

Bond Review and Measure Y Budget

Board of Education
June 7, 2023

Facilities Planning & Management
Facilities Committee
May 18, 2023



**OAKLAND UNIFIED
SCHOOL DISTRICT**

Community Schools, Thriving Students

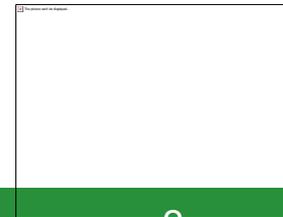
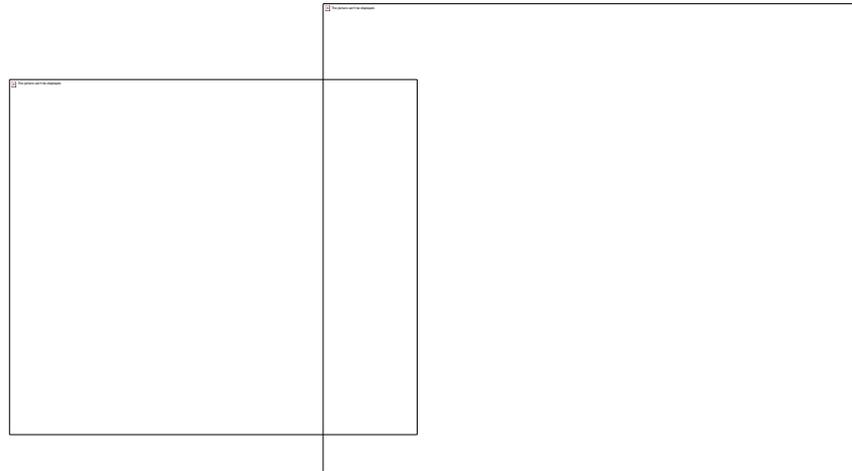


Our Vision

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

Overview

The Spending Plan cannot be revised without some revision to a major capital project.

Facilities Committee asks from March 16th and April 20th meetings:

- 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.
- Provide more specifics about what Priorities 1,2,3 represent.
- What would happen if we keep budgets as-is vs. adding or decreasing.
- Show an actual recommendation not options.

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 **\$3.4B 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.

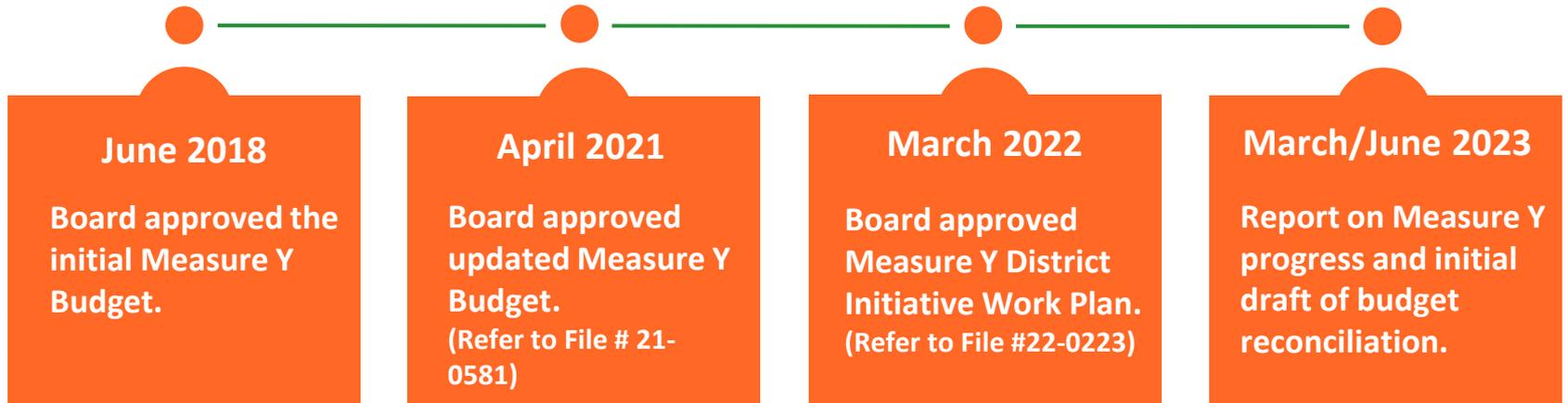
In May 2023, OUSD has experienced **28% increase in costs related to the bond projects due to market conditions**. The Master Plan stated need for the district is now **approximately \$4.4B in district need**.

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 Input 4-20-23
4. Bring to Facilities Committee for Approval of Recommendation 5-18-23
4. Bring to BOE for final vote June 2023
 - **Budget adjustments vs. scope reductions**
 - **Review, comment and approve revised Spending Plan**

Spending Plan Timeline

MEASURE Y TIMELINE



Current Measure Y Spending Plan

CAPITAL EXPENDITURES BY DISTRICT TO DATE

OUSD Facilities Department – Site Allocation By District (Spent to Date as of March 31, 2023)

	Measure B	Measure J	Measure Y	Fund 25	Fund 35	Total by District
District 1	\$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

Notes:

1. Fund 25 - Developer fees.
2. Fund 35 - State School Facilities Fund.
3. Measure B: June 2006 - \$435M. School Facilities improvement Bond.
4. Measure J: June 2012 - \$475M. School Facilities improvement Bond.
5. Measure Y: November 2020 - \$735M. School Facilities Improvement Bond.

Current Measure Y Spending Plan

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 generate 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 Measure Y Spending Plan

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% per 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

	June 2020 Approved Spending Plan	Current - April 2021 Approved Spending Plan
Site Specific Modernizations and New Construction		
Coliseum College Preparatory Academy - Site Expansion	\$35,500,000	\$35,500,000
Claremont MS - Multi Purpose Annex	\$18,000,000	\$18,000,000
Elmhurst United MS - Site Modernization	\$10,000,000	\$10,000,000
Garfield ES - Site Renovation/Replacement	\$56,700,000	\$56,700,000
Hillcrest ES - New Kitchen	\$1,700,000	\$1,700,000
Laurel Child Dev. Center - Site Renovations/Replacement	\$ 11,500,000	\$15,000,000
Marcus Foster ELC - Site Specific Projects	\$15,000,000	\$15,000,000
McClymonds HS - Site Renovation/Replacement	\$65,000,000	\$65,000,000
Melrose Leadership Academy/Maxwell Park ES - Site Expansion	\$49,500,000	\$49,500,000
Roosevelt MS - Site Renovation/Replacement	\$70,600,000	\$70,600,000
Piedmont ES - New Kitchen	\$2,000,000	\$2,000,000
Skyline HS - Various Site-Specific Projects	\$10,000,000	\$10,000,000
Subtotal	\$345,500,000	\$349,000,000
District-Wide Capital Projects		
Administration and Governance Center	\$50,000,000	\$50,000,000
Access and Quality Improvements	\$10,000,000	\$10,000,000
District-Wide Initiatives	\$200,000,000	\$200,000,000
Subtotal	\$260,000,000	\$ 260,000,000
Bond Program Contingency	\$73,500,000	\$70,000,000
Bond Program Coordination	\$56,000,000	\$56,000,000
TOTAL	\$735,000,000	\$735,000,000

Current Measure Y Projected Project Shortfall

- Revised budgets focus 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 the 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.

Large Site Project Considerations

School Name (Historical Campus)	Unduplicated Pupil	Type of Project	Seismic Needs	Facility Condition Grade Span Grading	Facilities Condition Index	Quartile	School Aged Students in Boundary	Enrollment Demand
Garfield ES	98.2%	Modernization	High	1st - Elementary	0.82	4	650	43%
Melrose Leadership Academy (Maxwell Campus)	55.8%	Modernization	Medium	2nd- Elementary (K-8)	.81	4	N/A	156%
Melrose Leadership Academy (Sherman Campus)	55.8%	Modernization	Low	30th- Elementary (K-8)	.32	2	N/A	156%
McClymonds HS	92.5%	Modernization	High	1st- High School	.73	4	838	31%
Roosevelt MS	96.5%	Modernization	High	1st- Middle School	.66	4	795	69%
Coliseum College Prep Academy (Havenscourt)	97.4%	Expansion	High	2nd- High School (6-12)	.59	4	1,105	155%

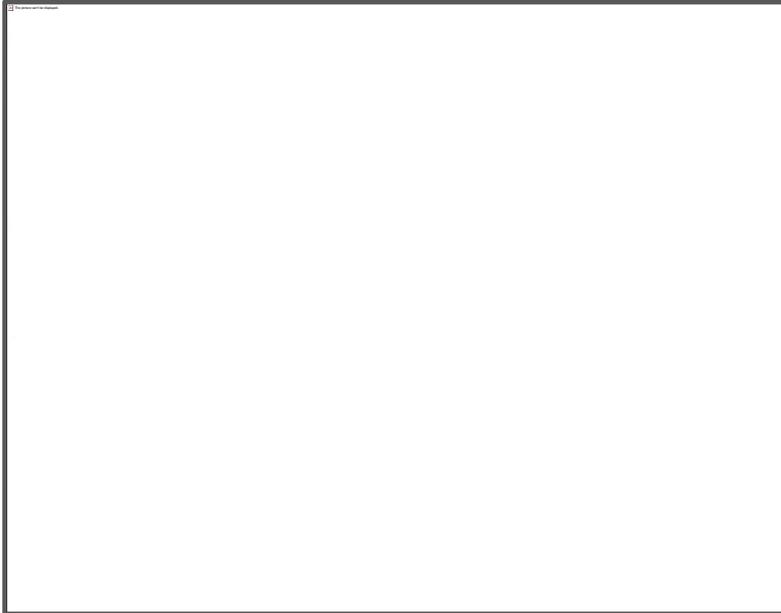
Current Measure Y Projected Project Shortfall

- 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 - Current Anticipated Project Needs

	From	To	Total Requests	Comments
Coliseum College Preparatory Academy: Site Expansion	\$35,500,000	\$55,000,000	\$19,500,000	To Meet District Educational Plan & Design Standards
McClymonds HS: Site Renovation or Replacement	\$65,000,000	\$91,250,000	\$26,250,000	To Meet District Educational Plan & Design Standards
Roosevelt MS: Site Renovation or Replacement	\$70,600,000	\$90,550,000	\$19,950,000	To Provide All Building Systems Scopes Based on Design
			\$65,700,000	

Demographics and Enrollment: COLISEUM COLLEGE PREP ACADEMY



Notes:

1. Map shows attendance area for CCPA/Greenleaf/Life.
2. Lists only the top three feeder schools from SY 2021-22 to SY 2022-23.

District: 6

Feeder Schools: Lockwood STEAM Academy, Bridges Academy, Highland Community

Current, SY 2022-23:

- Demand Rate = 155%
- Live in the Neighborhood: 1,105 students
- Enrollment: 700 students
 - Increased over the past five years
 - 75% Students live in the neighborhood
 - 21% Students live outside the neighborhood
 - 4% Students live outside Oakland/Other

Projected Enrollment, SY 2023-24: 778 students

Current Measure Y Spending Plan

PROJECT PLANNING INFORMATION: COLISEUM COLLEGE PREP ACADEMY MAY 2023

The expansion of CCPA consists of hazardous material abatement, seismic improvements, roof replacement, life safety, electrical upgrades, educational adequacy, minor Auditorium improvements, site enhancements, interim housing and miscellaneous interior & exterior improvements

Planning Data

Facilities Conditions Ranking: 88 (1=best condition)
Seismic Needs: High
Anticipated Future Design: 954 Students
Capital Investments to Date: \$22.85 M
Measures B, J, & Y, Funds 25, & 35 - expenditures to date as of 3/30/2023

Project Team

Architect:	Shaw Kawasaki
General Contractor:	TBD
Project Manager:	Wil Newby
Project Engineer:	Samuel Smith

Approved Budget: \$35.5M
Proposed Budget: \$55M

Proposed Project Scope

Priority 1 - Life Safety and Accessibility

- Hazardous Material Abatement
- Structural Seismic Improvements
- Life Safety – fire sprinkler modifications

Priority 2 - Building Systems and Classroom Enlargements

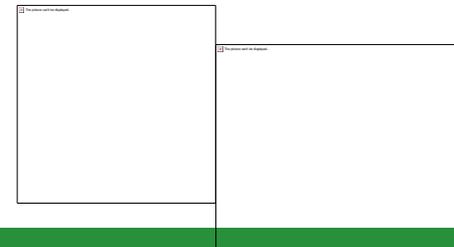
- Ceiling upgrades – classrooms and offices
- HVAC Improvements – Auditorium
- Additional Electrical Upgrades – corridors, etc.
- Life Safety – fire alarm voice evacuation
- Building Exterior – paint exterior, reseal windows and doors, etc.
- Right-Sizing Classrooms
- Roof Replacement
- HVAC Upgrades not inclusive of the Auditorium
- Electrical Upgrades
- PA / Speaker Communications
- Auditorium – replace stage curtains, lighting, and rigging only

Priority 3 - Modernizations to non-classroom areas or buildings

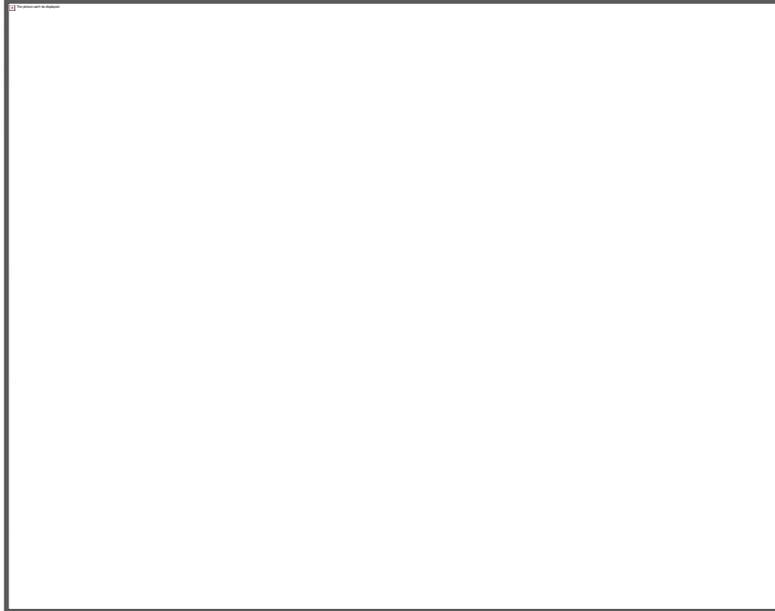
- Site Improvements
- Interim Housing

Recommendations

1. **Fund the projects proposed budget via amended Measure Y spending plan.**
2. **Advance the project consistent with the proposed scope and budget.**



Demographics and Enrollment: GARFIELDES



District: 2

Feeder Schools: Lockwood STEAM Academy,
Markham ES

Current, SY 2022-23:

- Demand Rate = 35%
- Live in the Neighborhood: 650 students
- Enrollment: 498 students
 - Declined over the past five years
 - 50% Students live in the neighborhood
 - 48% Students live outside the neighborhood
 - 2% Students live outside Oakland/Other

Projected Enrollment, SY 2023-24: 472 students

Note: Lists only the top two feeder schools from SY 2021-22 to SY 2022-23.

Current Measure Y Spending Plan

PROJECT PLANNING INFORMATION: GARFIELD ES APRIL 2023

Focus on the seismic, safety, and accessibility needs of Garfield with an emphasis on preparing the building for a future major project.

Planning Data

Facilities Conditions Rating: 103 (1=best condition)
Seismic Needs: High
Anticipated Future Design: TBD
Capital Investments to Date: \$325k
Measures B, J, & Y, Funds 25, & 35 - expenditures to date as of 3/30/2023

Project Team

Architect:	TBD
General Contractor:	TBD
Project Manager:	John Esposito
Project Engineer:	TBD

Approved Budget: \$56.7M
Proposed Budget: \$56.7M

Proposed Project Scope

Priority 1 - Life Safety and Accessibility

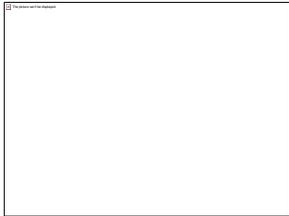
- Seismic & Accessibility Upgrades
- Fire Life Safety
- Building Systems
- Campus Safety
 - Related improvements from these scope impacts to the facility

Additional project scope to be defined through a planning effort within the remaining allocated budget, after Priority 1.

- Fund planning for a future project in a future bond.

Recommendations

1. ***Fund the projects proposed budget via proposed amended Measure Y spending plan.***
2. ***Advance the project consistent with proposed scope and budget***



Demographics and Enrollment: **McCLYMONDS** **HS**



District: 3

Feeder Schools: West Oakland MS, Westlake MS

Current, SY 2022-23:

- Demand Rate = 31%
- Live in the Neighborhood: 838 students
- Enrollment: 281 students
 - Declined over the past five years
 - 47% Students live in the neighborhood
 - 41% Students live outside the neighborhood
 - 12% Students live outside Oakland/Other

Projected Enrollment, SY 2023-24: 259 students

Note: Lists only the top three feeder schools from SY 2021-22 to SY 2022-23.

Current Measure Y Spending Plan

PROJECT PLANNING INFORMATION: **McCLYMONDS HS** MAY 2023

The proposed modernization of McClymonds HS consists of environmental remediation – hazardous material, vapor mitigation, complete plumbing replacement, HVAC and electrical upgrades, improved campus layout, learning and support space improvements, athletic and site improvements.

Planning Data

Facilities Conditions Ranking: 100 (1= best condition)
Seismic Needs: High
Anticipated Future Design: 650 Students
Capital Investments to Date: \$9M
Measures B, J, & Y, Funds 25, & 35 - expenditures to date as of 3/30/2023

Project Team

Architect:	Perkins Eastman
General Contractor:	HKIT Architects / Alten Construction
Project Manager:	Nicole Wells
Project Engineer:	Christina Stone

Approved Budget: \$65M
Proposed Budget: \$91.25M

Proposed Project Scope

Campus Modernization

Priority 1 - Life Safety and Accessibility

- Hazardous Material Abatement
- Complete Plumbing Replacement
- HVAC & Electrical upgrades
- Vapor mitigation solution

Priority 2 - Building Systems and Classroom Enlargement

- Improved campus layout
- Updated classrooms
- Updated pathway labs

Priority 3 - Modernizations to non-classroom areas or buildings

- Replace football bleachers
- New football field scoreboard
- Refresh and add lighting to outdoor basketball courts
- Refresh and add lighting to outdoor tennis courts
- Update plaza of peace
- Update site boundary fencing and site entry systems
- Updated auditorium
- Updated Cafeteria
- Updated gym locker rooms, weight, room dance classrooms, basketball bleachers, coaches offices

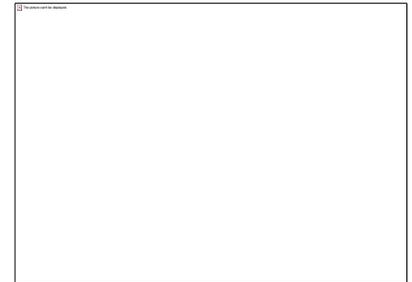
Proposed Project Scope Cont...

Priority 3

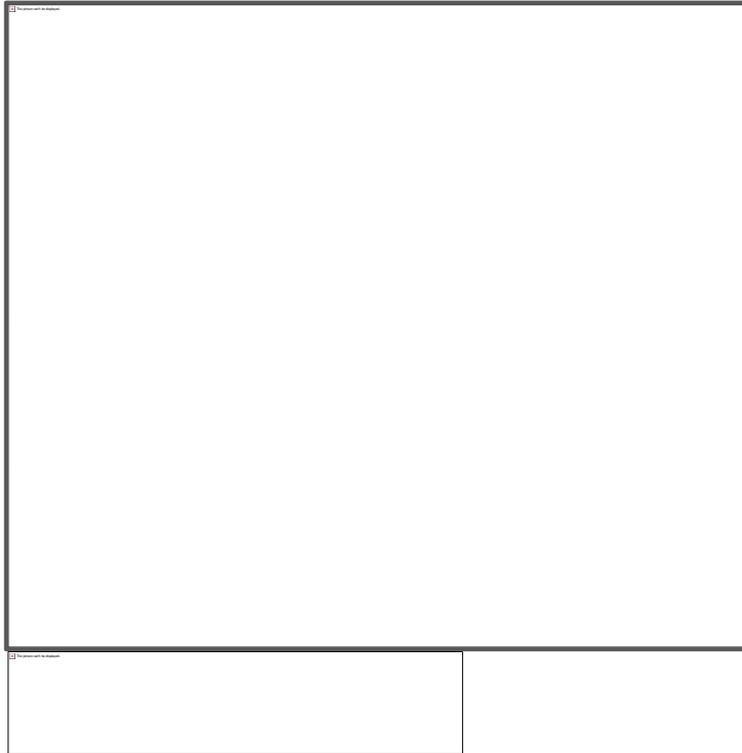
- Demolish annex building
- Relocate parking to previously occupied space.
- Redesign center of campus, landscape, green space.

Recommendations

1. **Fund the projects proposed budget via proposed amended Measure Y spending plan.**
2. **Advance the project consistent with proposed scope and budget.**



Demographics and Enrollment: MELROSE LEADERSHIP ACADEMY / MAXWELL PARK ES



District: 6

Feeder Schools: None, District Wide Boundary Based on Unique Program

Current, SY 2022-23:

- Demand Rate = 156%
- Enrollment: 656 students
 - Increased over the past five years

Projected Enrollment, SY 2023-24: 722 students

Current Measure Y Spending Plan

PROJECT PLANNING INFORMATION: MELROSE LEADERSHIP ACADEMY / MAXWELL PARK ES MAY 2023

The modernization of Melrose Leadership Academy / Maxwell Park ES consists of seismic and accessibility upgrades, HVAC and electrical upgrades, portable replacements, educational adequacy improvements, along with evaluating dedicated TK-K and Middle School Spaces.

Planning Data

Facilities Conditions Ranking:

Maxwell Park ES - **102** (1= best condition)

Sherman ES - **34** (1= best condition)

Seismic Needs: **Medium**

Anticipated Future Design: **725 Students**

Capital Investments to Date: **\$1.4M**

Measures B, J, & Y, Funds 25, & 35 -
expenditures to date as of 3/30/2023

Project Team

Architect:	HKIT Architects
General Contractor:	TBD
Project Manager:	Victor Manansala
Project Engineer:	Imani Nycosi

Approved Budget: **\$49.5M**

Proposed Budget: **\$36.5M**

Proposed Project Scope

Priority 1 - Life Safety and Accessibility

- Seismic & Accessibility Upgrades
- Fire Life Safety
- Building Systems
- Campus Safety

Priority 2 - Building Systems and Classroom Enlargement

Scenario Options, individual not compounding

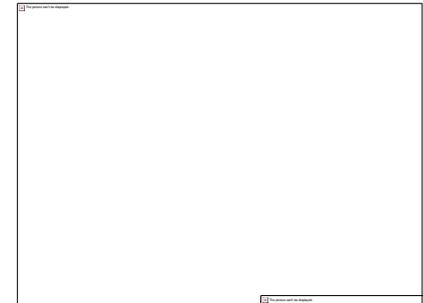
- Right size classrooms
- Sustainability improvements
- Improve building systems (electrical, mechanical, plumbing)

Priority 3 - Modernizations to non-classroom areas or buildings

- Exterior Space / Play Yards
- Evaluating Dedicated Middle School Spaces
- Gymnasium

Recommendations

1. ***Fund the projects proposed budget via amended Measure Y spending plan.***
2. ***Advance the project scope consistent with the proposed scope and budget.***



Demographics and Enrollment: ROOSEVELT MS



District: 2

Feeder Schools: Garfield ES, Franklin ES, Bella Vista ES

Current, SY 2022-23:

- Demand Rate = 69%
- Live in the Neighborhood: 795 students
- Enrollment: 593 students
 - Increased over the past five years
 - 55% Students live in the neighborhood
 - 39% Students live outside the neighborhood
 - 6% Students live outside Oakland/Other

Projected Enrollment, SY 2023-24: 589 students

Note: Lists only the top three feeder schools from SY 2021-22 to SY 2022-23.

Current Measure Y Spending Plan

PROJECT PLANNING INFORMATION: ROOSEVELT MS APRIL 2023

Modernize the existing Roosevelt Middle School with focus on environmental remediation, site improvements, seismic improvements, right-sizing of classroom, mechanical and electrical improvements, etc.

Planning Data

Facilities Conditions Rating: 94 (1=best condition)

Seismic Needs: High

Anticipated Future Design: 600 Students

Capital Investments to Date: \$3.4M

Measures B, J, & Y, Funds 25, & 35 - expenditures to date as of 3/30/2023

Project Team

Architect:	HKIT Architects
General Contractor:	TBD
Project Manager:	Mary Ledezma
Project Engineer:	Imelda Meza

Approved Budget: \$70.6M

Proposed Budget: \$90.55M

Proposed Project Scope

Building A - Priority 1

- Structural Seismic Improvements
- Fire Sprinkler, Fire & Intrusion upgrades
- Hazardous Material Abatement
- Renovate Main Entry to optimize security

Building A - Priority 2

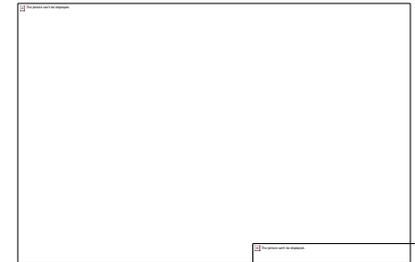
- Flooring finishes – classrooms
- Interim Housing (Portables)
- Science Modular Building for 6th graders
- Lighting upgrades - classrooms
- Paint interior spaces
- Stairway upgrades
- Clock / Speaker Upgrades
- HVAC Upgrades (except Auditorium)
- Electrical Upgrades
- Right-Sizing Classrooms
- Roof Replacement & New Downspouts

Priority 3 - Modernizations to non-classroom areas or building

- Garden & Bioretention improvements

Recommendations

1. **Fund the projects proposed budget via proposed amended Measure Y spending plan.**
2. **Advance the project consistent with proposed scope and budget**



Current Measure Y Spending Plan

PROJECT PLANNING SOURCES AND NOTES

1. Current Enrollment Source: California Longitudinal Pupil Achievement Data System (CALPADS), Census Day (the first Wednesday in October).
2. Anticipated Future Design Enrollment are an approximation and subject to change.
3. Fund the projects proposed budget via amended Measure Y spending plan.
4. Advance the project consistent with the proposed scope and budget.
5. Only the top three feeder schools from SY 2021-22 to SY 2022-23 are listed for CCPA, McClymonds HS, and Garfield ES. Melrose Leadership Academy / Maxwell Park ES has a district wide boundary and is based on Unique Program.

Recommendation

The recommendation of the Facilities Department is to reallocate funding for the following projects:

- Accessibility and quality,
- Defer Hillcrest ES / Piedmont until the next bond measure,
- Reduce Melrose Leadership Academy scope to address Maxwell Campus only.
- Reduce Nutritional Services District-Wide Investment (\$10M), District-wide initiatives projects (\$9M), and Project Contingency from District-wide Initiatives (\$20M) - \$39M Total

These funds will support scope needs at:

- Coliseum College Prep. Academy,
- McClymonds HS, and
- Roosevelt MS.

	Description	Recommended Budget Adjustment
A	Re-allocate Accessibility & Quality budget to Unfunded Projects	(\$10,000,000)
B	Include Hillcrest ES and Piedmont ES into Nutrition Services Districtwide Cafeteria and Kitchen Improvements	(\$3,700,000)
C	Reduce MLA Budget to Priority 1 at Maxwell Campus Only	(\$13,000,000)
D	District Wide Initiatives with Contingency	(\$39,000,000)
	SUBTOTAL	(\$65,700,000)
E	Increase Budgets: CCPA: \$19,500,000 McClymonds HS: \$26,250,000 Roosevelt MS: \$19,950,000	\$65,700,000
	TOTAL	\$0

Recommendation - District-wide Initiatives

The recommendation of the Facilities Department is to reallocate funding for the following projects:

Name	April 2021 Approved	Recommended Adjustment	
Facilities and Technology Improvements	\$132,697,920	(\$19,506,920)	\$113,191,000
Health, Safety, and Security Improvements	\$43,297,080	(\$7,903,080)	\$35,394,000
Energy Efficiency, Resiliency, and Sustainability Improvements	\$17,005,000	(\$4,590,000)	\$12,415,000
Improved Utilization - Unused or Underused Assets	\$7,000,000	(\$7,000,000)	\$0
TOTAL Withdrawn from District-wide Initiatives to fund CCPA, McClymonds, & Roosevelt	\$200,000,000	(\$39,000,000)	\$161,000,000

Recommendation - District-wide Initiatives

The recommendation of the Facilities Department is to reallocate funding for the following projects:

Name	Description	April 2021 Approved	Recommended Adjustment
Facilities and Technology Improvements			
Portable Removal and Replacements	Funding to support the design, DSA approval, removal, installation, and construction of new school site portables	\$3,000,000	(\$1,300,000)
Grounds	Shade structures at named elementary school site in support of outdoor learning and recreational activities at Joaquin Miller	\$200,000	(\$200,000)
Board Directed Initiative Allowance	This is an allowance to address any OUSD Board directed initiatives / projects	\$7,000,000	(\$3,125,000)
Contingency	Contingency	\$14,881,920	(\$14,881,920)
TOTAL Withdrawn from District-wide Initiatives to fund CCPA, McClymonds, & Roosevelt			\$19,506,920

Recommendation - District-wide Initiatives

The recommendation of the Facilities Department is to reallocate funding for the following projects:

Name	Description	April 2021 Approved	Recommended Adjustment
Health, Safety, and Security Improvements			
Nutritional Services	Provide additional dry, refrigeration, and freezer storage facilities.	\$20,500,000	(\$10,000,000)
Middle School Exterior & Interior Security Enhancements	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
High School Exterior & Interior Security Enhancements	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
Playground & Playsurface Replacement	Updating outdated play structures and play surfaces per Master Plan	\$0	\$2,000,000
Fire / Intrusion Alarm Replacements	Updating Fire Alarm and Intrusion Alarm Systems to current district standards	\$0	\$3,000,000
Contingency	Contingency	\$4,654,080	(\$4,653,080)
TOTAL Withdrawn from District-wide Initiates to fund CCPA, McClymonds, & Roosevelt			\$7,903,080

Recommendation - District-wide Initiatives

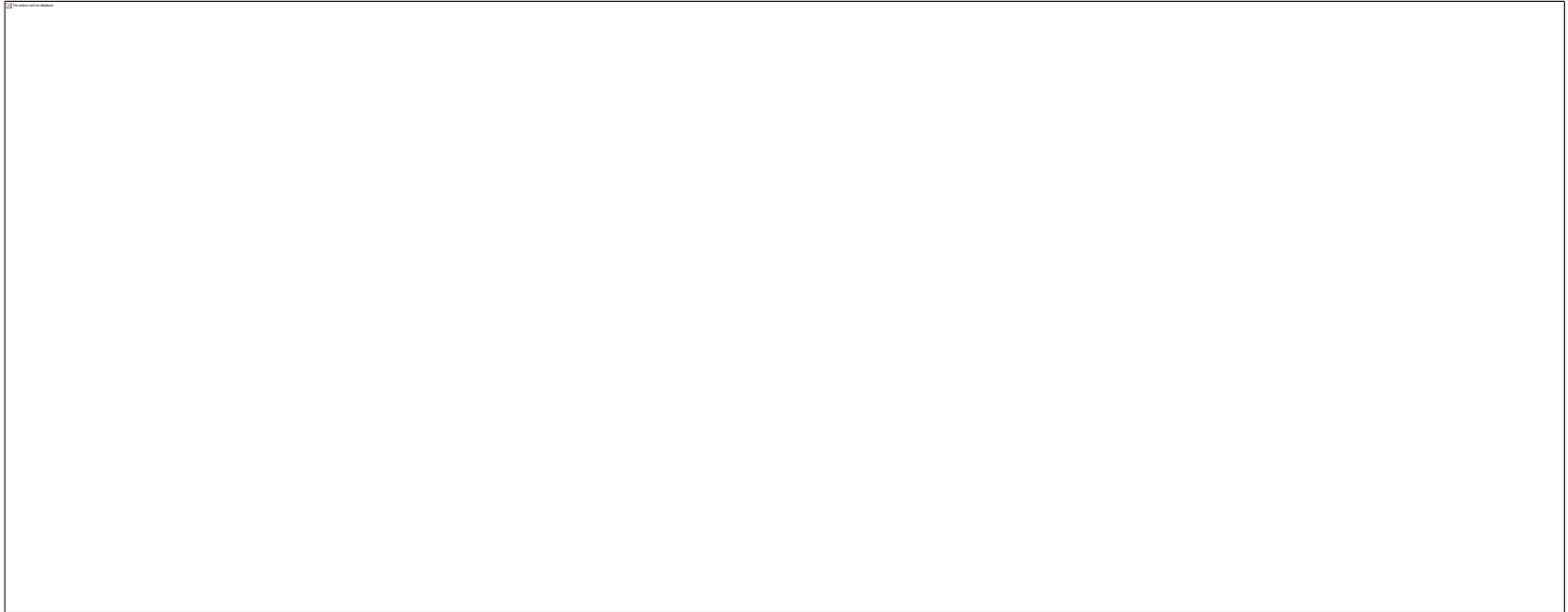
The recommendation of the Facilities Department is to reallocate funding for the following projects:

Name	Description	April 2021 Approved	Recommended Adjustment
Energy Efficiency, Resiliency, and Sustainability Improvements			
Solar PPA Project - funding for IOR and PM	Defund 3.5 MW of rooftop and canopy PV at Elmhurst MS, Kings Estate Campus, Prescott Campus, Reach Academy Campus, Redwood Heights ES	\$375,000	(\$375,000)
Solar PPA Project - funding for IOR and PM	Fund canopy PV at Horace Mann	\$0	\$75,000
Battery Storage	Oakland High - 400 kW battery storage (Tesla Megapack 2)	\$2,500,000	(\$800,000)
Battery Storage	Oakland Tech/Castlemont - 400 kW battery storage (Tesla Megapack 2)	\$2,500,000	(\$2,000,000)
Solar Readiness Retrofit	Fremont HS & The Center Solar Readiness Retrofit	\$500,000	(\$500,000)
Contingency	Contingency	\$990,000	(\$990,000)
TOTAL Withdrawn from District-wide Initiates to fund CCPA, McClymonds, & Roosevelt			\$4,590,000

Recommended Measure Y Spending Plan

Recommended	April 2021 Approved Budget	June 2023 Proposed Budget	Budget Change	COMMENTS
Site Specific Modernizations and New Construction				
Coliseum College Preparatory Academy - Site Expansion	\$35,500,000	\$55,000,000	\$19,500,000	Based on current enrollment projections and to meet standards and Ed. Specs. See Project Planning Information
Claremont MS - Multi Purpose Annex	\$18,000,000	\$18,000,000	\$ -	No Change
Elmhurst United MS - Site Modernization	\$10,000,000	\$10,000,000	\$ -	No Change
Garfield ES - Site Renovation or Replacement	\$56,700,000	\$56,700,000	\$ -	No Budget Update- Design Not Started
Hillcrest ES - New Kitchen	\$1,700,000	\$0	(\$1,700,000)	Covered in School Kitchen and Cafeteria Improvements.
Laurel Child Dev. Center - Site Renovations or Replacement	\$15,000,000	\$15,000,000	\$ -	No Change
Marcus Foster ELC - Site Specific Projects	\$15,000,000	\$15,000,000	\$ -	No Change
McClymonds HS - Site Renovation or Replacement	\$65,000,000	\$91,250,000	\$26,250,000	Based on current enrollment projections and to meet standards and Ed. Specs. See Project Planning Information
Melrose Leadership Academy/Maxwell Park ES - Site Expansion	\$49,500,000	\$36,500,000	(\$13,000,000)	Reduce scope to Maxwell campus only based on site assessment. Based on current enrollment projections and to meet standards and Ed. Specs. See Project Planning Information
Roosevelt MS - Site Renovation	\$70,600,000	\$90,550,000	\$19,950,000	Based on current enrollment projections and to meet standards and Ed. Specs. See Project Planning Information
Piedmont ES - New Kitchen	\$2,000,000	\$0	(\$2,000,000)	Covered in School Kitchen and Cafeteria Improvements.
Skyline HS - Various Site-Specific Projects	\$10,000,000	\$10,000,000	\$ -	No Change
Subtotal	\$349,000,000	\$398,000,000	\$49,000,000	
District-Wide Capital Projects				
Administration and Governance Center	\$50,000,000	\$50,000,000	\$ -	Central Administration Center at Cole
Access and Quality Improvements	\$10,000,000	\$0	(\$10,000,000)	
District-Wide Initiatives	\$200,000,000	\$161,000,000	(\$39,000,000)	Reduction of NS Warehouse needs, contingency, and district wide projects.
Subtotal	\$ 260,000,000	\$211,000,000	(\$49,000,000)	
Bond Program Contingency	\$70,000,000	\$70,000,000	\$ -	
Bond Program Coordination	\$56,000,000	\$56,000,000	\$ -	
TOTAL	\$735,000,000	\$735,000,000	\$0	

District -Wide Initiatives - Facilities and Technology



District -Wide Initiatives - Facilities and Technology

Pilot Project IAQ assessments, recommendations, and design	Laurel ES	Pilot project to assess, make recommendations, and develop implementable improvements for consideration throughout the District	\$500,000	\$0	\$500,000
Pilot Project IAQ assessments, recommendations, and design	Manzanita ES	Pilot project to assess, make recommendations, and develop implementable improvements for consideration throughout the District	\$500,000	\$0	\$500,000
Pilot Project IAQ assessments, recommendations, and design	West Oakland Middle School	Pilot project to assess, make recommendations, and develop implementable improvements for consideration throughout the District	\$500,000	\$0	\$500,000
ADA Ramp	Kaiser	Furnish and install an ADA ramp to address significant grade changes in support of a new academic program at Kaiser	\$2,600,000	\$0	\$2,600,000
Trust for Public Land Project	Bridges Academy	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.	\$100,000	\$0	\$100,000
Window Wall System Replacement	Lowell	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.	\$6,075,000	\$0	\$6,075,000
Tech Services - IT Improvements	All	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	This is an allowance to address any OUSD Board directed initiatives / projects	\$7,000,000	-\$3,125,000	\$3,875,000
Student Drop Off Enhancements	East Oakland Pride	Widen the driveway entrance and gate to ensure a safe multiple lane drop off	\$75,000	\$0	\$75,000
Relocate IT	TBD	Improvements at a site TBD to accommodate the IT Department	\$350,000	\$0	\$350,000
Deferred Maintenance Projects - not funded by the 5 yr Deferred Maintenance Budget				\$0	\$0
B&G Roofing & Plumbing - Repair and Replacement Projects	Multiple Sites	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	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	-\$14,881,920	\$0
Subtotal			\$132,697,920	-\$19,506,920	\$113,191,000

District -Wide Initiatives - Health, Safety and Security



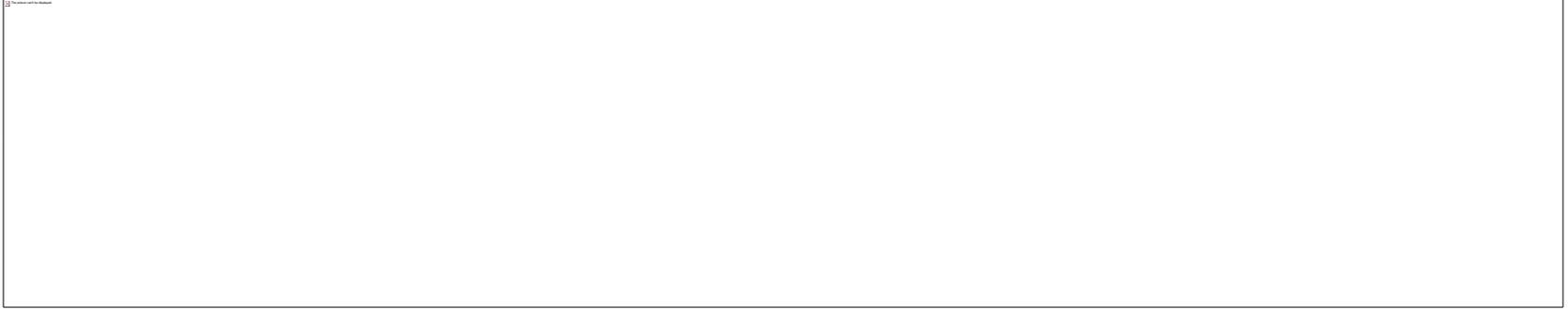
District-Wide Initiatives - Energy Efficiency, Resiliency, and Sustainability



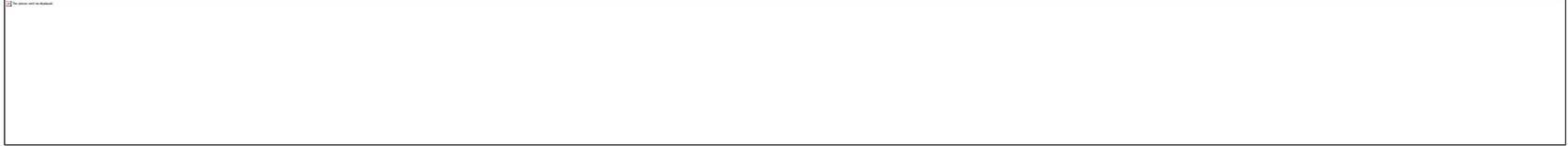
District-Wide Initiatives - Energy Efficiency, Resiliency, and Sustainability



District -Wide Initiatives - Energy Efficiency, Resiliency and Sustainability



District -Wide Initiatives - Improved Utilization



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: 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 - 3

1. Bring to the Facilities Committee 3-16-23 Discussion
2. Present to CBOC 4-10-23 Discussion
3. Present to Facilities Committee for discussion, direction, & deliberation on 4-20-23
4. Bring back to Facilities Committee for Approval 5-18-23
5. Bring to BOE in May/ June to review, discuss, & approve
 - Budget adjustments vs. scope reductions
 - Review, comment and approve Program Wide Initiatives Budget

THANK YOU

Any Questions?

Additionally, for more information, please reach out:

Kenya Chatman
Executive Director
Kenya.chatman@ousd.org



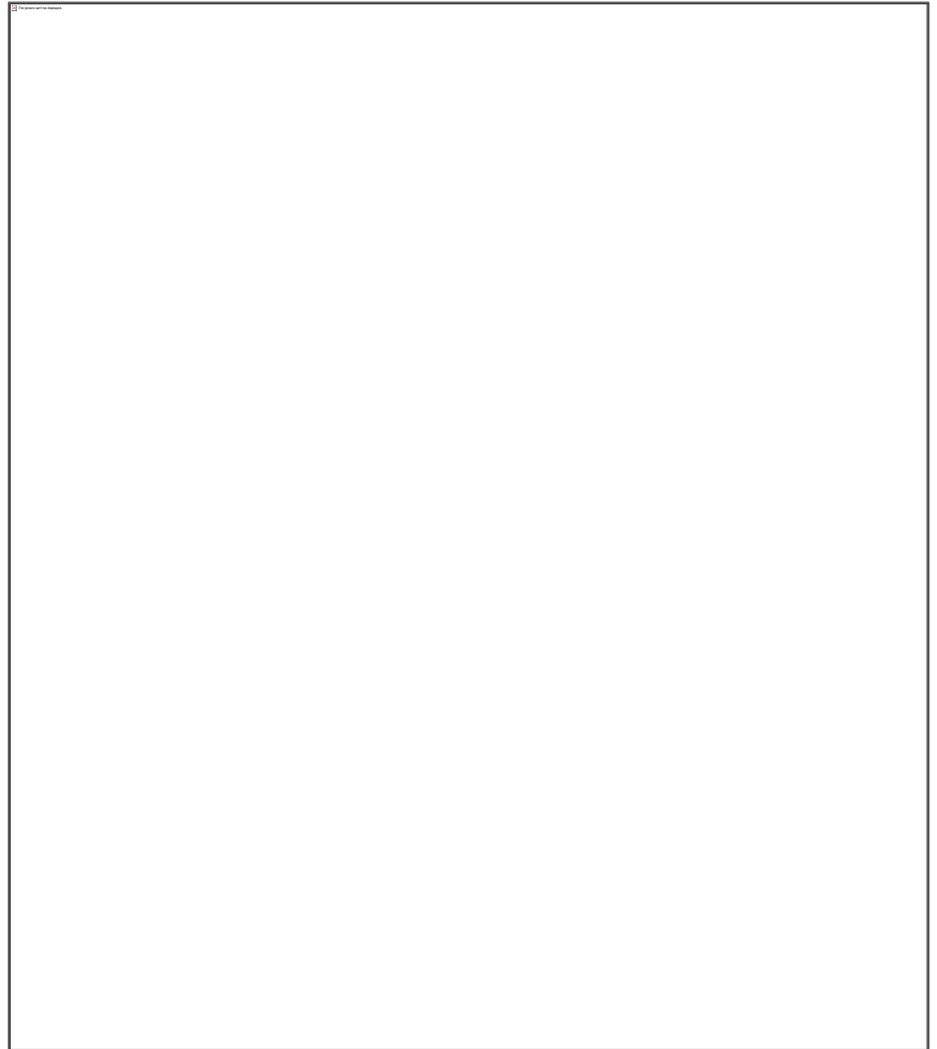
APPENDIX



OUSD Facilities Master Plan Projects

“A school-district’s Facilities Master Plan describes a set of building and renovation projects that a district will pursue to support its educational mission. A complete Facilities Master Plan will provide a road map for school district investment and enable a district to secure independent funding through a general obligation bond.”

[Facilities Master Plan](#)





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