

# NEW \$SAVINGS\$ through sustainability

**Savvy administrators are implementing strategies that create enduring sources of savings and improve the learning environment.**

**A**fter three years of budget cuts, school district leaders are hard-pressed to find ways to make further reductions without impacting educational quality. However, some seasoned leaders have turned to broad sustainability strategies to find new sources of savings and revenue.

The number of districts with qualified certification has increased five-fold since 2007. These districts are at risk of not meeting their financial obligations. However, some administrators have made strides to preserve fiscal solvency with creative strategies that work within budget constraints. Bonnie Tognazzini, deputy superintendent at Morgan Hill USD, remarked, “We’re in survival mode in California, so we’re on the lookout for measures that save us money.”

In the case studies that follow, three district leaders discuss their sustainability strategies, designed and implemented in collaboration with Chevron Energy Solutions. These programs create enduring sources of savings and improve the learning environment for long-term success.

## **East Side Union HSD: Saving and creating jobs with sustainability**

Jerry Kurr is passionate about bringing financially troubled districts back into fiscal solvency. “That’s what motivates me – to see how difficult a situation I can get through. All of the districts I’ve worked in have gone through financial difficulties, often while undergoing administrative and board changes.” After a 40-year career in business services administration at various California public schools, Kurr came out of retirement in 2005 to serve as the associate superintendent of administration and business services at East Side Union High School District in San Jose.

Part of his decision was financial, but he was especially motivated by the challenges he knew he would find at East Side, which had negative certification at the time. “An all high-school district is extremely challenging, and I’ve always gravitated toward the big challenges – or ‘fighting windmills,’ as

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*By Laura Battise*

they say. Don Quixote is one of my favorite classics.”

In 2009, about halfway through Kurr’s tenure at East Side, the district was heading into a series of budget reductions. He began to explore ways to reduce expenses and bring revenue into the district to save jobs. Kurr put together a broad sustainability strategy that included a comprehensive study of the district’s energy use and identified the opportunity to bring \$36 million into the district over the life of the program.

Kurr said, “It was an opportunity to bring money into the district, just like other things we do to lower expenses and make the district more efficient. I didn’t think at that time it would be as successful as it is.”

Over the next year, Kurr brought into being a sustainable energy initiative that would not only reduce expenses and create new revenue, but also bring enough funding to save between 30 and 40 teachers’ jobs, create more than 200 jobs in the local construction trades and reduce East Side’s dependence on utility grid electricity by 73 percent.

### Winning community support

Along the way, Kurr won the support of the district’s five board members who were largely unfamiliar with energy technology, and he engaged community members and parents to stand up for the initiative during public board meetings. In the midst of staff cuts, Kurr also received an endorsement for the program from the East Side Teachers Association.

He said, “It was difficult to get the community to understand why we should spend capital dollars on this initiative while we were struggling with our operational funds. But once you talk to them, listen and answer their questions, the community and the board come to understand why it’s the right thing to do.”

Some of the most passionate support came from the students in the district. “The students were my motivator – they’re what kept me on task,” Kurr said. “I met with student groups at three of the high schools to answer their questions, and they came to the board meetings and supported and promoted the initiative. They were as informed about the benefits as any of the staff were.

The principal at one of the high schools said that the impact of my coming to speak to the students really gave them the sense they were having an impact on the future of the district. Once the program came to their school, they were just elated.”

Kurr recognized that while East Side UHSD’s operational budget was facing se-

ing around financially challenged districts. “At every district I’ve worked in, I’ve had the challenge of declining enrollment or a state fiscal crisis,” Archibald said. “So I’ve had to look for unique ways to either raise revenue or cut costs.”

A pragmatic and creative leader, Archibald successfully brought Huntington Beach



**Solar panels shade the parking lot at Ann Sobrato High School in Morgan Hill.**

vere cuts, the district’s capital fund was still strong. He saw that by investing part of the district’s capital funds in a sustainability program, he could bring savings to the general fund. “This is one of the few capital projects that can actually bring operational savings.” Thus, Kurr and the district proceeded to fund the program with a combination of capital and paid-from-savings financing.

Kurr, who retired in December 2010, has left an enduring legacy at East Side UHSD. Not only did he guide the district through some of the most difficult fiscal conditions in its history, but he brought about a large-scale transformation in the way the district operates.

### Huntington Beach City School District: Creating a culture of energy conservation

Jon Archibald, assistant superintendent of administrative services, came to Huntington Beach City School District with a similar background to Jerry Kurr in turn-

ing from qualified to positive certification last year, and he continues to pursue strategies that buffer the district against unpredictable fiscal changes at the state level. Among these strategies is a broad sustainability initiative to reduce the district’s use of utility grid electricity by about 30 percent and meet 30 percent of their residual electricity demand using renewable technology.

As part of this initiative, Archibald is applying his deep experience improving district efficiency. During his tenure at Orange Unified School District, Archibald implemented a multi-phase initiative to reduce operating expenses through district-wide energy efficiency measures estimated to save the district \$16 million over 20 years.

Archibald views utility costs as one of the few areas in a district budget that can be reduced without negatively impacting educational quality. “In the total budget, electricity is probably between 1 and 2 percent, but that’s really significant when you consider

that 90 percent of our budget is compensation,” he noted. “If we want to make budget reductions that don’t affect people, those reductions have to come from the other 10 percent. By saving money there, we’re in effect saving jobs and protecting the quality of education for students in the classroom.”

Typically, balancing a school district budget includes implementing furlough days or reducing the number of employees, but Archibald explained, “This energy program we’re implementing is going to help minimize those kinds of cuts. Through this program, we’re creating significant savings so we can put those savings back into the classroom rather than sending a big check to the utility company every month.”

### **Creating awareness and behavioral change**

Archibald is also a strong believer in raising energy conservation awareness among staff. “I remember walking into a computer lab during a vacation week, and seeing every printer and monitor was still on and would be wasting energy for the next 11 days. So, we started an energy conservation initiative with our staff, just to get them to turn things off. We report to our staff on a monthly basis about how our energy usage is comparing to the previous year. This helps raise awareness and educates them on the importance of turning off their computers when they leave.”

The initiative has led to a 10 percent reduction in energy usage at the district over the past year. “The biggest impact comes from positive reinforcement – making people aware that they are making a difference,” Archibald said.

The district’s new sustainability initiative will build on the foundation Archibald has built. The program will include enhanced monitoring of the district’s energy use as well as a system monitoring solar energy production.

“The visibility into our energy usage that this program brings will really reinforce the awareness we’ve been building and will show that we are looking for every way we can to save money. Furthermore, once the solar is up there and we can start showing production results, that’s going to have a really great impact on staff and students.”

### **Financing through savings**

Without the resources of a large capital fund, Archibald was able to design a sustainability program that pays for itself out of savings. “We’re not a district that has a bond issue approved, so the financing had to come from the savings realized by the program. We looked at everything we could do to save energy, and we picked lighting, HVAC and the most efficient solar sites that we had.”

The program at Huntington Beach CSD includes a variety of measures that yield higher savings in combination than one-off improvements might. “That allowed us to have enough savings to pay for all the compo-

## **The sustainability initiative provides the opportunity not only for operational savings, but also to build the culture of conservation in the district community.**

nents of the program but also gave us money left over that goes to our bottom line.”

### **Improving the environment for students**

Having worked at multiple Southern California districts, Archibald understands how to address the unique challenges of operating schools in the region. For example, the efficiency initiative included upgrades to air conditioning systems, which Archibald explains will not only yield savings but also improve the learning environment.

“We don’t need air conditioning as much along the coast as you do inland, but when you do need it, you need it to work! It’s really important for students to have a temperature that they can tolerate. We always ran into problems during heat waves when the old equipment got overworked and stopped working on very hot days. The upgraded system will provide a more consistent classroom environment.”

To prevent overexposure to sun and heat at the Huntington Beach CSD schools, the district often had students eat lunch indoors

because many schools lack outdoor lunch shelters. To allow the students to eat outside without excessive sun exposure, Archibald said, “I thought why not put these solar shade structures over the lunch areas and other places where students would use the shade!” When complete, the solar installations will provide outdoor shade where students will be able to gather without the risk of overexposure.

To determine additional locations for the shade structures, Archibald and the staff took into account students’ favorite places to gather and, when possible, sited the structures accordingly. “We started observing where students congregate – during lunch, along the athletic fields during games and before and after school. At all our sites, we chose areas where students congregate, eat lunch or watch athletics. We only have one or two rows of parking covered by the solar panels and everywhere else, it’s shade for students. The parents absolutely love that idea.”

The sustainability program at Huntington Beach CSD reflects the district’s commitment to fiscal responsibility and a better environment for students. As both a business administrator and an educator, Archibald is always mindful of the impact his actions have on staff and students. The sustainability initiative gives him the opportunity not only to access operational savings, but also to build the culture of conservation in the district community.

### **Morgan Hill Unified School District: Building a Green Foundation**

At Morgan Hill Unified School District, deputy superintendent Bonnie Tognazini prides herself on maintaining a fiscally sound district. “I’m a business person, so the benefits I’m looking for from any new program or strategy are cost saving benefits. The sustainable energy program we are implementing is designed to offset 80 percent of our annual grid electricity use at our high schools.” The program is the first step in improving the district’s overall sustainability, including potential energy efficiency measures and “green” curriculum supplements.

She found strong community support for a program that could help reduce the

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# New savings

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district's budget woes. "After we had gone through some severe budget reductions, a community member who is on the Morgan Hill city council encouraged us to look into this opportunity to save money." The district was also interested in demonstrating environmental stewardship through the program.

## Learning from peers and evaluating options

When she started looking into sustainable energy for Morgan Hill USD, Tognazzini took the time to thoroughly research both the technologies and the financial vehicles available. "Initially, we looked into solar energy programs because we had heard that other districts in our county were far ahead of us in this area. And we certainly didn't want to be the trial district, but we knew that other districts were implementing green energy and using various financing vehicles," she explained.

"We researched San Jose USD and Milpitas USD to find out how their new solar energy programs were doing, and we decided to

move forward." The green energy program at Morgan Hill USD will serve as a strong foundation as the district continues to improve efficiency and make these measures meaningful in the classroom.

Thanks to thorough research and a careful program development process for their sustainable energy program, Morgan Hill USD will benefit from long-term savings to their general fund. Tognazzini advises taking the time to learn from what other districts have done. "I would encourage district leaders to go out and talk to other districts that have done this work and really come to understand the benefits and roadblocks other districts have seen when they went about implementing similar programs," she said.

## Smart sustainability strategies

These three case studies represent just a few of the innovative sustainability strategies available to superintendents today. Through bold leadership, savvy administrators are implementing programs that contribute to fiscal solvency, improve the learning environment and win broad community support.

Jerry Kurr's experience with sustainability at East Side UHSD shows the importance of clear communication in rallying diverse

stakeholders around a new program. Jon Archibald's work at Huntington Beach CSD demonstrates how well designed green initiatives have a positive impact on staff and students. And finally, Bonnie Tognazzini shared the value of talking to peers and learning from their experiences in order to build a strong foundation for Morgan Hill USD's sustainable energy initiative.

## Making the move

Whether working to overcome negative or qualified certification or simply looking to create much-needed savings, superintendents across California can benefit from an in-depth look at district non-educational costs. Students, teachers and the community will appreciate their district leaders making the smart move to go green. ■

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# Learning tools

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pedagogy in other countries to be competitive.

Complicating this scenario is the fact that today's youth are being called upon to use the vast amounts of information that floods the Internet to problem-solve, team-build and collaborate across networks.

If we are going to have a seat at this global table, we must begin to think differently. We must educate differently. Teach differently. Learn differently. How? If the future depends on our ability to innovate and create, we have a unique opportunity in front of us that poses questions that demand our attention.

1. How can we create an educational

delivery model that promotes innovative thinking and problem-solving?

2. How can we use technology as a vehicle to differentiate learning experiences and outcomes that are tied to how individual and collective students learn best?

3. What should education really look like?

4. Can our current system of teacher preparation programs and tenure support the changes we need?

Public education has the existing infrastructure to support the changes that we need. Sadly, both public education and post-secondary education are the two most resistant organizations to change. How do we navigate the necessary changes systemically when many of those who steer the ship are invested in the status quo of "go slow to go fast?" Either we move toward Web 3.0 with

students carrying the flag, or we will see our own demise in this Web 2.0 epoch. Technology can provide the entry point. ■

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