2019 Facilities Master Plan:

Status Update
1. What are the goals of this Facilities Master Plan?
2. The Process
   • Data Validation
   • Assessment
   • Operationalizing Asset Management
   • Project Prioritization
3. Next Steps
Facilities Master Plan Goals

• Alignment
  Ensure that investment in schools aligns with the district’s strategic Citywide Plan over the next 5-10 years

• Transparency
  Inform the public as to what projects are being prioritized and share data and methodology that informs decisions

• Support 2020 Bond
  Enable the district to put a Bond on the 2020 ballot so that Oakland’s voters will elect to invest in schools

• Operationalize Asset Management OUSD-wide
  Integrate board resolutions around smart Asset Management (BP 7350 and 6006) into systematic decision making in the District
Alignment: Guiding Principles

OUSD CORE VALUES

1. Students First
2. Equity
3. Excellence
4. Integrity
5. Cultural Responsiveness
6. Joy

FACILITIES MASTER PLAN GUIDING PRINCIPLES

1. Support the City-wide Plan and OUSD’s Community of Schools Policy
2. Cultivate Data-Driven Decision Making
3. Pursue Financially Sustainable Facilities
4. Engage OUSD Community
5. Pursue a System-Wide Approach
6. Foster Environmental Sustainability
7. Promote Effective Learning Environments
Facilities Master Plan Process: Overview

1. April '19
2. Apr - Sept '19
3. Dec '19 - Jan '20
4. Dec '19 - Mar '20

Outputs:
- 2020 Bond
- Tactical Implementation Plans
  - Real Estate Decisions
  - Administrative Facilities
  - Other

Validation and Assessment:
- Data Filtering
- Assessment

Facilities Master Plan 2019

Inputs:
- 7-11 Committee
- City Wide Plan
- Bond Processes
- Guiding Principles
- Blueprint
- Deferred Maintenance
- Deferred Bond Projects
- Seismic, Accessibility, etc.
Facilities Master Plan Process: Overview

WE ARE HERE

April ‘19

Apr - Sept ‘19

Dec ‘19 – Jan ‘20

Dec ‘19 – Mar ‘20
Data Validation

MKThink validated 2018 Blueprint data using updated floor plans, satellite photography, and site visits.

Validation Findings

- 11 sites had major issues in Blueprint data (missing buildings or broadly incorrect data)
- 65 sites had moderate or minor issues (individual rooms with missing or incorrect data)
- 32 sites with no issues.
- All issues resolved sufficient for planning purposes

Received raw 2018 blueprint data

Validation Findings

- 11 sites had major issues in Blueprint data (missing buildings or broadly incorrect data)
- 65 sites had moderate or minor issues (individual rooms with missing or incorrect data)
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Incorporated validated data into facility planning database tool
Assessment: Data Synthesis

Combining multiple data sets into a comprehensive database provides opportunities to achieve insight about challenges and constraints.

Where can OUSD project changes in demand for school facilities?

How do recent changes in classroom loading standards affect projected capacity?

Are in-district and charter school programs located at optimal long term sites?

What sites have physical deficiencies that require attention in the near term and long term?

What sites are suitable for revenue generation or cost avoidance opportunities, such as joint development or workforce housing?

Where are students going to school in relation to where they live, and how are they moving up through the OUSD system over time?
Assessment: Site Capacity

Using validated room and enrollment data, MKThink compared estimated capacity and enrollment using the following formulas:

Methodology:

- To estimate site capacity:
  - Use validated Blueprint data

- To estimate utilization:
  - Facility Utilization Baseline Estimator formula (at right)
  - 2018-2019 Enrollment data (CBEDS)
  - New loading standards

- Compare capacity to utilization to estimated Underutilized Classrooms

### 2017-2018 Facility Utilization Baseline Estimator

What if OUSD were to apply a standard facility use formula to school facilities, based on projected enrollment?

| Estimated Classroom Use below does NOT reflect the ACTUAL classroom use. The Estimate is a BASELINE using a "standard" formula. ACTUAL classroom use is likely HIGHER based on class sizes, supplemental programs, and instructional models. |

**PURPOSE:** Estimator is used to inform Preliminary Facility Use Proposals for the upcoming school year. Final Facility Use Proposals are VETTED w/ Site Leaders PRIOR to Final approval.

#### OAKLAND TECHNICAL HS

305 Oakland Tech
4351 broadway 94611

<table>
<thead>
<tr>
<th>Total Classrooms</th>
<th>General Education Classrooms</th>
<th>Required Program Classrooms</th>
<th>Specialized Classrooms</th>
<th>Parent Resource Room</th>
<th>Underutilized Classrooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-18 Enrollment Projection</td>
<td>1972</td>
<td>97</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| | | | | | |
|---|---|---|---|---|
| Total Classrooms | 97 |
| General Education Rooms | 66 |
| ES | 0 |
| MS | 0 |
| HS | 66 |
| Required Program Rooms | 22 |
| ECE | 0 |
| SPED | 12 |
| Bilingual | 0 |
| Newcomer | 0 |
| A through G | 10 |
| Specialized Rooms | 7 |
| Specialized % | 7.2% |
| Parent Resource Room | 1 |
| Total Estim. Utilized Classrooms | 96 |
| Estim. Underutilized Classrooms | 1 |

### Methodology:

- **To estimate site capacity:**
  - Use validated Blueprint data

- **To estimate utilization:**
  - Facility Utilization Baseline Estimator formula (at right)
  - 2018-2019 Enrollment data (CBEDS)
  - New loading standards

- Compare capacity to utilization to estimated Underutilized Classrooms

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**OAKLAND UNIFIED SCHOOL DISTRICT**

**Community Schools, Thriving Students**

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Oakland, CA 94609

**TEL:** 510.455.1300  **FAX:** 510.455.5859

**Website:** oakland.k12.ca.us  **Email:** oaklandunified@oakland.k12.ca.us

**Office Hours:** Monday – Friday, 8:00 a.m. – 5:00 p.m.
### Assessment: Site Capacity

Using validated room and enrollment data, MKThink compared estimated capacity and enrollment using the following formulas:

**Estimated Capacity**

- # of General Education rooms (+600 SF)
- # of Required Program Rooms (includes SPED + CTE; +600 SF)
- # of Specialized Classrooms (Art, Science, Computer Lab, Music, Drama; +600 SF)
- # of Parent/Community Rooms

= Estimated Total Classroom Capacity

**Estimated Utilization**

- General Education need = 2018-2019 enrollment divided by 2021-2022 Loading Standards (OEA Agreement Standards)
- Required Program need = # of existing CTE and SPED rooms (no change)
- Specialized Classroom need = 
  - 1 room per 8 GE rooms at Elementary level
  - 1 room per 6 GE rooms at Middle School level
  - 1 room per 10 GE rooms at HS level
- 1 of Parent/Community Room

= Estimated Classroom Utilization
Assessment: System-wide Site Capacity

New loading standards will reduce the effective capacity of the district, but even with new standards in place OUSD is still under capacity overall.

Current District-Wide Capacity Estimate: 2018-19 Loading Standards

- Estimate of 387* underutilized rooms at OUSD-owned K-12 school sites, including in-district and charter enrollment (2018-2019).
- TK/K: 24 students/class
- 1-3: 27 students/class
- 4-5: 30 students/class
- 6-12: 32 students/class

Estimated District-Wide Capacity Estimate: 2021-2022 Loading Standards

- Estimate of 267* underutilized rooms at OUSD-owned K-12 school sites, including in-district and charter enrollment (2018-2019).
- TK/K: 22 students/class
- 1-3: 25 students/class
- 4-5: 28 students/class
- 6-12: 30 students/class

*data still under review
Assessment: Site/Program Fit

Sites hosting K-12 In-District Programs:
Addressed by Citywide Plan

Sites hosting K-12 Charters:
OUSD to pursue long term leases for sites ideal for charter use

Sites hosting Admin/Operations:
OUSD to consolidate Admin/Operations activities to reduce expenses

Other sites:
OUSD to evaluate whether programs are good long term fit for each site and evaluate revenue generation opportunities

108 Total Sites
Operationalize OUSD Asset Management

The need: a Facilities Master Plan process that can connect tracks & integrate board resolutions BP 7350 & 6006 into intentional & systematic decision making in the District.
Project Prioritization: Approach

**Project List Inputs**
- Deferred Bond Projects
  - Modernizations & New Construction
  - Security Projects
  - Energy & Technology
  - Field, Recreation & Community Resource Projects
  - Deferred Maintenance
- City Wide Plan Projects
- Admin Facilities
- Seismic
- Accessibility
- Solar

**Key Filters 2019**
- Guiding Principles
  - Support City-Wide Plan & Community of Schools
  - Cultivate Data-Driven Decision Making
  - Pursue Financially Sustainable Facilities
  - Engage OUSD Community
  - Pursue a System-Wide Approach
  - Foster Environmental Sustainability
  - Promote Effective Learning Environments
- Asset Inventory
  - Role as Community Resource for Partners
  - Program Type, Utilization & Cohort Group
  - Market Value
  - Operational Cost
  - Condition Index
  - Grade Level Suitability of Existing Facilities
  - DSA Readiness
  - Sustainability
  - Portables vs Permanent Buildings
  - Environmental Quality
- Future Planning Factors
  - Enrollment Projections
  - Climate Impacts
  - Demographic Shifts
  - Learning Tools & Technological Shifts
  - Transportation
  - Energy Efficiency Regulations
  - Workforce / Affordable Housing

**Outputs 2019**
- Facilities Master Plan Project List
- 2020 Bond Project List
- 2020 Spending Plan
OUUSD’s bonding capacity will be limited for 2020 to ~$600-$800M, meaning that it will be impossible to fund projects to address all needs.
OUSD has prioritized projects that have been promised to schools but deferred due to a lack of funds.
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Example projects:

- **McClymonds HS Modernization:** Support school programs and improve retention of students in West Oakland
- **Roosevelt MS Modernization:** Pursue projects that have already been designed and approved by Board of Education
- **Claremont MS Multi-Purpose Building:** Replace fire-damaged building with permanent construction
Application of OUSD’s guiding principles and the use of validated data will be used to prioritize additional projects based on need.
Application of OUSD’s guiding principles and the use of validated data will be used to prioritize additional projects based on need.

Example projects:
- Seismic Safety Upgrades
- Campus Modernizations
- Grounds and Infrastructure Upgrades
- Energy Efficiency and Solar Projects
- Health Care and Childhood Development Center Improvements
Project Prioritization: Implementing an Equitable Process

Providing resources equitably across the district is a priority in developing a final project list. The following principles guide this project prioritization effort:

- Promote projects in every region and district of Oakland
- Ensure there are high quality school sites in every community
- Support Citywide Plan initiatives that require facility investment
- Pursue projects that enable OUSD to generate revenue or reduce ongoing costs
Next Steps: Schedule & Proposed Additional Services

OUSD Community Stakeholder Engagement
- Communications and Engagement Plan
- Master Plan Community Engagement Preparation and Workshop Facilitation
- Digital Communications to Support Public Outreach

Ongoing Support of an Integrated Master Plan
- Supporting cross-departmental site-related decision making
- Site evaluation matrix and recommendations support
- Cloud-based facilities database Dashboard