

Board Office Use: Legislative File Info.	
File ID Number	23-0668
Introduction Date	4/20/2023
Enactment Number	
Enactment Date	



**OAKLAND UNIFIED
SCHOOL DISTRICT**
Community Schools, Thriving Students

Memo

To Facilities Committee

From Kyla Johnson-Trammell, Superintendent
Kenya Chatman, Executive Director, Facilities Planning and Management

Board Meeting Date April 26, 2023

Subject Amendment, Measure Y Spending Plan - April 2023

Action Discussion/Possible Revised Measure Y Spending Plan - April 2023

Background The voters of the City of Oakland since 2006 have passed three General Obligation Bond Measures as noted herein.

In June 2006, Oakland voters passed Measure B, a \$435 million School Facilities Improvement Bond which provided funding to the Oakland Unified School District (OUSD). Except for some remaining fire alarm projects, all Measure B funds have largely been spent prior to fiscal year 2019-2020. May 2012 Masterplan stated \$1.5B in Facilities' Needs (File #12-1043).

In June 2012, Oakland voters passed Measure J, a \$475 million School Facilities Improvement Bond, for OUSD to enhance the educational environment for the students and communities of Oakland and better prepare students for college and jobs. Bond funds have been allocated to upgrade science labs, classrooms, computers, and technology; improve student safety and security; repair bathrooms, electrical systems, plumbing and sewer lines; improve energy efficiency; and make seismic upgrades. Majority of Measure J Funds have been spent. In May 2020 Masterplan stated \$3+B in Facilities' Needs. (File #19-2517).

In November 2020, Oakland voters passed Measure Y, a \$735 million School Facilities Improvement Bond, for OUSD to provide, among other things, classroom repair and school safety improvements, upgrading classrooms, science labs and technology; improving student safety and security; repairing bathrooms, electrical systems, plumbing and sewers; and improving energy-efficiency and earthquake safety.

The Board on April 14, 2021 adopted the Measure Y Spending Plan. (Enactment No. 21-0581).

Subsequent to the Board approval of the Measure Y Bond Spending Plan April 2021, costs associated with the approved Plan have outpaced execution by 28%, (shortfalls) necessitating revisions to the current spending plans, either by scope reductions and / or adjustments to budgets to provide the design elements based on:

1. Improved Seismic Safety
2. Accessibility Improvements
3. Heating & Ventilation upgrades
4. Electrical upgrades
5. Communications upgrades
6. Envelope Waterproofing
7. Program improvements (class size enlargement)

Recommendation

The Facilities staff requests the Facilities Committee/Board give direction as to how staff should address or meet the shortfall. The staff recommends that during its deliberation of the subject matter, the Facilities Committee / Board consider Option 1, Options 2, and 3, but not exclusively.

Fiscal Impact

Net zero balancing of Bond Proceeds and Proposed Spending.

Attachment

PowerPoint Presentation

Bond Review and Measure Y Budget

Facilities Planning & Management
Facilities Committee
April 20, 2023



**OAKLAND UNIFIED
SCHOOL DISTRICT**

Community Schools, Thriving Students

Our Vision

All OUSD students will find joy in their academic experience while graduating with the skills to ensure they are caring, competent, fully-informed, critical thinkers who are prepared for college, career, and community success.

Our Mission

Oakland Unified School District (OUSD) will build a Full Service Community District focused on high academic achievement while serving the whole child, eliminating inequity, and providing each child with excellent teachers, every day.



Agenda

1. Background
2. Ask of the Governing Body
3. Spending Plan Timeline
4. Current Measure Y Spending Plan
5. Current Project Budget Shortfalls
6. District Wide Initiatives Recommendations
7. Schedule for Next Bond Issuance
8. Conclusion
9. Next Steps
10. Questions & Answers

Overview

1. Spending Plan cannot be revised without some revision to a major capital project
2. Facilities Committee asks from March 16 meeting:
 - More detail in each case what is necessary within the dollar amount proposed.
 - How much of the overall Bond contingency that can be used for this offset that is being requested?
 - History of previous money spent per District with Bond Measures B and J.

Ask of the Governing Body

1. Bring to the Facilities Committee 3-16-23 Discussion
2. Present to Citizens Bond Oversight Committee (CBOC) 4-10-23
3. Bring back to Facilities Committee for Approval 4-20-23
4. Bring to BOE for final vote 4-26-23
 - **Budget adjustments vs. scope reductions**
 - **Review, comment and approve revised Spending Plan**

Background

In June 2006, Oakland voters passed Measure B, a \$435 million School Facilities Improvement Bond which provided funding to the Oakland Unified School District (OUSD). Except for some remaining fire alarm projects, all Measure B funds have largely been spent prior to fiscal year 2019-2020.

May 2012 Masterplan stated \$1.5B in Facilities Needs (File #12-1043)

In June 2012, Oakland voters passed Measure J, a \$475 million School Facilities Improvement Bond, for OUSD to enhance the educational environment for the students and communities of Oakland and better prepare students for college and jobs. Bond funds have been allocated to upgrade science labs, classrooms, computers, and technology; improve student safety and security; repair bathrooms, electrical systems, plumbing and sewer lines; improve energy efficiency; and make seismic upgrades. Majority of Measure J Funds have been spent.

In May 2020 Masterplan stated \$3+B in Facilities Needs. (File #19-2517)

In November 2020, Oakland voters passed Measure Y, a \$735 million School Facilities Improvement Bond, for OUSD to provide, among other things, classroom repair and school safety improvements, upgrading classrooms, science labs and technology; improving student safety and security; repairing bathrooms, electrical systems, plumbing and sewers; and improving energy-efficiency and earthquake safety.

Measure Y Timeline

- June 2018- Board approved initial Measure Y Budget
- April 2021- Board Approved updated Measure Y Budget
(Refer to File # 21-0581)
- March 2022 - Board Approved Measure Y District Initiative Work Plan
(Refer to File # 22-0223)
- March/April 2023- Report on Measure Y progress and initial draft of budget reconciliation

Capital spend by district to date

OUSD FACILITIES DEPARTMENT - Site Allocation By District			Spent to date as of	3/31/2023			
DISTRICT - 1	Measure B	Measure J	Measure Y	Fund 25	Fund 35		Total by District
	\$ 35,394,860	\$ 14,226,165	\$ 6,808,207	\$ 86,196	\$ 11,169,956		\$ 67,685,384
DISTRICT - 2							
	\$ 125,120,431	\$ 8,333,513	\$ 1,287,987	\$ 227,803	\$ 606,998		\$ 135,576,733
DISTRICT - 3							
	\$ 68,932,684	\$ 55,365,291	\$ 13,195,511	\$ 1,650,161	\$ 36,961,498		\$ 176,105,146
DISTRICT - 4							
	\$ 33,799,032	\$ 41,774,960	\$ 3,499,845	\$ 10,169,838	\$ 10,252,707		\$ 99,496,382
DISTRICT - 5							
	\$ 33,180,175	\$ 102,774,033	\$ 260,726	\$ 12,386,798	\$ 1,157,068		\$ 149,758,800
DISTRICT - 6							
	\$ 21,602,173	\$ 52,530,553	\$ 270,116	\$ 90,410	\$ 14,556,232		\$ 89,049,484
DISTRICT - 7							
	\$ 51,608,756	\$ 8,628,209	\$ 4,492,066	\$ 15,866,166	\$ 11,540,100		\$ 92,135,297
District Wide Projects							
	\$ 62,894,837	\$ 160,127,377	\$ 12,169,541	\$ 24,597,203	\$ 31,559,441		\$ 291,348,399
	\$ 432,532,949	\$ 443,760,102	\$ 41,984,000	\$ 65,074,575	\$ 117,804,000		\$ 1,101,155,626

Key Observations of Measure Y

- Current average age of facilities is **75 years, and lack of investment** in infrastructure and building systems has led to increased cost to bring up to date
- Current market conditions have significantly **increased construction** costs
- **Major capital projects are being impacted** and we are having to consider scope reductions to comply with the current budgets.
- **Initiatives should be District Wide** to accommodate urgent needs that arise during the bond program.
- **Solar Projects** are becoming more **difficult to make receive the return on investment for the energy efficiency**, due to additional costs such as aging electrical switchgears and site logistics.
- Projected project budget **short falls** are only for **projects in design**, future project budget needs unknown.

Current Project Budget Projections

- Construction Costs (labor and materials) have gone up 28% in the last two years, and are projected to continue to escalate 8-10%/ year, as compared to 3% traditionally.
- Base scopes are based on: Improved Seismic Safety, Accessibility Improvements, Heating and Ventilation upgrades, Electrical upgrades, Communications upgrades, Envelope Weatherproofing and Program Improvements (Class Size Enlargement)
- Projections are only for projects which are actively in Design or Construction: Claremont, Laurel CDC, Cole Administration Center, Roosevelt, McClymonds, Coliseum College Prep Academy and Melrose Leadership Academy
- No Projections are made for future projects, but it is assumed that they will also be unable to deliver base scopes.

Current Measure Y Spending Plan/Projections

MEASURE Y BOND SPENDING PLAN - CHANGES BY BOARD ACTION AND PROPOSED CHANGES							
DRAFT	Proposed for June 2020 Board	Proposed for March 2021 Board	Proposed for April 2022 Board	Current Projected Budget Proposed	Current Budget Need Requested	COMMENTS	
Site Specific Modernizations and New Construction							
1	Coliseum College Preparatory Academy - Site Expansion	\$ 35,500,000	\$ 35,500,000	\$ 35,500,000	\$ 55,000,000	\$ 19,500,000	Based on current enrollment projections and to meet standards and Ed. Specs.
2	Claremont MS - Multi Purpose Annex	\$ 18,000,000	\$ 18,000,000	\$ 18,000,000	\$ 18,000,000	\$ -	
3	Elmhurst United MS - Site Modernization	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ -	No Budget Update- Design Not Started
4	Garfield ES - Site Renovation/Replacement	\$ 56,700,000	\$ 56,700,000	\$ 56,700,000	\$ 56,700,000	\$ -	No Budget Update- Design Not Started
5	Hillcrest ES - New Kitchen	\$ 1,700,000	\$ 1,700,000	\$ 1,700,000	\$ 1,700,000	\$ -	No Budget Update- Design Not Started
6	Laurel Child Dev. Center - Site Renovations/Replacement	\$ 11,500,000	\$ 11,500,000	\$ 15,000,000	\$ 15,000,000	\$ -	
7	Marcus Foster ELC - Site Specific Projects	\$ 15,000,000	\$ 15,000,000	\$ 15,000,000	\$ 15,000,000	\$ -	No Budget Update- Design Not Started
8	McClymonds HS - Site Renovation/Replacement	\$ 65,000,000	\$ 65,000,000	\$ 65,000,000	\$ 91,250,000	\$ 26,250,000	Based on current enrollment projections and to meet standards and Ed. Specs.
9	Melrose Leadership Academy/Maxwell Park ES - Site Expansion	\$ 49,500,000	\$ 49,500,000	\$ 49,500,000	\$ 65,500,000	\$ 16,000,000	Based on current enrollment projections and to meet standards and Ed. Specs.
10	Roosevelt MS - Site Renovation/Replacement	\$ 70,600,000	\$ 70,600,000	\$ 70,600,000	\$ 90,550,000	\$ 19,950,000	Based on current enrollment projections and to meet standards and Ed. Specs.
11	Piedmont ES - New Kitchen	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ -	No Budget Update- Design Not Started
12	Skyline HS - Various Site Specific Projects	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ -	No Budget Update- Design Not Started
	Subtotal	\$345,500,000	\$ 345,500,000	\$ 349,000,000	\$ 430,700,000	\$ 81,700,000	
District-Wide Capital Projects							
13	Administration and Governance Center	\$ 50,000,000	\$ 50,000,000	\$ 50,000,000	\$ 50,000,000	\$ -	Central Administration Center at Cole
14	Access and Quality Improvements	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ -	
15	District-Wide Initiatives	\$ 200,000,000	\$ 200,000,000	\$ 200,000,000	\$ 200,000,000	\$ -	
	Subtotal	\$260,000,000	\$ 260,000,000	\$ 260,000,000	\$ 260,000,000		
16	Bond Program Contingency	\$ 73,500,000	\$ 73,500,000	\$ 70,000,000	\$ 70,000,000	\$ -	
17	Bond Program Coordination	\$ 56,000,000	\$ 56,000,000	\$ 56,000,000	\$ 56,000,000	\$ -	
	TOTAL	\$735,000,000	\$ 735,000,000	\$ 735,000,000	\$ 816,700,000	\$ 81,700,000	

Current Measure Y Projected Project Shortfall

- The construction industry has experienced a 28% increase in cost, which was not predictable and is having a significant impact on all current projects.
- The net change in cost from the original Measure Y plan to this proposed projection is due to the costs for existing site issues and needs not being included in the original cost projection/scope.
- To meet the District Educational Plan and Designs Standards that have been developed since the Fremont project, the following cost increases, which includes an increase in the projected cost of construction is listed below.

ACTIVE PROJECTS CURRENTLY PROJECTED PROJECT NEEDS				
	From	To	Total Request	Comments
1 Coliseum College Preparatory Academy - Site Expansion	\$ 35,500,000	\$ 55,000,000	\$ 19,500,000	To Meet District Educational Plan and Design Standards
2 McClymonds HS - Site Renovation/ Replacment	\$ 65,000,000	\$ 91,250,000	\$ 26,250,000	To Meet District Educational Plan and Design Standards
3 Melrose Leadership Adademy/ Maxwell Park ES - Site Expansion	\$ 49,500,000	\$ 65,500,000	\$ 16,000,000	To Meet District Educational Plan and Design Standards
4 Roosevelt MS - Site Renovation/Replacement	\$ 70,600,000	\$ 90,550,000	\$ 19,950,000	To provide all building systems scopes based on design
			\$ 81,700,000	

Overview

1. Spending Plan cannot be revised without some revision to a major capital project
2. Facilities Committee asks from March 16 meeting:
 - More detail in each case what is necessary within the dollar amount proposed.
 - How much of the overall Bond contingency that can be used for this offset that is being requested?
 - History of previous money spent per District with Bond Measures B and J.

Current Measure Y Projected Project Shortfall

- Revised budgets are focused on meeting safety, building system upgrades and upgrades to meet current Classroom Standards.
- Project scopes have been focused on work in classroom areas, consistent with Board direction on bond expenditures.
- Project prioritization is based on projects which were on previous bonds, but de-funded, and in areas of district in the highest socio-economic needs.
- Scope prioritization will allow for most work in focused areas and additional phases as required on remaining buildings
- Priority 1: Life Safety and Accessibility/ Priority 2: Building Systems and Classroom Enlargement/ Priority 3: Modernizations to non-classroom areas or buildings, site, etc.

PROGRAM WIDE BOND SPENDING PLAN- PROJECT AUGMENTATION BY PRIORITY								
	Current Budget	PRIORITY 1/2 Recommended	Total Prioritized Budget Augmentation	PRIORITY 3 Add'l Requested	Total Project Estimate	Total Delta Budget to Estimate	Comments	
1 Coliseum College Preparatory Academy - Site Expansion	\$ 35,500,000	\$ 55,000,000	\$ 19,500,000	\$ 19,262,000	\$ 74,262,000	\$ 38,762,000	Recommended design includes Priority 1, Portions of Priority 2 and portions of Priority 3, including Building M Mod/ Portable Replacement/ Sitework	
2 McClymonds HS - Site Renovation/ Replacment	\$ 65,000,000	\$ 91,250,000	\$ 26,250,000	\$ 40,000,000	\$ 131,250,000	\$ 66,250,000	Recommended design includes Modernizations of Classrooms, Locker Rooms and minor modifications to Gym	
3 Melrose Leadership Adademy/ Maxwell Park ES - Site Expansion	\$ 49,500,000	\$ 65,500,000	\$ 16,000,000	\$ 35,000,000	\$ 100,500,000	\$ 51,000,000	Recommended design includes priorities 1-3, with modernizations to classroom buildings on both sites, but does not include site consolodation.	
4 Roosevelt MS - Site Renovation/Replacement	\$ 70,600,000	\$ 90,550,000	\$ 19,950,000	\$ 26,058,000	\$ 116,608,000	\$ 46,008,000	Recommended design includes Priority 1 and 2 Modernization of Building A only/New Science CR and restroom building, misc site improvements	
	\$ 220,600,000	\$ 302,300,000	\$ 81,700,000	\$ 120,320,000	\$ 422,620,000	\$ 202,020,000		

Options

Program Contingency reallocation is based on proportionate budgets for three projects needing augmentation, plus additional contingency for listed Measure Y Cap Projects.

The calculation of the current active projects that we are discussing within this proposed change is 28.9%

\$28,900,000 can be lifted from the Bond Contingency.

Current Measure Y Projected Project Shortfall

- The construction industry has experienced a 28% increase in cost, which was not predictable and is having a significant impact on all current projects.
- The net change in cost from the original Measure Y plan to this proposed projection is due to the costs for existing site issues and needs not being included in the original cost projection/scope.
- To meet the District Educational Plan and Designs Standards that have been developed since the Fremont project, the following cost increases, which includes an increase in the projected cost of construction is listed below.

ACTIVE PROJECTS CURRENTLY PROJECTED PROJECT NEEDS				
	From	To	Total Request	Comments
1 Coliseum College Preparatory Academy - Site Expansion	\$ 35,500,000	\$ 55,000,000	\$ 19,500,000	To Meet District Educational Plan and Design Standards
2 McClymonds HS - Site Renovation/ Replacment	\$ 65,000,000	\$ 91,250,000	\$ 26,250,000	To Meet District Educational Plan and Design Standards
3 Melrose Leadership Adademy/ Maxwell Park ES - Site Expansion	\$ 49,500,000	\$ 65,500,000	\$ 16,000,000	To Meet District Educational Plan and Design Standards
4 Roosevelt MS - Site Renovation/Replacement	\$ 70,600,000	\$ 90,550,000	\$ 19,950,000	To provide all building systems scopes based on design
			\$ 81,700,000	

Option 1

1. Reduces Accessibility and Quality, District Wide Initiatives and District Contingency
2. All major listed capital projects remain, with augmentation to first four, McClymond, Roosevelt, Coliseum College Preparatory and Melrose Leadership Academy in the amount of \$81.7M.

OPTION 1			
DESCRIPTION		Potential Budget Adjustment	Comments
A	Allocate Accessibility and Quality Budget to underfunded projects	\$ (10,000,000)	
B	Allocate proportional program contingency	\$ (23,600,000)	
C	Reduce District Wide Initiatives	\$ (48,100,000)	
TOTAL		\$ (81,700,000)	

Options 2 & 3

1. Reduces Accessibility and Quality, Melrose Augmentation, portions of Melrose Leadership Academy budget, and in option 2, kitchen projects at Piedmont and Hillcrest ES.
2. Due to MLA reduction, augmentation has been deleted, making projected need \$65.7M.
3. Option 3 more substantially reduces MLA budget, and adds contingency for future project overruns into program contingency.

	From	To	Total Request	Comments
1 Coliseum College Preparatory Academy - Site Expansion	\$ 35,500,000	\$ 55,000,000	\$ 19,500,000	To Meet District Educational Plan and Design Standards
2 McClymonds HS - Site Renovation/ Replacment	\$ 65,000,000	\$ 91,250,000	\$ 26,250,000	To Meet District Educational Plan and Design Standards
3 Roosevelt MS - Site Renovation/Replacement	\$ 70,600,000	\$ 90,550,000	\$ 19,950,000	To provide all building systems scopes based on design
			\$ 65,700,000	

Option 2

1. Program Contingency reallocation is based on proportionate budgets for three projects needing augmentation.
2. Scope of MLA would be Bridges Site Improvements, plus additional project with reduced scope project.

OPTION 2		
DESCRIPTION	Potential Budget Adjustment	Comments
A Allocate Accessibility and Quality Budget to underfunded projects	\$ (10,000,000)	
B Allocate proportional program contingency	\$ (23,600,000)	
C Reduce additional budget augmentation for MLA	\$ (16,500,000)	
D Reduce Project Scope for MLA to current Bridges Site project and reduced modernization project.	\$ (11,900,000)	
E Reduce budget for Kitchens at Hillcrest ES and Piedmont ES	\$ (3,700,000)	
TOTAL	\$ (65,700,000)	

Option 3

1. Program Contingency reallocation is based on proportionate budgets for three projects needing augmentation.
2. Scope of MLA would be Bridges Site Improvements only.

OPTION 3			
DESCRIPTION	Potential Budget Adjustment	Comments	
A	Allocate Accessibility and Quality Budget to underfunded projects	\$ (10,000,000)	
B	Allocate proportional program contingency	\$ (23,600,000)	
C	Reduce additional budget augmentation for MLA	\$ (16,500,000)	
D	Reduce Project Scope for MLA to current Bridges Site project only.	\$ (44,500,000)	Campus consolidation, or modernization would be new bond.
E	Augment Program Contingency for future unstarted projects	\$ 28,900,000	
TOTAL		\$ (65,700,000)	

Options Discussion

MEASURE Y BOND SPENDING PLAN- CHANGES BY BOARD ACTION AND PROPOSED CHANGES

DRAFT	Proposed for June 2020 Board	Proposed for March 2021 Board	Proposed for April 2022 Board	Current Projected Budget Proposed	Current Budget Need Requested	COMMENTS
Site Specific Modernizations and New Construction						
1 Colliseum College Preparatory Academy - Site Expansion	\$ 35,500,000	\$ 35,500,000	\$ 35,500,000	\$ 55,000,000	\$ 19,500,000	Based on current enrollment projections and to meet standards and Ed. Specs.
2 Claremont MS - Multi Purpose Annex	\$ 18,000,000	\$ 18,000,000	\$ 18,000,000	\$ 18,000,000	\$ -	
3 Elmshurst United MS - Site Modernization	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ -	No Budget Update- Design Not Started
4 Garfield ES - Site Renovation/Replacement	\$ 56,700,000	\$ 56,700,000	\$ 56,700,000	\$ 56,700,000	\$ -	No Budget Update- Design Not Started
5 Hillcrest ES - New Kitchen	\$ 1,700,000	\$ 1,700,000	\$ 1,700,000	\$ 1,700,000	\$ -	No Budget Update- Design Not Started
6 Laurel Child Dev. Center - Site Renovations/Replacement	\$ 11,500,000	\$ 11,500,000	\$ 15,000,000	\$ 15,000,000	\$ -	
7 Marcus Foster ELC - Site Specific Projects	\$ 15,000,000	\$ 15,000,000	\$ 15,000,000	\$ 15,000,000	\$ -	No Budget Update- Design Not Started
8 McClymonds HS - Site Renovation/Replacement	\$ 65,000,000	\$ 65,000,000	\$ 65,000,000	\$ 91,250,000	\$ 26,250,000	Based on current enrollment projections and to meet standards and Ed. Specs.
9 Melrose Leadership Academy/Maxwell Park ES - Site Expansion	\$ 49,500,000	\$ 49,500,000	\$ 49,500,000	\$ 65,500,000	\$ 16,000,000	Based on current enrollment projections and to meet standards and Ed. Specs.
10 Roosevelt MS - Site Renovation/Replacement	\$ 70,600,000	\$ 70,600,000	\$ 70,600,000	\$ 90,550,000	\$ 19,950,000	Based on current enrollment projections and to meet standards and Ed. Specs.
11 Piedmont ES - New Kitchen	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ -	No Budget Update- Design Not Started
12 Skyline HS - Various Site Specific Projects	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ -	No Budget Update- Design Not Started
Subtotal	\$ 345,500,000	\$ 345,500,000	\$ 349,000,000	\$ 430,700,000	\$ 81,700,000	
District-Wide Capital Projects						
13 Administration and Governance Center	\$ 50,000,000	\$ 50,000,000	\$ 50,000,000	\$ 50,000,000	\$ -	Central Administration Center at Cole
14 Access and Quality Improvements	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ -	
15 District-Wide Initiatives	\$ 200,000,000	\$ 200,000,000	\$ 200,000,000	\$ 200,000,000	\$ -	
Subtotal	\$ 260,000,000	\$ 260,000,000	\$ 260,000,000	\$ 260,000,000		
16 Bond Program Contingency	\$ 73,500,000	\$ 73,500,000	\$ 70,000,000	\$ 70,000,000	\$ -	
17 Bond Program Coordination	\$ 56,000,000	\$ 56,000,000	\$ 56,000,000	\$ 56,000,000	\$ -	
TOTAL	\$ 735,000,000	\$ 735,000,000	\$ 735,000,000	\$ 816,700,000	\$ 81,700,000	

District Wide Initiatives- Budget Overview

PROGRAM WIDE BOND SPENDING PLAN- DISTRICT WIDE INITIATIVES				
	From	To	Total Request	Comments
1 Facilities and Technology	\$ 131,697,920	\$ 131,697,920	\$ -	
2 Health, Safety and Security	\$ 43,297,080	\$ 50,297,080	\$ 7,000,000	Fund Additional School Security Projects at MS and ES
3 Energy Efficiency	\$ 17,005,000	\$ 17,005,000	\$ -	
4 Improved Utilization	\$ 7,000,000	\$ -	\$ (7,000,000)	Not required without school closures
			\$ -	

District Wide Initiatives- Facilities and Technology



Category	Site	Department Requestor	Description	District	Current Budget Allotment	Recommended Changes	Recommended Budget Allotment
Facilities and Technology Improvements - \$106M originally allotted							
Grounds	Multiple Locations Castlemont, Skyline, Glenview, Oakland, Madison, and Oakland Tech	Custodial	Construction of storage / charging sheds for electric utility carts at larger sites to improve custodial capacity for upkeep of fields and the entire site.	1	\$2,616,000	\$0	\$2,616,000
Turf Field Replacements	Multiple Sites	B&G	Replacement of synthetic turf fields that have reached end of life (no longer maintainable)		\$8,000,000	\$0	\$8,000,000
Stadium ADA Improvements	Castlemont High	Facilities	Stadium improvements consisting of new field, new bleacher, fire and life safety improvements, lighting, and new ADA restrooms. The project includes replacement of outdoor athletic field, track and speciality sport areas and bleachers. Existing restroom facilities will be upgraded and new single occupancy accessible facilities will be added to new North & South Plazas. Accessible parking & Path Of Travel (POT) to the new work will be included.	7	\$4,900,000	\$0	\$4,900,000
Portable Removal and Replacements	Multiple Sites	Facilities	Funding to support the design, DSA approval, removal, installation, and construction of new school site portables		\$3,000,000	\$0	\$3,000,000
Grounds	Joaquin Miller	B&G	Shade structures at named elementary school site in support of outdoor learning and recreational activities at Joaquin Miller	4	\$200,000	\$0	\$200,000
Ventilation & IAQ Comfort Improvements	Multiple	B&G	Ventilation & IAQ Comfort Improvements inclusive of but not limited to developing a prioritized list of school sites in need of ventilation and comfort improvements such as; new HVAC, cool roofs, window shading or tinting, high volume low velocity ceiling fans and new environmental controls. The first initiative will be to conduct the study via pilot projects at Laurel, Manzanita, and WOVMS		\$37,500,000	\$0	\$37,500,000

District Wide Initiatives- Facilities and Technology



Category	Site	Department Requestor	Description	District	Current Budget Allotment	Recommended Changes	Recommended Budget Allotment
Facilities and Technology Improvements - \$106M originally allotted							
Pilot Project IAQ assessments, recommendations, and design	Laurel ES	Facilities	Pilot project to assess, make recommendations, and develop implementable improvements for consideration throughout the District	4	\$500,000	\$0	\$500,000
Pilot Project IAQ assessments, recommendations, and design	Manzanita ES	Facilities	Pilot project to assess, make recommendations, and develop implementable improvements for consideration throughout the District	5	\$500,000	\$0	\$500,000
Pilot Project IAQ assessments, recommendations, and design	West Oakland Middle School	Facilities	Pilot project to assess, make recommendations, and develop implementable improvements for consideration throughout the District	3	\$500,000	\$0	\$500,000
ADA Ramp	Kaiser	Facilities	Furnish and install an ADA ramp to address significant grade changes in support of a new academic program at Kaiser	1	\$2,600,000	\$0	\$2,600,000
Trust for Public Land Project	Bridges Academy	Facilities	This is a collaborative project with Trust for Public Land in which the District is a recipient of grant funds for improvements at Bridges, funding being requested is to design and construct green school yard improvements.	5	\$100,000	\$0	\$100,000
Window Wall System Replacement	Lowell	B&G	Demolish and replace the existing window wall system at Lowell, which has failures and water infiltration into the building. Funding is to design and construct a new storefront window wall system with metal panels.	3	\$6,075,000	\$0	\$6,075,000
Tech Services- IT Improvements	All	Tech Services	Funding is to support the classroom learning experience - wifi, modernizing classrooms, cable degradation, refresh of network equipment, etc.		\$25,000,000	\$0	\$25,000,000
Board Directed Initiative Allowance	Multiple	Board	This is an allowance to address any OUSD Board directed initiatives / projects		\$7,000,000	\$0	\$7,000,000
Student Drop Off Enhancements	East Oakland Pride	Facilities	Widen the driveway entrance and gate to ensure a safe multiple lane drop off		\$75,000	\$0	\$75,000
Relocate IT	TBD	B&G	Improvements at a site TBD to accommodate the IT Department		\$350,000	\$0	\$350,000
Deferred Maintenance Projects - not funded by the 5yr Deferred Maintenance Budget							
B&G Roofing & Plumbing- Repair and Replacement Projects	Multiple Sites	B&G	Due to a number of roofing leaks, utility - sewer line failures the department has established a pool project to address some deferred maintenance needs that didn't get approved via the B&G 5 Year Deferred Maintenance budget		\$11,600,000	\$0	\$11,600,000
B&G Asphalt Repair & Replacement Pool	Multiple Sites	B&G	Many school sites have failed asphalt that require ongoing maintenance, however budget cuts to B&G's 5 Year Deferred Maintenance Budget require an additional funding source.		\$7,300,000	\$0	\$7,300,000
Facilities & Technology Improvements Contingency					\$14,881,920	\$0	\$14,881,920
Subtotal					\$132,697,920	\$0	\$132,697,920

District Wide Initiatives- Health, Safety and Security



Category	Site	Department Requestor	Description	District	Current Budget Allotment	Recommended Changes	Recommended Budget Allotment
Funded Projects							
Health, Safety, and Security Improvements- \$45M originally allotted						\$45,000,000	
Nutritional Services	TBD	Nutrition	Provide additional dry, refrigeration, and freezer storage facilities.		\$20,500,000	\$0	\$20,500,000
Safety	Oakland Tech, Madison, and Skyline HS	B&G	Design and install new LED field lighting at Oakland Tech, Madison, and Skyline HS	1	\$1,313,000	\$0	\$1,313,000
Middle School Exterior and Interior Security Enhancements	Middle School Exterior and interior security enhancements	Facilities	Funding to provide additional perimeter and interior controls inclusive of but not limited to CCTV cameras, door entry controls (i.e. aiphones), and other measures to properly secure the Middle School sites		\$2,631,000	\$1,000,000	\$3,631,000
High School Exterior and Interior Security Enhancements	High School Exterior and interior security enhancements	Facilities	Funding to provide additional perimeter and interior controls inclusive of but not limited to CCTV cameras, door entry controls (i.e. aiphones), and other measures to properly secure the High School sites		\$2,100,000	\$750,000	\$2,850,000
CCTV & Aiphone System	Fremont High School	Facilities	CCTV & Aiphone System	5		\$0	\$0
CCTV & Aiphone System	Oakland High School	Facilities	CCTV & Aiphone System	2		\$0	\$0
CCTV & Aiphone System	Oakland International High School	Facilities	CCTV & Aiphone System	1		\$0	\$0
CCTV & Aiphone System	Oakland Technical High School	Facilities	CCTV & Aiphone System	1		\$0	\$0
CCTV & Aiphone System	King Estates Campus - Rurdsdale + Sojourner Truth	Facilities	CCTV & Aiphone System	7		\$0	\$0
CCTV & Aiphone System	Skyline High School	Facilities	CCTV & Aiphone System	6		\$0	\$0
CCTV & Aiphone System	Street Academy	Facilities	CCTV & Aiphone System	3		\$0	\$0
Elementary School door entry access	Elementary School door entry improvements (i.e. aiphone)	Facilities	Funding to provide main entrance door controls		\$2,000,000	\$0	\$2,000,000
Evacuation Maps	District Wide		Design and install evacuation maps for each school site to ensure compliance with Fire Marshall emergency evacuation requirements		\$4,000,000	\$0	\$4,000,000
Other safety and security improvements	Various	Facilities	Funding to provide perimeter controls (i.e. fencing), and support additional identified security enhancements		\$6,000,000	\$0	\$6,000,000

REDUCE TO 10%

District Wide Initiatives- Health, Safety and Security



Category	Site	Department Requestor	Description	District	Current Budget Allotment	Recommended Changes	Recommended Budget Allotment	
Funded Projects								
Health, Safety, and Security Improvements - \$45M originally allotted						\$45,000,000		
Carbon Dioxide Sensors	Various	Facilities	Installation of CO2 monitoring equipment in 50+ schools. This expense is required in order to maintain our eligibility for the \$4.1M funding requested from the CalSHAPE (AB 841) program. Without CO2 sensors, we will not get the \$4.1M program incentive.		\$100,000	\$0	\$100,000	
Playground & Playsurface Replacement	Various	Facilities	Updating outdated play structures and play surfaces per Master Plan		\$0	\$3,000,000	\$3,000,000	
Fire Alarm/ Intrusion Alarm Replacement	Various	Facilities	Updating Fire Alarm and Intrusion Alarm Systems to current district Standards		\$0	\$6,903,080	\$6,903,080	
Health, Safety, and Security Improvements Contingency					\$4,653,080	(\$4,653,080)	\$0	
Subtotal						\$48,297,080	\$7,000,000	\$50,297,080

District Wide Initiatives- Energy Efficiency, Resiliency and Sustainability



Category	Site	Department Requestor	Description	District	Current Budget Allotment	Recommended Changes	Recommended Budget Allotment
Funded Projects							
Energy Efficiency, Resiliency, and Sustainability Improvements - \$39M originally allotted							
Solar PV				SITE SOLAR PROJECTS CANCELLED			
Solar PPA Project - funding for IOR and PM	Claremont MS	Facilities	35 MW of rooftop and canopy PV	1	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	Cole Admin Bldg	Facilities	Canopy PV	3	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	Elmhurst MS	Facilities	35 MW of rooftop and canopy PV	7	\$75,000	(\$75,000)	\$0
Solar PPA Project - funding for IOR and PM	Fremont HS	Facilities	35 MW of rooftop and canopy PV	5	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	Frick MS	Facilities	35 MW of rooftop and canopy PV	6	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	Glenview ES	Facilities	35 MW of rooftop and canopy PV	5	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	Highland ES	Facilities	35 MW of rooftop and canopy PV	7	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	Hoover ES	Facilities	35 MW of rooftop and canopy PV	3	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	Horace Mann	Facilities	Canopy PV		\$0	\$75,000	\$75,000
Solar PPA Project - funding for IOR and PM	OAK @ Howard Campus	Facilities	35 MW of rooftop and canopy PV	7	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	Kings Estate Campus	Facilities	35 MW of rooftop and canopy PV	7	\$75,000	(\$75,000)	\$0
Solar PPA Project - funding for IOR and PM	Laurel CDC	Facilities	35 MW of rooftop and canopy PV	4	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	Lockwood ES	Facilities	35 MW of rooftop and canopy PV	6	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	Madison Park Upper	Facilities	35 MW of rooftop and canopy PV	7	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	Manzanita Campus	Facilities	35 MW of rooftop and canopy PV	5	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	MLK Jr. ES	Facilities	35 MW of rooftop and canopy PV	3	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	Prescott Campus	Facilities	35 MW of rooftop and canopy PV	3	\$75,000	(\$75,000)	\$0
Solar PPA Project - funding for IOR and PM	Reach Academy (COX) Campus	Facilities	35 MW of rooftop and canopy PV	6	\$75,000	(\$75,000)	\$0
Solar PPA Project - funding for IOR and PM	Redwood Heights ES	Facilities	35 MW of rooftop and canopy PV	4	\$75,000	(\$75,000)	\$0
Solar PPA Project - funding for IOR and PM	Stonehurst Campus	Facilities	35 MW of rooftop and canopy PV	7	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	The Center	Facilities	Canopy PV	3	\$75,000	\$0	\$75,000
Solar PPA Project - funding for IOR and PM	The Woodland Campus	Facilities	35 MW of rooftop and canopy PV	7	\$75,000	\$0	\$75,000

District Wide Initiatives- Energy Efficiency, Resiliency and Sustainability



Category	Site	Department Requestor	Description	District	Current Budget Allotment	Recommended Changes	Recommended Budget Allotment
Funded Projects							
Energy Efficiency, Resiliency, and Sustainability Improvements- \$39M originally allotted							
Energy Efficiency Cal Shape	Various	Facilities	Plug Load Reduction & LED Lighting		\$0	\$0	\$0
Energy Efficiency Cal Shape	Allendale	Facilities	Plug Load Reduction	4	\$20,000	\$0	\$20,000
Energy Efficiency Cal Shape	Bella Vista	Facilities	Plug Load Reduction	2	\$16,000	\$0	\$16,000
Energy Efficiency Cal Shape	Bret Harte	Facilities	LED Lighting	4	\$815,000	\$0	\$815,000
Energy Efficiency Cal Shape	Bret Harte	Facilities	Plug Load Reduction	4	\$40,000	\$0	\$40,000
Energy Efficiency Cal Shape	Elmhurst	Facilities	Plug Load Reduction	7	\$45,000	\$0	\$45,000
Energy Efficiency Cal Shape	Fruitvale	Facilities	LED Lighting	5	\$430,000	\$0	\$430,000
Energy Efficiency Cal Shape	Fruitvale	Facilities	Plug Load Reduction	5	\$15,000	\$0	\$15,000
Energy Efficiency Cal Shape	Lockwood	Facilities	LED Lighting	6	\$530,000	\$0	\$530,000
Energy Efficiency Cal Shape	Lockwood	Facilities	Plug Load Reduction	6	\$55,000	\$0	\$55,000
Energy Efficiency Cal Shape	Global Family	Facilities	Plug Load Reduction	5	\$12,000	\$0	\$12,000
Energy Efficiency Cal Shape	Grass Valley	Facilities	LED Lighting	7	\$250,000	\$0	\$250,000
Energy Efficiency Cal Shape	Grass Valley	Facilities	Plug Load Reduction	7	\$22,000	\$0	\$22,000
Energy Efficiency Cal Shape	Laurel	Facilities	LED Lighting	4	\$280,000	\$0	\$280,000
Energy Efficiency Cal Shape	Laurel	Facilities	Plug Load Reduction	4	\$37,000	\$0	\$37,000
Energy Efficiency Cal Shape	Madison Park	Facilities	LED Lighting	7	\$640,000	\$0	\$640,000
Energy Efficiency Cal Shape	Madison Park	Facilities	Plug Load Reduction	7	\$5,000	\$0	\$5,000
Energy Efficiency Cal Shape	Madison S obrante	Facilities	LED Lighting	7	\$260,000	\$0	\$260,000
Energy Efficiency Cal Shape	Madison S obrante	Facilities	Plug Load Reduction	7	\$12,000	\$0	\$12,000
Energy Efficiency Cal Shape	Manzanita	Facilities	LED Lighting	5	\$550,000	\$0	\$550,000
Energy Efficiency Cal Shape	Manzanita	Facilities	Plug Load Reduction	5	\$29,000	\$0	\$29,000
Energy Efficiency Cal Shape	MLK	Facilities	LED Lighting	3	\$400,000	\$0	\$400,000
Energy Efficiency Cal Shape	MLK	Facilities	Plug Load Reduction	3	\$14,000	\$0	\$14,000
Energy Efficiency Cal Shape	New Highland	Facilities	LED Lighting	7	\$580,000	\$0	\$580,000
Energy Efficiency Cal Shape	New Highland	Facilities	Plug Load Reduction	7	\$30,000	\$0	\$30,000

District Wide Initiatives- Energy Efficiency, Resiliency and Sustainability



Category	Site	Department Requestor	Description	District	Current Budget Allotment	Recommended Changes	Recommended Budget Allotment
Funded Projects							
Energy Efficiency, Resiliency, and Sustainability Improvements - \$39M originally allotted							
Energy Efficiency Cal Shape	Oakland HS	Facilities	LED Lighting	2	\$2,100,000	\$0	\$2,100,000
Energy Efficiency Cal Shape	Oakland HS	Facilities	Plug Load Reduction	2	\$70,000	\$0	\$70,000
Energy Efficiency Cal Shape	West Oakland MS	Facilities	Plug Load Reduction	3	\$20,000	\$0	\$20,000
Energy Efficiency Cal Shape	Oakland Tech	Facilities	Plug Load Reduction	1	\$66,000	\$0	\$66,000
Energy Efficiency Cal Shape	Skyline	Facilities	Plug Load Reduction	6	\$95,000	\$0	\$95,000
Energy Efficiency Cal Shape	La Escuelita	Facilities	Plug Load Reduction	2	\$22,000	\$0	\$22,000
Energy Efficiency Cal Shape	Calvin Simmons	Facilities	LED Lighting	5	\$915,000	\$0	\$915,000
Energy Efficiency Cal Shape	Chabot	Facilities	LED Lighting	1	\$315,000	\$0	\$315,000
Energy Efficiency Cal Shape	La Escuelita	Facilities	RoX	2	\$50,000	\$0	\$50,000
Water Efficiency Pilot	Elmhurst (scaling to 4 additional sites)	Facilities	Installing Flow Management Device technology to achieve 15% water use	7	\$100,000	\$0	\$100,000
Battery Storage	Oakland High	Facilities	400 kW battery (Tesla Megapack 2)	2	\$2,500,000	(\$800,000)	\$1,700,000
Battery Storage	Oakland Tech/ Castlemont	Facilities	400 kW battery (Tesla Megapack 2)	1	\$2,500,000	(\$2,000,000)	\$500,000
Solar Readiness Retrofit	Fremont HS & The Center	Facilities	Solar Readiness Retrofit		\$500,000	(\$500,000)	\$0
EV Charging Stations	Various	Facilities	EV Charging Station		\$100,000	\$0	\$100,000
Sustainability Contingency					\$990,000	\$3,600,000	\$4,590,000
Subtotal					\$17,005,000	\$0	\$17,005,000

District Wide Initiatives- Improved Utilization

Category	Site	Department Requestor	Description	District	Current Budget Allotment	Recommended Changes	Recommended Budget Allotment
Funded Projects							
Improved Utilization - Unused or Under-used Assets - \$10M originally allotted							
Improved utilization	TBD	Facilities	Placeholder to fund moth balling and securing consolidated school sites or alternative uses.		\$7,000,000	-\$7,000,000	\$0
Subtotal					\$7,000,000	-\$7,000,000	\$0

Schedule for Second Series B Bond Issuance

- To support the District's desire to support resources available to encumber contracts by July 2023 (Q3)

Draft Bond Financing Schedule

- May: District Board Presentation / Possible 2x2 meetings
- June 7: District Board Approval of Resolution
- Week of July 17: Meeting with Rating Agency
- July 18: County Board of Supervisors Meeting
- July 28: Receive Rating
- August 8: Post Preliminary Official Statement
- August 16: Bond Pricing
- August 30: Bond Closing

Next Steps

Previous Engagements Steps 1 - 2

1. Bring to the Facilities Committee 3-16-23 Discussion
2. Present to CBOC 4-10-23 Discussion
3. Bring back to Facilities Committee for discussion, direction, deliberation of recommendations on 4-20-23
4. Bring to BOE on 4-26-23 to review, discuss, provide direction
 - Budget adjustments vs. scope reductions
 - Review, comment and approve Program Wide Initiatives Budget
5. Bring to BOE on May 10th to vote on approval of revised Spending Plan

Thank you

For more information, please reach out:

Kenya Chatman

Executive Director

Kenya.chatman@ousd.org