

# 2019 Facilities Master Plan:

# Status Update

OUSD  
Friday, September 13, 2019

THINK<sup>MK</sup>



# Agenda

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

# Facilities Master Plan Goals

- **Alignment**

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

- **Transparency**

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

- **Support 2020 Bond**

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

- **Operationalize Asset Management OUSD-wide**

Integrate board resolutions around smart Asset Management (BP 7350 and 6006) into systematic decision making in the District

# Alignment: Guiding Principles



## OUSD CORE VALUES



**1. Students First**

**2. Equity**

**3. Excellence**

**4. Integrity**

**5. Cultural Responsiveness**

**6. Joy**

## FACILITIES MASTER PLAN GUIDING PRINCIPLES

1. Support the City-wide Plan and OUSD's Community of Schools Policy

2. Cultivate Data-Driven Decision Making

3. Pursue Financially Sustainable Facilities

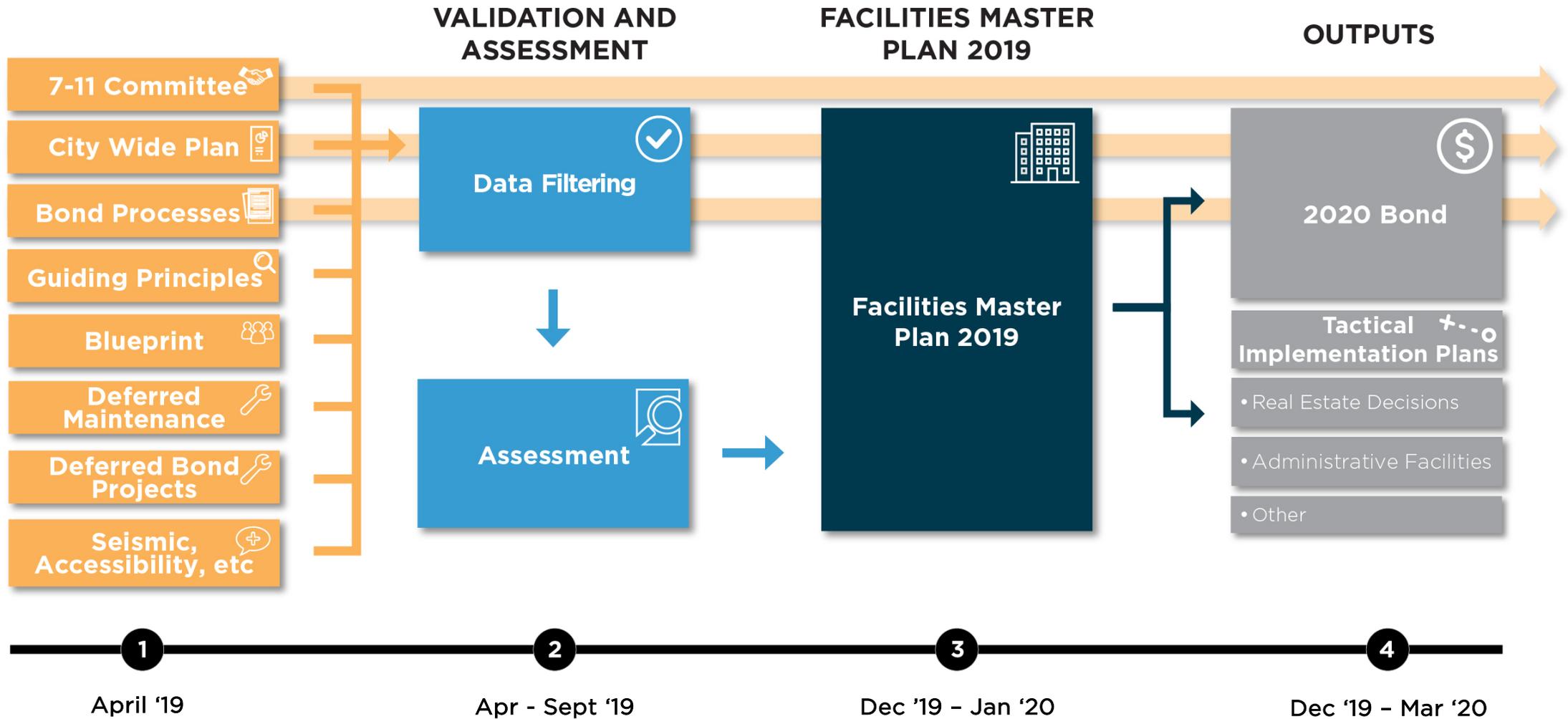
4. Engage OUSD Community

5. Pursue a System-Wide Approach

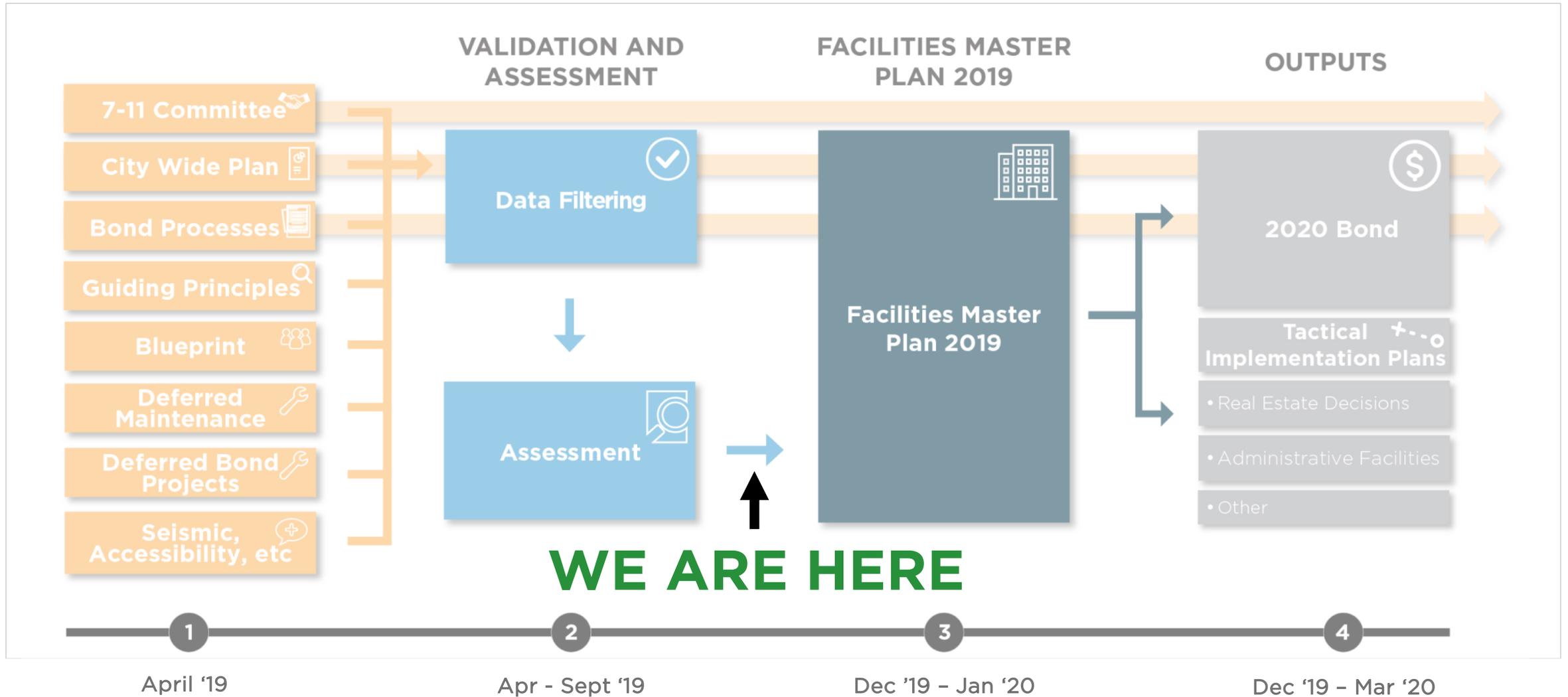
6. Foster Environmental Sustainability

7. Promote Effective Learning Environments

# Facilities Master Plan Process: Overview



# Facilities Master Plan Process: Overview



# Data Validation

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

## Validation Findings

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

Received raw 2018 blueprint data



**WHITTIER ELEMENTARY SCHOOL MODERNIZATION PROJECT**

PROJECT LOCATION:  
6328 EAST 17TH STREET, OAKLAND, CA 94621  
OAKLAND UNIFIED SCHOOL DISTRICT  
ALAMEDA COUNTY

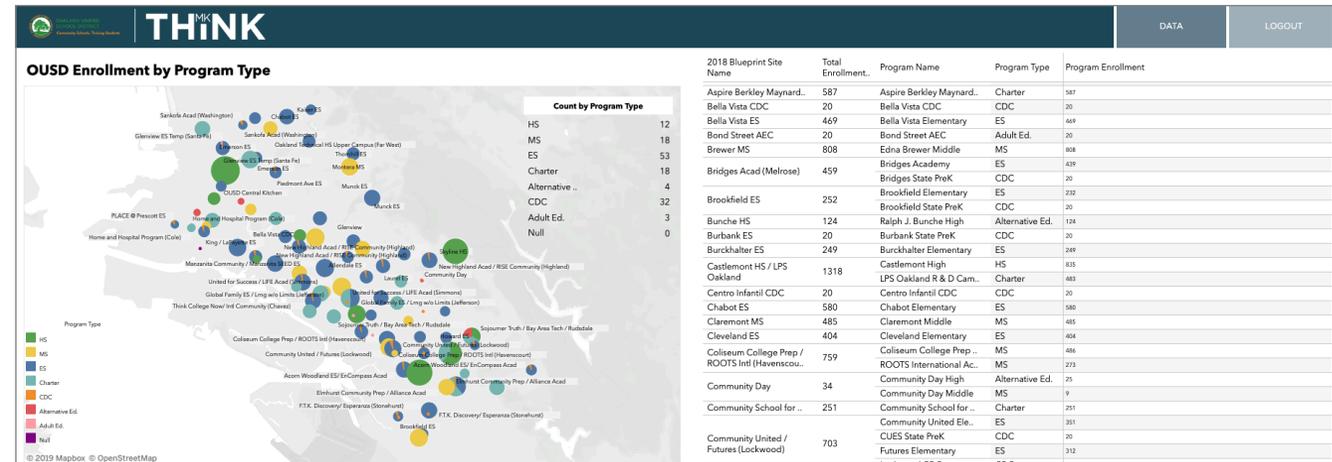
U.S.A. FILE NO. 1-9  
U.S.A. APPLICATION NO. 01-19847  
TRACING NO. 01808-02  
OUSD PROJECT NO. 0804-16

MECHANICAL / PLUMBING  
H & M Mechanical Group  
Gary Harrington, P.E.  
2200 Longdon Street  
Oakland, CA 94612  
Tel: (916) 991-5000  
Fax: (916) 991-6000  
www.hmmec.com

ELECTRICAL ENGINEER  
American Consulting Engineers, Inc.  
Barry Penabaz, P.E.  
100 Santa Monica  
Suite # 300  
Santa Monica, CA 90401  
909.506.2113  
www.aec.com

PROJECT NO. 06-17-796

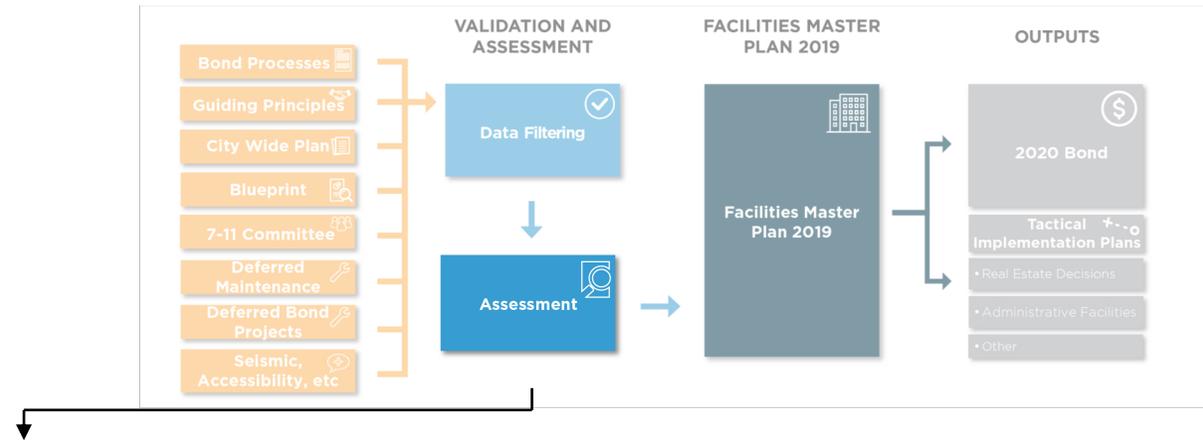
Validated with site plans, data from RAD, Google Earth, and site visits



Incorporated validated data into facility planning database tool

# Assessment: Data Synthesis

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



**ENROLLMENT PROJECTIONS**  
Where can OUSD project changes in demand for school facilities?

**SITE UTILIZATION + CAPACITY**  
How do recent changes in classroom loading standards affect projected capacity?

**SITE / PROGRAM FIT**  
Are in-district and charter school programs located at optimal long term sites?

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

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

**FEEDER PATTERNS**  
Where are students going to school in relation to where they live, and how are they moving up through the OUSD system over time?

# Assessment: Site Capacity

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

## Methodology:

- To estimate site capacity:
  - Use validated Blueprint data
- To estimate utilization:
  - Facility Utilization Baseline Estimator formula (at right)
  - 2018-2019 Enrollment data (CBEDS)
  - New loading standards
- Compare capacity to utilization to estimated Underutilized Classrooms

**2017-2018 Facility Utilization Baseline Estimator**

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

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

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

**OAKLAND TECHNICAL HS**  
 305 Oakland Tech  
 4351 Broadway 94611

Total Classrooms
−
General Education Classrooms
−
Required Program Classrooms
−
Specialized Classrooms
−
Parent Resource Room
=
Underutilized Classrooms

<b>2017-18 Enrollment Projection</b>	<b>1972</b>	
<b>Total Classrooms</b>	<b>97</b>	
<b>General Education Rooms</b>	<b>66</b>	
ES	0	
MS	0	
HS	66	
<b>Required Program Rooms</b>	<b>22</b>	
ECE	0	
SPED	12	(10+2)
Bilingual	0	
Newcomer	0	
A through G	10	
<b>Specialized Rooms</b>	<b>7</b>	
Specialized %	7.2%	
<b>Parent Resource Room</b>	<b>1</b>	
<b>Total Estim. Utilized Classrooms</b>	<b>96</b>	
<b>Estim. Underutilized Classrooms</b>	<b>1</b>	

**READ THESE NOTES**

Rooms above 600 sq ft that are not used for libraries, multipurpose rooms, gymnasiums, auditoriums, etc. \*\*\* Classrooms used by Charter School lease agreements are eliminated from the Total Classroom count.

Classrooms used for instruction of district-run TK-12 programs.  
 Estimator Rate: 26:1 or 24:1 >300 (Contract is 24:1 @ TK-3, 30:1 @ 4-5)  
 Estimator Rate: 30:1 (Contract is 32:1 core classes)  
 Estimator Rate: 30:1 (ISS Schools 25:1) (Contract is 32:1 core classes)

CENTRAL OFFICE DETERMINES: Classrooms used for the delivery of classes for Special Education (Special Day Classes - SDC), prekindergarten and early childhood education programs, and A through G programs at the high school level. \*\*\* Bilingual and Newcomer classroom counts are based on a reduced classroom loading ratio specifically for this population within the school.

At the elementary level, specialized rooms are estimated as 1 for every 8 of general education classrooms. At the middle school level, specialized rooms are estimated as 1 for every 6 of general education classrooms. At the high school level, specialized rooms are estimated as 1 for every 10 of general education classrooms. Minimum 2.

Service Community Schools model.

# Assessment: Site Capacity

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

## Estimated Capacity

# of General Education rooms (+600 SF)

# of Required Program Rooms (includes SPED + CTE; +600 SF)

# of Specialized Classrooms (Art, Science, Computer Lab, Music, Drama; +600 SF)

# of Parent/Community Rooms

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= Estimated Total Classroom Capacity

## Estimated Utilization

General Education need = 2018-2019 enrollment divided by 2021-2022 Loading Standards (OEA Agreement Standards)

Required Program need = # of existing CTE and SPED rooms (no change)

Specialized Classroom need =  
1 room per 8 GE rooms at Elementary level  
1 room per 6 GE rooms at Middle School level  
1 room per 10 GE rooms at HS level

1 of Parent/Community Room

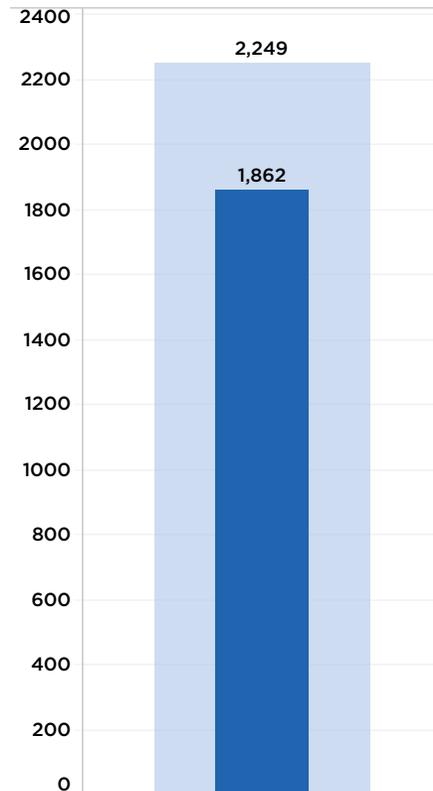
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= Estimated Classroom Utilization

# Assessment: System-wide Site Capacity

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

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

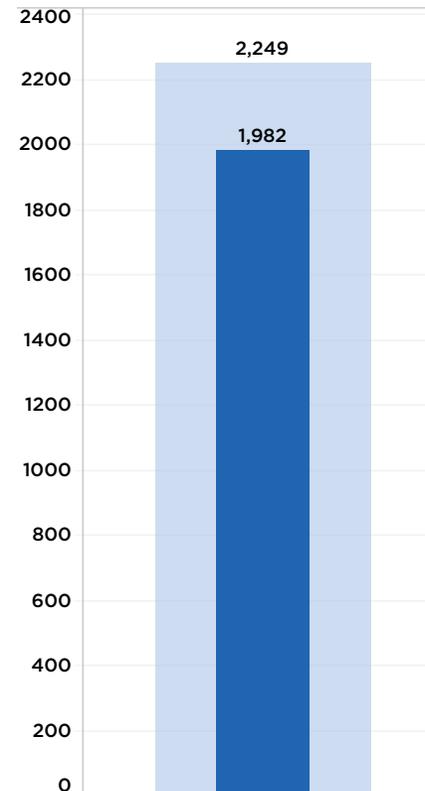


Estimate of **387\*** underutilized rooms at OUSD-owned K-12 school sites, including in-district and charter enrollment (2018-2019).

TK/K: 24 students/class  
1-3: 27 students/class  
4-5: 30 students/class  
6-12: 32 students/class

Legend  
■ Estimated Rooms Needed Based on Enrollment  
■ Total Rooms at Site

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



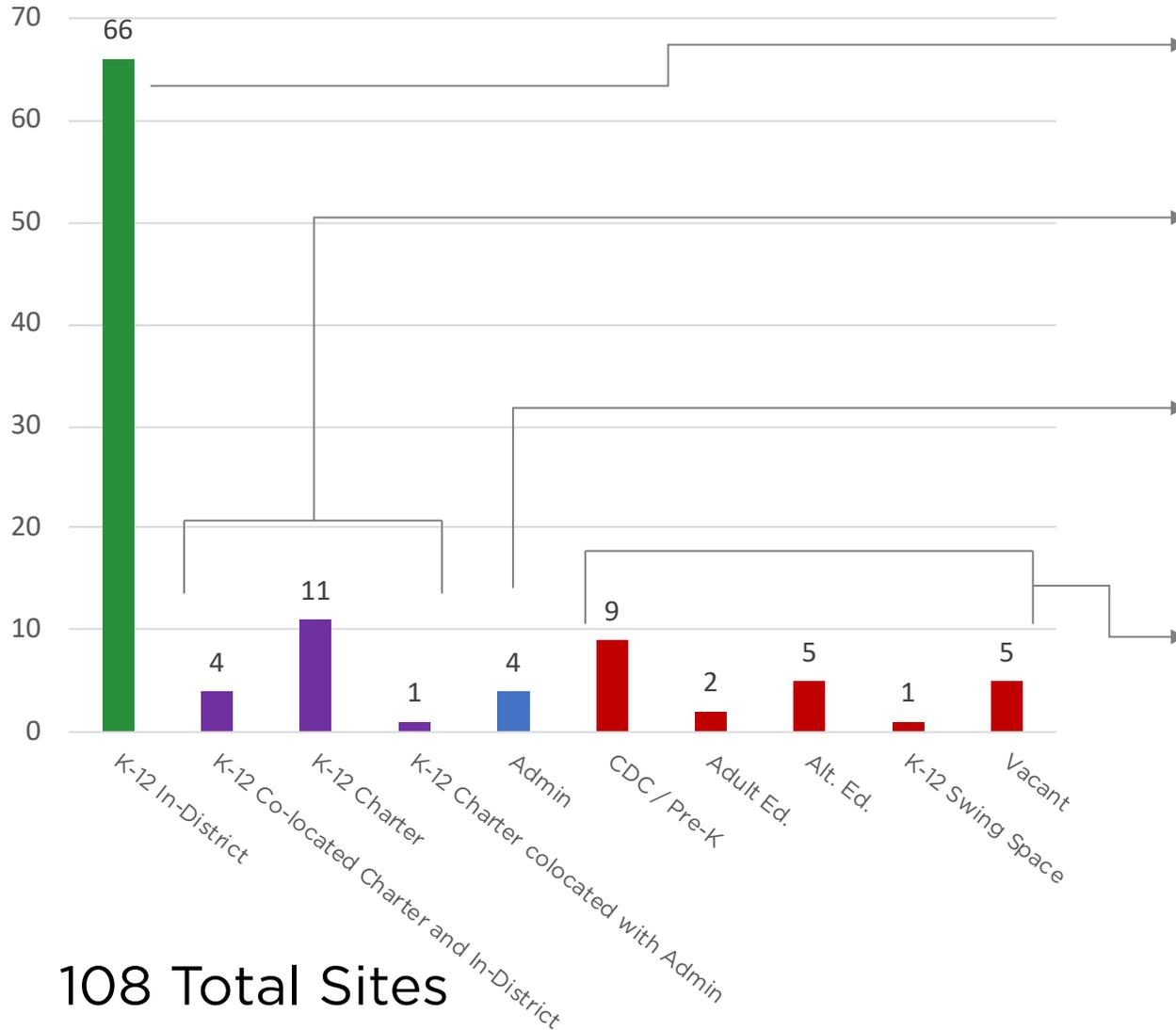
Estimate of **267\*** underutilized rooms at OUSD-owned K-12 school sites, including in-district and charter enrollment (2018-2019).

TK/K: 22 students/class  
1-3: 25 students/class  
4-5: 28 students/class  
6-12: 30 students/class

Legend  
■ Estimated Rooms Needed Based on Enrollment  
■ Total Rooms at Site

\*data still under review

# Assessment: Site/Program Fit



## Sites hosting K-12 In-District Programs:

Addressed by Citywide Plan

## Sites hosting K-12 Charters:

OUSD to pursue long term leases for sites ideal for charter use

## Sites hosting Admin/Operations:

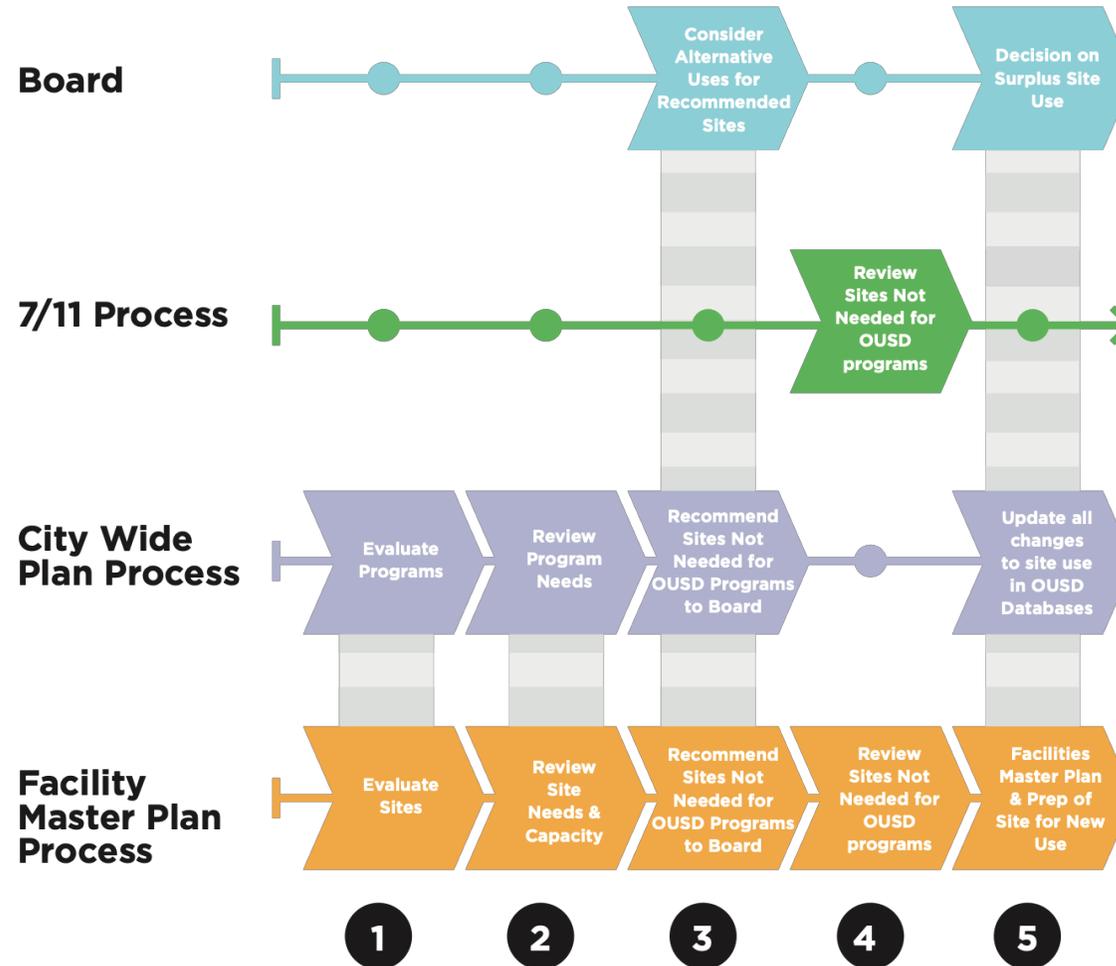
OUSD to consolidate Admin/Operations activities to reduce expenses

## Other sites:

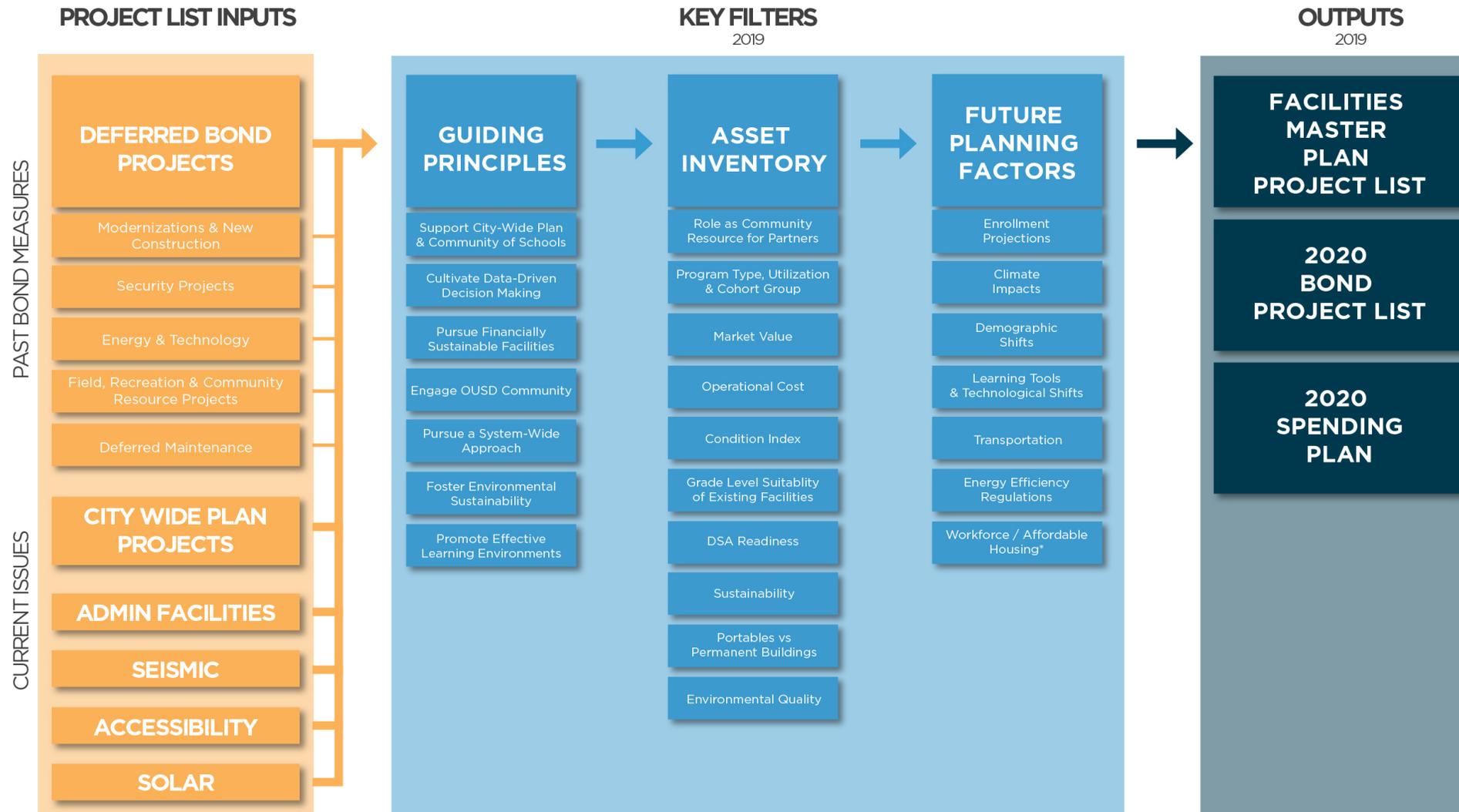
OUSD to evaluate whether programs are good long term fit for each site and evaluate revenue generation opportunities

# Operationalize OUSD Asset Management

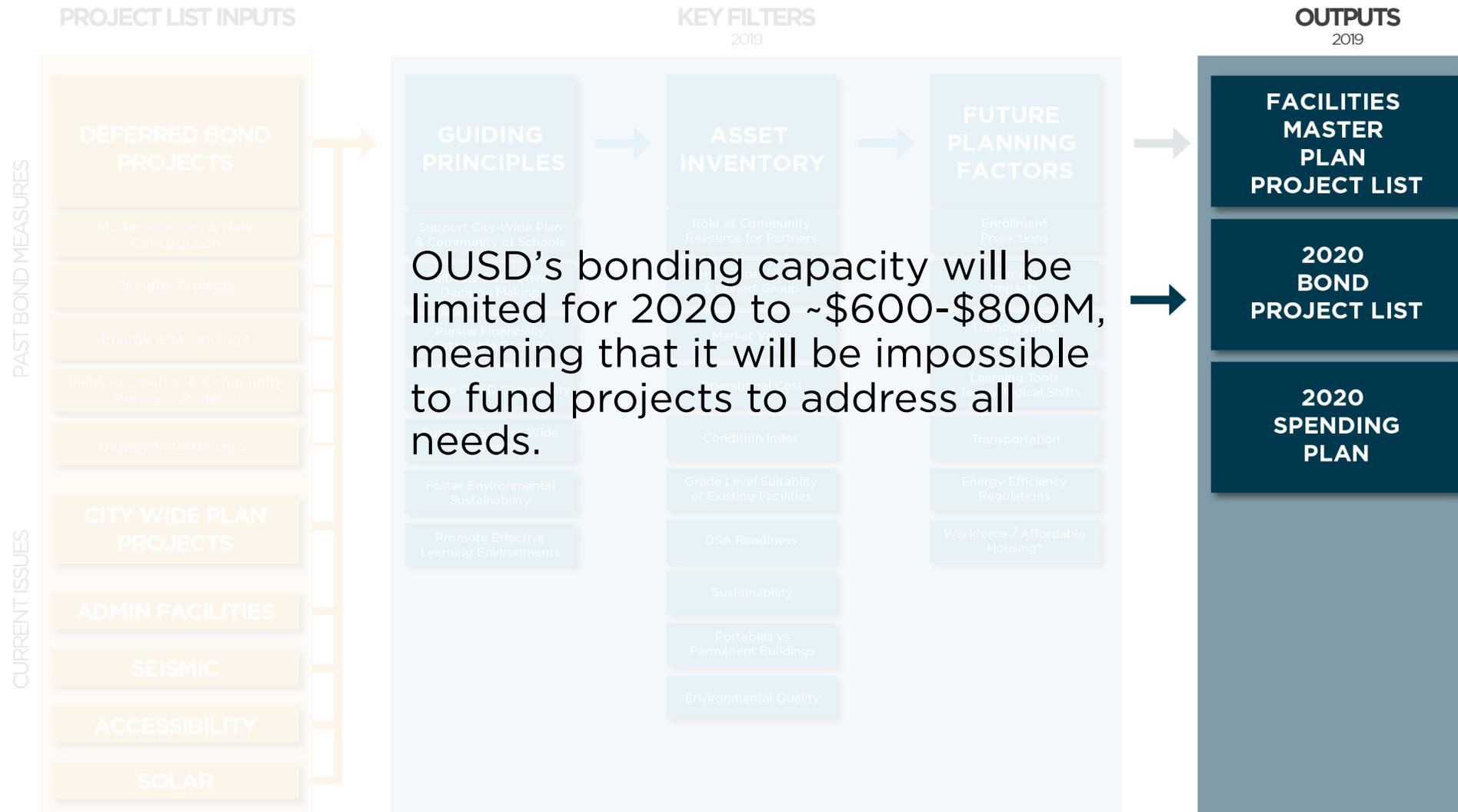
The need: a Facilities Master Plan process that can connect tracks & integrate board resolutions BP 7350 & 6006 into intentional & systematic decision making in the District



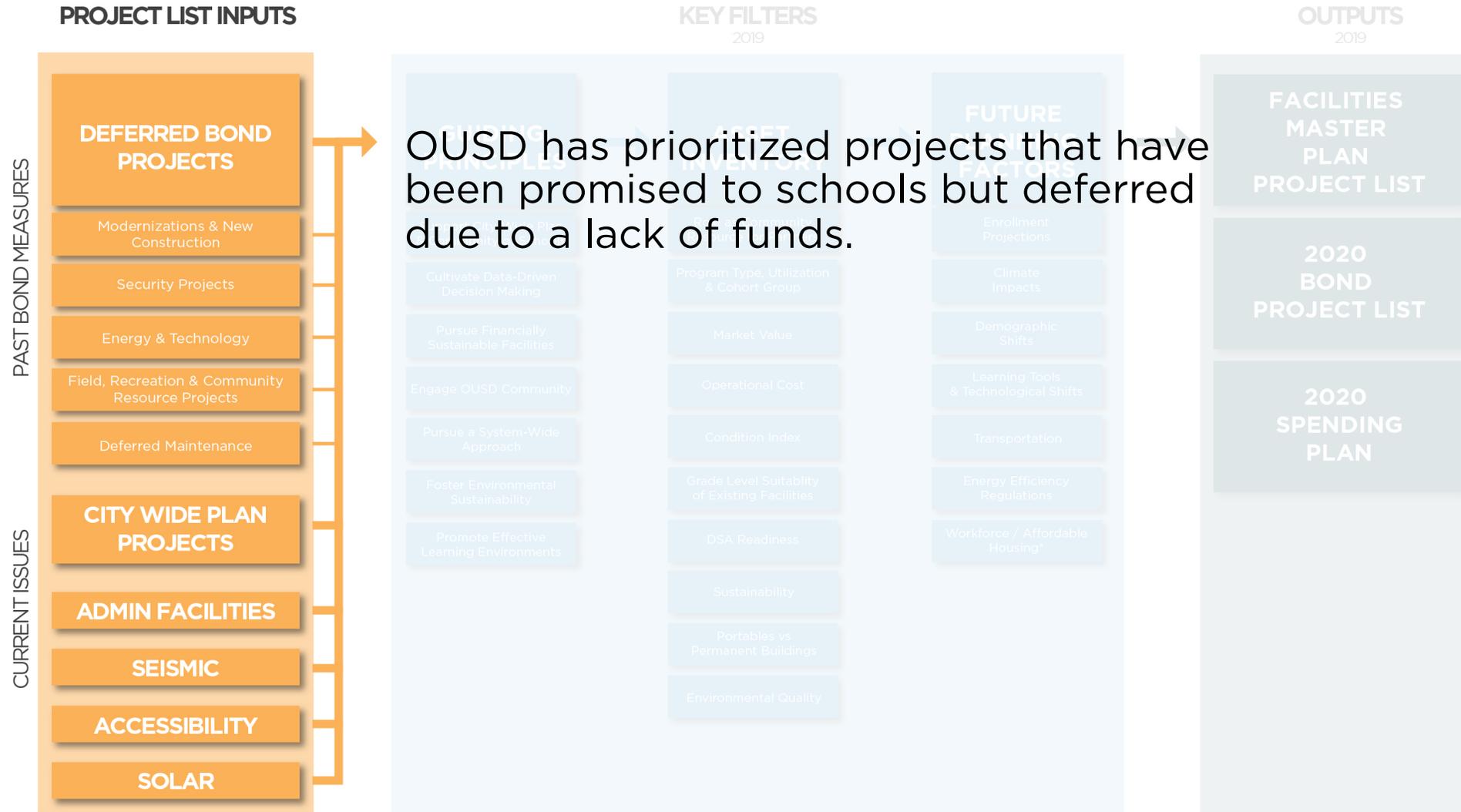
# Project Prioritization: Approach



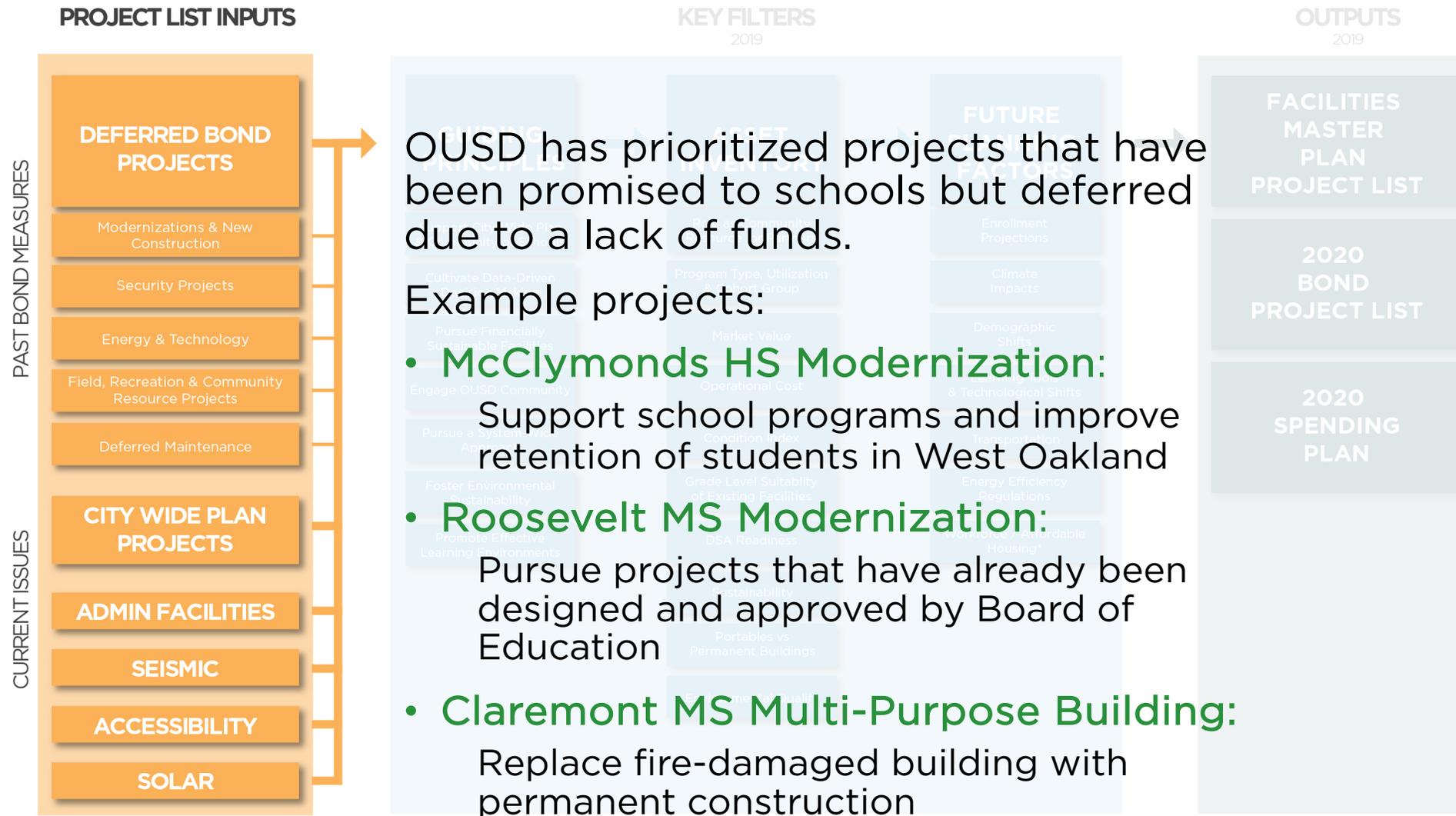
# Project Prioritization: Bonding Capacity



# Project Prioritization: Promised Projects

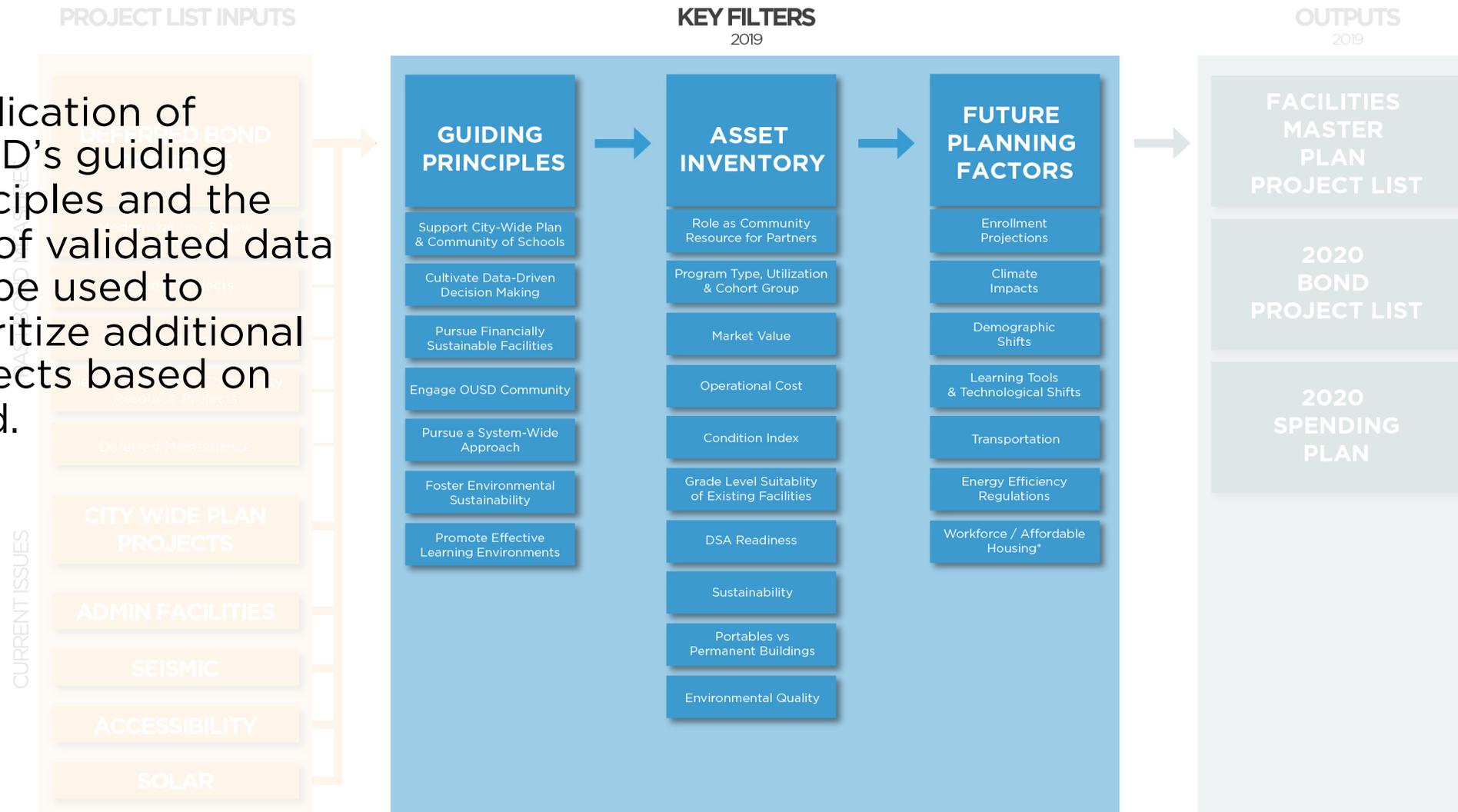


# Project Prioritization: Promised Projects



# Project Prioritization: Defining Need

Application of OUSD's guiding principles and the use of validated data will be used to prioritize additional projects based on need.



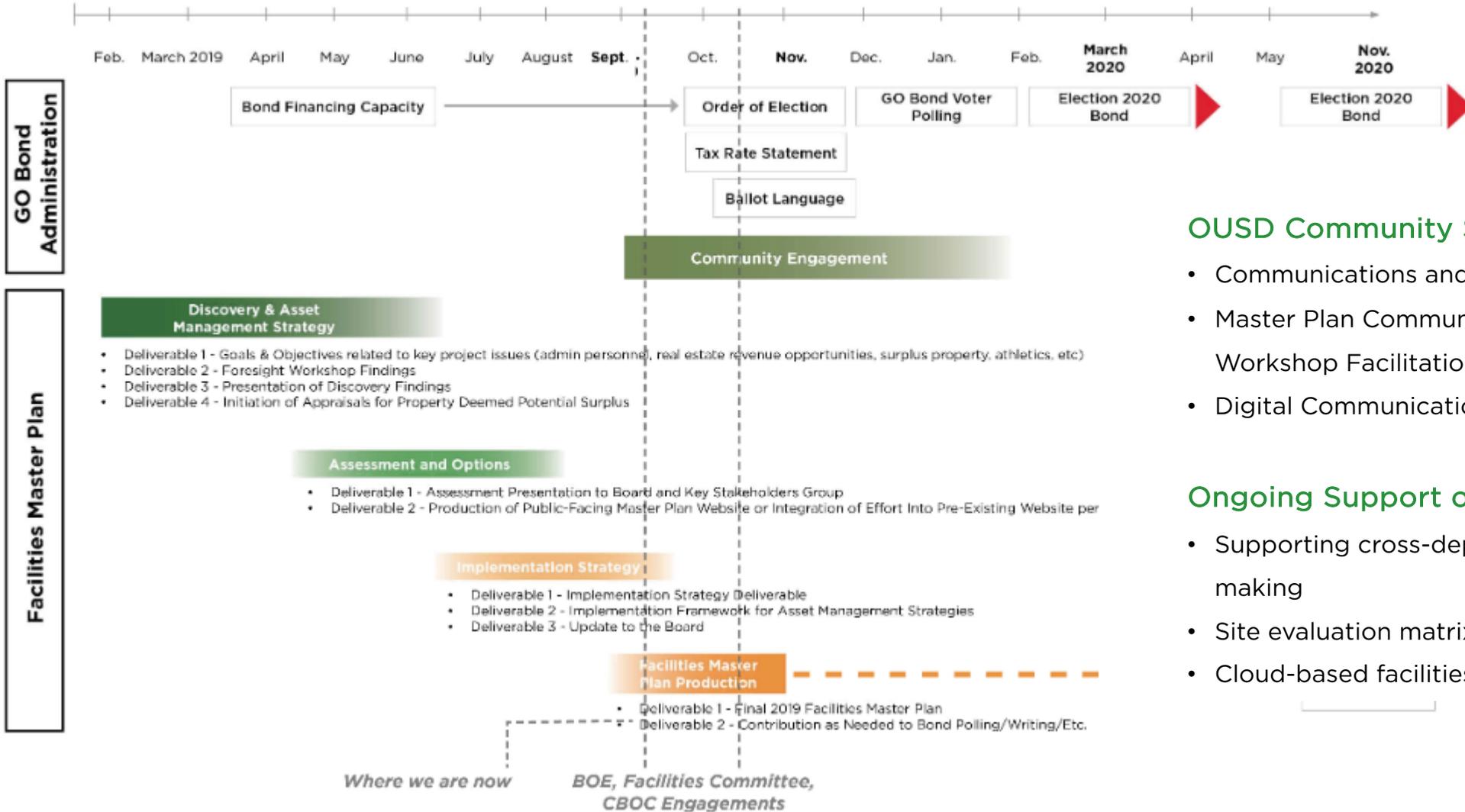
# Project Prioritization: Defining Need

Application of OUSD's guiding principles and the use of validated data will be used to prioritize additional projects based on need.





# Next Steps: Schedule & Proposed Additional Services



## OUSD Community Stakeholder Engagement

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

## Ongoing Support of an Integrated Master Plan

- Supporting cross-departmental site-related decision making
- Site evaluation matrix and recommendations support
- Cloud-based facilities database Dashboard