

OAKLAND UNIFIED SCHOOL DISTRICT

ASSET MANAGEMENT PLAN EXECUTIVE SUMMARY



DRAFT

ENROLLMENT TARGET FOR ASSET MANAGEMENT

GUIDING PRINCIPLES

Oakland Unified School District (OUSD) owns and operates 6,000,000 square feet in 1,000 buildings across 115 sites. OUSD uses its facilities to educate 37,000 students attending public schools and 10,000 more students attending charter schools. Additionally, OUSD facilities are used to house more than 600 staffers and administrators. The challenge

of managing so many people with such varied needs in so many different facilities is the primary context for this asset management plan.

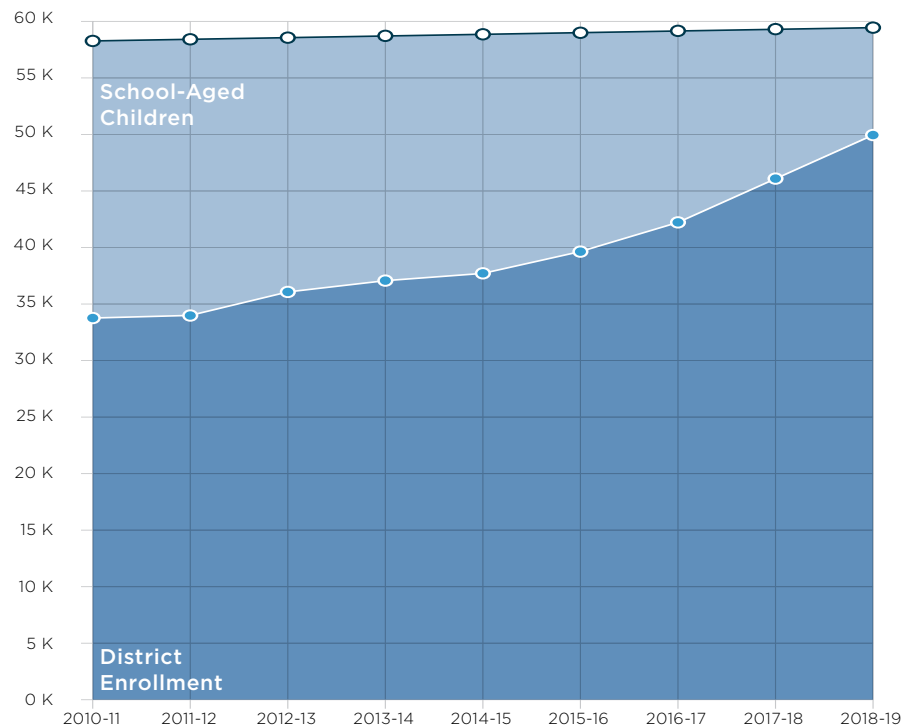
The OUSD Board Policy on Asset Management provided the guiding principles for this work. These principles include an intent to: Manage the district's physical assets as a system; Provide safe, secure, healthy, and technology-ready schools; Use properties to

realize unrestricted revenue; Develop a classroom loading model; and Reduce portable capacity. Three additional goals were set out to guide the development of this plan. First is that every school should operate as a functional school of choice. The second goal is that optimization means having enough seats where students live. The third is to find a long term solution to housing the district's leadership divisions.

BACKGROUND

According to the 2010 census there were about 58,700 school-aged children living in the city of Oakland in the 2013-2014 school year. Growth rates suggest a 0.25% growth the city's population rate, which means that in the 2018-2019 school year, there will be roughly 59,500 school-aged children in Oakland. OUSD currently houses around 37,000 students in district run programs and 4,000 students in charter programs. In order to effectively plan for future capacity level the district has set an enrollment target of 50,000 students for the 2018-2019 school year. This enrollment target will dictate the capacity levels that OUSD's physical assets will need to accommodate.

Because OUSD is already capturing a relatively high proportion of the district's elementary school aged-children, and because the existing capacity gap is district facilities exists in the middle and high schools, OUSD will have to fill more seats in grades 6-12 than in grades K-5 in order to meet the high growth target of 50,000 seats filled.



HIGH GROWTH 50,000 STUDENTS

Necessary Enrollment In District Schools By Grade Level To Meet Overall Target

TK-5	:	24,250
6-8	:	11,875
9-12	:	13,875

Necessary Capture Rate By Grade Level To Meet Enrollment Target

TK-5	:	90.6%
6-8	:	84.5%
9-12	:	74.2%

CLASSROOM LOADING MODEL AND UTILIZATION

OUSD properties are used primarily to serve students enrolled in district operated programs. The classroom utilization rate for the district is strong 73%, but the district could increase its asset optimization by better utilizing the 12% of classrooms that are underutilized. Furthermore, 1% of district classrooms are considered overutilized which means that some district schools are over capacity and do not have an adequate amount of space to house a variety of important program offerings. The remaining 14% of district-owned classrooms are used to house charter programs, administrative functions, or are leased to an adjacent school district, and these classrooms could be better used by housing district-run programs.

The following are a list of defined categories of classroom uses that are taken into account when calculating a site's classroom utilization rate.

Total Classrooms - Rooms above 600 sq ft that are not used for libraries, multipurpose rooms, gymnasiums, auditoriums, etc.

General Education Classrooms -

Classrooms used for instruction of district-run TK-12 programs.
Required Program Classrooms - Classrooms used for Programs for Exceptional Children, bilingual, newcomer, pre-kindergarten and early childhood education, and A through G programs at the high school level.

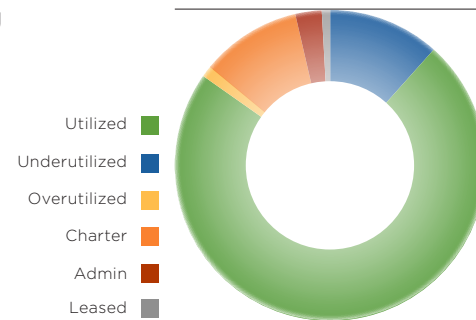
Flex Rooms - Flex rooms are used to allow programs flexibility in how they use non- gen ed classrooms. At the elementary level, flex rooms are calculated as 1/8 of general education classrooms and they are often used for things like science prep, art, and reading intervention. At the middle school level, flex rooms are calculated as 1/6 of general education classrooms. Middle school flex rooms are used to house elective classes that augment general education. At the high school level, flex rooms are calculated as 1/10 of general education classrooms. These rooms are typically used for purposes above and beyond general education and required A through G programs such as computer labs and science labs.

Parent / Family Resource Rooms - Each school is allocated one parent resource room.

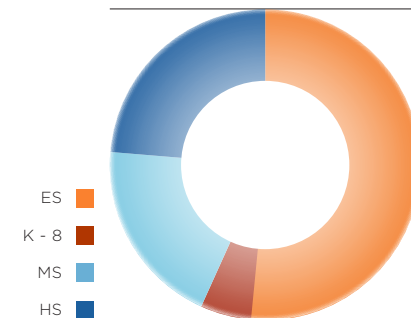
Available Classrooms - The number of classrooms remaining after subtracting general education, required program, flex, and parent rooms from the total number of classrooms.

16 district schools have overutilized classrooms, while 56 district schools have underutilized classrooms. 16 district sites house non-district programs or administrative functions.

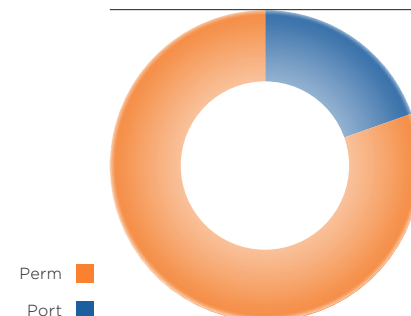
UTILIZATION



PROGRAM TYPE



BUILDING TYPE



LOADING FORMULA AND CAPACITY ANALYSIS

The district has 2,578 classrooms to fill. If every classroom were loaded with the maximum number of students, the district could house 55,695 students. The district has enough capacity to educate 93% of all school aged children in the city of Oakland.

Site Capacity is the maximum number of students that should be assigned to a given school site. In this case, capacity is calculated by determining the

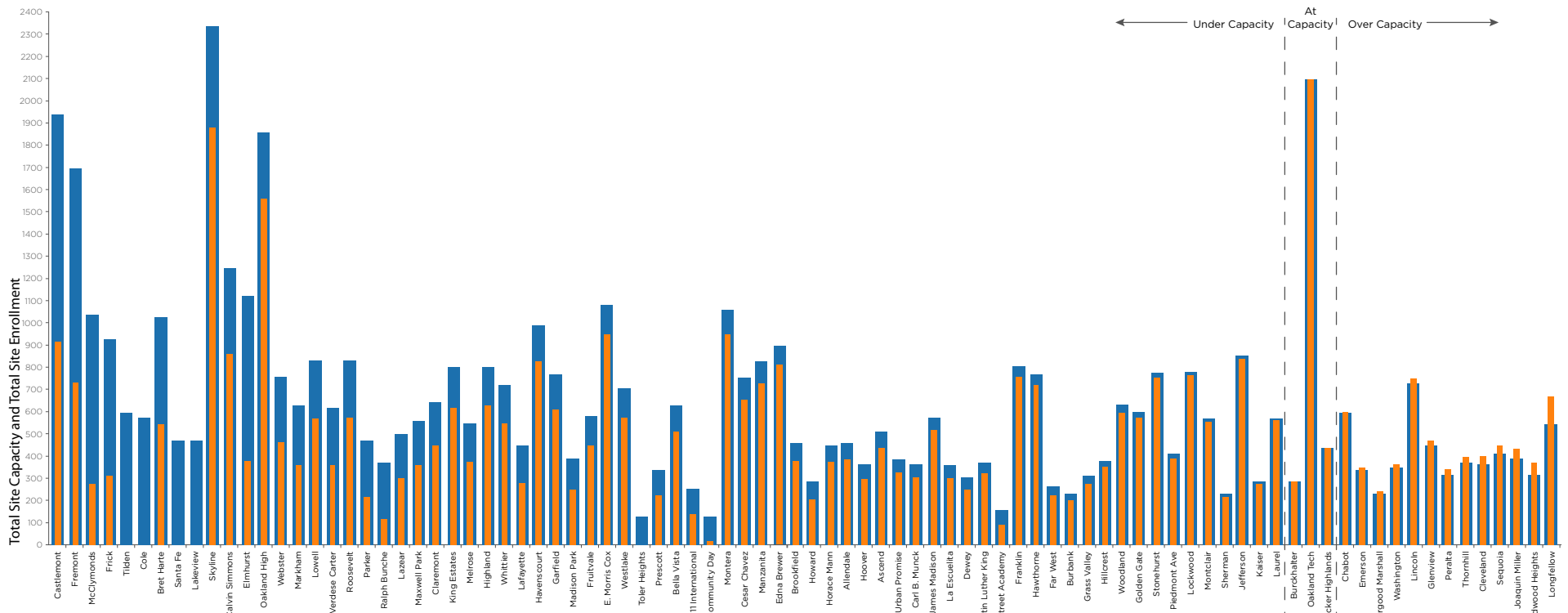
number of loadable rooms at a given site and then applying a classroom loading standard to each loadable room. At current capacity levels, all OUSD students could be housed in 75 of the district's 107 school sites.

OUSD Elementary schools are capturing 51.5% of the elementary school-aged children living in Oakland. At the middle school level, the capture rate drops to 22.4%. For high school aged students,

the capture rate is 26.1%. Increasing enrollment to meet enrollment targets means OUSD will have to increase the capture rate at the middle and high school levels.

13 district schools are enrolled beyond capacity, while 72 district school sites are under capacity, meaning they could hold more students. This indicates that there is a misalignment between enrollment and capacity across the district. Asset optimization

means evening out this misalignment. Comparing site capacity and school enrollment illustrates those schools that are over loaded with students and those that have available space. Sites on the left side of the chart have more students enrolled than is appropriate for building capacity. Schools on the right side of the chart have capacity for additional students.



OPERATIONS AND MAINTENANCE

Every year, OUSD spends \$5 million on energy costs alone. Adding costs associated with maintenance, materials, and modernization puts the operating budget associated with facilities into the 10's of millions of dollars. In addition to the \$5 million in energy costs OUSD spends per year, many sites throughout the district are in need of maintenance and seismic upgrades. Altogether, these projects account for more than \$400 million in deferred

maintenance district-wide.

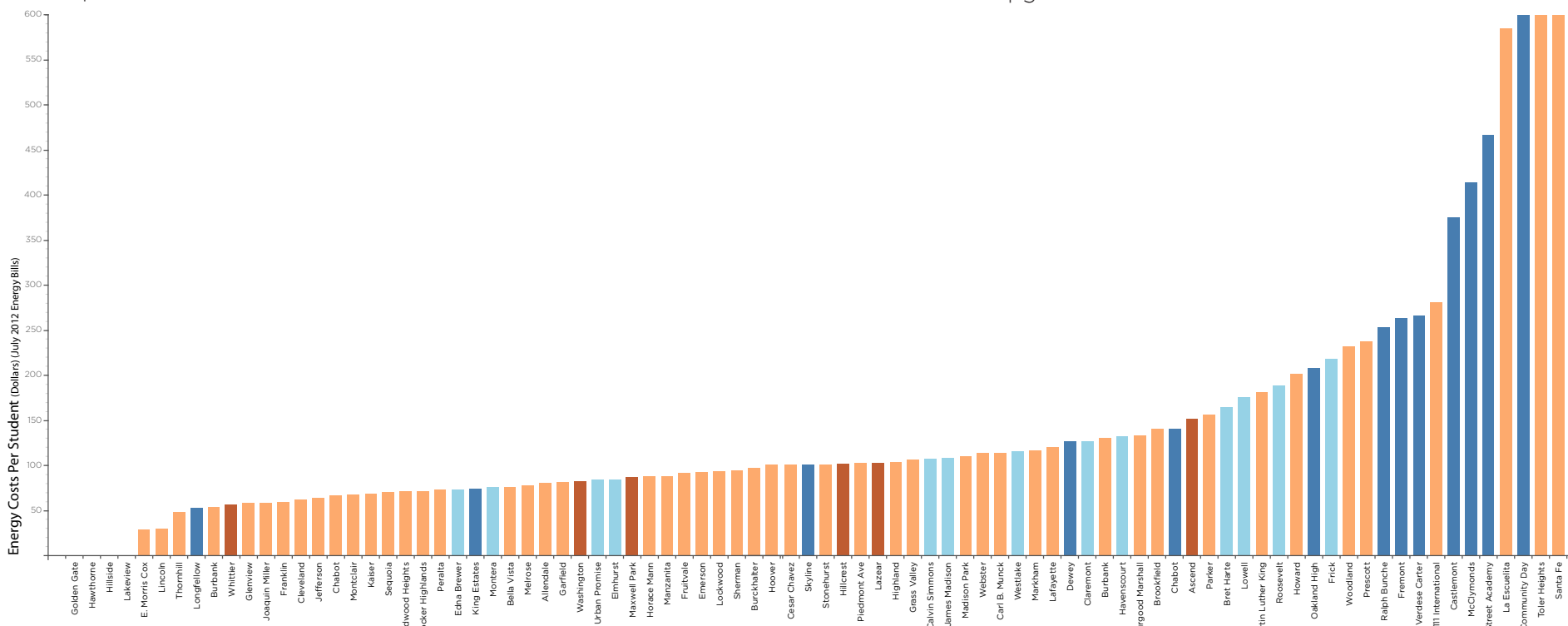
In 2012, annual energy costs were estimated at \$4,634,350. Of the energy costs in June 2012, five schools accounted for 26% of the total while ten account for 39%. The overall energy costs in 2012 were up 103% from 2011. That increase was largely driven by thirteen schools that experienced increased costs ranging from 12% (at La Escuelita) to as high as a 41% increase (at Oakland

Technical).

Currently, 84 district sites—92% of the entire district—are in need of some form of deferred maintenance. The total cost for all maintenance and modernization driven projects is estimated at \$333 million. The top five schools in need of maintenance represent 21% of that total while the top ten account for 34%. (59)

The 118 buildings that are in need of seismic upgrades

are dispersed throughout the district across 78 sites—86% of the district's properties. The total cost of addressing these collective seismic deficiencies of the entire district is estimated at \$80.6 million. The top five schools in need of upgrades/repairs account for 32% of this total while the top ten represent 47%. (61)



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REUNIFICATION OF DISTRICT LEADERSHIP

OUSD's leadership staff of nearly 600 full time and flex time workers are currently distributed across six district-owned sites and one leased site consuming more than 300,000ft² of space. By consolidating the administrative divisions housed in 180,000 ft² of school space to a 100,000 ft² centralized facility, OUSD could reduce ongoing costs associated with moving district employees, add capacity to the school system, and generate unrestricted

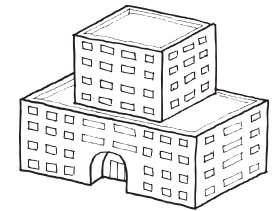
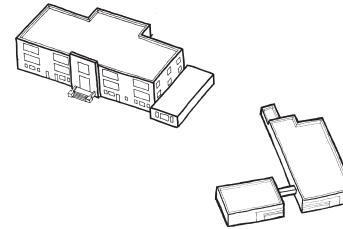
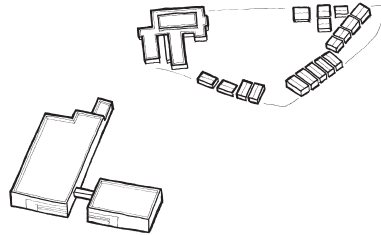
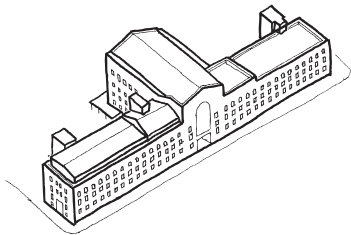
revenues in the process.

As per the vision set by the OUSD Board of Education on 4 September 2014, the property at 1025 2nd Avenue should be redeveloped into an educational and leadership complex that will house district administrative divisions along with a new development for Dewey High School.

Not only would reunification

of those administrative divisions that were dispersed from the district's previous administrative facility into a 100,000 ft² office space save time, money, and travel, it would also add a level of cohesion to OUSD's organizational culture. When members of an organization are collocated, they are more likely to feel like they are part of something larger than their own division, and they can see more easily how their work

and effort fits in with that of other individuals and other departments. A culture based around a decentralized model for housing staff leads to siloing of divisions, less cultural cohesion, and inefficient organization processes. Moving OUSD back to a centralized model would create greater efficiencies not only from a facilities point of view, but also from an organizational culture point of view.



2011	2012	2013	2014	2015	2016	2017	2018
CENTRALIZED LEADERSHIP	LEADERSHIP FACILITY DAMAGED	RELOCATE DIVISIONS	ASSET MANAGEMENT PLAN	PLANNING NEW LEADERSHIP BUILDING	DESIGN OF NEW LEADERSHIP BUILDING	CONSTRUCTION OF NEW BUILDING	REUNIFIED LEADERSHIP
CENTRALIZED ADMINISTRATION	DEVELOPED FACILITIES MASTER PLAN	DISTRIBUTED DIVISIONS TO UNDERUTILIZED OR VACANT SCHOOL SITES MOVED STAFF AND MATERIALS	CONDUCT UTILIZATION ANALYSIS DOCUMENT ADMINISTRATIVE SPACE NEEDS DEVELOP ASSET MANAGEMENT PLAN DEVELOP DISPOSITION STRATEGY	SELECT SITE SELECT ARCHITECT AND CONSTRUCTION TEAMS DOCUMENT USER AND FUNCTIONAL REQUIREMENTS AND DEVELOP BUILDING PROGRAM	DEVELOP ARCHITECTURAL CONCEPT DESIGN BUILDING SYSTEMS DEVELOP CONSTRUCTION DOCUMENTS	BREAK GROUND INFILL PLAN FOR VACATED SCHOOL SITES FURNITURE INVENTORY AND REPLACEMENT SELECT FINISHES	MOVE INTO NEW ADMIN BUILDING MOVE OUT OF SCHOOL BUILDINGS REUTILIZE SCHOOL FACILITIES

SOLUTIONS FOR OPTIMIZATION

	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019				
1	CREATE ATTRACTIVE PROGRAMS	Assess Feasibility of STEM Corridor; Begin Community Engagement for Fremont; Develop Plan for Academic and Architectural Programs at Fremont High School	Begin Engagement for STEM Corridor Begin Planning and Design for Fremont High	Begin Planning and Design for STEM Corridor Begin Construction For Fremont High	Begin Construction for STEM Corridor Projects Continue Construction For Fremont High	Complete Construction for STEM Corridor Projects Move In To New Fremont High School Buildings			
2	CAP SCHOOL ENROLLMENT		Cap Enrollment at Some Overutilized Schools	Cap Enrollment at Some Overutilized Schools	Cap Enrollment at Some Overutilized Schools				
3	CO-MANAGE FACILITIES AND STUDENT ASSIGNMENT	Assess and Improve Student Assignment Processes; Conduct Site Visits for Prop 39 Charter Assignment Process	Roll Out New Student Assignment Process Assess, Improve, and Implement Prop 39 Process	Assess Assignment and Enrollment Strategy to Improve Process Assess, Improve, and Implement Prop 39 Process	Assess Assignment and Enrollment Strategy to Improve Process Assess, Improve, and Implement Prop 39 Process	Assess Assignment and Enrollment Strategy to Improve Process Assess, Improve, and Implement Prop 39 Process			
4	EXPAND OR CONSOLIDATE PROGRAMS	Program Expansions at: James Madison Washington Elementary Whittier Elementary	Program Expansions at: Parker Elementary	Consolidate Programs at: Martin Luther King, Jr. and Lafayette Elementary; Markham Elementary and Webster	Program Expansions at: McClymonds High				
5	REDUCE PORTABLE CLASSROOMS	Remove Portables at: Fremont High Castlemont High Frick Middle Roosevelt Middle	Webster Elementary Fruitvale Elementary Markham Elementary	Remove Portables at: Montera Middle Elmhurst Middle Bret Harte Middle Brookfield Elementary	Melrose Elementary Howard Elementary Parker Elementary Bella Vista Elementary	Remove Portables at: Skyline High Garfield Elementary Grass Valley Elementary E. Morris Cox Elem	Lockwood Elementary Toler Heights Elem Allendale Elementary	Remove Portables At Any Remaining Schools With Additional Capacity and Underutilized Classrooms	Remove Portables at: Lakeview Elementary Tilden Elementary
6	RECENTRALIZE DISTRICT ADMINISTRATION	Document User and Functional Requirements Select Site Select Architect Develop Building Program	Develop Architectural Concept Design Building Systems Develop Construction Documents Bid Project	Break Ground on Admin Building Infill Plan For Vacated Schools Furniture Inventory and Replacement Select Finishes	Move Staff Out Of Schools Buildings Move Staff Into New Admin Building				
7	DEVELOP COMPETITION LEVEL ATHLETIC FACILITIES	Conduct Assessment of Current Athletic Facilities Develop Feasibility Study for Location and Build Out of Athletic Facilities	Draft Plans for New Athletic Facilities Integrate Athletic Facilities Into New Construction At Fremont High School	Construct New Athletic Facilities	Construct New Athletic Facilities Lease Out Athletic Facilities to Generate Revenue	Lease Out Athletic Facilities to Generate Revenue			
8	PROPERTY DISPOSITION	Identify Partners for Lease and/or Joint Use for: Edward Shands Rudsdale Neighborhood Centers Pleasant Valley	Develop Disposition Strategy For All Remaining Vacant Properties	Develop Disposition Strategy For All Remaining Vacant Properties					

The strategies for optimization are intended to be implemented in conjunction with one another. Three time lines are included in the Asset Management Plan.

The first schedule (above) is a high-level time line showing the steps that should be taken over the next five years for each of the strategies for asset optimization. Facilities managers should work in conjunction with officers and

staffers from other district divisions in order to effectively implement these strategies. The time line illustrates the sequence of actions that, when taken together, will lead the district to increased optimization of its physical assets.

The second time line indicates the best current, near-term, and long-term uses for each property owned by OUSD. Most properties in

this time line matrix are and will continue to be district run school sites. Some site, however, will be vacated due to program consolidations and administration reunification. These properties will require a use and/or disposition strategy once vacated.

The final time line is a detailed series of steps that, when taken will allow the district to reunify its leadership facilities into one central location while

it undergoes the process of developing the joint Education and Leadership Complex at 1025 2nd Avenue. This time line also include the critical path steps necessary in order to move district leadership staff off of sites that play an important role in several ongoing redevelopment projects including the construction of a central kitchen facility at Foster Middle School and the development of new facilities at Glenview.