: i am OUSD

Board of Education Retreat
Saturday, January 20th

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Today's Outcomes

Rational Outcomes:

➢ To ensure a common understanding of the Blueprint for Quality Schools Timeline and Recommendations for the spring and beyond.

➢ To gain knowledge about facilities master plan, funding and projects to inform a discussion about a Bond decision.

➢ To provide direction about initiating polling for a potential Bond and to understand the implications of the Bond timing decision.

Relational Outcomes:

➢ To reflect on our team dynamics and how they can influence decisions and discussions in our work this spring.

Overview of Facilities Division,
Data & Bond Program

Current State of our Facilities

OUSD Facility Inventory

Facility Portfolio

Facility Type	Campuses	School Orgs	Permanent Buildings		Temporary Buildings		All Buildings		
			Count	Total Sq Ft	Count	Total Sq Ft	Count	Total Sq Ft	Ave Age
Elementary School Campus	50	61	134	2,347,289	264	217,911	398	2,565,200	53
Middle School Campus	13	16	60	1,174,972	69	63,370	129	1,238,342	62
High School Campus	8	9	58	1,288,252	75	73,524	133	1,361,776	58
Charter Campus (in OUSD-owned bldgs)	12	12	16	399,963	70	73,331	86	473,294	62
Alternative Education School	5	5	12	88,302	29	31,230	41	119,532	48
Adult School	1	1		10,650	-	-	1	10,650	47
Administration/Support Facilities	4	14		340,215	8	950	22	341,165	74
Vacant facilities and land	7	5	-	-	-	42,426	5	42,426	58
Total	100	103	300	5,649,643	515	502,742	815	6,152,385	58

Summary of Aging Facilities:

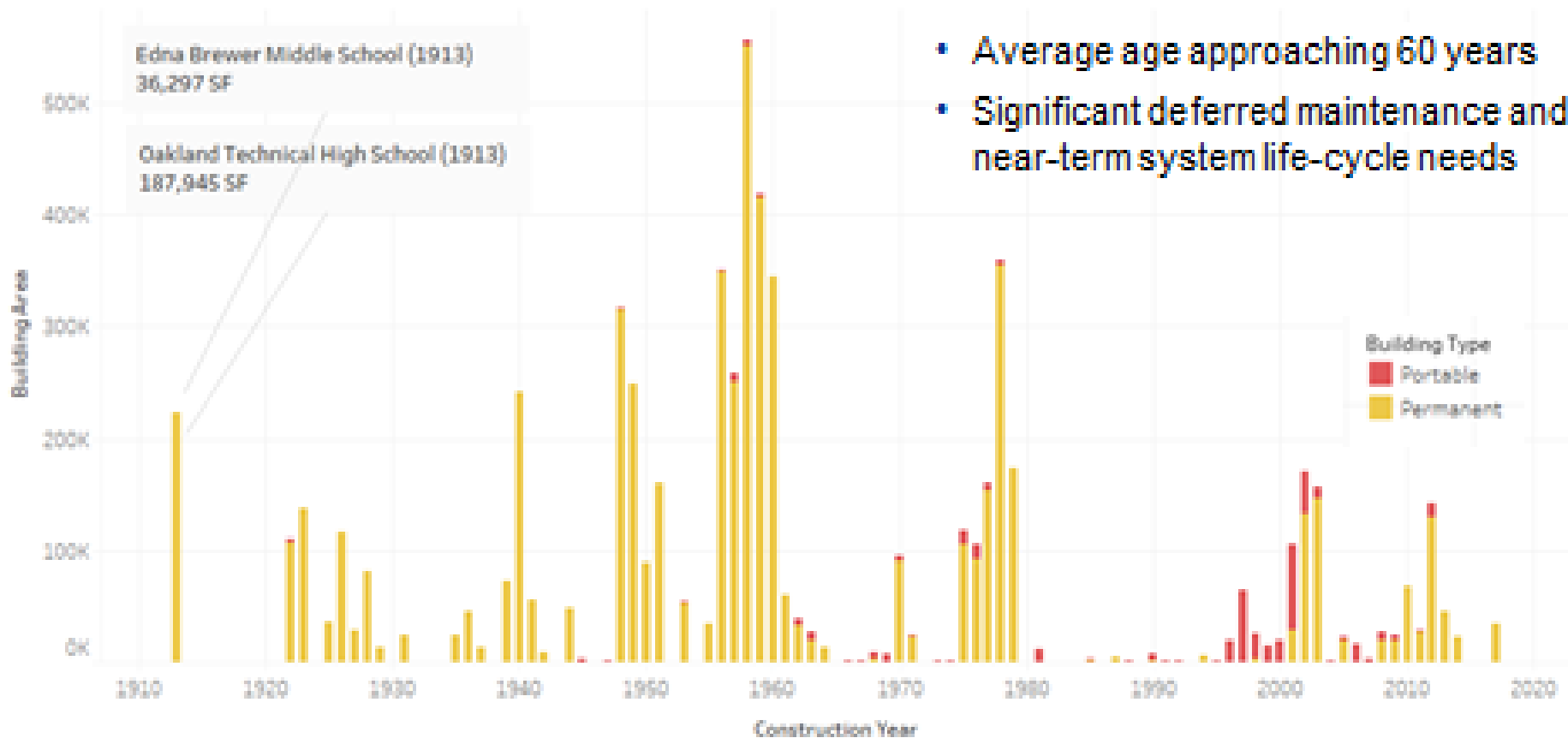Campus (site) vs School (organization)

Average age 58 years

131 of the 515 portables are older than 30 years old, ~50 on underutilized campuses

Note: While not included in assessment, the facility master plan considers unoccupied facilities and pre-K centers as assets for facility options.

Oakland USD Facility Inventory Age

Building Original Construction, Permanant and Portable

Edna Brewer Middle School (1913)
36,297 SF

Oakland Technical High School (1913)
187,945 SF

- Average age approaching 60 years
- Significant deferred maintenance and near-term system life-cycle needs

Building Type
- Portable
- Permanent

Building Area

Construction Year
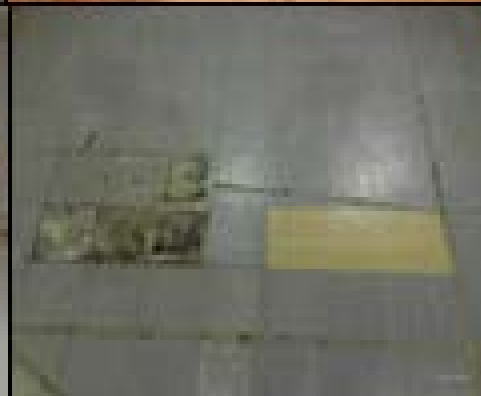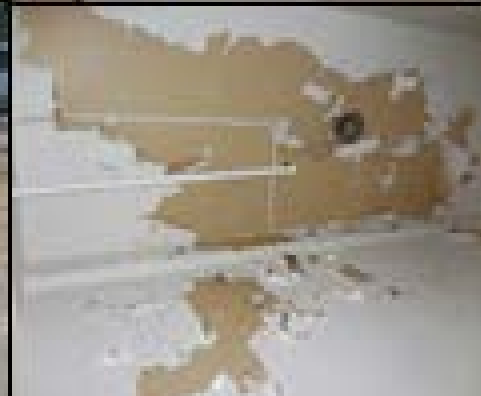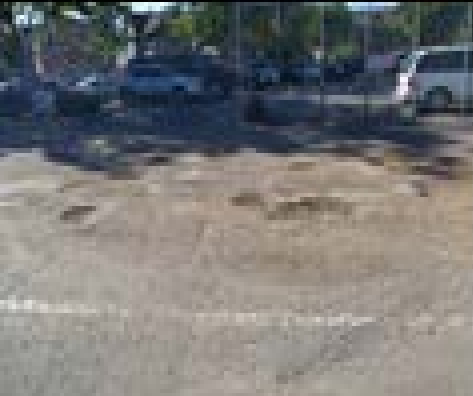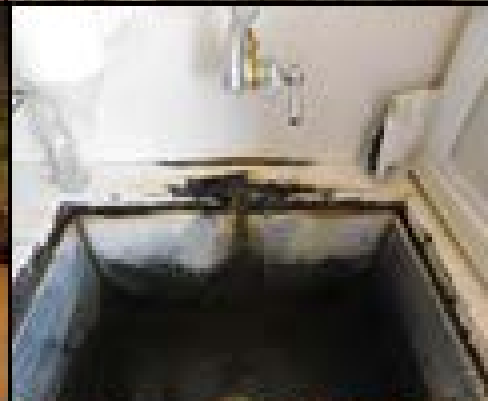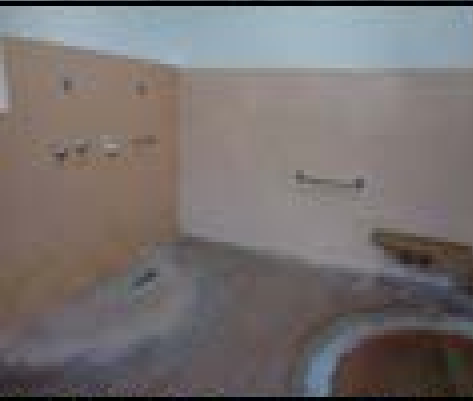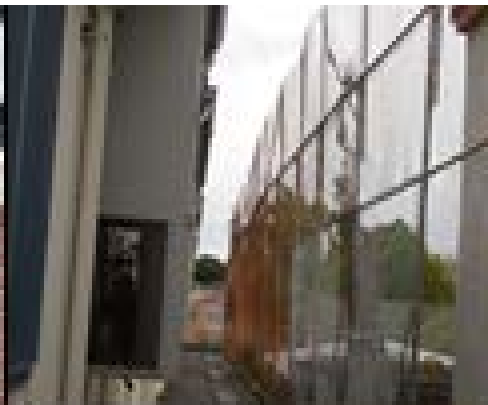
OUSD Facility Needs

- Facility Need Categories:
  - **5-Year Repairs** (what's broken)
  - **Seismic** (what are structural retrofits)
  - **Educational Adequacy** (what's missing)
  - ADA (accessibility deficiencies, pending)
  - **Program/Technology** (program enhancements defined during planning and engagement, pending)

- $2+ Billion in Facility Needs vs. ~$450 additional bond capacity

$2+ Billion Facility Needs (Existing Bldgs)

937

396

696
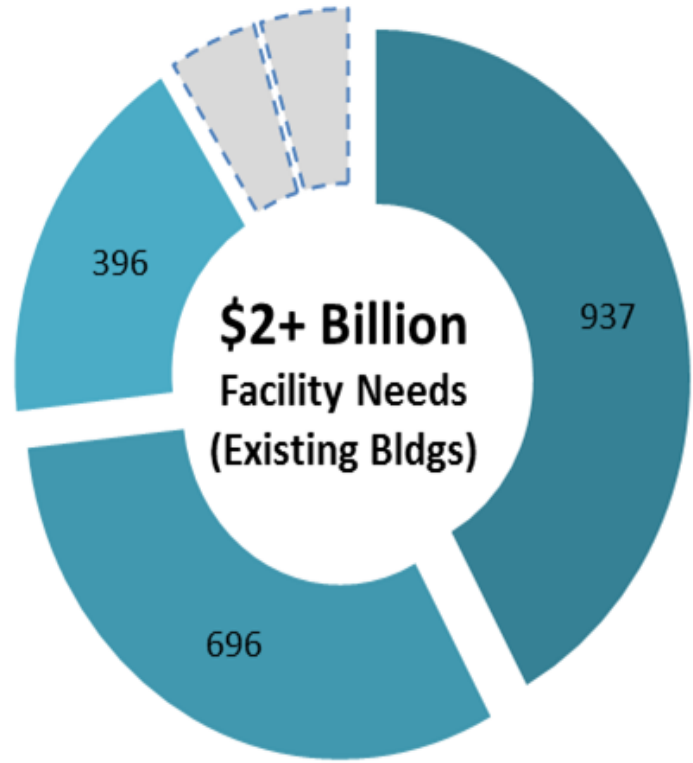
- 5-Year Repairs
- Seismic
- Educational Adequacy
- ADA (pending)
- Program and Technology

Bond Program and Investments

Facilities Capital Program Funding

Fund 21 Measure J and B $540m budget (Measure J $475m, B $65m)

$207,207,193.93 annual budget
$179m cash and $180m not drawn down

$ 4,777,575.00   (Salary/Benefits)
$ 29,067.00   (Supplies)
$ 13,840,482.17   (Contracts/Architects/License)
$124,976,704.00 (Construction Cost)

Fund 25 Developer Fees $24,351,640.41 (estimated annual revenue)

$16mil beginning fund balance from previous years
(Estimated annual revenue $5-10m for expansion projects)

Fund 35 State Matching Funds $2,976,839.86 fund balance (Applying for State project eligibility)

Fund 40 Grants $1,282,266.69

$752k cash (Breakdown – Donations/City of Oakland/Urban Forestry, etc.)

Facilities Division Funding 17-18 (M&O/Custodial/Facilities)

Routine Restricted Maintenance	**$13,048,405.00** (65% Salary/Benefits & 35% Supplies)
Gardeners	**$1,079,225.66** (99% Salary/Benefits & 1% Supplies)
Custodial	**$17,077,693.52** (Indirect School Site Budgets)
Deferred Maintenance	**0** (not included in the LCAP funding process)
Solar, Energy Efficiency CSI Rebates & Other Reimbursements	**0** (est $12m total, $3.14m swept from Facilities Projects)

Facilities 2018 Project List

OUSD Summer 2018 Project List

#	Proj #	Site	Scope	Fund
1	15103	Brookfield ES	Intensive Support Site (ISS) Ph1	Measure J
2	07130	Burbank CDC	Fire Alarm & Intrusion	Measure B
3	15104	Castlemont HS	Intensive Support Site (ISS) Ph1	Measure J
4	07093	Centro Infantil CDC	Fire Alarm & Intrusion	Measure B
5	15127	Claremont MS	New Kitchen & Cafeteria	Measure J
6	13143	Edna Brewer MS	Fire Alarm & Intrusion	Measure B
7	15124	ELC\Dewey	Education Learning Center	Measure J and B
8	17111	Emerson Field	Softball Field	Measure J
9	13133	Foster ES	Central Kitchen - "The Center"	Measure J and B
10	13158	Fremont HS	Addition and Renovation	Measure J and B
11	15139	Frick MS	Intensive Support Site (ISS) Ph2	Measure J and B
12	15105	Frick MS	Play Field	Measure J
13	13134	Glenview ES	New Building Increment 3	Measure J
14	13175	Hillcrest ES	Finishing Kitchen	Measure J
15	07120	Joaquin Miller ES	Fire Alarm & Intrusion	Measure B
16	13177	Kaiser ES	Finishing Kitchen	Measure J
17	13179	Laurel ES	Finishing Kitchen	Measure J
18	17128	Lincoln	Water Intrusion	Measure J
19	13124	Madison Park	Expansion Phase 2 – HS Bldg	Measure J and B
20	07102	Manzanita CDC	Fire Alarm & Intrusion	Measure B
21	15111	Martin Luther King, JR	Fire Alarm & Intrusion	Measure B
22	15106	McClymonds HS	Intensive Support Site (ISS) Ph2	Measure J
23	13198	Oakland Tech HS	Health Clinic	Measure J
24	13184	Piedmont ES	Finishing Kitchen	Measure J
25	13125	Sankofa/Washington	MPR Seismic & Kitchen	Measure J
26	17112	Sankofa	Play Matting Phase 2	Measure J
27	15137	Westlake MS	Playfield	Measure J

Current Bond Projects

- 1-pager Project Summary Reports (please refer to attachments)
  - Link: Facilities Project List, 1-pagers

- Measure J & B Spending Plan (please refer to attachments)
  - Link: Bond Spending Plan

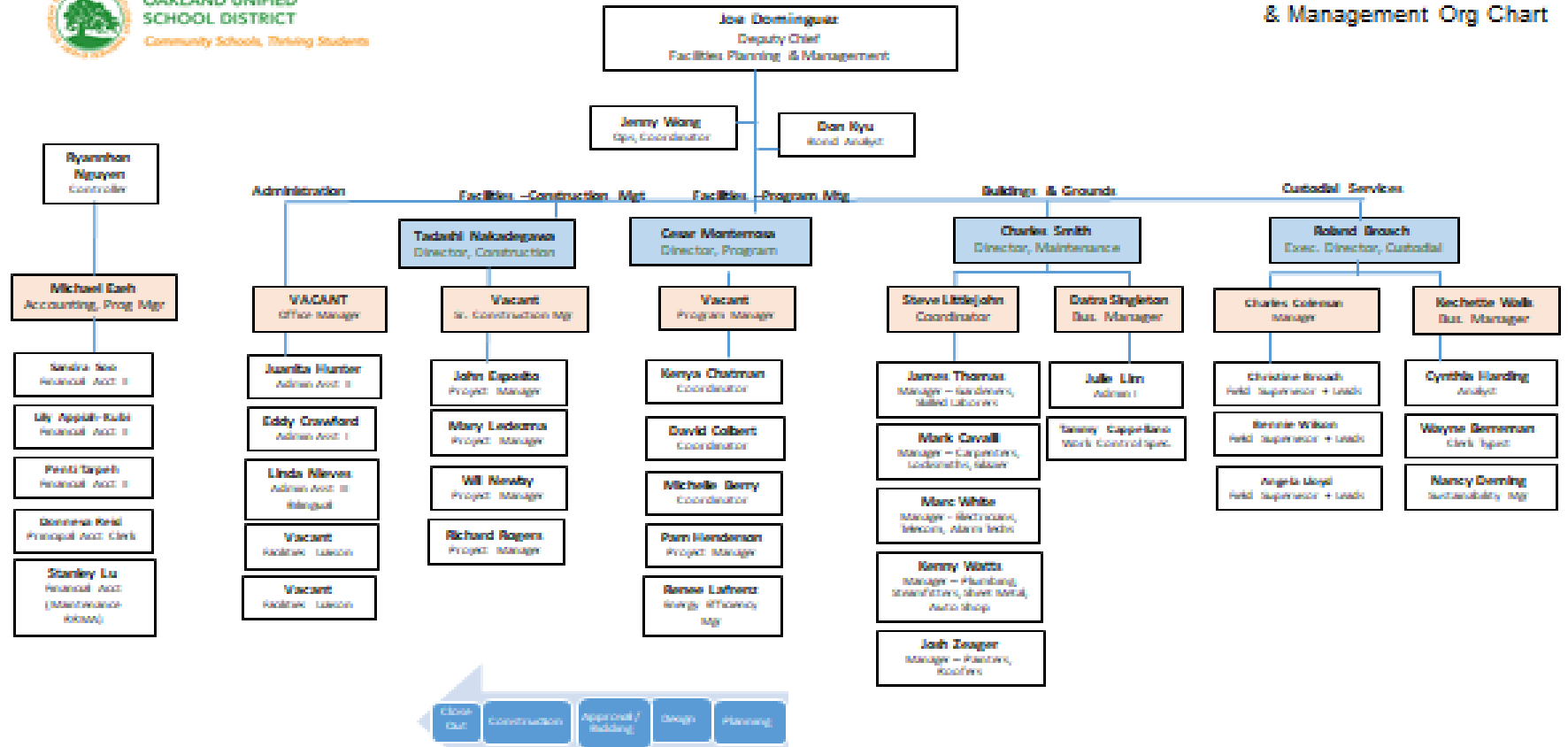Successful Bond Projects:

"Building Safe Play Structures!"

Current Organizational Structure

Facilities Division Org Chart

2017-18 Division of Facilities Planning & Management Org Chart

Facilities Dept Org Chart

Division of Facilities Planning & Management Org Chart

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Accounting

Ryannhon Nguyen
Controller

Michael Ezeh
Accounting Mgr (A)

Sandra Soo
Financial Accountant II

Pentil Tarpeh
Financial Accountant II

Lily Appiah-Kubi
Financial Accountant II

Donneva Reid
Principal Account Clerk

Joe Dominguez
Deputy Chief
Facilities Planning & Management

Jenny Wong
Division Ops. Coordinator

Dan Kyu
Bond Analyst

Administration Office

Operations Manager
VACANT

Linda Nelven
Admin Asst. III

Eddy Crawford
Admin Asst. I

VACANT
Facilities Liaison

VACANT
Facilities Liaison

Facilities – Construction Mgt

Tadashi Nakagawa
Director

Sr. Construction Mgr
VACANT

John Esposito
Project Manager

Will Newby
Project Manager

Richard Rodgers
Project Manager

Mary Ledezma
Project Manager

Cordoba, CBMG, Baines Group Inc.
Consultant

Cumming, Hatin
Consultant

Facilities – Program Mgt

Cesar Monteroso
Director

Sr. Program Mgr
VACANT

David Colbert
Coordinator

Pam Anderson
Project Manager

Michelle Berry
Coordinator

Renee Lafrenz
Energy Efficiency

Kenya Chatman
Coordinator

Program Engineer
VACANT

Program Engineer
VACANT

Program Engineer
VACANT

Close Out | Construction | Approval/ Bidding | Design | Planning

Accounting team, all staff = Fund 21 Bond Fund

Projections and Cash Flow

Bond Program Spending Plan

Measure J & B Spending Plan (please refer to attachment) <u>Bond Spending Plan</u>

- A proposed revised bond program spending plan is being finalized to make sure that major projects have necessary budgets to complete. (Central Kitchen/ ELC/Contingency Fund)

- Current cost estimates of various projects are in excess of $30m for current unforeseen budget commitments based on current market conditions.

- Smaller project budgets will be reduced or delayed to a future bond measure.

Cash Flow Analysis (please refer to attachment) <u>Facilities Cash Flow</u>

- Adjustment to cash flow projection is being finalized to make sure that we have necessary cash on hand for scheduled project payments and property claims.

Sample Construction Burn Rate

1 Year $10mil project
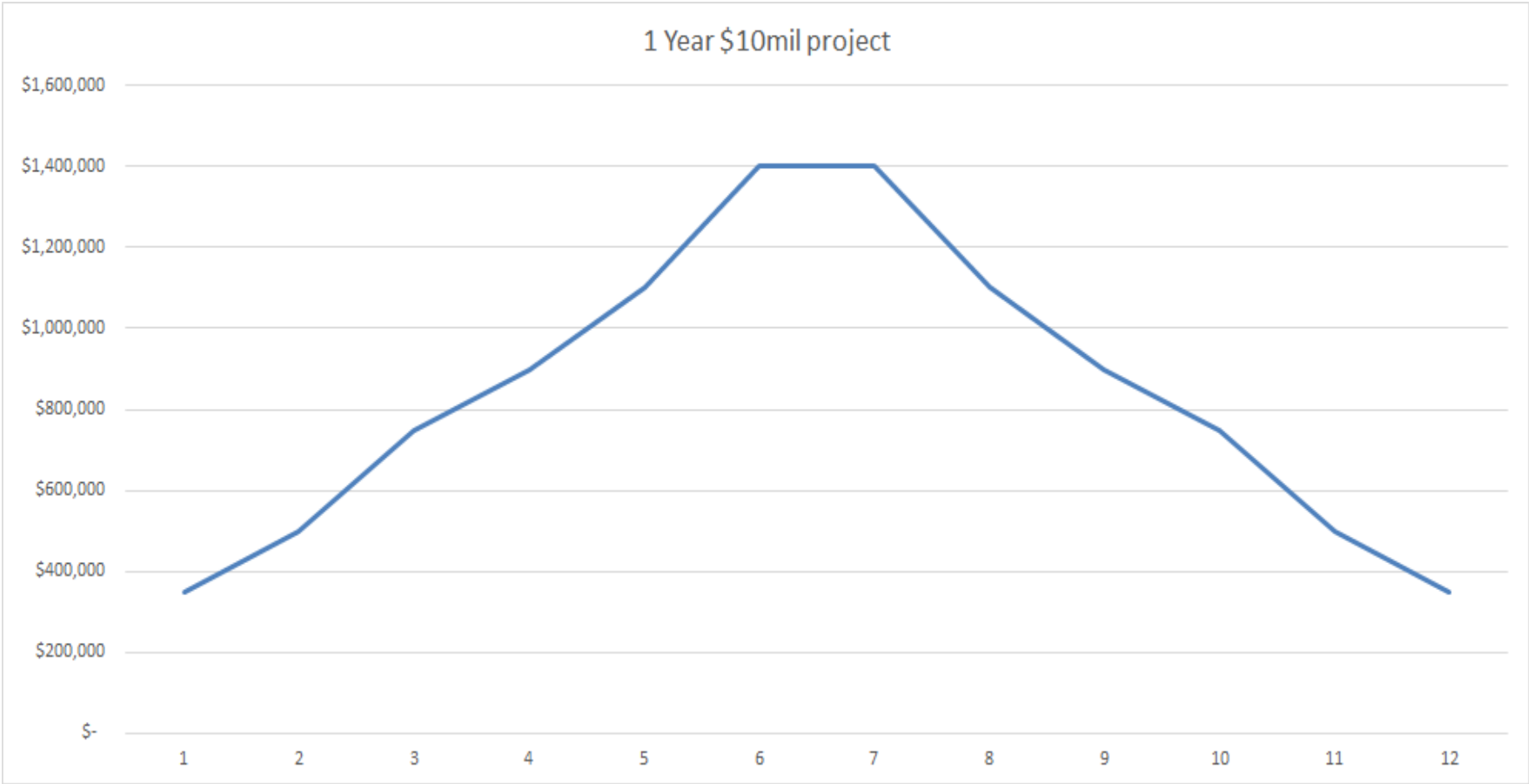
Bond Information & Strategic Planning

What is a school bond?

A **school bond election** is a bond issue used by a public school district, typically to finance a building project or other capital project.

Capital needs: Building new facilities and or new schools in alignment with educational framework. Improving and modernizing existing facilities. This includes for improvements to school security/safety and classrooms, building new schools, athletic fields, 21st century media centers, etc. Bonds are for capital projects not routine or ongoing maintenance.

Educational Adequacy | A Facilities Perspective

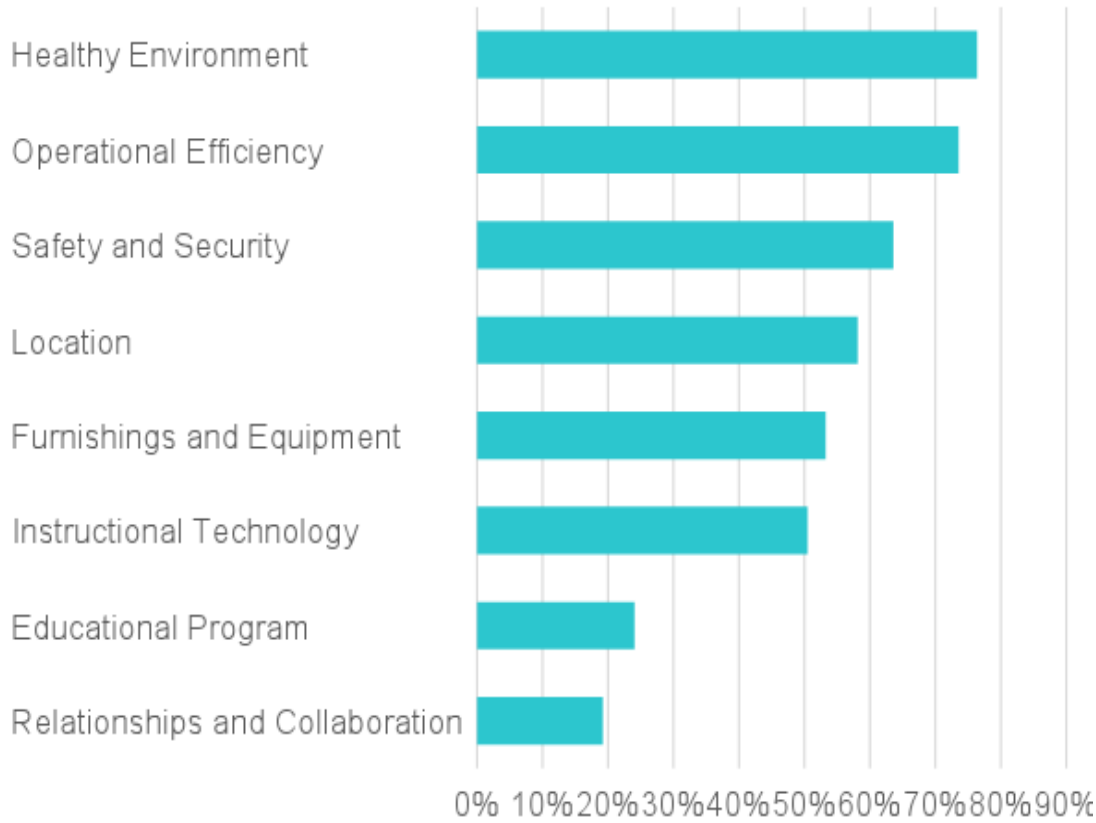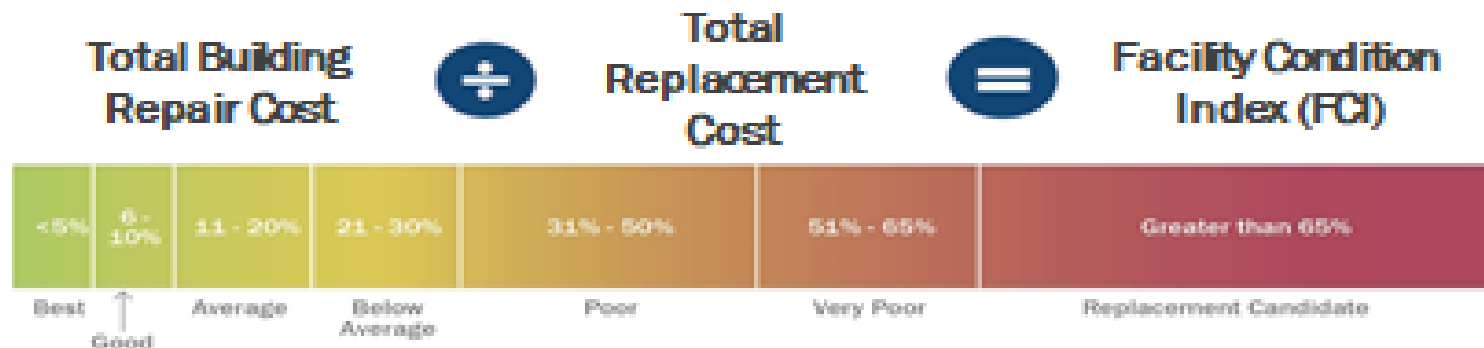| What the educational adequacy assessment does	What the educational adequacy assessment <u>does not do</u>
• The educational adequacy assessment provides a measure of how well the physical spaces and layout of a school supports student needs and modern teaching and learning practices.	• The educational adequacy assessment does not measure the effectiveness of instruction at the school.

BLUEPRINT
FOR
QUALITY SCHOOLS

Educational Adequacy

- Results show OUSD has prioritized healthy, safe environments with a limited budget.
- Lowest scores pertain to 21st Century learning spaces and design.
- The challenge and opportunity is to determine a pathway forward that brings as many students as possible into modern learning environments with fixed resources.

Educational Adequacy Scores Districtwide

Healthy Environment
Operational Efficiency
Safety and Security
Location
Furnishings and Equipment
Instructional Technology
Educational Program
Relationships and Collaboration

0% 10%20%30%40%50%60%70%80%90%

BLUEPRINT FOR **QUALITY SCHOOLS**

Facility Condition Index

Total Building Repair Cost ÷ **Total Replacement Cost** = **Facility Condition Index (FCI)**

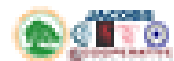| <5%	6 - 10%	11 - 20%	21 - 30%	31% - 50%	51% - 65%	Greater than 65%
Best	Good	Average	Below Average	Poor	Very Poor	Replacement Candidate

$2.0 Billion
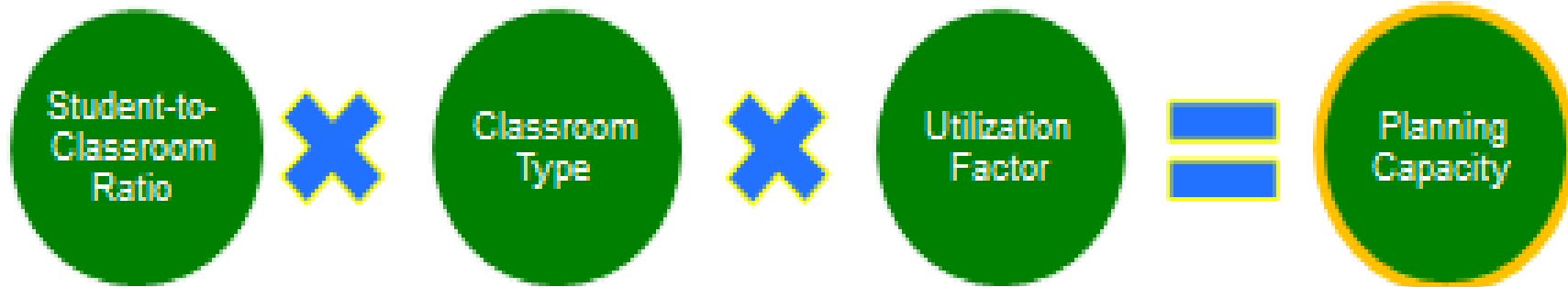Repair, Seismic, and Adequacy Cost

$3.4 Billion
Replacement Cost

60% FCI, 5-Year

$1.3 Billion
Repair and Adequacy Cost (w/o seismic)
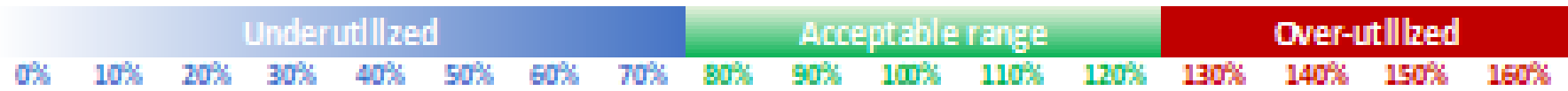
$3.4 Billion
Replacement Cost

38% FCI, 5-Year

School Capacity

Student-to-Classroom Ratio ✕ Classroom Type ✕ Utilization Factor = Planning Capacity

Utilization = Enrollment / Capacity

Under-utilized								Acceptable range					Over-utilized		
0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	110%	120%	130%	140%	150%	160%

Sample building utilization: 60% - 77%

Lower utilization scores show how a building is currently operating and provides a minimum utilization score.

Higher utilization scores show how a building could operate (e.g., if state funding changed to allow it) and provides a maximum utilization score.

Planning for School Bond Ballot Measure

The issue of voting for bonds for school improvement is vital to most school systems. It is a process that requires total community involvement. Children require sound school buildings, just as they need a strong instructional program.

Some major considerations of any bond campaign to consider:

- Community Support & Endorsements
- Bond Committee organization and appointment
- Timelines
- Getting out the vote
- Competing ballot measures
- Public perception

Campaign Questions That Need Answers

- Who supported you the last time you went to the polls?   Why?   Where are these people now?
- How do they feel about the current issue?
- Do you anticipate any problems which may affect the vote, even though they are not related to the issue?
- How can you eliminate or minimize these problems?
- How can you capitalize on the good things the school district is doing?

Bond Decision

Pros & Cons Discussion Protocol

Step 1: Each member write the pros and cons on note cards and post on the wall.

Step 2: Read each card and combine duplicates.

Step 3: Each member asks clarifying questions on each of the pros and cons.

Step 4: Each member gets three dots to indicate what they think are the biggest CONS and three dots to indicate what are the biggest PROs.

Step 5: Each member has time to advocate or raise issues for during an open discussion.

Step 6: Take a vote of the group to get a sense of the room.

Step 7: Decide next steps.

Meeting Review

- **Process Check:** Reflection on outcomes & norms

- **Review Next Steps:** What, who, by when

- **Review Decisions:** Ready to communicate, needs more discussion

Appreciations

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EVERY STUDENT THRIVES!

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APPENDIX

Size of Schools

Executive summary

- Economics of schools learning group was dedicated to providing the below **outcomes: given the deadline that is approaching, this analysis will focus on minimum size of schools**
  - Analysis for minimum size of OUSD schools for elementary, middle, and high schools
  - Analysis for central office restructuring to optimize the management of centrally-provided services to schools

- Recommended number of students per school depends on benchmark used; analysis suggest minimum size of school is the below for ~80% of schools:

Peer benchmark	Elementary	Middle	High
Peers Districts	372	587	480*
OUSD	292	330	318*

It is important to note that, in many cases, small schools were intentional by design for students to benefit from a smaller school environment, and some of these schools have produced sizable student gains; however, in some situations, schools have become unintentionally small due to physical facilities constraints or due to under-enrollment; dollars used in these situations (particularly on facilities and maintenance) could potentially be used more effectively. - ERS
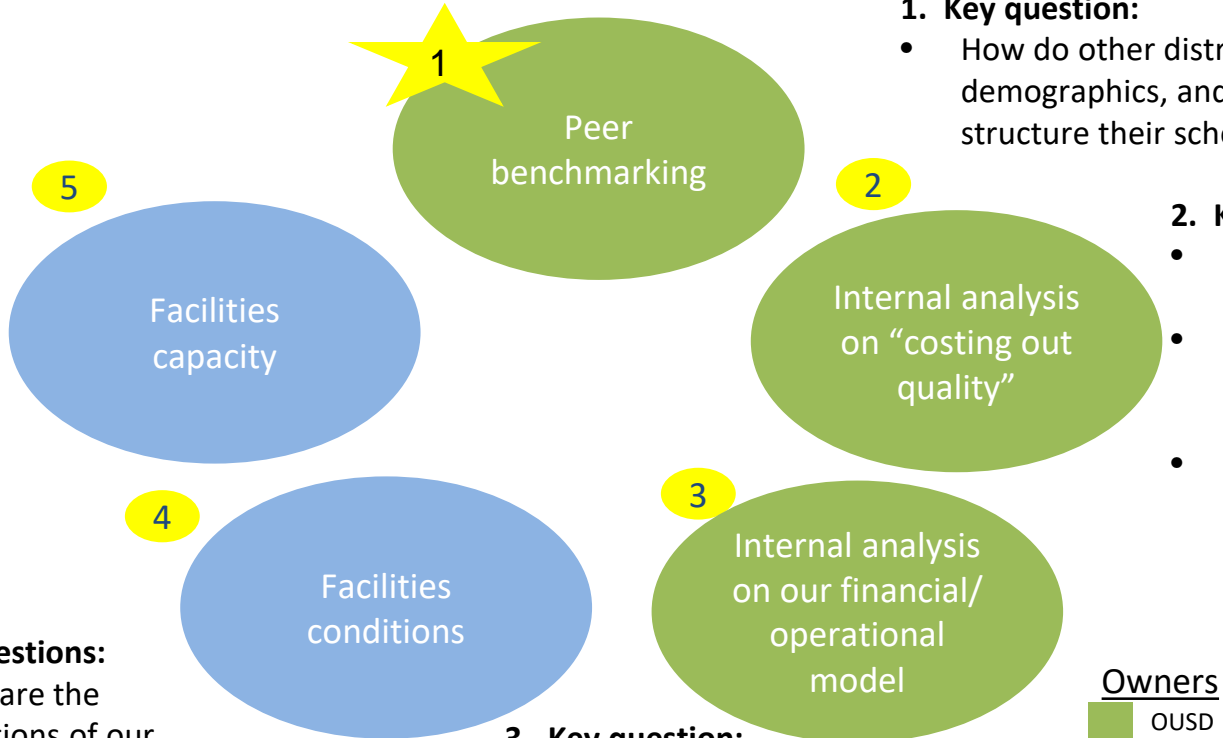
Should not be used, limited sample

Multiple approaches will inform our perspective on the optimal size of schools; we will now focus on #1

5. Key question:
- Which facilities are under or over capacity in terms of utilization?
- Which schools are underenrolled?

1. Key question:
- How do other districts (of similar size, demographics, and other characteristics) structure their school portfolio?

2. Key questions:
- How do we define quality?
- What staffing and other costs does this imply?
- What does this mean for the number of students needed to cover our costs?

1 — Peer benchmarking

5 — Facilities capacity

2 — Internal analysis on "costing out quality"

4 — Facilities conditions

3 — Internal analysis on our financial/operational model

4. Key questions:
- What are the conditions of our buildings?

3. Key question:
- How much $$ can be saved by consolidation?
- Do small schools perform better?

Owners
- OUSD
- Jacobs

Methodology

- Based on data from the 15-16 California Department of Education (DOE), Jacobs has shown that OUSD over indexes on number of schools relative to other large districts in CA; this analysis builds upon the helpful work Jacobs already provided by taking into consideration:

  1) Alternative schools

  2) District level demographics

  3) Performance data by demographics

- This analysis **first defines a set of "peer" districts** based enrollment, charter presence, and various demographic characteristics.

- Then, this analysis provides a recommendation for the minimum size of elementary, middle, and high school level ~***80% of the time based on the frequency distribution of schools of peer districts***

Data Caveats/Limitations

Analysis only apply to traditional elementary and middle schools

o **Excludes alternative schools:** Because OUSD tends to over index on alternative schools relative to other districts our size, this analysis focuses only on traditional schools.

o **Excludes 6-12, K-12 Schools:** Because of sample size limitations, schools that span elementary-high school (Life Academy, CCPA) are also not included in the analysis.

o **Due to low number of traditional high schools for OUSD (n=7), data should not be used to drive decision-making for high schools.**

Performance by subgroup

o According to the 2017 California School Dashboard, which uses identical benchmarks to measure the performance of all California Schools, **OUSD does not perform better than our peers with minority students.**

o No evidence to date suggests that performance by subgroup should be rationale used to discount benchmarking against other districts.

All data used is 2015-2016 California Department of Education data except for graduation rates (2014-2015 California Department of Education data).

[SUGGESTED SAMPLE] Peers are defined as the below

	#Alt schools	Enrollment (district-run schools)	% FRL	%ELL	Race/ethnicity				
					White	Hispanic	AA	Asian	Other
Oakland Unified	8	36976	74.1	31.8	9.7	44.5	25.8	12.8	7.2
Fontana Unified	2	38693	85.3	32.8	4.3	86.6	5.7	1.1	2.3
Garden Grove Unified	3	45220	68.4	39.2	8.4	54	0.6	33.5	3.5
Hayward Unified	2	20864	75.4	31.9	5.6	62.8	10	7.9	13.7
Los Angeles Unified	88	484165	78.7	25.9	10	73.6	8.6	3.7	4.1
Riverside Unified	5	41581	63.8	16.8	23.3	61.4	7	3.4	4.9
Sacramento City Unified	5	40714	70.3	18.4	17.8	39	16.7	16.7	9.8
San Bernardino City Unified	9	50000	89	27.1	6.4	74.1	12.7	1.5	5.3
San Diego Unified	11	106945	61.4	24.7	23	46.8	9	8.4	12.8
San Francisco Unified	8	52343	56.3	27.3	13.9	29.3	9.3	34.1	13.4
Santa Ana Unified	4	51017	89.7	42.1	2.7	93.1	0.3	2.5	1.4
Stockton Unified	5	34751	76.2	28.1	6.5	64.2	10.8	9.2	9.3

Source: California Department of Education, 2015-2016;
Performance dashboards are 2017 Spring data
Only edit above was made for 9 alt. schools for OUSD based on 2017 data

# Using peers suggests that minimum size for 80% of elementary schools is ~372

Frequency Distribution of Size:
OUSD vs. Peer Districts Elementary Schools
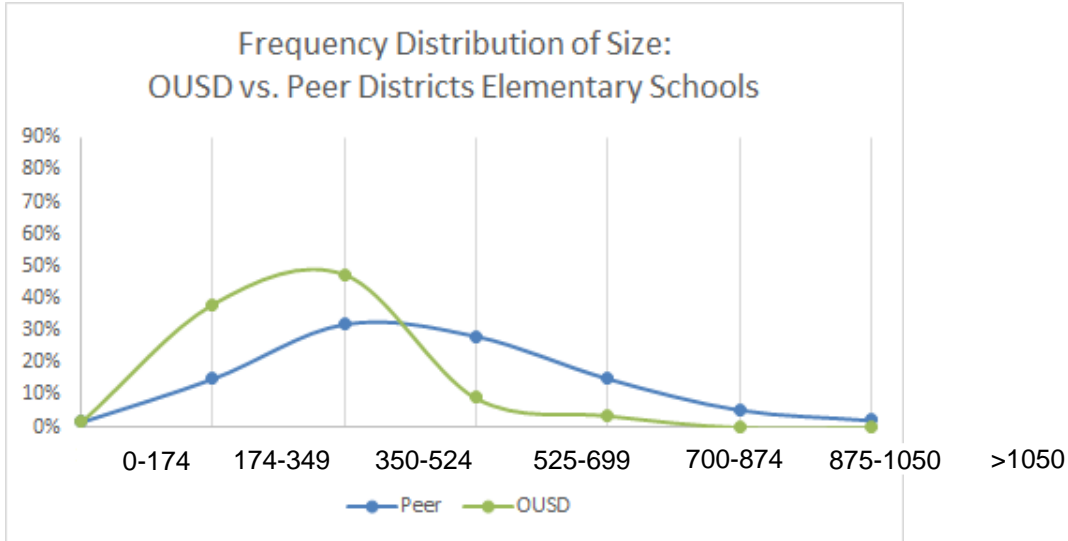
Size of school	Peers	OUSD
0-174	2%	0%
175-349	15%	39%
350-524	32%	48%
525-699	28%	9%
700-874	15%	3%
875-1050	5%	0%
>1050	2%	0%
Sample size (n)	931	54

83% of the time, peers have elementary schools with 350+ students (vs. OUSD 60%)

Percentile rank: 80% of peer districts Peer Elementary schools are >372 Students (recommended).

Using peers suggests that minimum size for 80% of middle schools is ~587

Frequency Distribution of Size: OUSD vs. Peer Districts Middle Schools
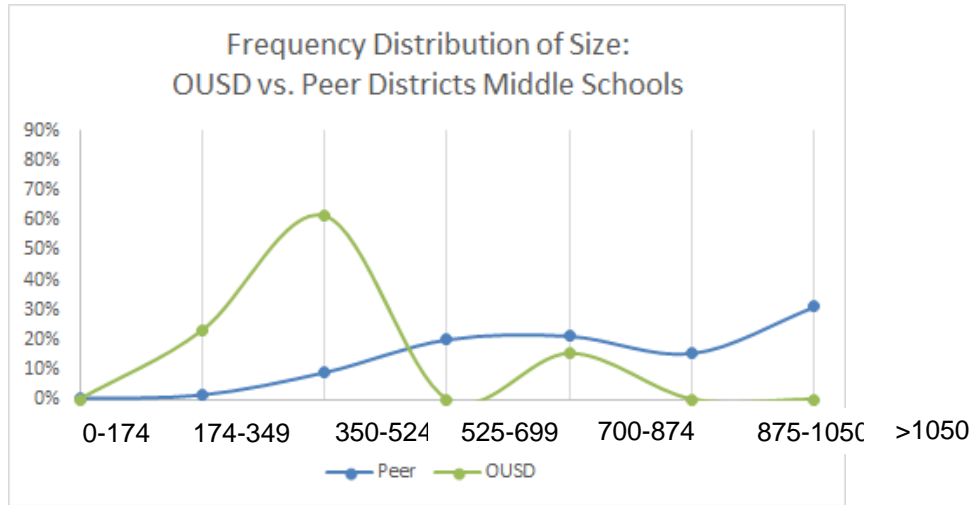
Size of school	Peers	OUSD
0-174	1%	0%
175-349	2%	23%
350-524	9%	62%
525-699	20%	0%
700-874	21%	15%
875-1050	16%	0%
>1050	31%	0%
Sample size (n)	173	13

88% of the time, peers have middle schools with 525+ students (vs. OUSD 15%)

Percentile rank: 80% of Peer Middle schools are >587 Students (recommended).

Thought experiment: this suggests a restructuring of ~20-30 of our schools to reach minimums based on peers

	Elementary	Middle	High
Schools above or at the minimum (A)	27	2	5
Schools below minimum (B)	27	11	2
Total traditional schools (C=A+B)	54	13	7*
80% of total traditional schools (D=80%*C)	44	10	N/A
Number of schools that would need restructuring for 80% of schools to be in line with peers (D-A)	17	8	N/A

Note:
-Only includes traditional elementary and middle schools
-The above is based only on peer benchmarking; peers may or may not have quality community schools; we are concurrently looking into an approach that uses internal data to cost out quality community schools, which may raise the minimum size of schools
-Based off of 15-16 CDE enrollment data; subject to change based on changing enrollment numbers.
*Limited sample size; would not recommend using peer benchmarks to drive decision-making.