young people.”

Michael Dunn, finance manager at Sahuaro, runs an after-school program for students interested in the technical end of performance arts. Some of his students have gone on to work in professional theaters.

“Our students are innovating with the tools we give them,” Dunn said. “They are working with what is out there in the real world. They can do anything on an iPad, controlling the show from a seat in the audience.”

## New Construction Builds Positive Learning Environments



Darien Wiebe, 12, loves going to school every day in a state-of-the-art school that feels nurturing and safe.

“I love how friendly it is and how secure,” said the 8th-grade student at Mary Belle McCorkle Academy of Excellence K-8, which was built with funding from the 2004 Bond Program. She attends McCorkle with her sister, Itza Wiebe, 5.

“I can’t believe we have a brand new, beautiful school,” said their mom, Darien Aguilera. “I wish every child had an opportunity to be in a school like this.”

McCorkle, which opened in 2011, was built with \$17,128,759 in bond funding. The southwest side school was designed with input from parents, faculty and the community. It is a “green school” showplace with 955 students that incorporates cutting-edge technology.

Children armed with iPads collaborate on projects in common areas, comfortable in bean bag chairs and on couches.

“Collaboration, creativity, critical thinking and communication – all driven by common core standards – are at the heart of our school,” said Principal Elizabeth Maldonado. “Our students are building those skills into everything they do.”

She said McCorkle “is designed to prepare kids with the skills they need to be successful in life. The message to our students is that we as a community care enough about you to provide you with a new school with up-to-date technology to prepare you for a bright future.”

McCorkle was part of \$63,478,927 spent in new construction throughout TUSD. More than \$37 million of that was spent on renovation and construction at existing schools, with classroom additions at 15 schools.

The upgrades bring new vitality to the schools.

Bond money allowed students at Mary Meredith K-12 School to move out of portables and into a new \$ 6.2 million school in central Tucson that serves up to 96 students with severe emotional challenges.

In shades of clay and blue, Meredith features specialized classrooms, a grassy field, a playground, basketball court and a nearby community garden.

Kathy Clow has two grandchildren at Meredith. “I love this school,” she said. “It is a beautiful campus and my grandchildren are comfortable here.”



*Mary Meredith K-12 School*

Principal Terri Polan said the campus is welcoming. “The portables were on desert land and it had a dingy, grungy feeling about it,” she said. “This facility lends itself to everyone who comes here feeling respected and welcomed in an educational setting. It has changed the climate and the culture. Students feel valued and it results in a more positive learning environment.”

## **TUSD Gets ‘Green’ Through Bond Funding**

Tucson Unified School District took a major step in going “green” through the 2004 Bond Program.

The district spent \$5,427,164 on environmentally focused upgrades, with more than \$4.3 million of that paid for by rebates from Tucson Electric Power and grants from a variety of sources.

Twenty-four schools received retrofits to accommodate energy-efficient lighting at a cost of \$4.3 million.

Six schools converted to reclaimed water for irrigation, at a cost of \$1 million. Other renovation and new construction projects utilized green building elements, including highly efficient air conditioning and lighting equipment, water harvesting and solar energy.

The efforts translate into a reduction in electricity usage of about 1 million kilowatt hours per year, said TUSD Energy Projects Manager Tina Cook.

“There were a variety of projects that were done through the Bond Program to reduce electricity and water usage throughout the district,” Cook said.

The improvements allow numerous schools to reduce energy usage by 1 to 3 percent and reduce water usage – critical in the desert – by as much as 2 percent. As utility rates climb, the modifications will add up to savings.

The upgrades are good for the budget, good for the environment, and “it’s the right thing to do,” Cook added.

The new Mary Belle McCorkle Academy of Excellence K-8, built with bond funding, is a model school in energy efficiency, minimizing water and electricity use and boosting recycling efforts. Students and staff recycle 40 percent of waste produced at the school.

“We wanted McCorkle to be an example for the students as to what kind of a school we can build and that we are doing the right thing for the environment,” Cook said.

Students at McCorkle and other schools are learning about solar energy and ways to protect the planet.

“Spending money on energy and water efficiency is a good thing, especially when you can tie in an educational piece,” Cook added.



*Safford K-8 School Reclaim Irrigation*