JOINT SPECIAL MEETING AGENDA

PLEASANTON CITY COUNCIL
AND
PLEASANTON UNIFIED SCHOOL DISTRICT
BOARD OF TRUSTEES

Tuesday, May 13, 2025
6:00 p.m.

Pleasanton Unified School District Office – Board Room
5785 W. Las Positas Blvd.
Pleasanton, CA 94588

TV and Streaming: TV 28 on Cable TV or by streaming from TV28 at tv28live.org

Public participation: When public comment is opened on an agenda item, individuals may speak once per agenda item.

In Person:
- Submit a physical speaker card at the meeting. When your name is called, please provide comment at the podium.

Virtual:
- Join the Zoom meeting using this URL: https://us02web.zoom.us/j/87946160265?pwd=OQ8YQezDneVVJWmc6HIJ9aztSK2QHP.1
- Join by phone +1 (669) 900-9128, or +1 (669) 444-9171 US.
- When prompted: Enter Webinar ID: 879 4616 0265, passcode 705823
- Use the “raise hand” function when public comment is opened on the agenda item. You will be unmuted when your name is called and re-muted after the allotted time. To raise your hand, click the “raise hand” button or *9 on your telephone. To unmute your phone, press *6.

Notice is hereby given, pursuant to section 54954 of the California Government Code, that a special meeting is called.

1. Call to Order and Pledge of Allegiance

2. Roll Call

3. Public Comment

4. Joint Presentation: Why Do We Partner?

5. Joint Presentation: Development and Demographic Outlook

6. Joint Presentation: Current Partnerships

7. Adjournment

Accessible Public Meetings

In compliance with the American with Disabilities Act, if you need disability-related modification, accommodation or assistance to participate in this meeting, please contact the Superintendent's Office at (925) 426-4333. Requests should be received at least two working days prior to the meeting to allow the District to make reasonable arrangements to ensure accessibility to this meeting.

City-PUSD Joint Meeting

Why Do We Partner?

May 13, 2025

Our Shared Beliefs

From our strategic plans, we find alignment in our values:

- Equity and inclusion
- Service to the community
- Safety and well-being
- Innovation and adaptability
- Fiscal stewardship

Why We Partner

We partner because…

- Our work is interconnected
- Our families and students move through our systems every day
- Complex challenges require unified solutions
- Collaboration sets the tone for community trust and problem-solving

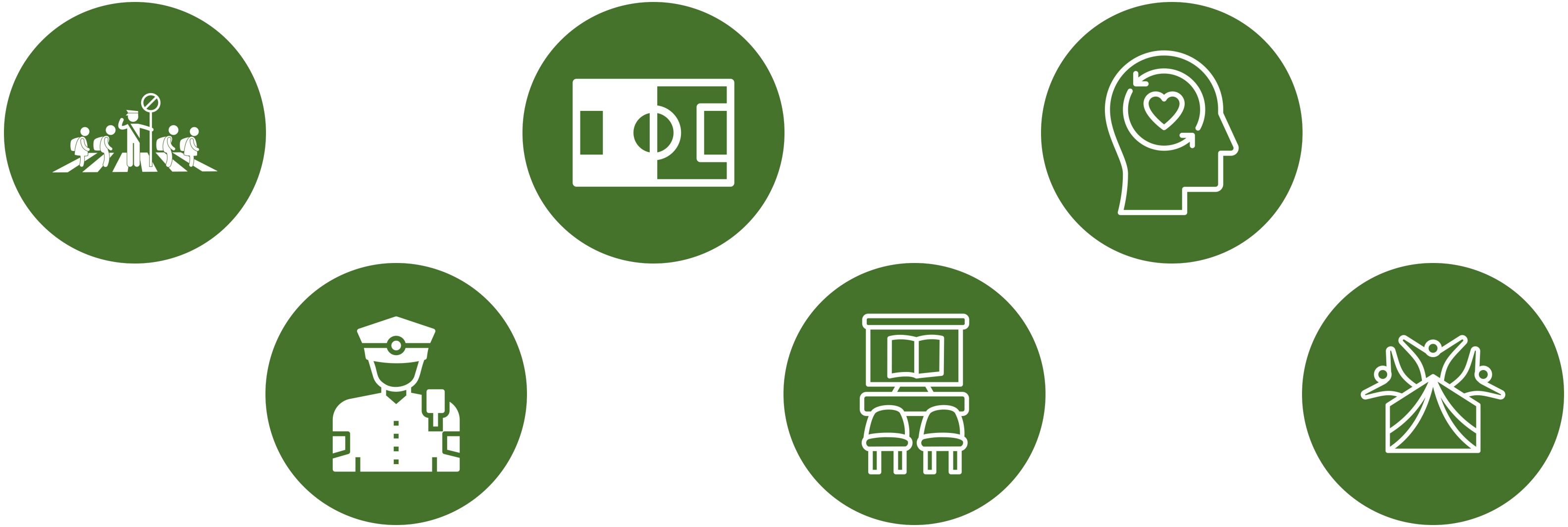
Our Shared Purpose

Two Agencies. One Community.

- We serve the same families
- We work in the same neighborhoods
- We are trusted with shaping opportunity and quality of life

Partnership in Action

Examples of where we already show up together:



Why do we partner?

- Council and Board Discussion

The Year Ahead

Budget Milestones | Subcommittee Meetings | Ongoing Collaboration

July 1, 2025

- Start of the City's 2-year budget cycle (Year 1)
- Start of PUSD's **annual budget cycle*

Monthly, September 2025 through June 2026

- Monthly coordination touchpoints
- No meetings in July and August

Developing a Shared Work Plan Framework

- Areas of alignment may include:
  - Shared Services
  - Coordinated planning
  - Aligned priorities

Item 5

City-PUSD Joint Meeting

Development and Demographic Outlook

May 13, 2025

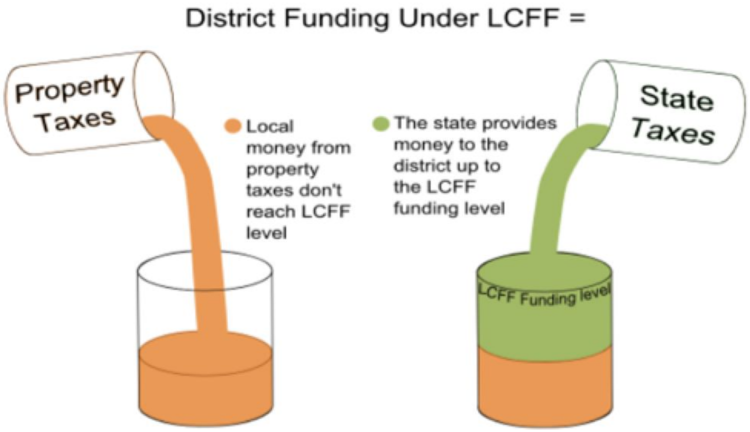
PUSD and City Collaboration: Resources, Demographics, Development Impacts, and Joint Opportunities

- Resources
- Demographics
- City Development
- Joint Opportunities

1. PUSD: School Funding

- Local Control Funding Formula (LCFF)
- Revenues/Expenditures
- Property Assets

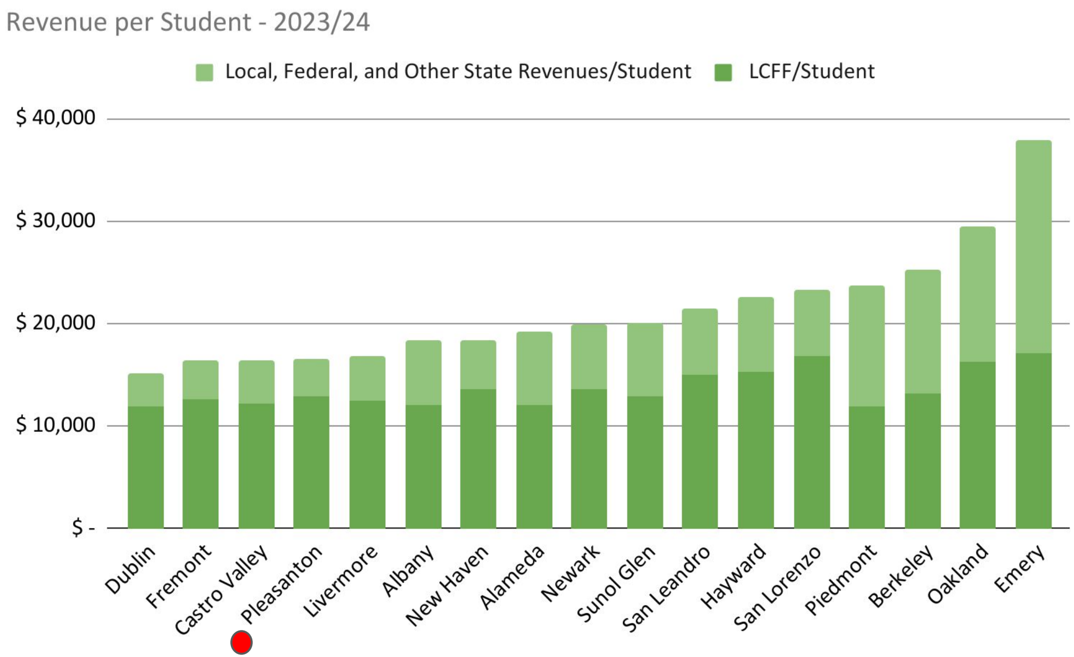
Local Control Funding Formula (LCFF)



The LCFF is the State's <u>equity based funding formula</u> which ensures a base funding level for all districts based on their <u>average daily attendance</u> and student demographics. Additional funding is allocated for students that meet specific criteria (English learners, eligible for the free/reduced meals, foster, and unhoused students

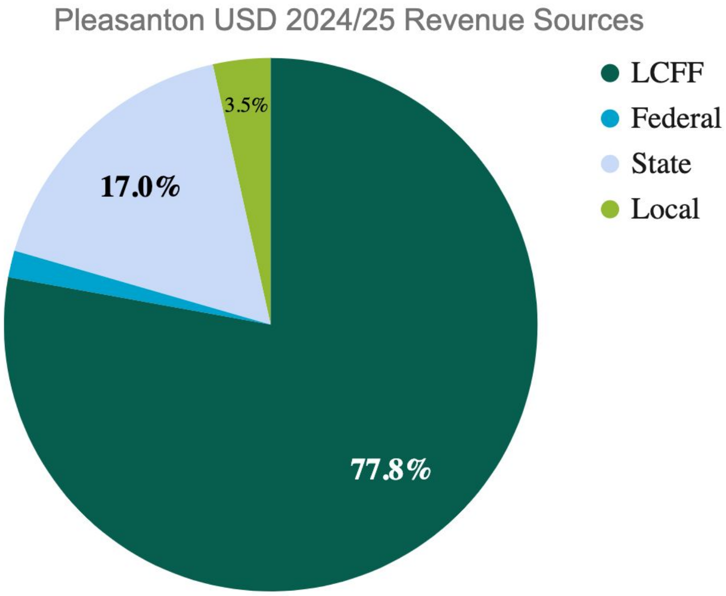
Districts can supplement State funding with local funds (parcel tax and donations). PUSD has no parcel tax. Districts where the property tax exceeds the LCFF can retain the additional monies (community funded schools). PUSD's local property tax provides about 55-60% of the LCFF amount. The State provides the remaining funds to the LCFF level.

Local Control Funding Formula (LCFF)

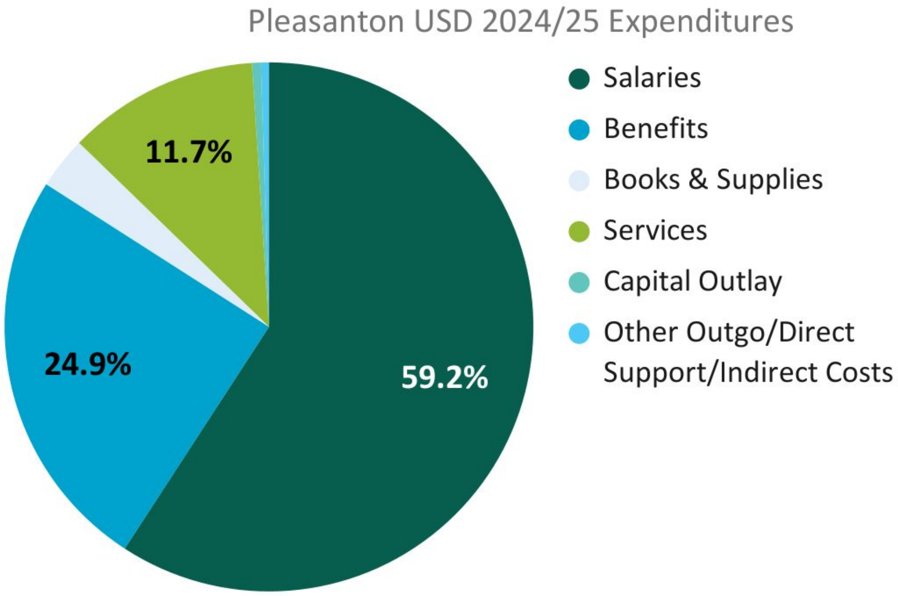


- Base Grant (by grade span) **multiplied by** ADA
- Grade level add-ons **multiplied by** ADA
  - TK, K-3, and 9-12 Grades
- Supplemental and Concentration grants are provided based on the % of students that are considered unduplicated
- **Declining enrollment equates to reduced funding/revenues**
- PUSD enrollment has **declined by 1,600 students since 2019/20**
  - $24-25M of lost revenue

PUSD 2024/25 Revenues and Expenditures (General Fund)



Total Revenues: $210,542,362



Total Expenditures: $219,411,881
84% on Salaries and Benefits

Leveraging our Assets to Increase Revenue/Future Planning

The purchase of the new District Office and Sale of the Vineyard Property will net the District $1M in annual revenues.

District is exploring options to sale/develop 7 acres for housing and use funds to purchase new property for revenue and/or workforce housing.

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Facility Upgrades: Bond Measures I1 and I

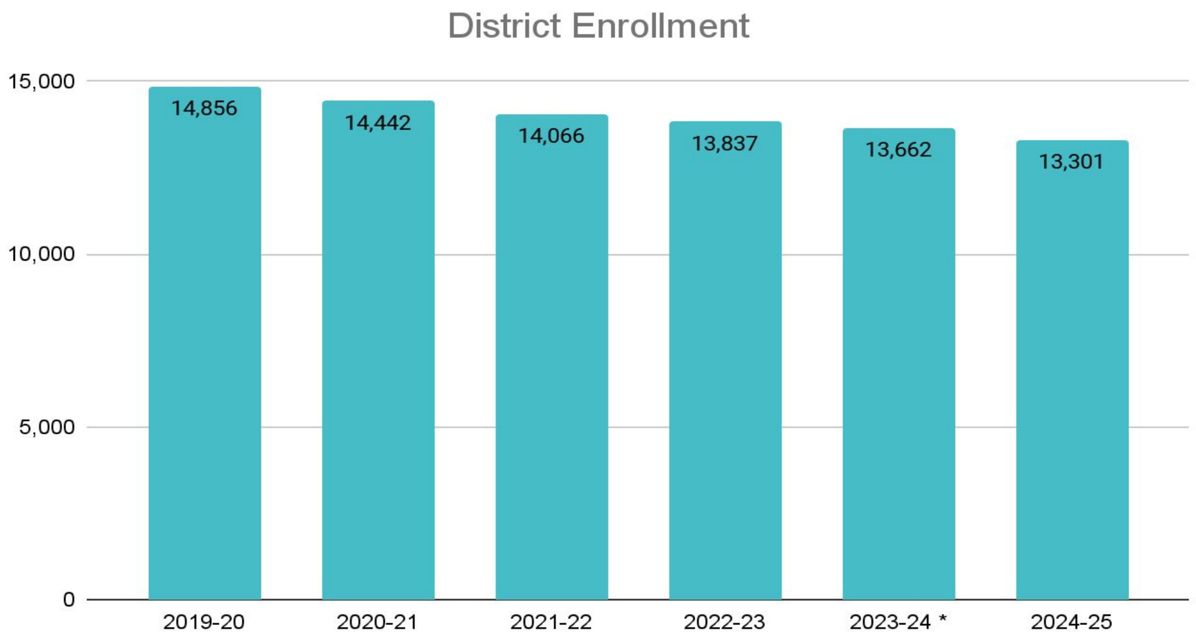
- Voter approved Bond Measures pay for PUSD's major facility upgrades and new facilities
- Measure I1 (2016): $270M
- Measure I (2022): $395M
- Funds are separate from the General Fund and can not be used for general fund salaries or operational costs

New Educational Options Center/Village High School

2. PUSD: Demographic Information

- Current/projection enrollment
- Capture rate
- Capacity of school sites

Enrollment Trends - Census Day



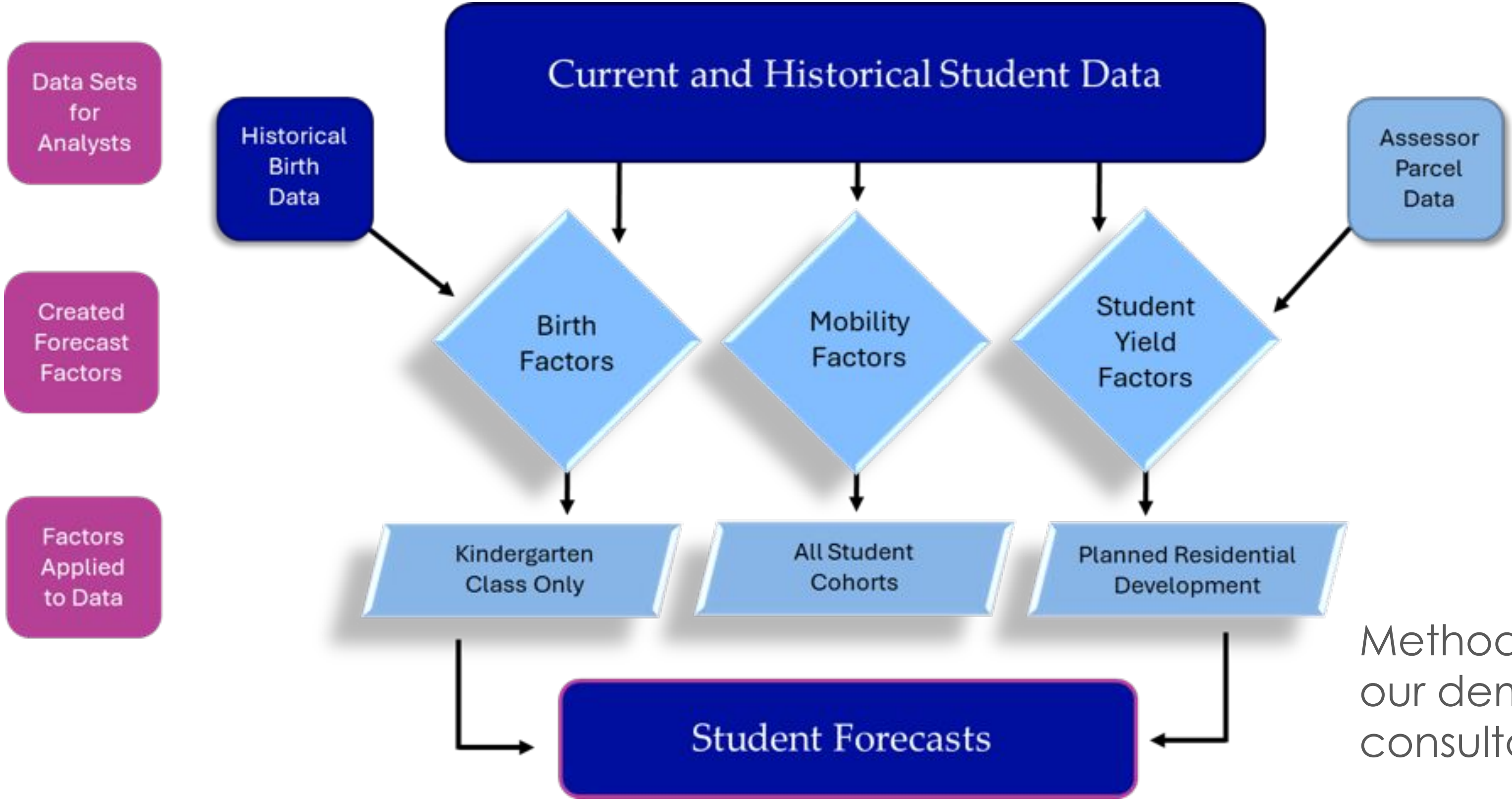
Enrollment Trends - Census Day

	Oct 2019	Oct 2020	Oct 2021	Oct 2022	Oct 2023	Oct 2024	1 Year Comp.	6 Year Comp.
Elementary	6,182	5,943	5,677	5,560	5,466	5,264	-202	-918
Middle	3,541	3,412	3,385	3,334	3,259	3,131	-128	-410
High	5,133	5,087	5,004	4,943	4,937	4,906	-31	-227
Total	**14,856**	**14,442**	**14,066**	**13,837**	**13,662**	**13,301**	**-361**	**-1,555**

Projections vs. Actual Enrollment

Grade range	Demographer Projection for Fall 2023[1]	Enrollment October 2023	Demographer Projection for Fall 2024[2]	Enrollment October 2024	Demographer Projection for Fall 2025[3]
Elementary (TK-5) Total	5,446	5,466	5,335	5,264	5,184
Middle School (6-8) Total	3,190	3,259	3,269	3,131	3,096
High School (9-12) Total	4,842	4,937	4,924	4,906	4,779
District Total	**13,478**	**13,662**	**13,668**	**13,301**	**13,060**

Enrollment Projections



Methodology used by our demographic consultant MGT.

Enrollment Projections

Pleasanton Unified School District
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Resident Students											
Grade	Historic			Current	Forecasted						
	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
TK	168	199	279	309	414.6	393.5	422.5	451.6	454.2	464.8	464.8
K	743	[illegible]	[illegible]	611	641.8	604.6	568.3	613.0	615.8	632.0	633.4
1	816	806	742	655	649.5	685.0	664.9	636.0	668.4	678.7	683.6
2	888	845	844	770	681.0	679.8	735.9	724.7	679.8	720.5	719.2
3	898	885	852	853	773.6	688.3	706.0	771.4	745.5	706.7	735.9
4	918	931	912	868	877.7	800.6	730.8	759.5	812.4	792.8	741.3
5	996	923	949	929	879.3	892.8	833.2	771.7	786.0	846.6	815.2
6	1,041	999	944	966	942.6	897.0	929.3	878.2	803.3	824.1	877.6
7	1,092	1,089	1,029	956	995.1	974.0	946.7	987.8	920.2	849.5	862.9
8	1,129	[illegible]	[illegible]	1,017	968.1	1,009.1	1,007.1	987.3	1,014.1	952.8	872.7
9	1,135	[illegible]	[illegible]	1,148	1,044.0	996.1	1,046.2	1,052.7	1,026.8	1,059.1	988.8
10	1,206	1,125	1,165	1,134	1,139.7	1,039.0	999.4	1,055.5	1,054.4	1,033.3	1,057.4
11	1,186	1,204	1,123	1,159	1,132.6	1,139.8	1,047.6	1,015.4	1,065.3	1,068.5	1,038.2
12	1,228	1,177	1,182	1,115	1,146.8	1,121.5	1,137.2	1,052.2	1,014.9	1,067.6	1,063.5
Resident Student Totals by Grade Configuration											
TK-5	5,427	5,302	5,188	4,995	4,917.5	4,744.6	4,661.6	4,727.9	4,762.1	4,842.1	4,793.4
6-8	3,262	3,194	3,099	2,939	2,905.8	2,880.1	2,883.1	2,853.3	2,737.6	2,626.4	2,613.2
9-12	4,755	4,669	4,617	4,556	4,463.1	4,296.4	4,230.4	4,175.8	4,161.4	4,228.5	4,147.9
TK-12	13,444	13,165	12,904	12,490	12,286.4	11,921.1	11,775.1	11,757.0	11,661.1	11,697.0	11,554.5

Impact from Mobility Factor

Impact from New Housing Projects

Forecasts were generated using Fall 2024 Census student dase as a base by MGT.

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Enrollment Projections

Pleasanton UNIFIED SCHOOL DISTRICT Educate. Inspire. Empower.

	Special Day Class (SDC) Students (not used in forecast)												
TK-5	112	104	108	113	111.2	107.3	105.5	107.0	107.7	109.5	108.4		
6-8	56	58	57	58	57.3	56.8	56.9	56.3	54.0	51.8	51.6		
9-12	96	90	104	93	91.1	87.7	86.4	85.2	84.9	86.3	84.7		
TK-12	264	252	269	264	259.7	251.9	248.7	248.5	246.7	247.7	244.7		
	Non-Resident Students (not used in forecast)												
TK-5	111	163	179	158	155.5	150.1	147.5	149.6	150.6	153.2	151.6		
6-8	48	98	113	135	133.5	132.3	132.4	131.1	125.7	120.6	120.0		
9-12	112	171	203	230	225.3	216.9	213.6	210.8	210.1	213.5	209.4		
TK-12	271	432	495	523	514.3	499.3	493.4	491.4	486.5	487.3	481.1	Changes from	
	Total Students											2024 to 2031	
TK-5	5,650	5,569	5,475	5,266	5,184.3	5,002.0	4,914.5	4,984.4	5,020.5	5,104.8	5,053.5	-212.5	-4.0%
6-8	3,366	3,350	3,269	3,132	3,096.6	3,069.2	3,072.4	3,040.7	2,917.4	2,798.9	2,784.8	-347.2	-11.1%
9-12	4,963	4,930	4,924	4,879	4,779.5	4,601.0	4,530.3	4,471.8	4,456.4	4,528.3	4,442.0	-437.0	-9.0%
TK-12	13,979	13,849	13,668	13,277	13,060.4	12,672.2	12,517.3	12,496.9	12,394.3	12,432.0	12,280.2	-996.8	-7.51%
	Annual Net Change												
TK-5		-81	-94	-209	-81.7	-182.3	-87.5	69.9	36.1	84.3	-51.3		
6-8		-16	-81	-137	-35.4	-27.4	3.2	-31.8	-123.3	-118.5	-14.1		
9-12		-33	-6	-45	-99.5	-178.5	-70.7	-58.5	-15.4	71.9	-86.3		
TK-12		-130	-181	-391	-216.6	-388.2	-155.0	-20.3	-102.7	37.7	-151.7		

Notes

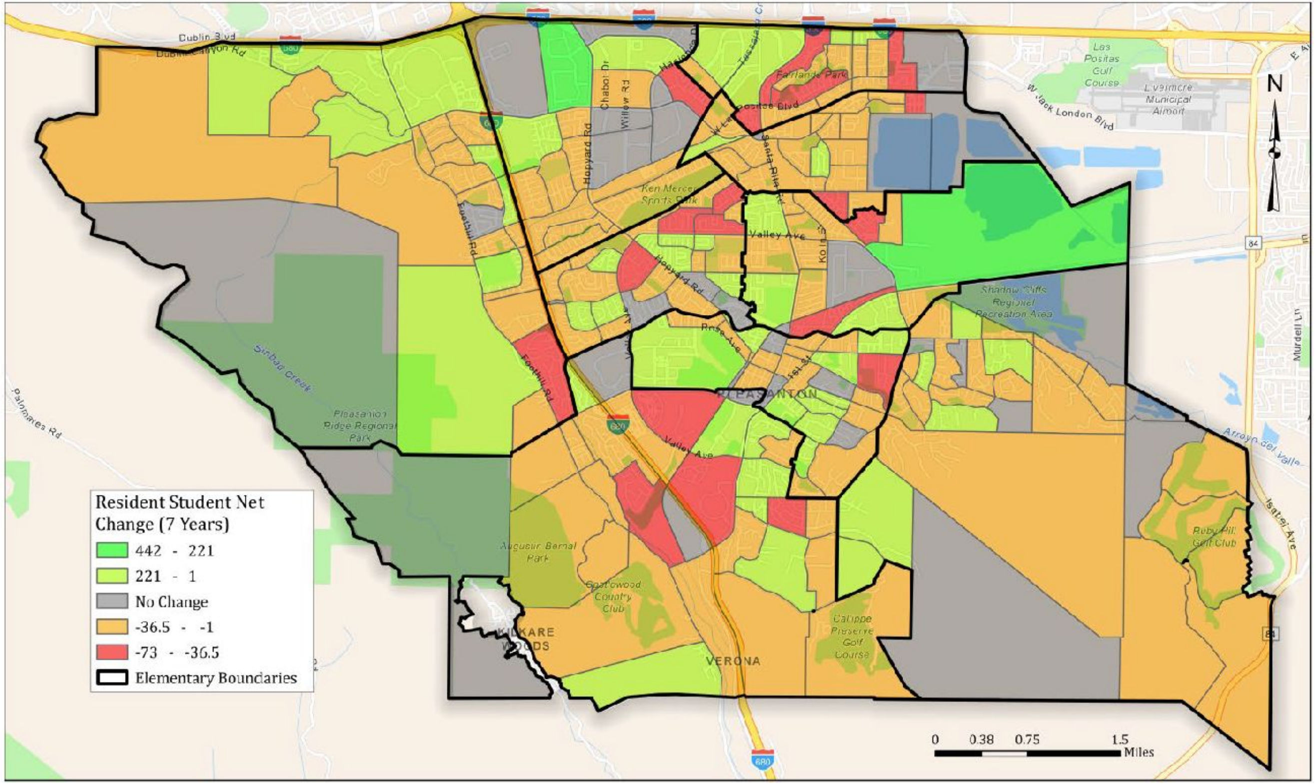
Forecast based on student data as of 10/2/2024

Resident students refer to General Education students who reside within the district boundary.

Total for current 2024/25 students excludes 29 Grade 13 students

Increased non-resident students support maintaining our enrollment and funding.

TK-12 Resident Students Projected Net Change



Residential Development

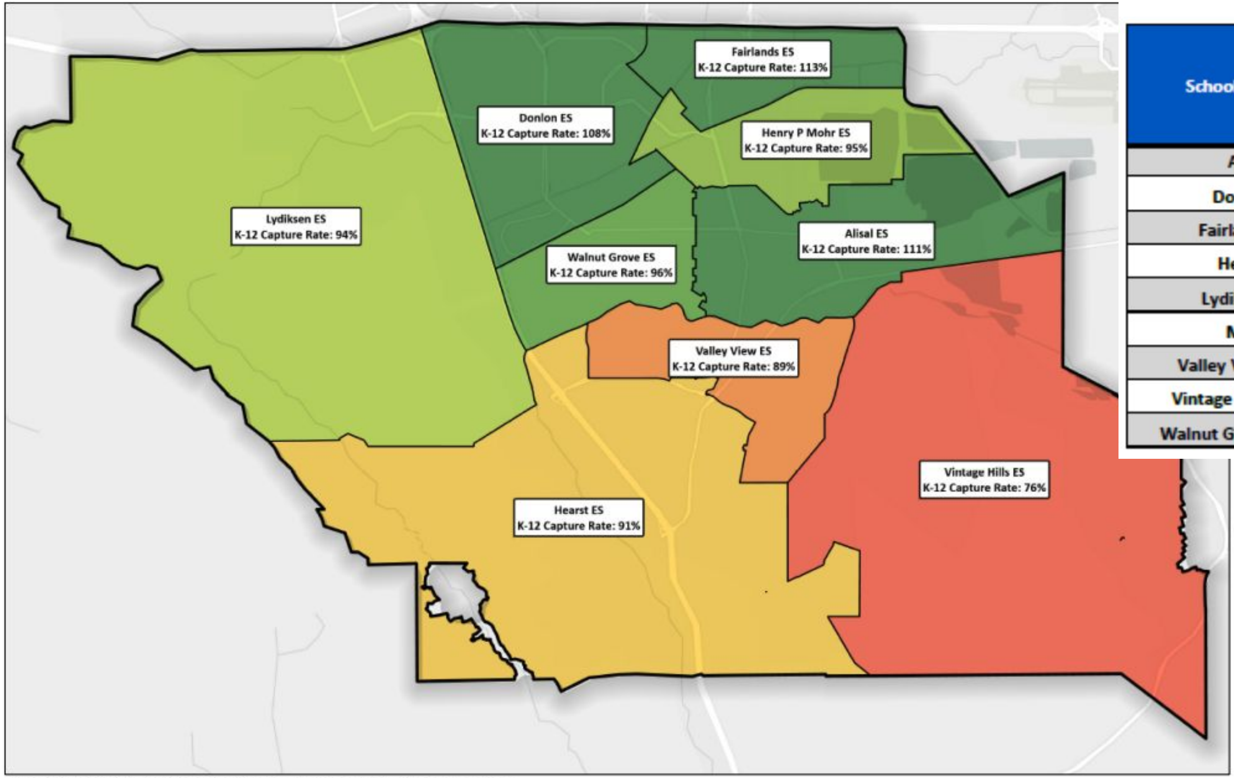
- 22 projects are currently active in 7 of the 9 elementary attendance areas
- 2,826 total units included in 7-year forecast
- 2,136 units are multi-family units
- 31% of the units are in the Alisal ES boundary

School Capacity

School	Total Capacity	Current Enrollment	% of Capacity
Alisal	717	548	76%
Donlon	766	706	92%
Fairlands	761	662	87%
Hearst	761	465	61%
Lydiksen	780	594	76%
Mohr	681	497	73%
Valley View	761	627	82%
Vintage Hills	687	523	76%
Walnut Grove	816	631	77%
Hart	1445	1120	76%
Harvest Park	1196	1019	85%
Pleasanton Middle	1412	942	67%
Amador Valley	2998	2562	85%
Foothill	2542	2172	85%

Capture Rate

PLEASANTON UNIFIED SCHOOL DISTRICT | CAPTURE RATE ANALYSIS 24-25



Map of total K-12 capture rates for each Elementary Attendance Area.

Totals for School by School Type

School	2024-2025 K-5 Population Capture Rate	2024-2025 6-8 Population Capture Rate	2024-2025 9-12 Population Capture Rate	2024-2025 Total K-12 Population Capture Rate2
Alisal ES	109%	116%	117%	111%
Donlon ES	113%	114%	105%	108%
Fairlands ES	126%	99%	119%	113%
Hearst ES	90%	83%	107%	91%
Lydiksen ES	98%	89%	99%	94%
Mohr ES	98%	91%	105%	95%
Valley View ES	91%	85%	98%	89%
Vintage Hills ES	79%	76%	78%	76%
Walnut Grove ES	102%	93%	97%	96%

The capture rate is defined as the total number of students in the student file living within a given area divided by the possible total student population based on the American Community Survey (ACS) Detailed Age Profile.

3. City of Pleasanton Budget

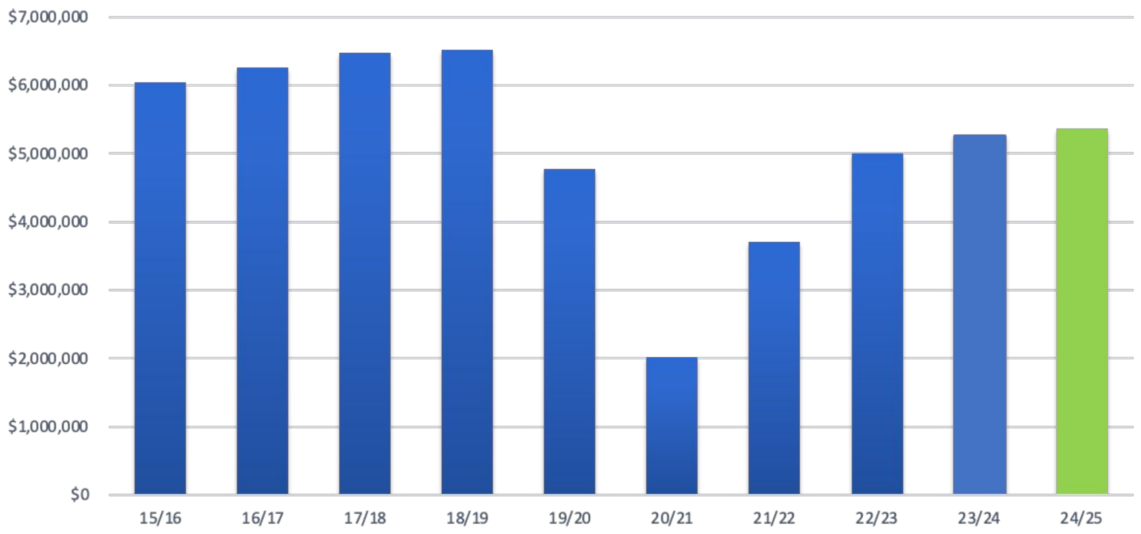
- Financial Challenges
- General Fund Budget
- Key Budget Solutions

Financial Challenges

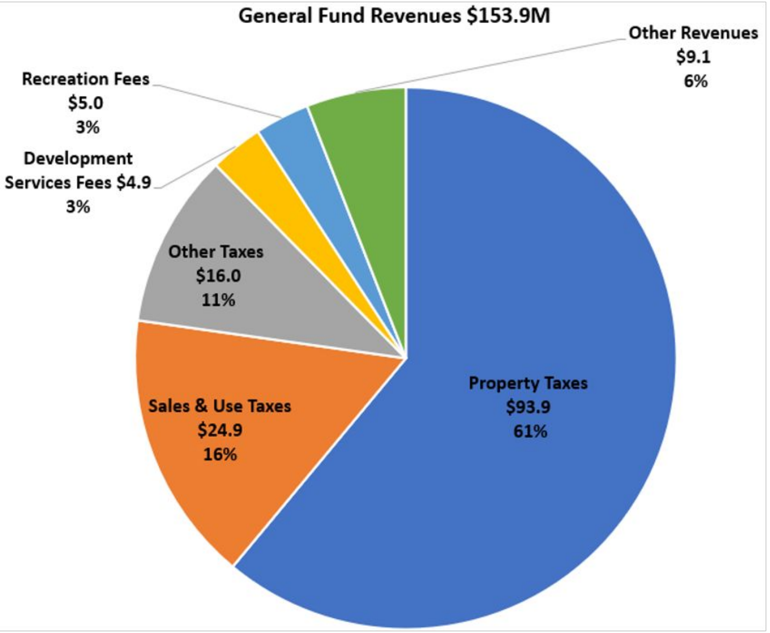
- Reduced hotel revenue impacted by the pandemic
- Forecasted General Fund structural deficit
- Significant infrastructure funding gap
  - $900M for the General Fund and Enterprise Funds over 10 year
- Unfunded retiree medical and pension liabilities
  - Over $200M

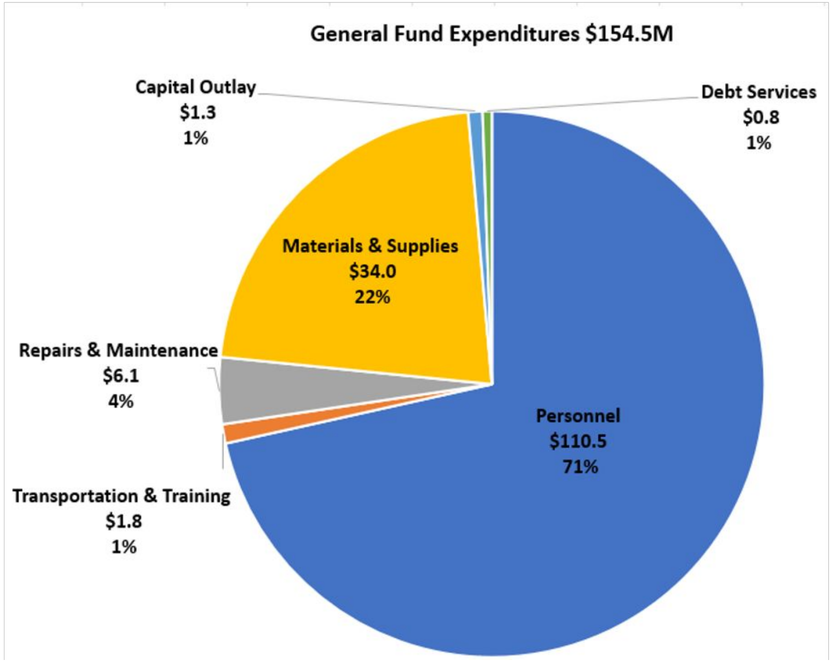
10-Year Hotel Tax History

- Hotel tax is sensitive to economic cycles



FY 2024/25 General Fund Budget





Key Budget Solutions

- Implement service reductions to contain costs
- Conduct municipal service reviews to improve efficiency and identify potential cost savings
- Explore new revenue options to increase revenue
- Expand economic development to attract and retain businesses

4. Residential Development

- Residential development activity is a factor in enrollment trends
- School districts have mandate/primary responsibility under State law to assess and plan for expected capacity
- City collaborates and shares information to help PUSD effectively plan for projected enrollment:
    - Annual City update on current and projected residential development activity to PUSD demographer
    - Consultation during major planning and project reviews, including seeking PUSD input on school capacity and constraints
    - Input during PUSD boundary adjustment and site planning efforts

Residential Development Activity

Under Construction or Expected in 2025

- Avalon Bay: 82 townhome and garden apartment units + 254 apartments
- Harmony Condominiums (Tri-Valley Inn): 42 townhomes
- Harvest Valley Church: 56 townhomes + apartments
- Barones (Robson Homes): 14 Single-Family Homes

Residential Development Activity

Approved or Pending Approval, Construction not yet Started

- Stoneridge Mall/Simon: 360 Apartments
- Kiewit/Villages at the Quarry: 310 Single-Family, 102 Affordable Apartments
- 4400 Black Avenue: 67 Townhomes
- Neal Property/Vineyard: 27 Single-Family Homes
- Lester: 31 Single-Family Homes

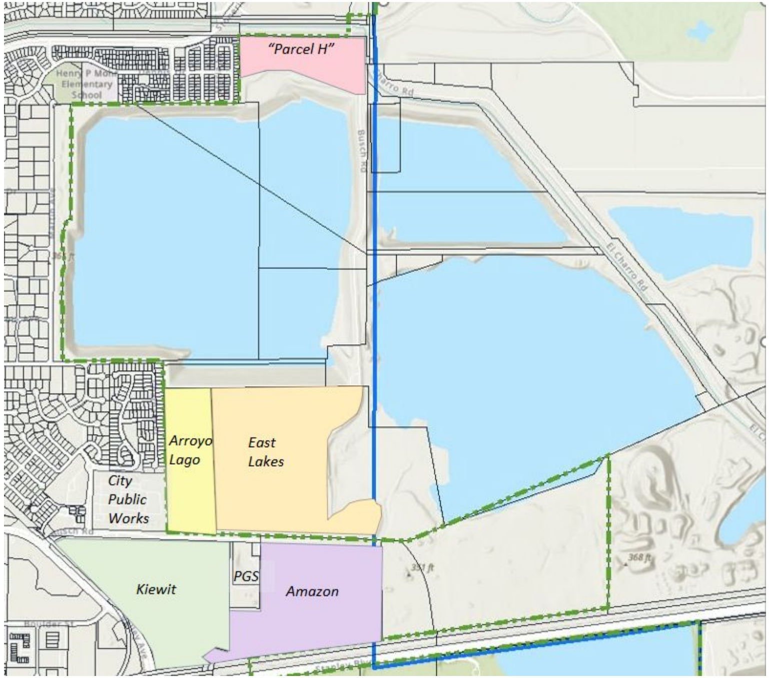
Residential Development Activity: Future

East Pleasanton:

- Arroyo Lago (County): 194 Units
- East Lakes (County): Up to 697 Units in "City" Project
- Annexation required for both parcels

Stoneridge Mall:

- 1,000 + High Density Apartments



Looking Ahead

- Housing outlook is uncertain: lots of entitlement activity, relatively little construction - interest rates and tariffs are among the systemic factors creating uncertainty in development
- City continues to plan to provide more certainty around future residential growth:
  - Stoneridge Mall Master Plan
  - East Pleasanton General Plan Policy Framework
  - East Dublin/Pleasanton BART Station Concept Plan

Item 6

City-PUSD Joint Meeting

Current Partnerships

May 13, 2025

Current Partnerships

1. Shared Programs and Services
2. Future Opportunities

Current Partnerships - Facilities

1. Middle School Gyms
2. Upper Bernal Fields
3. Amador High School Tennis Courts
4. School Site Use for City Programs/ Events
5. City Site Use for School Programs/ Events

Current Partnerships - Programs/Services

1. Field Trips
2. Paws to Read
3. Booklegger Program
4. Youth in Government Day
5. Local History & Nature Programs

Current Partnerships - Programs/Services Continued

6. High School Volunteer Opportunities
7. Student Success Initiative
8. Online Homework Help
9. Economic Workforce Development
10. Workability

Current Partnerships - Support Services

1. Street Closures
    - High School Band Reviews
2. Fuel Procurement and Storage

Current Partnerships - Programs/Services - *Police*

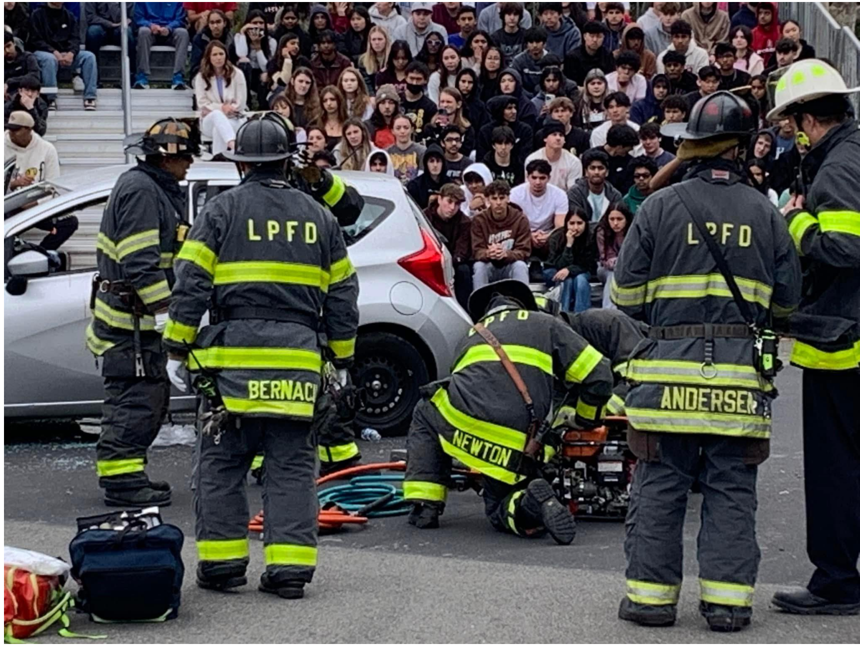
1. School Resource Officers
    - Security Detail for HS Sporting Events
    - School Liaison Committee
    - Intruder Drills/Site Safety Reviews

2. SCORE
3. Crossing Guards
4. Every 15 Minutes
5. Alternative Response Unit (ARU)

School Resource Officer Chris Jones

Current Partnerships - Programs/Services
Livermore Pleasanton Fire Department

1. Fire Education
   - LPFD provides public education free of cost either at the schools or at the fire stations for many PUSD schools each year
   - In 2024, there were 25 separate LPFD public education visits with PUSD students.



Future Ideas and Opportunities

- Cost Sharing
- Shared Facilities
  - Maintenance and Operations Memo
  - Office space
- After School Study and Collaboration Space

MEMORANDUM

Date: May 13, 2025

To: City Council and Pleasanton Unified School District Board of Trustees

From: Gerry Beaudin, City Manager

Subject: Partnership Update: Maintenance and Operations Co-Location Assessment

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BACKGROUND

In 2018, the City of Pleasanton and Pleasanton Unified School District (PUSD) began exploring the feasibility of co-locating PUSD's Maintenance, Operations, and Transportation (MOT) facility at the City's Operations Services Center (OSC) on Busch Road. This exploration was undertaken as the District evaluated repurposing options for its First Street property while the City assessed optimization opportunities at the OSC.

Management Partners, a consulting firm, was engaged to facilitate a preliminary issues assessment, which was completed in September 2018. The assessment analyzed the 16-acre OSC site with 21 buildings (103,282 sq. ft.) and the PUSD's First Street maintenance facility with 3 buildings (39,076 sq. ft.). The analysis identified 16 specific operational and policy questions requiring resolution before proceeding with any co-location arrangement.

The assessment was presented to the City-PUSD Liaison Committee in January 2019. The preliminary findings indicated that while co-location was conceptually possible, numerous complex issues required further study, including:

1. Space reconfiguration needs
2. Circulation impacts
3. Management structure
4. Parking constraints
5. Cost allocation
6. Future growth requirements

The assessment concluded that having the District's maintenance facilities located near (but not on) the OSC site would be preferable to full integration, potentially through acquisition of adjacent land in East Pleasanton. This approach would create opportunities for some shared capital facilities while maintaining operational independence.

DISCUSSION

Current OSC Site Constraints

Since the 2018-2019 assessment, significant operational changes have occurred at the OSC that have substantially reduced available space and further constrained site capacity:

1. **Facility Repurposing:** The Sewer Utility building has been repurposed to house the Waste & Recycling and Environmental Services Divisions; in addition to continuing to serve as storage for some City records.
2. **Fleet Expansion:** The City has increased its vehicle and equipment inventory at the site and currently there are a large number of pieces requiring maintenance and storage.
3. **Additional Large Vehicles:** The Police Department purchased two large vehicles and Library purchased one mobile book vehicle that will be stationed at the OSC.
4. **Planned EV Infrastructure:** Multiple EV charging stations are planned for the OSC for City fleet, with additional public and staff charging stations planned (contractor currently awaiting materials).

These changes represent a significant reduction in available space at the OSC, making co-location of PUSD maintenance facilities even more infeasible at this location. The City must maintain adequate space for its growing operational needs, especially as Pleasanton continues to develop and municipal service responsibilities expand.

CONCLUSION

While the co-location of maintenance facilities is not feasible due to the operational constraints at the OSC, the City of Pleasanton remains committed to our partnership with PUSD. As both agencies face fiscal challenges, we must continue to focus on maintaining essential services while identifying new opportunities for collaboration that are operationally and financially sustainable for both parties.

The City will continue to engage with PUSD through the City-PUSD Liaison Committee to explore additional partnership opportunities that align with our mutual goals of serving the Pleasanton community efficiently and effectively.

ATTACHMENT

1. Update to Preliminary Issues Assessment: Co-Location of Maintenance Facilities Study
    a. Management Partners memo dated September 24, 2018, which includes the Preliminary Issues Assessment: Co-Location of Maintenance Facilities Study

THE CITY OF PLEASANTON

Date: November 15, 2022

To: Gerry Beaudin, City Manager

Through: Pamela Ott, Assistant City Manager

From: Tamara Baptista, Interim Director of Operations and Water Utilities

Subject: Update to the Preliminary Issues Assessment: Co-Location of Maintenance Facilities Study

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Background:
In 2018, the Pleasanton Unified School District (PUSD) and the City partnered to prepare a preliminary issues assessment of a proposal to co-locate the School District's maintenance facility on city property 16 x 20 where city maintenance operations are also headquartered. Management Partners was selected to assist the City and PUSD with this assessment. The attached draft report summarizes the key policy issues, and key questions for consideration include four case studies of similar partnership outlines an approach for a full feasibility study should one be undertaken and recommends the next steps.

Since the draft report was completed in 2018, there are some updates to the Operations Service Center (OSC) sites that should be considered, which are listed below:

- The office and crew space in the Sewer Utility building was repurposed to house the City's records (approx. 2,200SF).
- OSD is currently renting a mobile office trailer which is used by Environmental Services Staff. The trailer is16ft by 20ft and is accompanied by separate rental restroom unit, which is 5ft by 5ft.
- As part of the PFAS Treatment and Well Rehabilitation Project, the City Council has approved the use of a portion of the OSC to be used for the PFAS water treatment plant and supporting facilities. The treatment facility would be sited in the "boneyard" area of the OSC and would occupy approximately 72,000SF.
- The draft report states that the city has 300 vehicles and 125 additional pieces of equipment and there are now a total of 425 pieces of city-maintained vehicles & equipment.
- The City will be accepting a 16ft by 7ft Care and Shelter Trailer from Alameda County Office of Emergency Services in the next few months.
- The City is currently working with East Bay Community Energy (EBCE) to install EV charging stations at the OSC for City fleet.
- There will also be EV charging stations for the public and staff in the upcoming years as we continue to work with EBCE.

There has been a lot of changes to the Operations Service Center since 2018. Any available space that was previously identified is now being used. Also, the Police Department and Library are in the process of procuring large vehicles which may be stationed at the OSC in the future.

Attachments:

1. Management Partners memo dated September 24, 2018, which includes the Preliminary Issues Assessment: Co-Location of Maintenance Facilities Study

To:	Mr. Nelson Fialho, City Manager, City of Pleasanton Mr. David Haglund, Superintendent, Pleasanton Unified School District
From:	Jan Perkins, Senior Partner Mary Neilan, Senior Manager
Subject:	Preliminary Issues Assessment Regarding Potential Co-Location of Pleasanton Unified School District/City of Pleasanton Maintenance Facilities
Date:	September 24, 2018

Executive Summary

Management Partners was engaged by the City of Pleasanton and the Pleasanton Unified School District to assist with a preliminary issues assessment of a proposal to co-locate the School District's maintenance facility on city property where city maintenance operations are also headquartered. The District finds it may have better uses for the property on which its current maintenance facility is located, and both City and District leaders believe there could be benefits from co-locating maintenance facilities. A preliminary assessment of the feasibility as well as a greater understanding of the pros and cons of such co-location are desired to determine whether a business plan should be developed.

Two meetings with City and District staff were held as part of this preliminary issues assessment. The first was on April 26, 2018, during which representatives of the City and District identified the reasons for studying the feasibility of co-locating the maintenance facilities. The second was on August 9, 2018 for the purpose of discussing Management Partners' draft analysis and next steps.

This report summarizes the key policy issues, identifies 16 key questions for the parties to consider, presents four case studies of similar partnerships between public agencies, outlines an approach for a full feasibility study should one be undertaken, and recommends next steps.

Key Policy Questions

The policy questions identified by City and School District staff as a result of this preliminary issues assessment are as follows:

1. ***Is co-location of District maintenance functions at the City's Operations Services Center site feasible?***
   Summary answer: Yes, but more detail is necessary. Since this was a preliminary assessment, numerous issues and questions were identified that first must be addressed before this

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question can be fully answered. Working together with the City, the School District also has the potential of acquiring land through the East Pleasanton Specific Plan process to address future needs. In addition to a new school site, options exist for acreage to accommodate maintenance operations adjacent to the City's Operations Services Center. This strategy would also create more collaborations and efficiencies, and fewer redundancies for the two agencies due to their proximity to one another (e.g. meeting space, fueling stations, storage, etc.).

2. ***Are shared services between the City and District feasible with co-located maintenance facilities?***
   Summary answer: The focus of this study was shared capital facilities that enable maintenance operations to be co-located at the City's Operations Service Center (OSC) and/or in proximity to the OSC for the reasons stated above. However, both parties acknowledge that having maintenance functions nearby could eventually lead to shared services agreements to benefit the City and District in the future. This would have to be addressed separately and would necessitate meet and confer obligations with affected labor groups, as well as a study of financial impacts and policy considerations by both governing bodies.

3. ***What future needs may the City have as a result of growth and build out?***
   Summary answer: Population is expected to grow as the City reaches General Plan build out. Beyond buildout, new State housing mandates may impact previous assumptions regarding the City's anticipated maintenance responsibilities which would necessitate the City's need to preserve currently unoccupied space at the OSC. The same impacts apply to the School District regarding their ideal operational needs through build-out and beyond. Such growth will come with maintenance requirements which will likely mean adding staff and equipment. This is an important factor to be considered by the City in releasing property at the Operations Services Center, and/or considering newly acquired property in East Pleasanton in proximity to the OSC. Both considerations are noted in the report below.

4. ***Would having the District's maintenance facilities in close proximity near the City's Operations Services Center be better than onsite integration with the City?***
   Summary answer: Yes; this was identified as the preferred option during the discussions and would need further study. It would also require the cooperation from East Pleasanton property owners (Lionstone or Kiewit) through an approved Specific Plan process. The concept discussed was for the District maintenance facilities to be located on vacant property adjacent or across from the Operations Services Center which might create opportunities for some shared capital facilities in the near term and potential shared services arrangements in the long-term.

Overview of Operations Services Center Site and School District Site

The Operations Services Center is located at 3333 Busch Road. It contains multiple buildings and uses by several City departments and the Livermore Pleasanton Fire Department. The Pleasanton Unified School District site is located at 4750 First Street and houses its district administration, maintenance, and other functions. Attachment A contains information about both sites, and Attachments B and C contain site maps for the sites.

Highlights of Observations

- The District has multiple operations on their current site that could potentially be relocated to the City's site. There are varying degrees of compatibility with existing uses at the City's maintenance facility.
- Parking is in short supply at the Operations Services Center and if uses are added, it could become exacerbated.
- Planning and managing a co-location project will require considerable resources from both City and District.
- The impact on the adjacent residential neighborhood from expanding operations at the City Operations Services Center will require study and public vetting.
- Co-location of compatible uses could offer opportunities for service sharing, joint purchasing or cost sharing of capital improvements.
- The City's and District's future needs should be considered in any current decisions related to maintenance facilities.

Highlights of Lessons Learned from Case Studies

- A comprehensive, written agreement between parties will provide clarity and allow each agency to plan for operational and financial impacts, in the short and long term.
- Successfully sharing facilities requires a certain amount of flexibility and willingness to accommodate each other's needs from time to time.
- Reducing long-term capital costs is a likely benefit of sharing maintenance facilities.
- Operating costs may be reduced if cooperative purchasing of supplies or joint use of on-site facilities (such as a fueling station) is implemented.

See Attachment D for a summary of the four case studies.

Organization of Report

The remainder of this report is organized into the following sections:

Part 1: Issues to Consider Regarding Co-Location
Part 2: Future Comprehensive Feasibility Study
Part 3: Recommended Next Steps
Attachment A: Summary of Data Submitted by City and District
Attachment B: Site Map of Operations Services Center
Attachment C: Site Map of School District Property
Attachment D: Case Study Summaries

Part 1: Issues to Consider Regarding Co-Location

Management Partners reviewed all the information provided and identified 16 issues for consideration by City and District leaders. Those issues are shown in Table 1 below.

Table 1. List of Issues to Consider

Questions Identified
1. Which functions are appropriate for co-location at the Operations Services Center?
2. Can current buildings or outside spaces be reconfigured to accommodate District uses?
3. Could some functions be coordinated or could some spaces be shared by both entities?
4. Are there alternatives available other than the Operations Services Center site?
5. What future needs may the City have for expansion of staff, facilities and equipment at the Operations Services Center due to population growth and build out?
6. How will parking needs be accommodated with increased uses at the Operations Services Center?
7. What changes in circulation may be needed to accommodate the safe movement of an increased number of vehicles?
8. What communication and power requirements would be needed for the increased functions?
9. What hazardous materials may be produced or stored by the District that will need to be handled on-site?
10. What clarifications or new guidelines may be needed regarding on-site storage of sensitive records for either agency?
11. What will be the costs to move the District's operations to the site and then to maintain the expanded uses on the site?
12. What steps will be taken to ensure that the two organizations can work well side by side and who will manage the center?
13. What branding will be needed at a co-located site?
14. What employee relations concerns could arise from any next steps?
15. What long term policy commitment would such a move mean for the City and District?
16. Who will take responsibility for implementation of the next steps in the process and for future project management?

Introduction to the Issues

In reviewing the data provided on current maintenance operations and identifying questions to be answered, we offer the observations below.

- If the District's non-maintenance operations were excluded, the remaining functions being moved would require approximately17,000 square feet (plus storage areas and an auto service bay), workspace for 35 employees, 30 fleet vehicles and additional parking for staff and visitors. The maintenance functions are similar to what is there now and could be complementary.
- Both the City and District have insufficient parking now for their needs. It is not clear that this would be resolved with more employees on site (and assuming no public serving uses are added).
- The Operations Services Center is a maintenance yard with auxiliary functions that the City is able to manage because they either occur on the weekend (police and fire

training) or are minimal, as in the case of the public contact. The District's non-maintenance operations would bring a different set of issues to the Center, with parents, young people and other members of the public on site. It could result in difficult situations with respect to circulation and other conditions that would not be easily reconciled.

- Having two agencies on one site will involve management issues and it will be important for there to be clarity about who is in charge of the center and who makes decisions when an issue arises.
- The City has several departments utilizing the center now, and their interests should also be considered as to how the site will work with new functions should the District be located there.
- The management team of both the District and City representing the operations involved will need to invest significant time working through many issues. This effort will need to be factored into their regular workload and is the feasibility of doing so will need to be determined.
- An extensive public process regarding expanding operations on the existing site is likely, given interests of the adjacent residential development.

Sixteen Issues for Consideration

Each of the 16 issues is addressed below.

1. Which functions are appropriate for co-location at the Operations Services Center?

The predominant function at the Operations Services Center is that of maintenance and operations, with police and fire training functions on site. The City has some public-facing services, but they are limited. The School District's functions proposed to be moved are broader in scope than exists on the Operations Services Center Site. The functions other than maintenance or operations for both entities are shown in Table 2 below.

Table 2. Non-Maintenance or Operations Functions Located at Each Site Now

City of Pleasanton	Pleasanton Unified School District
• Utility billing and related administrative functions • Dog licensing • Environmental services • Water quality laboratory • Livermore Pleasanton Fire Department training facility and tower • Police Department gun range and storage • Use of Remillard Conference Room	• Administration function for Kid's Club • Purchasing operation • Mail room • Graphics shop • Data processing • Computer lab • Warehouse

Both parties would need to agree on what operations are appropriate and feasible to be located at the City's Operations Services Center. City staff expressed interest in limiting any co-location to maintenance functions only. District staff noted they would need to examine the functions further to determine which should be proposed for relocation.

With functions that involve the public coming to the site, the City would need to be concerned with issues of parking, liability and potentially neighborhood traffic, depending on the volume. Data was not specifically sought regarding the number of cars in and out of the area with non-maintenance functions, and that would need to be provided during the next phase of study.

2. ***Can current buildings or outside spaces be reconfigured to accommodate District uses?***
   Once a determination is made about which functions would be appropriate for co-location at the Operations Services Center, an assessment of the site will be needed. It should include both the current uses and needs, and any future space requirements that have been identified (or will be through a more thorough examination, considering future population growth and other needs). Some areas may have excess space and can be reduced in size, while others may require additional space than presently available. The assessment should include, at the minimum:
   - Square feet required for each operation to be located at the site;
   - Possible consolidation of current city storage areas (e.g., the boneyard, storage and bin storage areas);
   - Lunch room, restrooms, storage and conference rooms.
   - Possible reconfiguration of the boneyard and the Fire District training area (not including the tower)
   - Consideration of the sewer building as an opportunity site, if storage needs can be addressed

3. ***Could some functions be coordinated or could some spaces be shared by both entities?***
   The economies of scale that can be achieved through the coordination of functions and shared use of space, along with the estimated cost savings and benefits to the parties should be evaluated. The City and District noted during the April meeting that they currently collaborate on the fueling of vehicles (with the District's use of the City's fueling facilities).

   Co-locating operations may present further opportunities for coordinating services. Examples of potential opportunities that could be studied are listed below.
   1. *Vehicle maintenance and repair operations*
   2. *Grounds keeping*
   3. *Emergency Operations Center (EOC)*
   4. *Other uses, such as offices, conference rooms, locker rooms and outdoor spaces*

   For any of these, there will be a host of issues to consider, including costs, administrative issues, logistics, employee relations and others.

4. ***Are there alternatives available other than the Operations Services Center site?***
   In conducting a full feasibility study, Management Partners recommends that alternatives be examined, such as the following:
   - Potential to locate PUSD maintenance facility in close proximity to the OSC, providing some of the benefits without the impact on existing City operations. Properties directly across the street from OSC and adjacent to OSC could both be analyzed.

- Space in other city locations may be available to the City for relocating some of its administrative operations.
- The District may be able to find other suitable property.

5. ***What future needs may the City have for expansion of staff, facilities and equipment at the Operations Services Center due to population growth and build out?***
   Pleasanton, as part of the Bay Area economy, will continue to see residential and commercial growth for the foreseeable future. While the City's General Plan contemplates "build-out", there will be local decisions, such as a new general plans and area plans, and outside forces, such as new State laws that will enable and/or require additional development in Pleasanton. Increases in the number of residents, employees and visitors will generate increased demand for services – and likely the need for increased staff and facilities space to support the increased demand. The City and the School District will need to factor growth into their planning efforts.

6. ***How will parking needs be accommodated with increased uses at the Operations Services Center?***
   The City's data submittal indicated parking is currently inadequate at times. If the District were to locate some functions at the site, its employees will also require parking. A specific assessment of parking for City and District employees and parking required for visitors will be required. The size of vehicles and type of equipment housed (e.g., fire vehicles and buses) needs to be incorporated. Space for electric charging stations for use in the future also needs to be considered. Consideration of alternative transportation options for employees and visitors to the site could also be explored.

7. ***What changes in circulation may be needed to accommodate the safe movement of an increased number of vehicles?***
   The Operations Services Center site will need to accommodate the circulation of traffic entering and exiting the site for employees, visitors, deliveries and the movement of equipment at the location. An analysis of the site's ability to adequately support traffic circulation of the functions intended to be co-located needs to be performed, including the interaction between maintenance vehicles and the public. A more comprehensive planning effort for the site and surrounding area may be warranted if the co-location plan advances.

8. ***What communication and power requirements would be needed for the increased functions?***
   A communication and electrical power needs assessment will be required to identify the number of phone lines and trucks, computer line capacity, wireless, radio and power capacity needed to accommodate the co-located operation and the associated costs. If the District's data processing function is moved to the combined site, the cost of relocating the district "head end" will also need to be considered.

9. What hazardous materials may be produced or stored by the District that will need to be handled on-site?

Some operations result in the storage of hazardous materials. This may not be a new issue for either the City or District since both entities have hazardous materials on their sites now. However, with a combined operation, this would need to be further analyzed. Some operations result in run-off that is not allowable under the City's storm water permit. Presumably both parties are following proper procedures for hazardous materials storage and storm water run-off, however a review of current procedures, the development of written guidelines for handling and storing hazardous materials and for avoiding run-off should be performed and communicated to employees working on the site.

10. What clarifications or new guidelines may be needed regarding on-site storage of sensitive records for either agency?

While both agencies have existing guidelines and protocols regarding records of various sorts, anytime a new agency and use is introduced into a site, written guidelines should be updated for onsite storage of sensitive records and evidence pursuant to legal requirements and administrative procedures.

11. What will be the costs to move the District's operations to the site and then to maintain the expanded uses on the site?

Once the City and District conclude whether some functions would be appropriate to move to the site, an important step will be to prepare cost estimates for the move. Costs will be incurred for both the City and District in such a move. Examples include:

- One-time costs for such areas as design and construction of facility improvements required to accommodate both operations;
- Costs associated with moving some Operations Services Center functions to new locations on the site;
- Ongoing maintenance costs of operating the co-located operation;
- Future capital improvements for replacements and upgrades;
- On site management of the co-located operations;
- Cost adjustments over time to ensure that cost sharing remains equitable; and
- Liability-related costs.

The division of costs applicable to each of the parties for the above cost categories will need to be determined. An updated assessment every two to three years is recommended so both parties can be assured of paying their fair share.

12. What steps will be taken to ensure that the two organizations can work well side by side and who will manage the center?

The organizational cultures, the values and behaviors that contribute to the working environment, vary among public agencies, in this case a city and a school district. While there are undoubtedly similarities, it is possible that the two entities could have different priorities that could cause impediments or problems with co-located operations. Examples include expenditure priorities, approaches to problem solving, communications between individuals and team approaches.

Joint decision-making through the use of a committee comprised of members from the City and District has been successful in other joint-use operations. However, having one entity clearly in charge will be important for long term management of the center to address operational issues, supplemented by a well-defined communication strategy with the partner agency.

Additionally, clear expectations should be written out in any agreement about how employees will work together in the same place in advance of any actual co-location. Utilizing a joint committee can be helpful in communicating issues and concerns as they arise, but clear management and responsibility will need to be established in a formal agreement to help ensure operational and maintenance objectives of both parties are met.

Examples of some issues that would need to be decided in advance are the following:

a. Who is the lead for management of the center;
b. What operating rules and procedures will be in place for employees on site;
c. How will conflicts be resolved;
d. How will allocation of costs be determined for those costs that arise during operations and are not anticipated in an original agreement;
e. To what standard will building improvements and additions be constructed;
f. If noise or ventilation issues associated with ongoing operations arise, how they will be mitigated;
g. Whether confidentiality requirements need to be considered regarding office arrangements; and
h. How the City and District will communicate with each other.

13. *What branding will be needed at a co-located site?*

If the District locates some functions at the City's Operations Services Center, what would be the expectations regarding branding of the site? Presumably there would be appropriate signage for the buildings, but are there other branding or naming issues that would need to be addressed?

14. *What employee relations issues could arise from any next steps?*

Depending on the range of options to be studied in any next phase, employee relations issues that would need to be addressed by either the City, the District, or both should be identified.

15. *What long term policy commitment would such a move mean for the City and District?*

If the District were to locate some functions on the City's site, the decision would presumably be for the long term. There may be policy considerations that should be addressed in a next phase study.

16. ***Who will take responsibility for implementation of the next steps in the process and for future project management?***

    Conducting the types of studies needed to answer the questions that have surfaced as part of this preliminary assessment will take time on the part of City and District staff. Additionally, as the process moves through future phases, project management will be needed by both parties to address all of the issues. A schedule and implementation plan will be needed as part of the assessment identifying the timing required, various tasks, and the responsible City and/or District staff member.

Part 2: Future Comprehensive Feasibility Study

If the City and District determine that they wish to further analyze the co-location concept or other alternatives, Management Partners recommends a comprehensive feasibility analysis of options be conducted. A feasibility study would determine what site alternative would be most suitable, whether the project is technically feasible, what the specific costs and benefits for the City and PUSD would be, and the steps and timing of implementation. It would also provide policy makers and executive managers with information to decide whether the project provides sufficient operational and financial benefits to meet policy and community interests, and therefore warrants a decision to move forward.

Policy and Operational Parameters

A first step before proceeding with a comprehensive feasibility study would be to jointly develop policy and operational parameters or guidelines under which such a project might be considered. Examples of issues to be addressed up front include the following.

1. Operational functions which should be included and those that should not.
2. Acceptable land use scenarios or alternatives.
3. The degree to which shared services are acceptable and what those might be.
4. Acceptable cost impacts.
5. Future growth and competing public policies that may present significant obstacles.

Elements of a Feasibility Study

A feasibility study for the co-location project would include at the following, at a minimum:

1. ***Location options*** – Define the location options to be studied, such as:
    a. Specified PUSD functions (as agreed to by the parties) on the OSC site;
    b. Acquire land adjacent to OSC and relocate specified PUSD functions in close proximity to City operations; and,
    c. Acquire land across from OSC and relocate specified PUSD functions in close proximity to City operations.
2. ***Operational requirements*** – Conduct a thorough analysis of current operational requirements of the City and PUSD, as well as projected future needs to determine land and space requirements.
3. ***Reconfiguration options to maximize use and operations of existing OSC*** – Analyze existing space and uses at OSC for potential reconfiguration, repurposing or new

construction to optimize and/or increase capacity (e.g., administrative/office space; "boneyard"; the LPFD training area, excluding the tower; and the sewer building).

4. ***Opportunities to reduce space needs through shared services*** – Identify and assess opportunities that could reduce space needs through coordination of services (e.g., vehicle maintenance and repair, grounds keeping, emergency operations center functions and other ancillary services).
5. ***Parking and circulation requirements*** – Conduct a parking/circulation study of the OSC that accounts for current and proposed uses on the site.
6. ***Parking impacts*** – Assess transportation options for employees and visitors to the site that could reduce dependence on single occupancy vehicles and reduce overall parking demand.
7. ***Utility impacts*** – Analyze communication requirements (e.g., , phone, internet), power needs assessment to determine current capacity, future needs and cost to serve co-located functions.
8. ***Infrastructure*** – Determine the infrastructure (roads, sewers, power) impacts and costs of alternative options.
9. ***Cost/benefit analysis*** – Conduct a cost analysis of each option, including initial planning/design, relocation, ongoing maintenance and future capital improvements, including projected cost savings as a result of the project.
10. ***Agency cost impacts*** – Conduct an analysis to determine the appropriate pro-rata distribution of costs of co-location between City and PUSD.
11. ***Implementation Action Plan*** – Prepare an estimated schedule and implementation plan to fully understand the commitment required in time, resources and staffing to undertaking such a project (including recommendations for public engagement and key decision points (off ramps) for the City and PUSD to consider along the way.

Part 3: Recommended Next Steps

1. Discuss the results of the preliminary issues assessment with the City Council and School Board to determine interest in further analysis.
2. Develop policy and operational parameters under which a comprehensive feasibility study would proceed.
3. Identify the cost of conducting the feasibility analysis, who could conduct it, how it would be paid for, which agency will be in the lead for managing the project, composition of the project team, and a schedule for the feasibility analysis.

Attachment A
Summary of Data Provided by City and District

Both agencies submitted basic information about their current and projected uses and needs for maintenance facilities. An excel spreadsheet was created by Management Partners and provided to both agencies. The data points asked on the spreadsheet are listed on Table 3.

Table 3. Data Provided by City and District

List of Data
1. Contact Information (for those responding to the questionnaire)
2. Current Building Site Data
a. Function/Division
b. Building Name
c. Service Provided
d. Day of Week and Hours of Operation
e. Total Size (square feet)
f. Primary Purpose/Other Notes
g. Number of Vendor Deliveries per week
h. Approximate Number of Employees
i. Office Space (Square Feet)
j. Storage/Shops/Warehouse Space (Square Feet)
k. Meeting Room Space (Square Feet)
l. Other Space (Break Rooms/Mechanical (Square Feet)
m. Restroom
n. Corridors
o. Number of Vehicles
p. Full Time/Part Time Staff
q. Pieces of Equipment
3. Services and Equipment (questions and comments related to vehicle repair, warehousing, fueling, charging station and storage)
4. Operations (questions related to counter, meeting space, and parking)
5. Future Needs (open-ended for parties to define future needs)
6. Organization Chart

Summary of the Data

This section contains a summary of the information provided by the two agencies. Information is provided in the following categories.

1. Description of Current Sites and Uses on Each Site
2. Deliveries and Other Activity Levels on Each Site
3. Parking
4. Hours of Operation
5. Future Needs Identified by the Agencies

1. Description of Current Sites and Uses on Each Site

City of Pleasanton

The City's Operations Services Center site located at 3333 Busch Road is approximately 16 acres. There are 21 buildings in use on the site with an estimated total of 103,282 square feet. This estimate does not include the 14,760 square foot gun range located on this site.

The property across the street to the east is expected to be developed. No estimated timeframe for that development has been provided.

The site is currently shared by the Operations Services Department, Police Department and Livermore/Pleasanton Fire District. The number of employees working onsite range from an estimated 123 to 172 per day.

- The administrative operations for the Operations Services Department has utility billing, water lab and dog licensing functions at this site, both of which serve the public. The Parks Division has storage space, a waste area, a large mulch area, a place to store its vehicles, and a chemical building. The sign shop has work space, its sign inventory, and vehicle/ equipment storage. A portion of the sewer building is used for storage. The remainder of the building houses a welding room, woodshop, and supplies and equipment storage. The water and sewer operation has a room for its supervisory control and data acquisition system (SCADA), office space, maps storage, and space for vehicle storage and repair. There is also a welding area and woodshop.

- The Police Department uses the property for classroom space, property and evidence storage and the gun range.

- The Livermore Pleasanton Fire Department uses the site for its training tower, classrooms and offices, and storage.

- In addition, there is an area for fleet operation mechanics, a building maintenance area, fuel island, car wash, employee and visitor parking and an area set aside for street sweeping waste. A separate materials storage area, referred to as the "boneyard" is used by operations staff and traffic engineering. A wireless cell tower, generator and water well are also on site.

Based on the data provided by the city, the buildings on this site are used for administrative, maintenance and operations, storage or for combined purposes. Table 4 shows specific uses of the 21 city buildings.

Table 4. City of Pleasanton Operations Services Center Site

Type of Use	Building Number	Building Name	Building Purpose
Administrative	1	OSC Administration	Operations support
	12	Fire Training Office	Training office and classroom
Maintenance and Operations	2	Support Services – Facility Maintenance	Shop and parts
	3	Support Services – Automotive Maintenance	Automotive repair/fabrication
	4	Water and Sewer- Systems Maintenance and Operation	Control and distribution
	6	Streets - Roadway Marking/Sign Production	Fabrication and maintenance
	8	Parks and Street Landscaping	Service and repair
	9	Gun Range – Target and Swat Training	Target practice and gun smithing
	11	Vehicle Services II – Car Wash and Cleanout	Cleaning of vehicles and equipment
	13	Fire Training Tower	Fire training with 15 containers on site
	14	Vehicle Services II – Pressure Washing and Steam Cleaning	Cleaning park mowers and equipment
	17	Collapsed Rescue Training	Training simulator
	18	Ventilator Building Training	Training simulator
	20	Utilities – Well 8	Potable water well
Storage	5	Sewer Systems Maintenance	Shop, parts, storage
	10	Police Evidence Storage	Evidence retention and records
	15	Support Services – Storage and Fire MSA Bottle Filling	Storage of building materials and high-pressure air filling for fire district
	16	Community Services – Storage	Event and production storage
	21	Well 8 Chemicals	Chemical storage for city water system
Combined Operations and Storage	7	Streets – Roadway Repair/ADA/Sidewalks	Repair and storage
	19	Livermore Pleasanton Fire Department Training and Storage	Training area for heavy equipment

Although these are not buildings, the following are important to recognize on the site:

- Generator
- E-waste outside of Sewer Building
- Hazardous waste collection area
- Three food storage containers used by non-profit organizations

Pleasanton Unified School District

The District's Maintenance, Operations and Transportation (MOT) operation is located on the School District's property located at 4750 First Street in Pleasanton. It has three buildings, a storage area, 37 parking spaces for vehicles, and an employee parking area on its existing site. The three buildings have an estimated total of 39,076 square feet. This total does not include square footage estimates for the mezzanine storage and outside auto service bay located in the maintenance office, outside storage for the maintenance shops or the walk-in freezer space in the Educational Support Facilities building. Square footage estimates for these structures were not provided.

At full staff, 47 employees work at the District site in the maintenance and support operations. Based on the District's data submittals, it is assumed the District is proposing to relocate these personnel to the City's Operations Services Center site.

The District currently has a maintenance building for storage, metal work and woodworking and an office building for transportation and Kid's Club staff with a three-bay garage for vehicle maintenance and bus storage. A third building, used for support operations, includes purchasing, mail room, graphics shop, data processing and a computer lab. In addition, there is an outdoor storage area with eight shipping containers and an employee parking area.

Based on the data provided by the School District, the three buildings on the School District site are used for administrative, maintenance, storage or for combined purposes. Table 5 shows specific uses of the three District buildings.

Table 5. District Maintenance, Operations and Transportation (MOT) Site

Type of Use		Building Name	Building Purpose
Combined Administrative, Maintenance, Storage and Parking	1	Maintenance Office	Offices for maintenance operations, transportation, facilities and Kid's Club administration. Vehicle maintenance shop, bus garage and archive drawing storage.
Maintenance	2	Maintenance Shops	Shops (wood, metal, paint, electrical, plumbing, HVAC) and material storage
Administrative	3	Educational Support Facilities	Graphics, warehouse and purchasing

2. *Deliveries and Other Activity Levels on Each Site*

City of Pleasanton

The City estimates that 105 deliveries are made to the site each week. Members of the public visit the site to pay utility bills and obtain dog licenses, but an estimated number of visits from the public was unavailable. City employees arriving and leaving work add to the site activity.

Pleasanton Unified School District

The School District estimates that a minimum of 65 deliveries are made to the site each week. Parents of school-age children visit the site to submit transportation forms and Kids Club supervisors visit the site for meeting and training. District employees arriving and leaving during the work day add to the site activity.

3. *Parking*

City of Pleasanton

The City has 183 vehicles and 67 additional pieces of equipment on its existing site. The size of vehicles or equipment was not requested as a data point. As previously noted, the current employee count is 123 to 172 per day. There are 110 spaces for employee parking. Based on the timing of work schedules there is sufficient parking for employees. However, when fire or police training classes are being held or when the large (Remillard) conference room is in use, parking is not sufficient. The City has 40 spaces now for visitor parking and has indicated that 20 more are needed.

Pleasanton Unified School District

The District has 44 vehicles, 19 trailers and 3 auto lifts. Six of the vehicles are buses. The size of the vehicles or equipment was not requested as a data point in this preliminary assessment. There are 37 spaces for District vehicles, deliveries and child nutrition. There is reportedly no parking specifically designated for visitors at the current site.

As previously noted, up to 47 employees currently use the facilities. The District estimates it will need 30 spaces for fleet vehicles and another 50 spaces for employees and visitors to the site. The District noted that some added parking would be needed for supervisors that come to the site for training and meetings.

4. *Hours of Operation*

City of Pleasanton

Most City staff arrive at 5:30 a.m. and are on site nine hours per day, five days per week. Police and fire personnel are on site on weekends and after normal working hours. The water well operates continually on the site 24 hours per day/seven days per week.

Pleasanton Unified School District

District employees arrive at their work site at 5:30 a.m. Grounds crews work on weekends.

5. *Future Needs Identified by the Agencies*

City of Pleasanton

The City indicates the need for additional office and work space for the environmental services staff and additional conference rooms or training space to accommodate police and fire training. The City has plans to locate a new emergency operations center (EOC) adjacent to fire training tower or above the gun range in the future. There may be an opportunity to coordinate emergency operations with the District.

Pleasanton Unified School District

The District indicates the need for additional conference space, which could be shared with the City. Added storage space (including surplus furnishings) and added warehouse space for stocking custodial supplies was also requested.

The District indicates that charging stations for future electric vehicles will be needed. In addition, the District may want to relocate its central kitchen to the co-located site. If the District's data processing function moves, if may also be necessary to relocate the "head end" to the site.

Attachment B

Operations Services Center - Site Maps

Attachment C
Pleasanton Unified School District - Site Maps

Attachment D

Summary of Case Studies and Lessons Learned

Management Partners conducted research to find examples of local governments and school districts that share maintenance facilities. The purpose of the research was to serve as a source of learning for the City of Pleasanton and Pleasanton Unified School District (PUSD) to understand what helped those agencies be successful and what pitfalls to avoid in a facility sharing arrangement. In doing our research, we carried out the tasks detailed below.

- ***Identified candidate agencies.*** We conducted research to identify agencies and asked for examples that the City and PUSD may know about. We discussed potential candidate agencies with the City and PUSD at our meeting on April 26, 2018. Neither the City nor PUSD were aware of specific examples of co-located city/school maintenance facilities and we were unable to find many examples. The agencies used for the case studies are listed below.
- ***Researched information online.*** We conducted a general internet search to gather information on potential case study examples and reviewed information available on each agency's website.
- ***Contacted the agencies.*** We contacted the agencies by phone and email to ask questions about their experience. In two cases, we were unsuccessful in having our phone calls or emails returned.
- ***Prepared case studies.*** The following case studies are described below.
  1. City of Livermore and the Livermore Area Recreation and Parks District (California): Joint use Maintenance Service Center
  2. City of Manassas and Manassas City Public Schools (Virginia): Shared services, including use of Public Works Compound
  3. City of Corning and Corning-Painted Post School District (New York): Consolidated fleet maintenance facility feasibility study
  4. Town of Windham and RSU 14 Windham/Raymond School District (Maine): Shared vehicle maintenance facility

Lessons Learned from Case Studies

While each case study is quite different, and none identically match the circumstances and potential partnership that are the focus of this preliminary issues assessment, there are several lessons learned from these examples that may inform the decision-making process in Pleasanton.

- A comprehensive, written agreement between parties will provide clarity and allow each agency to plan for operational and financial impacts, short and long term.
- The terms of such an agreement, including cost sharing, space allocation, administrative responsibilities and dispute resolution should be developed jointly by the parties.

- Establishing a joint oversight committee is an appropriate means of addressing and resolving conflicts during the term of the agreement.
- When ongoing costs are shared, information about anticipated cost increases should be openly communicated with the affected party, prior to those increased costs being assessed.
- Successfully sharing facilities requires a certain amount of flexibility and willingness to accommodate each another's needs from time to time.
- Reducing long-term capital costs is a likely benefit of sharing maintenance facilities.
- Operating costs may be reduced if cooperative purchasing of supplies or joint use of on-site facilities (such as a fueling station) is implemented.
- Parties that are affected indirectly by the shared facility arrangement should be kept informed about plans, costs and operational impacts.

CASE STUDY 1	
Agencies:	***City of Livermore/Livermore Area Recreation and Parks District (California)***
Project:	***Joint Use Maintenance Service Center***

Background

In 1989, the City of Livermore (City) and the Livermore Area Recreation and Parks District (LARPD) both recognized a need for their respective agencies to have an improved maintenance service facility. The City owned 17.77 acres of land on Robertson Park Road, five acres of which was utilized for their existing city maintenance services buildings and grounds. LARPD owned Robertson Park Road, providing the only access to the site.

The parties formed the Government of Livermore Financing Authority (GOLFA) that became the mechanism for financing improvements to the site and to Robertson Park Road. Improvements were financed through the issuance of Certificates of Participation with the City and LARPD owning the improvements as tenants in common. The City held a 62% interest and LARPD a 38% interest, reflecting the proportionate share each agency would require of the site and use of the road.

In 1992, the City and LARPD entered into a Joint Use Agreement that outlines the uses for the property, how costs would be shared and responsibilities of each party. The agreement, approved for a term of 99 years, divides the site into "Commonly Shared Areas", "City's Premises" and "District's Premises". Use of the property was limited to maintenance service, storage and related uses.

City responsibilities include maintenance of all improvements except landscaping, making timely payments on the debt by GOLFA, tracking expenses incurred in connection with the property and providing general liability, workers compensation and property insurance coverage. LARPD is responsible for landscape maintenance at the site and must provide general liability and workers' compensation insurance. The agreement also delegates responsibility for maintaining Robertson Park Road to LARPD.

The agreement stipulates that the City will bill LARPD for 38% of the cost of the following:

- Interior and exterior building maintenance;
- Pavement, irrigation, fence/gates, trash disposal, fuel dispensing system;
- Utilities;
- Janitorial services;
- Fire extinguisher maintenance;
- Property insurance;
- Employee parking lot maintenance; and
- Warehouse and storage area maintenance.

The agreement also calls for LARPD to pay 50% of the following City costs:

1. Building and perimeter security, and
2. Maintenance of public parking area.

The City is obligated to reimburse LARPD for 62% of the cost of landscape maintenance.

The agreement called for a Joint Operations Coordinating Committee to be formed, made up of one elected official and two staff members from each agency to meet on an as-needed basis to ensure the "operational and maintenance objectives of each party are addressed and resolved."

Lastly, the agreement contains a clause that requires reimbursement by either agency for the use of the other's individually controlled equipment, including office equipment and vehicles, and calls for LARPD to reimburse the City for their proportionate share of radio system maintenance and maintenance of the City's "computerized equipment."

Interview with LARPD General Manager

In conversation with Tim Barry, LARPD General Manager, he described the partnership as having evolved over the years, but one that remains very beneficial to both agencies. The only major change to the 1992 agreement described above is one currently going through the approval process that would shift responsibility for maintaining Robertson Park Road from LARPD to the City. In exchange, LARPD would take on maintenance of a bicycle/pedestrian trail and small city-owned building, both of which are in Robertson Park. A cost analysis of this proposal was conducted using data from each agency's recently completed asset management plan. The exchange of responsibilities was determined to be financially equitable and would delegate tasks in a way that more accurately reflects the City's and LARPD's operational capabilities and focus.

Mr. Barry stated that a certain amount of give and take operationally is necessary to make the partnership work. Personalities matter, and there have been times when staff at the joint facility got along and worked well together and times when some took a more rigid approach to space allocation and delegated responsibility. He explained that each agency's needs have been accommodated over time. They currently share office space and locker rooms and sharing of outdoor spaces has also evolved informally over the years, although he noted that he has kept a paper trail of arrangements that have been entered into among users without formally amending the agreement.

One area Mr. Barry thought the agreement was lacking in is cost sharing for capital improvements. As the facilities age, regular maintenance will need to be supplemented with occasional capital investment and those projects will have to be discussed and negotiated as they occur.

Mr. Barry noted that the cost sharing arrangement works well, as long as each agency keeps the other informed when cost increases are anticipated. Because each agency makes independent decisions about spending on activities subject to reimbursement, communication during and after that decision-making process is key to maintaining a positive relationship.

As anticipated in the Joint Use Agreement, the City and LARPD maintain separate operations at the Maintenance Service Center. On occasion they have discussed combining certain functions, such as fleet maintenance, but it was felt that priorities may not always align in a way that would meet the needs of both organizations. For example, the City maintains police vehicles and LARPD was concerned that if resources had to be assigned to service patrol vehicles or school buses, it would likely (and perhaps rightly) be the public safety vehicles that were prioritized.

In summary, Mr. Barry felt the long-standing partnership worked well and was very beneficial for both agencies.

Source: City of Livermore administrative record; LARPD administrative record; interview with Tim Barry, General Manager of LARPD

Emails to City of Livermore Public Works Maintenance Manager were not answered.

CASE STUDY 2	
Agencies:	***City of Manassas and Manassas City Public Schools (Virginia)***
Project:	***Shared services, including use of Public Works Compound***

Background

In the Commonwealth of Virginia there is a clear distinction between cities and towns. Towns operate much like cities in other states in that they are part of a county and look to county government to provide certain services. Cities in Virginia are considered co-equal to counties and are responsible for all local services, including schools.

Manassas, located in Prince William County, was founded as a town in 1873. In 1974, in response to a movement to improve local schools and public safety services, Manassas separated from the county and established itself as an independent city. City government and education have been closely entwined ever since.

As a city, Manassas has a responsibility to help fund the local school district, which provides kindergarten through twelfth grade education and whose boundaries are coterminous with city limits. Virginia schools are funded partially by the state, with local government providing the rest. The City of Manassas funds roughly 50% of the Manassas City Public Schools (MCPS) annual budget.

Over time, in addition to the direct funding allocated in the city's budget, the sharing of services between city and school district became the norm. The arrangements resulted largely from handshake agreements, but with the impending retirement of the school superintendent, Manassas City Manager Patrick Pate proposed codifying these arrangements in a Memorandum of Understanding (MOU).

In the fall of 2017, the City and MCPS appointed a Joint Facilities Use Committee (consisting of two members of the City Council and two members of the School Board) to draft an MOU for Shared Services between City of Manassas (City) and Manassas City Public Schools (MCPS). The Joint Facilities Use Committee met four times in the Fall of 2017 to develop and review the document. The MOU was approved by the City on November 13, 2017 and by MCPS on December 12, 2017.

The MOU lists the following services to be provided by the City:

- Remove snow from school parking lots, bus loops and sidewalks in front of schools.
- Mow and maintain school grounds, except for sports fields.
- Share capital improvement costs to certain school facilities; maintain playground equipment.
- Provide space at city Public Works Compound for school bus parking, a trailer for drivers, office space and storage space. MCPS to pay direct expenses (i.e. utilities) for MCPS facilities.
- Install and maintain flashing crossing signs at schools, paid for by MCPS.

- Waive development review fees for MCPS projects.
- Provide Council Chambers for MCPS school board meetings.
- Provide garbage collection at school sites.
- Maintain school buses at established labor rates and parts costs.
- Waive fees at Manassas Museum for MCPS field trips.

The following services are provided by MCPS:

- Waive fees for:
    - City meetings at schools,
    - Use of schools as voting precincts,
    - Use of school parking lot for Fourth of July event,
    - City use of school buses for city events (City to pay direct labor costs),
    - Use of schools as emergency shelters,
    - Use of schools and buses for Police Department training events, and
    - Children of city employees who live outside city and attend MCPS.
- Remove snow from building sidewalks at MCPS facilities (other than schools).

Interview with Manassas City Manager

City Manager Pate more fully explained the use of the Public Works Compound. Providing space at the site for school buses has occurred since Manassas became a city. The city has never imposed a charge for space made available to MCPS. The City's fleet operation is set up as an Internal Service Fund. City personnel service the school buses at an agreed upon rate, similar to the rate charged to city departments. Mr. Pate noted that although MCPS does not pay directly for space at the Public Works Compound, he would like to increase the hourly rates charged to reflect a modest cost for use of the space.

Mr. Pate noted that city and school staffs work very well together. There is a great deal of synergy and shared purpose between agencies such that sharing services does not create conflict.

He is, however, undertaking a comprehensive cost assessment of services provided, so policy makers and residents have an accurate picture of how city resources are allocated. The city and MCPS are just concluding a three-year funding agreement, so he feels the time is right to place a value on the services provided by the city and include that in the renewed funding agreement.

Mr. Pate said the partnership between city and schools was very positive and an accurate reflection of the priorities of the community as a whole. He did caution however, that arrangements evolved over time, however informal, are nearly impossible to undo. So, care should be taken to be transparent about costs and benefits and to formalize agreements whenever possible.

Interview with MCPS Executive Director of Finance and Operations Andy Hawkins

Mr. Hawkins emphasized that although they are housed in the city Public Works Compound, MCPS and city maintenance operations remain separate, an arrangement he feels suits both agencies. Sharing a facility but operating independently allows staff from MCPS and the city to build productive relationships with one another while still being able to prioritize assignments and responsibilities to suit their respective organizations. Mr. Hawkins believes the attitude of city and MCPS maintenance staff is very positive and supportive, with each willing to accommodate the other (sharing tools, assisting with small projects) when needed.

The current financial arrangement at the compound was viewed by Mr. Hawkins as beneficial to MCPS. He noted that when the city proposed increasing the hourly rate charged for city staff to maintain school buses, there was resistance from the school board. MCPS staff explored alternatives and found the city was charging less than other service providers in the community, satisfying the board's concerns. The board's position is that the city should not be making a "profit" from providing services to the district and the city accommodates that concern by providing documentation to justify the charges.

Mr. Hawkins noted that MCPS was the only district he had worked for (in a 25+ year career) that shared a maintenance facility, but agreed with Mr. Pate that the arrangement worked well.

Source: City of Manassas administrative record; interview with City Manager Patrick Pate and interview with MCPS Executive Director of Finance and Operations Andy Hawkins.

CASE STUDY 3	
Agencies:	***City of Corning and Corning-Painted Post School District (New York)***
Project:	**Consolidated Fleet Maintenance Facility Feasibility Study**

Background

The State of New York administers a Local Government Efficiency (LGE) Program that provides technical assistance and competitive grants to local governments for the development of projects that will achieve savings and improve municipal efficiency through shared services, cooperative agreements, mergers, consolidations and dissolutions. The program's objective is to control costs while maintaining the quality service delivery provided by New York's local governments.

In 2008, both the City of Corning (City) and Corning-Painted Post School District (District) had outgrown their aging (50+ years old), undersized and inefficient fleet maintenance facilities. The District proposed the agencies cosponsor an application for an LGE grant to fund a feasibility study to update, expand and consolidate the two facilities. The $22,500 grant was awarded in 2009, with the City and District sharing the required 10% local match.

In the summer of 2009, the District was in the process of developing a comprehensive, district-wide facilities plan (bond issue) that, if approved, would have impacted every school district building, including their vehicle maintenance building. The feasibility study was put on hold until after the bond vote. The ballot measure failed in December 2009 and failed again in March of 2010. The District then decided to scale back the size of the facilities plan and a new fleet maintenance facility was eliminated.

Nevertheless, in the spring of 2010 the District and City formed a Joint Fleet Management Facility Committee (Committee) and gave the Committee the responsibility of moving the study forward. Hunt Engineers & Architects was retained to complete the study, which was published in March 2012.

The feasibility study included the following action plan:

- Evaluate the existing buildings of both entities to determine if either building would be a good "candidate" for a building expansion.
- If both buildings were determined to be inadequate for expansion, provide a conceptual design of a facility that would be large enough to accommodate the needs of both entities.
- Perform site evaluations for a new building, including the existing two sites and other sites in the immediate Corning area.
- Review staffing needs to determine if the fleet maintenance workload of the two entities could be accommodated by combining and possibly reducing staff to save costs.
- Calculate cost savings of a new, shared fleet maintenance facility when compared with constructing and operating two separate new facilities.

The study found that neither existing site was suitable for expansion. Two conceptual plans were developed for a shared facility and four sites were studied as possible locations (three owned by the City and one by the local utility company). Staffing levels at both City and District were found to be adequate but not sufficient in size to warrant combining and reducing staff to save costs. The Committee identified a preferred plan and location, with an estimated price tag of $5.9 million.

The study also found that in addition to the benefits of having sufficient space and an upgraded facility for fleet maintenance, the co-location project would benefit both City and District by allowing joint purchasing of parts and supplies, and joint operation and use of a fueling station.

The Committee identified a source of state funding typically earmarked to help fund school facilities projects. However, it also acknowledged that

> *The current fiscal crisis within the State of New York will likely impact state aid to both the city and school district. With that in mind the committee realizes that, even though a shared fleet maintenance facility would, over the long term, be a savings to taxpayers (vs. new individual facilities) the implementation of the plan in the immediate future is unlikely.*

Source: March 2012 Final Report, Corning-Painted Post School District/City of Corning, Consolidated Fleet Maintenance Facility Feasibility Study, prepared by Hunt Engineers, Architects and Land Surveyors, P.C.; City of Corning administrative record; Corning-Painted Post School District administrative record.

Emails and phone calls to the Corning City Manager and the Corning-Painted Post School District were not answered.

CASE STUDY 4	
Agencies:	***Town of Windham and RSU 14 Windham/Raymond School District (Maine)***
Project:	***Shared Vehicle Maintenance Facility***

Background

The Town of Windham, Maine (Town) built its current vehicle maintenance facility in 1978 and has since outgrown its size and functionality. In November 2017, the residents of the Town approved a ballot measure to fund a $9.3 million renovation and expansion of the existing vehicle maintenance facility, one they have shared for more than 30 years with the local School District RSU 14 (District).

The new 30,000-square-foot facility will triple the size of the existing, 40-year old structure and be located on the same property as the current facility. A Shared Vehicle Maintenance Facility Joint Project Team studied the building needs and recommended the project that broke ground in May of this year. The new facility is expected to be completed in the summer of 2019. The Town and District are working on an inter-municipal agreement where RSU 14 would potentially pay about 25% of the new facility's cost through a lease-like structure.

RSU 14 is a school district that serves students from the towns of Windham and Raymond. Both municipalities share in the cost of providing educational services and facilities for the K-12 population. In 2014, dissatisfaction with the way school costs were allocated between the two towns led the Town of Raymond to initiate an action to withdraw from the District. A new cost allocation agreement between the towns was struck in 2015 and the effort was abandoned.

The construction of the new vehicle maintenance facility has again caused concern for Raymond officials and a new petition to leave the District is being circulated.

Raymond residents did not vote on the bond for the facility, because the Town of Windham will own the garage with space leased by the District. Yet they will share in the expense by way of a yet-to-be negotiated lease agreement. This, they claim, violates terms of the 2015 cost allocation agreement, which assigns all capital costs for school facilities to the municipality in which the facility is located.

District officials argue that the agreement does not apply to the shared garage because the building will be owned by Windham with space leased by the District. Maine state education statute defines major capital costs as school construction projects and specifies that a school construction project does not include "the lease-purchase of bus garage and maintenance facilities."

Should the town of Raymond decide to withdraw from the District, the impact on District fleet maintenance operations and need for an upgraded facility are unclear. At a minimum, it would likely reduce the amount of financial support the District could provide, potentially straining the Town of Windham's budget.

Source: news.keepmecurrent.com; Windham Eagle News; Town of Windham administrative record; RSU 14 administrative record.

Emails and phone calls to the Windham Town Manager and Public Works Director were not answered.