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## Memo

**To** Facilities Committee

**From** Preston Thomas, Chief Systems & Services Officer  
Kenya Chatman, Executive Director of Facilities  
Pranita Ranbhise, Director, Facilities Planning & Management

**Board Meeting Date** November 14, 2024

**Subject** Proposed Measure Y Spending Plan Revisions to bring expenditures for 1025 2nd Avenue into Draw 2 to support the demolition of 1025 2nd Avenue and potentially Ralph Bunche Academy.

**Action Requested** Discussion; no action is needed at this time.

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

The Board on April 14, 2021, adopted the Measure Y Spending Plan. (Enactment No. 21-0581). After the Board approval of the Measure Y Bond Spending Plan April 2021, costs associated with the approved Plan has outpaced execution by 28%, (shortfalls), necessitating revisions to the current spending plans, either by scope reductions and/or adjustments to budgets to provide the design elements based on:

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

On June 21, 2024, the Board adopted Amendment No 2 to Spending Plan (Enactment No 23-0668) that adjusted spending to increase the projects for McClymonds High School, Roosevelt Middle School and CCPA in a total of \$65.7M.

**Recommendation** The Facilities Committee reviews potential recommendations on the spending plan and provides guidance, feedback, and recommendations to staff to bring back to the Facilities Committee after engagement with CBOC.

**Fiscal Impact**

TBD, Fund 21, Measure Y

**Attachments**

Measure Y Spending Plan and Presentation

Measure Y Spending Plan

OAKLAND UNIFIED SCHOOL DISTRICT - FACILITIES PLANNING AND MANAGEMENT									
Measure Y - October 2024 Revised Spending Plan and Drawdown.									
Draft 8/27/2024									
Site Specific Named Projects	Project Type + Delivery Method	Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
	Major Projects	Investment Summary	\$453,000,000	\$76,328,966	\$40,443,972	\$95,431,646	\$208,345,416	\$32,450,000	\$453,000,000
Site Specific Named Projects		Subtotal	\$453,000,000	\$76,328,966	\$40,443,972	\$95,431,646	\$208,345,416	\$32,450,000	\$453,000,000
Draft 8/27/2024									
Facilities and Tech Improvements		Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
	Deferred Maintenance	Investment Summary	\$46,788,592	\$6,504,591	\$12,273,119	\$9,000,000	\$8,656,500	\$10,354,382	\$46,788,592
	Heat Mitigation, Air Quality, Ventilation, and Comfort Improvements	Investment Summary	\$47,172,173	\$757,846	\$12,623,212	\$7,291,840	\$26,499,275	\$0	\$47,172,173
	Tech Services - IT Improvements	Investment Summary	\$20,365,408	\$365,408	\$2,000,000	\$316,666	\$15,000,000	\$2,683,334	\$20,365,408
	Board Directed Initiative Allowance	Various Sites	\$125,000					\$125,000	\$125,000
Facilities and Tech Improvements		Subtotal	\$114,451,173.00	\$7,627,845.00	\$26,896,331.00	\$16,608,506.00	\$50,155,775.00	\$13,162,716.00	\$114,451,173.00
Draft 8/27/2024									
Health and Safety Upgrades		Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
	Safety and Security Investment	Investment Summary	\$21,481,000	\$1,993,970	\$270,723	\$5,372,000	\$2,824,429	\$11,019,878	\$21,481,000
	School Site Kitchen and Dining Upgrades	Investment Summary	\$10,500,000	\$0	\$0	\$150,000	\$5,175,000	\$5,175,000	\$10,500,000
	Play Surfacing	Investment Summary	\$2,000,000			\$1,000,000	\$1,000,000		\$2,000,000
Health and Safety Upgrades		Subtotal	\$33,981,000	\$1,993,970	\$270,723	\$6,432,000	\$8,999,429	\$16,194,878	\$33,981,000
Draft 8/27/2024									
Energy Efficiency and Sustainability		Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
	Solar Projects	Investment Summary	\$11,024,968	\$156,508	\$0	\$10,868,460	\$0	\$0	\$11,024,968
	Energy Efficiency Upgrades	Investment Summary	\$7,592,827	\$0	\$2,024,801	\$5,568,026	\$0	\$0	\$7,592,827
	Water Efficiency	Investment Summary	\$100,000	\$0	\$0	\$100,000	\$0	\$0	\$100,000
	Battery Storage	Investment Summary	\$1,050,000	\$1,690	\$0	\$698,310	\$350,000	\$0	\$1,050,000
	Switch Gear Upgrades	Investment Summary	\$2,350,000	\$0	\$0	\$2,087,756	\$262,244	\$0	\$2,350,000
	EV Charging Station Installations	Investment Summary	\$100,000		\$0		\$100,000		\$100,000
Energy Efficiency and Sustainability		Subtotal	\$22,217,795.00	\$158,198.00	\$2,024,801.00	\$19,322,552.00	\$712,244.00	\$0.00	\$22,217,795.00
Draft 8/27/2024									
Program Funds			Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
Program Funds		Subtotal	\$111,350,032	\$29,255,194	\$0	\$47,205,296	\$26,686,675	\$8,202,867	\$111,350,032
Draft 8/27/2024									
TOTAL MASTER PLAN FOR MEASURE Y			Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
			\$735,000,000	\$115,364,173	\$69,635,827	\$185,000,000	\$294,899,539	\$70,010,461	\$735,000,000
				\$185,000,000					

OAKLAND UNIFIED SCHOOL DISTRICT - FACILITIES PLANNING AND MANAGEMENT

Measure Y - October 2024 Revised Spending Plan and Drawdown.

Site Specific Named Projects	Project Type + Delivery Method	Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
	Major Projects	Investment Summary	\$453,000,000	\$76,328,966	\$40,443,972	\$95,431,646	\$208,345,416	\$32,450,000	\$453,000,000
Coliseum College Prep. Academy	Site Expansion + Progressive DBE	Havenscourt	\$55,000,000	\$877,927	\$122,073	\$10,050,000	\$43,950,000		\$55,000,000
Claremont MS	Cafeteria/MPR + DBB	Claremont	\$18,000,000	\$15,850,162	\$2,149,838				\$18,000,000
Elmhurst United MS	Site Modernization + TBD	Elmhurst	\$10,000,000				\$1,225,000	\$8,775,000	\$10,000,000
Garfield ES	Site Renovation + LLB	Garfield	\$56,700,000	\$164,604	\$158,334	\$7,000,000	\$49,377,062		\$56,700,000
Laurel CDC	Site Renovation + DBB	Laurel	\$15,000,000	\$12,355,424	\$2,644,576				\$15,000,000
1025 Second Ave	Site Specific Projects + TBD	1025 Second Ave	\$15,000,000				\$125,000	\$14,875,000	\$15,000,000
McClymonds HS	Site Renovation + Progressive DBE	McClymonds	\$91,250,000	\$1,769,872	\$11,480,128	\$31,833,563	\$46,166,437		\$91,250,000
Melrose Leadership Academy	Site Expansion + LLB	Melrose Leadership Academy	\$36,500,000	\$3,733,246	\$1,466,754	\$10,000,000	\$21,300,000		\$36,500,000
Roosevelt MS	Site Renovation + LLB	Roosevelt	\$90,550,000	\$6,507,328	\$2,492,672	\$36,548,083	\$45,001,917		\$90,550,000
Skyline HS	Site Mod: ADA, Bathroom, Portables + TBD	Skyline	\$10,000,000				\$1,200,000	\$8,800,000	\$10,000,000
Permanent Central Admin	Central Admin + DBB	Cole	\$55,000,000	\$35,070,403	\$19,929,597				\$55,000,000
Site Specific Named Projects		Subtotal	\$453,000,000	\$76,328,966	\$40,443,972	\$95,431,646	\$208,345,416	\$32,450,000	\$453,000,000

OAKLAND UNIFIED SCHOOL DISTRICT - FACILITIES PLANNING AND MANAGEMENT  
Measure Y - October 2024 Revised Spending Plan and Drawdown.

Facilities and Tech Improvements		Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
	Deferred Maintenance	Investment Summary	\$46,788,592	\$6,504,591	\$12,273,119	\$9,000,000	\$8,656,500	\$10,354,382	\$46,788,592
	B&G Roofing, Plumbing, and Asphalt Investments	Investment Summary	\$22,950,000	\$1,914,775	\$8,690,435	\$1,000,000	\$8,000,000	\$3,344,790	\$22,950,000
	Student Drop Off Enhancements and Asphalt Replacement	East Oakland PRIDE	\$4,750,000	\$518,431	\$4,231,569				\$4,750,000
	Playground ADA Ramp	Kaiser	\$2,600,000	\$1,384,913	\$1,215,087				\$2,600,000
	B&G Roofing and Plumbing - Repair and Replacement Projects	UPA	\$1,100,000	\$11,431	\$1,088,569				\$1,100,000
	B&G Roofing and Plumbing - Repair and Replacement Projects	Roosevelt	\$900,000		\$900,000				\$900,000
	B&G Roofing and Plumbing - Repair and Replacement Projects	Various Sites	\$6,800,000			\$500,000	\$4,000,000	\$2,300,000	\$6,800,000
	B&G Asphalt Repair and Replacement Pool	Various Sites	\$6,800,000		\$1,255,210	\$500,000	\$4,000,000	\$1,044,790	\$6,800,000
	Portable Removal and Replacements	Investment Summary	\$7,009,592	\$0	\$0	\$0	\$0	\$7,009,592	\$7,009,592
	Portable Removal and Replacement	Various Sites	\$7,009,592					\$7,009,592	\$7,009,592
	Turf Field Replacements and Maintenance	Investment Summary	\$16,829,000	\$4,589,816	\$3,582,684	\$8,000,000	\$656,500	\$0	\$16,829,000
	Safety Lighting for Fields	Oakland Tech, Skyline HS, and Madison	\$1,313,000			\$656,500	\$656,500		\$1,313,000
	New Turf Field	Various Sites	\$10,616,000		\$3,272,500	\$7,343,500			\$10,616,000
	Turf Field Replacements	McClymonds	\$0						\$0
	Turf Field Replacements	Oakland High	\$0						\$0
	Turf Field Replacements	Calvin Simmons	\$0						\$0
	Turf Field Replacements	Caesar Chavez	\$0						\$0
	Turf Field Replacements	EOP	\$0						\$0
	Stadium ADA Improvements	Castlemont High	\$4,900,000	\$4,589,816	\$310,184				\$4,900,000
	Heat Mitigation, Air Quality, Ventilation, and Comfort Improvements	Investment Summary	\$47,172,173	\$757,846	\$12,623,212	\$7,291,840	\$26,499,275	\$0	\$47,172,173
	Ventilation and Air Quality Improvements	Various Sites	\$24,243,117	\$143,842		\$2,000,000	\$22,099,275		\$24,243,117
	Living School Yards & Heat Mitigations Strategies: Reducing Heat Island Impacts.	Multiple Sites	\$8,800,000			\$4,400,000	\$4,400,000		\$8,800,000
	Window Wall System Replacement	Lowell	\$9,825,000	\$408,789	\$9,416,211				\$9,825,000
	CalShape HVAC Assessment	Multiple Sites	\$2,704,056		\$2,704,056				\$2,704,056
	Pilot Project IAQ assessments, recommendations, and design	Laurel ES	\$500,000	\$32,026	\$170,694	\$297,280			\$500,000
	Pilot Project IAQ assessments, recommendations, and design	Manzanita ES	\$500,000	\$93,915	\$108,805	\$297,280			\$500,000
	Pilot Project IAQ assessments, recommendations, and design	West Oakland Middle School	\$500,000	\$34,405	\$168,315	\$297,280			\$500,000
	Trust for Public Land Project	Bridges Academy	\$100,000	\$44,869	\$55,131				\$100,000
	Tech Services - IT Improvements	Investment Summary	\$20,365,408	\$365,408	\$2,000,000	\$316,666	\$15,000,000	\$2,683,334	\$20,365,408
	Relocate Tech. Services	Old Observatory Campus	\$365,408	\$365,408	\$0				\$365,408
	Tech Services - IT Improvements	Various Sites	\$20,000,000		\$2,000,000	\$316,666	\$15,000,000	\$2,683,334	\$20,000,000
	Board Directed Initiative Allowance	Various Sites	\$125,000					\$125,000	\$125,000
Facilities and Tech Improvements		Subtotal	\$114,451,173.00	\$7,627,845.00	\$26,896,331.00	\$16,608,506.00	\$50,155,775.00	\$13,162,716.00	\$114,451,173.00

Draft 8/27/2024									
<b>OAKLAND UNIFIED SCHOOL DISTRICT - FACILITIES PLANNING AND MANAGEMENT</b> <b>Measure Y - October 2024 Revised Spending Plan and Drawdown.</b>									
Draft 8/27/2024									
Health and Safety Upgrades		Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
	<b>Safety and Security Investment</b>	<b>Investment Summary</b>	<b>\$21,481,000</b>	<b>\$1,993,970</b>	<b>\$270,723</b>	<b>\$5,372,000</b>	<b>\$2,824,429</b>	<b>\$11,019,878</b>	<b>\$21,481,000</b>
	<b>Other Safety and Security Enhancements</b>	<b>Investment Summary</b>	<b>\$9,000,000</b>	<b>\$75,571</b>	<b>\$100,000</b>	<b>\$3,000,000</b>	<b>\$2,824,429</b>	<b>\$3,000,000</b>	<b>\$9,000,000</b>
	<i>Fire Alarm/ Intrusion Alarm Replacement</i>	<i>Various Sites</i>	<i>\$3,000,000</i>			<i>\$1,000,000</i>	<i>\$1,000,000</i>	<i>\$1,000,000</i>	<i>\$3,000,000</i>
	<i>Evacuation Maps</i>	<i>District Wide</i>	<i>\$4,000,000</i>	<i>\$75,571</i>	<i>\$100,000</i>	<i>\$2,000,000</i>	<i>\$1,824,429</i>		<i>\$4,000,000</i>
	<i>Other Safety and Security Enhancements</i>	<i>Various Sites</i>	<i>\$2,000,000</i>					<i>\$2,000,000</i>	<i>\$2,000,000</i>
	<b>Camera Security Systems</b>	<b>Investment Summary</b>	<b>\$8,803,851</b>	<b>\$1,853,399</b>	<b>\$170,723</b>	<b>\$1,907,000</b>	<b>\$0</b>	<b>\$4,872,729</b>	<b>\$8,803,851</b>
	<b>Elementary School Security Cameras</b>	<b>Investment Summary</b>	<b>\$5,000,000</b>	<b>\$127,271</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,872,729</b>	<b>\$5,000,000</b>
	<i>ES</i>	<i>Madison Primary</i>	<i>#</i>	<i>\$127,271</i>					<i>\$127,271</i>
	<i>ES</i>	<i>Various Sites</i>	<i>#</i>					<i>\$4,872,729</i>	<i>\$4,872,729</i>
	<b>Middle School Security Cameras</b>	<b>Investment Summary</b>	<b>\$1,907,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$1,907,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$1,907,000</b>
	<i>MS</i>	<i>Bret Harte Middle School</i>	<i>#</i>			<i>\$164,000</i>			<i>\$164,000</i>
	<i>MS</i>	<i>Elmhurst United Middle School</i>	<i>#</i>			<i>\$169,000</i>			<i>\$169,000</i>
	<i>MS</i>	<i>Frick United Academy of Language</i>	<i>#</i>			<i>\$220,000</i>			<i>\$220,000</i>
	<i>MS</i>	<i>Claremont Middle School</i>	<i>#</i>			<i>\$225,000</i>			<i>\$225,000</i>
	<i>MS</i>	<i>Montera Middle School</i>	<i>#</i>			<i>\$225,000</i>			<i>\$225,000</i>
	<i>MS</i>	<i>Madison</i>	<i>#</i>			<i>\$225,000</i>			<i>\$225,000</i>
	<i>MS</i>	<i>Roosevelt Middle School</i>	<i>#</i>			<i>\$227,000</i>			<i>\$227,000</i>
	<i>MS</i>	<i>Urban Promise Academy</i>	<i>#</i>			<i>\$225,000</i>			<i>\$225,000</i>
	<i>MS</i>	<i>Westlake Middle School</i>	<i>#</i>			<i>\$227,000</i>			<i>\$227,000</i>
	<i>MS</i>	<i>Various Sites</i>	<i>\$0</i>						<i>\$0</i>
	<b>High School Security Cameras</b>	<b>Investment Summary</b>	<b>\$1,896,851</b>	<b>\$1,726,128</b>	<b>\$170,723</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$1,896,851</b>
	<i>HS</i>	<i>Castlemont</i>	<i>#</i>	<i>\$334,339</i>					<i>\$334,339</i>
	<i>HS</i>	<i>CCPA</i>	<i>#</i>	<i>\$179,244</i>					<i>\$179,244</i>
	<i>HS</i>	<i>Ralph Bunche and Woms</i>	<i>#</i>	<i>\$150,252</i>					<i>\$150,252</i>
	<i>HS</i>	<i>Life Academy/United for Success</i>	<i>#</i>	<i>\$187,034</i>					<i>\$187,034</i>
	<i>HS</i>	<i>Fremont High School</i>	<i>#</i>	<i>\$99,000</i>	<i>\$55,000</i>				<i>\$154,000</i>
	<i>HS</i>	<i>Oakland High School</i>	<i>#</i>	<i>\$256,637</i>					<i>\$256,637</i>
	<i>HS</i>	<i>Oakland International High School</i>	<i>#</i>	<i>\$114,973</i>					<i>\$114,973</i>
	<i>HS</i>	<i>Oakland Technical High School</i>	<i>#</i>	<i>\$114,973</i>	<i>\$115,723</i>				<i>\$230,696</i>
	<i>HS</i>	<i>King Estates Campus - Rudsdale + Sojourner Truth</i>	<i>#</i>	<i>\$137,855</i>					<i>\$137,855</i>
	<i>HS</i>	<i>Skyline High School</i>	<i>#</i>	<i>\$122,249</i>					<i>\$122,249</i>
	<i>HS</i>	<i>Street Academy</i>	<i>\$29,572</i>	<i>\$29,572</i>					<i>\$29,572</i>
	<b>Door Entry Systems</b>	<b>Investment Summary</b>	<b>\$3,677,149</b>	<b>\$65,000</b>	<b>\$0</b>	<b>\$465,000</b>	<b>\$0</b>	<b>\$3,147,149</b>	<b>\$3,677,149</b>
	<b>CDC Door Entry Systems</b>	<b>Investment Summary</b>	<b>\$90,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$90,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$90,000</b>
	<i>CDC</i>	<i>Emerson</i>	<i>\$30,000</i>			<i>\$30,000</i>			<i>\$30,000</i>
	<i>CDC</i>	<i>Manzanita</i>	<i>\$30,000</i>			<i>\$30,000</i>			<i>\$30,000</i>
	<i>CDC</i>	<i>Hintil Ku</i>	<i>\$30,000</i>			<i>\$30,000</i>			<i>\$30,000</i>
	<b>Elementary School Door Entry Systems</b>	<b>Investment Summary</b>	<b>\$908,500</b>	<b>\$0</b>	<b>\$0</b>	<b>\$60,000</b>	<b>\$0</b>	<b>\$848,500</b>	<b>\$908,500</b>
	<i>ES</i>	<i>Grass Valley</i>	<i>\$30,000</i>			<i>\$30,000</i>			<i>\$30,000</i>
	<i>ES</i>	<i>Santa Fe</i>	<i>\$30,000</i>			<i>\$30,000</i>			<i>\$30,000</i>
	<i>ES</i>	<i>Various Sites</i>	<i>#</i>					<i>\$848,500</i>	<i>\$848,500</i>
	<b>Middle School Door Entry Systems</b>	<b>Investment Summary</b>	<b>\$1,815,500</b>	<b>\$0</b>	<b>\$0</b>	<b>\$285,000</b>	<b>\$0</b>	<b>\$1,530,500</b>	<b>\$1,815,500</b>
	<i>MS</i>	<i>Elmhurst United Middle School</i>	<i>\$30,000</i>			<i>\$30,000</i>			<i>\$30,000</i>
	<i>MS</i>	<i>Frick United Academy of Language</i>	<i>\$30,000</i>			<i>\$30,000</i>			<i>\$30,000</i>
	<i>MS</i>	<i>Claremont Middle School</i>	<i>\$30,000</i>					<i>\$30,000</i>	<i>\$30,000</i>
	<i>MS</i>	<i>Various Sites</i>	<i>#</i>			<i>\$225,000</i>		<i>\$1,500,500</i>	<i>\$1,725,500</i>
	<b>High School Door Entry Systems</b>	<b>Investment Summary</b>	<b>\$863,149</b>	<b>\$65,000</b>	<b>\$0</b>	<b>\$30,000</b>	<b>\$0</b>	<b>\$768,149</b>	<b>\$863,149</b>
	<i>HS</i>	<i>CCPA</i>	<i>\$0</i>						<i>\$0</i>
	<i>HS</i>	<i>Ralph J. Bunche</i>	<i>#</i>					<i>\$250,000</i>	<i>\$250,000</i>
	<i>HS</i>	<i>Madison</i>	<i>\$25,000</i>	<i>\$25,000</i>					<i>\$25,000</i>
	<i>HS</i>	<i>Oakland High School</i>	<i>\$15,000</i>	<i>\$15,000</i>					<i>\$15,000</i>
	<i>HS</i>	<i>Oakland Technical High School</i>	<i>\$25,000</i>	<i>\$25,000</i>					<i>\$25,000</i>
	<i>HS</i>	<i>Skyline High School</i>	<i>\$0</i>						<i>\$0</i>
	<i>HS</i>	<i>McClymonds</i>	<i>\$30,000</i>			<i>\$30,000</i>			<i>\$30,000</i>
	<i>HS</i>	<i>Various Sites</i>	<i>#</i>					<i>\$518,149</i>	<i>\$518,149</i>
	<b>School Site Kitchen and Dining Upgrades</b>	<b>Investment Summary</b>	<b>\$10,500,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$150,000</b>	<b>\$5,175,000</b>	<b>\$5,175,000</b>	<b>\$10,500,000</b>
	<i>School Site Kitchen and Dining Upgrades</i>	<i>Various Sites</i>	<i>\$10,500,000</i>			<i>\$150,000</i>	<i>\$5,175,000</i>	<i>\$5,175,000</i>	<i>\$10,500,000</i>
	<b>Play Surfacing</b>	<b>Investment Summary</b>	<b>\$2,000,000</b>			<b>\$1,000,000</b>	<b>\$1,000,000</b>		<b>\$2,000,000</b>
	<i>Play Surfacing</i>	<i>Various Sites</i>	<i>\$2,000,000</i>			<i>\$1,000,000</i>	<i>\$1,000,000</i>		<i>\$2,000,000</i>
<b>Health and Safety Upgrades</b>		<b>Subtotal</b>	<b>\$33,981,000</b>	<b>\$1,993,970</b>	<b>\$270,723</b>	<b>\$6,432,000</b>	<b>\$8,999,429</b>	<b>\$16,194,878</b>	<b>\$33,981,000</b>

Draft 8/27/2024									
OAKLAND UNIFIED SCHOOL DISTRICT - FACILITIES PLANNING AND MANAGEMENT									
Measure Y - October 2024 Revised Spending Plan and Drawdown.									
Draft 8/27/2024									
Energy Efficiency and Sustainability		Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
	Solar Projects	Investment Summary	\$11,024,968	\$156,508	\$0	\$10,868,460	\$0	\$0	\$11,024,968
	Solar PPA Phase 1	Highland ES	\$18,924	\$18,924					\$18,924
	Solar PPA Phase 1	Hoover ES	\$19,413	\$19,413					\$19,413
	Solar PPA Phase 1	Lockwood ES	\$25,456	\$25,456					\$25,456
	Solar PPA Phase 1	MLK Jr. ES	\$20,409	\$20,409					\$20,409
	Solar PPA Phase 1	Frick MS	\$21,495	\$21,495					\$21,495
	Solar PPA Phase 1	Central Kitchen	\$19,177	\$19,177					\$19,177
	Solar PPA Phase 1	The Woodland Campus	\$30,258	\$30,258					\$30,258
	Solar PPA Phase 1	Settlement	\$1,375,000			\$1,375,000			\$1,375,000
	Solar Phase 2 - Roof Top	Claremont MS	\$732,593	\$50		\$732,543			\$732,593
	Solar Phase 2 - DBB	Cole Admin Bldg.	\$1,457,737	\$50		\$1,457,687			\$1,457,737
	Solar Phase 2 - DBB	Fremont HS	\$2,027,492	\$50		\$2,027,442			\$2,027,492
	Solar Phase 2 - Roof Top	Glenview ES	\$1,161,709	\$0		\$1,161,709			\$1,161,709
	Solar Phase 2 - DSA Approval	Horace Mann	\$651,468	\$319		\$651,149			\$651,468
	Solar Phase 2 - DSA Approval	OAK @ Howard Campus	\$377,640	\$269		\$377,371			\$377,640
	Solar Phase 2 - DSA Approval	Laurel CDC	\$444,016	\$50		\$443,966			\$444,016
	Solar Phase 2 - DSA Approval	Madison Park Upper	\$1,458,005	\$319		\$1,457,686			\$1,458,005
	Solar Phase 2 - DSA Approval	Stonehurst Campus	\$1,184,176	\$269		\$1,183,907			\$1,184,176
	Energy Efficiency Upgrades	Investment Summary	\$7,592,827	\$0	\$2,024,801	\$5,568,026	\$0	\$0	\$7,592,827
	Plug Load Reduction	Investment Summary	\$659,000	\$0	\$186,333	\$472,667	\$0	\$0	\$659,000
	Plug Load Reduction	Various Sites	\$659,000		\$186,333	\$472,667			\$659,000
	Energy Efficiency LED Lighting	Investment Summary	\$6,933,827	\$0	\$1,838,468	\$5,095,359	\$0	\$0	\$6,933,827
	LED Lighting	Various Sites	\$6,933,827		\$1,838,468	\$5,095,359			\$6,933,827
	Water Efficiency	Investment Summary	\$100,000	\$0	\$0	\$100,000	\$0	\$0	\$100,000
	Water Efficiency	Elmhurst	\$100,000			\$100,000			\$100,000
	Battery Storage	Investment Summary	\$1,050,000	\$1,690	\$0	\$698,310	\$350,000	\$0	\$1,050,000
	Battery Storage	Oakland High	\$350,000	\$1,690		\$348,310			\$350,000
	Battery Storage	Castlemont	\$350,000			\$350,000			\$350,000
	Battery Storage	Oakland Tech	\$350,000				\$350,000		\$350,000
	Switch Gear Upgrades	Investment Summary	\$2,350,000	\$0	\$0	\$2,087,756	\$262,244	\$0	\$2,350,000
	Switch Gear Upgrades	Manzanita	\$0						\$0
	Switch Gear Upgrades	Various Sites	\$2,350,000			\$2,087,756	\$262,244		\$2,350,000
	EV Charging Station Installations	Investment Summary	\$100,000		\$0		\$100,000		\$100,000
Energy Efficiency and Sustainability		Subtotal	\$22,217,795.00	\$158,198.00	\$2,024,801.00	\$19,322,552.00	\$712,244.00	\$0.00	\$22,217,795.00

Draft 8/27/2024									
OAKLAND UNIFIED SCHOOL DISTRICT - FACILITIES PLANNING AND MANAGEMENT									
Measure Y - October 2024 Revised Spending Plan and Drawdown.									
Draft 8/27/2024									
Program Funds			Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
Cost of Bonds	Bond Sale Fees		\$4,838,620	\$1,205,296		\$1,205,296	\$1,928,028	\$500,000	\$4,838,620
Facilities Master Plan	Facilities Master Plan		\$1,352,835			\$1,352,835			\$1,352,835
Bond Program Contingency	For Unanticipated costs.		\$55,350,032			\$26,647,165	\$21,000,000	\$7,702,867	\$55,350,032
Bond Coordination	Project and Const. Managers. Facilities Admin and Mgmt. Staff		\$49,808,545	\$28,049,898		\$18,000,000	\$3,758,647		\$49,808,545
Program Funds		Subtotal	\$111,350,032	\$29,255,194	\$0	\$47,205,296	\$26,686,675	\$8,202,867	\$111,350,032
Draft 8/27/2024									
TOTAL MASTER PLAN FOR MEASURE Y			Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
			\$735,000,000	\$115,364,173	\$69,635,827	\$185,000,000	\$294,899,539	\$70,010,461	\$735,000,000
				\$185,000,000					



Presentation

# Measure Y Spending Plan October 2024 Update (First Read)

Facilities Planning & Management  
Facilities Committee  
November 14, 2024



**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. Measure Y Overview
2. Background
3. Ask of the Governing Body
4. Spending Plan Recommendations
5. Any Shifts- Draw 2 or 4
6. Next Steps



# Overview

The Spending Plan is a **dynamic document, subject to continuous review and adjustment to uphold the financial integrity and fiduciary responsibilities of the Measure Y Bond.**

Regular revisions ensure alignment with evolving needs and market conditions, construction escalation, safeguarding the long-term health of the bond.

To maintain fiscal accountability and efficiency, the Facilities and Planning Department conducts monthly reviews of project budgets, assessing them against project milestones and current market trends. This proactive approach ensures that spending remains optimized and responsive to any changes in scope or costs.

The October 2024 Spending Plan reflects a strategic focus, charting a clear course for the successful implementation of district-wide initiatives as the major projects gain momentum.

# 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**.

# Progress to Date

90

Funded Projects

28

Completed Projects

\$115  
Million

Spent through  
May 2024, Draw 1



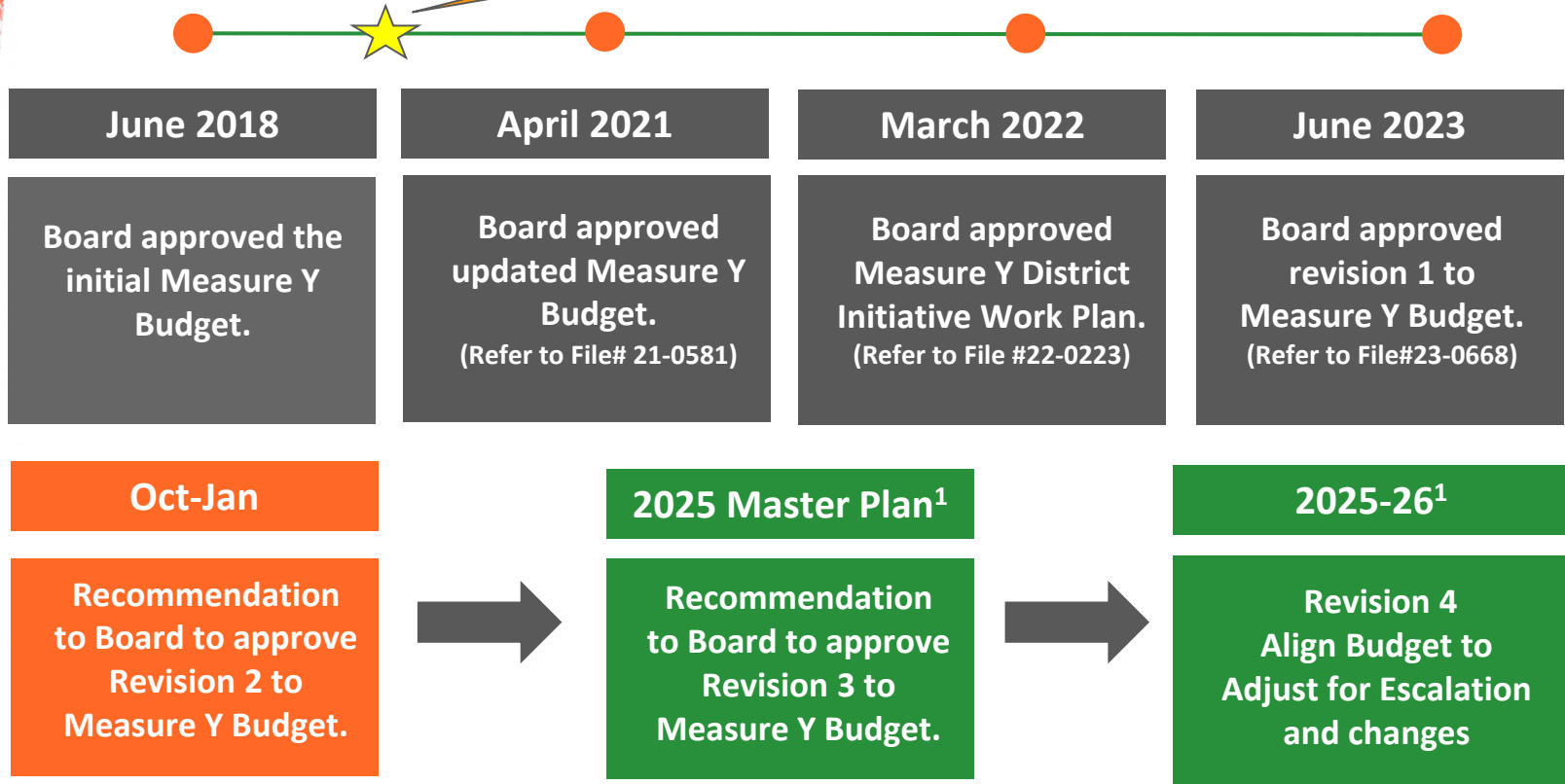
Key milestone in that 5 named projects have completed schematic design and the facilities team has much more insight around project costs across the life of the bond.

# Ask of the Governing Body

1. Bring to the Facilities Committee September 19, 2024 for Discussion and Feedback
2. Present to Citizens Bond Oversight Committee (CBOC) October 2024
3. Bring back to Facilities Committee for Approval of Staff Recommendation October 2024
4. Bring to BOE for vote October 2024
  - **Review, comment and approve revised Spending Plan**

# Background

Measure Y Passes  
November 2020



<sup>1</sup>Estimated timeline and subject to change based on changing market conditions and Board priorities.



# Spending Plan Overview

Investments	Draw 1	Draw 2	Draw 3	Draw 4	Total Investment
Major Projects	\$116.7	\$95.4	\$208.3	\$32.5	\$453
District Wide Investments					
Facilities & Technology	\$34.5	\$16.6	\$50.1	\$13.2	\$114.5
Health & Safety	\$2.3	\$6.4	\$9.0	\$16.2	\$33.9
Energy Efficiency & Sustainability	\$2.2	\$19.3	\$7	\$0	\$22.2
Bond Management	\$29.3	\$47.2	\$26.7	\$8.2	\$111.4
Measure Y Total	\$185	\$185	\$294.9	\$70	\$735

All values in Millions of Dollars, and rounded to the nearest Hundred Thousand Dollars.

# Prioritizing Bond Priorities to Support Demolition of Vacant Parcels

**Board Resolution 2021-0168**-Development of Cole Site and identified funding, “the Board hereby expresses its intent to fund (through Measure Y or a future bond measure) future construction (renovation or demolition and new construction) at 1025 Second Avenue that could include administrative offices and/or programmatic space for alternative education and career technical education programming.

There are two Vacant Sites that based on vandalism and blight require demolition to avoid additional district expenditures to maintain properties:

- 1025 Second Ave- \$13.5M Estimated Demolition of Buildings
- Ralph Bunche Academy- \$2M Estimated Demolition of Buildings

Lead Remediation: [24-2552 Re-Prioritization - Measure Y GOB Funds - Water Lead Issues](#) repurposes the 4th Draw of the bond for water lead issue.

# Review of Major Project Investments

Site Specific Named Projects	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
	\$453,000,000	\$76,328,966	\$40,443,972	\$95,431,646	\$208,345,416	\$32,450,000	\$453,000,000
McClymonds HS	\$91,250,000	\$1,769,872	\$11,480,128	\$31,833,563	\$46,166,437		\$91,250,000
Roosevelt MS	\$90,550,000	\$6,507,328	\$2,492,672	\$36,548,083	\$45,001,917		\$90,550,000
Garfield ES	\$56,700,000	\$164,604	\$158,334	\$7,000,000	\$49,377,062		\$56,700,000
Coliseum College Prep. Academy	\$55,000,000	\$877,927	\$122,073	\$10,050,000	\$43,950,000		\$55,000,000
Permanent Central Admin	\$55,000,000	\$35,070,403	\$19,929,597				\$55,000,000
Melrose Leadership Academy	\$36,500,000	\$3,733,246	\$1,466,754	\$10,000,000	\$21,300,000		\$36,500,000
Claremont MS	\$18,000,000	\$15,850,162	\$2,149,838				\$18,000,000
Laurel CDC	\$15,000,000	\$12,355,424	\$2,644,576				\$15,000,000
1025 Second Ave	\$15,000,000				\$125,000	\$14,875,000	\$15,000,000
Elmhurst United MS	\$10,000,000				\$1,225,000	\$8,775,000	\$10,000,000
Skyline HS	\$10,000,000				\$1,200,000	\$8,800,000	\$10,000,000
Site Specific Named Projects	\$453,000,000	\$76,328,966	\$40,443,972	\$95,431,646	\$208,345,416	\$32,450,000	\$453,000,000

*Staff needs direction on how to shift funding for 1025 Second Ave into the Draw 2 as the funding is currently prioritized in the Draw 4 based on cash flow projections for other bond projects and priorities.*

*No project funding adjustments proposed since June 2023 Approved Spending Plan*

# Facilities and Technology Investments

Facilities and Tech Improvements	Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
<b>Deferred Maintenance</b>	<b>Investment Summary</b>	<b>\$46,788,592</b>	<b>\$6,504,591</b>	<b>\$12,273,119</b>	<b>\$9,000,000</b>	<b>\$8,656,500</b>	<b>\$10,354,382</b>	<b>\$46,788,592</b>
<b>B&amp;G Roofing, Plumbing, and Asphalt Investments</b>	<b>Investment Summary</b>	<b>\$22,950,000</b>	<b>\$1,914,775</b>	<b>\$8,690,435</b>	<b>\$1,000,000</b>	<b>\$8,000,000</b>	<b>\$3,344,790</b>	<b>\$22,950,000</b>
Student Drop Off Enhancements and Asphalt Replacement	East Oakland PRIDE	\$4,750,000	\$518,431	\$4,231,569				\$4,750,000
Playground ADA Ramp	Kaiser	\$2,600,000	\$1,384,913	\$1,215,087				\$2,600,000
B&G Roofing and Plumbing - Repair and Replacement Projects	UPA	\$1,100,000	\$11,431	\$1,088,569				\$1,100,000
B&G Roofing and Plumbing - Repair and Replacement Projects	Roosevelt	\$900,000		\$900,000				\$900,000
B&G Roofing and Plumbing - Repair and Replacement Projects	Various Sites	\$6,800,000			\$500,000	\$4,000,000	\$2,300,000	\$6,800,000
B&G Asphalt Repair and Replacement Pool	Various Sites	\$6,800,000		\$1,255,210	\$500,000	\$4,000,000	\$1,044,790	\$6,800,000
<b>Portable Removal and Replacements</b>	<b>Investment Summary</b>	<b>\$7,009,592</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$7,009,592</b>	<b>\$7,009,592</b>
Portable Removal and Replacement	Various Sites	\$7,009,592					\$7,009,592	\$7,009,592
<b>Turf Field Replacements and Maintenance</b>	<b>Investment Summary</b>	<b>\$16,829,000</b>	<b>\$4,589,816</b>	<b>\$3,582,684</b>	<b>\$8,000,000</b>	<b>\$656,500</b>	<b>\$0</b>	<b>\$16,829,000</b>
Safety Lighting for Fields	Oakland Tech, Skyline HS, and Madison	\$1,313,000			\$656,500	\$656,500		\$1,313,000
New Turf Field	Various Sites	\$10,616,000		\$3,272,500	\$7,343,500			\$10,616,000
Turf Field Replacements	McClymonds	\$0						\$0
Turf Field Replacements	Oakland High	\$0						\$0
Turf Field Replacements	Calvin Simmons	\$0						\$0
Turf Field Replacements	Caesar Chavez	\$0						\$0
Turf Field Replacements	EOP	\$0						\$0
Stadium ADA Improvements	Castlemont High	\$4,900,000	\$4,589,816	\$310,184				\$4,900,000



# Facilities and Technology Investments - Cont.

Facilities and Tech Improvements	Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
<b>Heat Mitigation, Air Quality, Ventilation, and Comfort Improvements</b>	<b>Investment Summary</b>	<b>\$47,172,173</b>	<b>\$757,846</b>	<b>\$12,623,212</b>	<b>\$7,291,840</b>	<b>\$26,499,275</b>	<b>\$0</b>	<b>\$47,172,173</b>
Ventilation and Air Quality Improvements	Various Sites	\$24,243,117	\$143,842		\$2,000,000	\$22,099,275		\$24,243,117
Living School Yards & Heat Mitigations Strategies: Reducing Heat Island Impacts.	Multiple Sites	\$8,800,000			\$4,400,000	\$4,400,000		\$8,800,000
Window Wall System Replacement	Lowell	\$9,825,000	\$408,789	\$9,416,211				\$9,825,000
CalShape HVAC Assessment	Multiple Sites	\$2,704,056		\$2,704,056				\$2,704,056
Pilot Project IAQ assessments, recommendations, and design	Laurel ES	\$500,000	\$32,026	\$170,694	\$297,280			\$500,000
Pilot Project IAQ assessments, recommendations, and design	Manzanita ES	\$500,000	\$93,915	\$108,805	\$297,280			\$500,000
Pilot Project IAQ assessments, recommendations, and design	West Oakland Middle School	\$500,000	\$34,405	\$168,315	\$297,280			\$500,000
Trust for Public Land Project	Bridges Academy	\$100,000	\$44,869	\$55,131				\$100,000
<b>Tech Services - IT Improvements</b>	<b>Investment Summary</b>	<b>\$20,365,408</b>	<b>\$365,408</b>	<b>\$2,000,000</b>	<b>\$316,666</b>	<b>\$15,000,000</b>	<b>\$2,683,334</b>	<b>\$20,365,408</b>
Relocate Tech. Services	Old Observatory Campus	\$365,408	\$365,408	\$0				\$365,408
Tech Services - IT Improvements	Various Sites	\$20,000,000		\$2,000,000	\$316,666	\$15,000,000	\$2,683,334	\$20,000,000
<b>Board Directed Initiative Allowance</b>	<b>Various Sites</b>	<b>\$125,000</b>					<b>\$125,000</b>	<b>\$125,000</b>
	<b>Subtotal</b>	<b>\$114,451,173.00</b>	<b>\$7,627,845.00</b>	<b>\$26,896,331.00</b>	<b>\$16,608,506.00</b>	<b>\$50,155,775.00</b>	<b>\$13,162,716.00</b>	<b>\$114,451,173.00</b>

# Health and Safety Investments

Health and Safety Upgrades	Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
Safety and Security Investment	Investment Summary	\$21,481,000	\$1,993,970	\$270,723	\$5,372,000	\$2,824,429	\$11,019,878	\$21,481,000
Other Safety and Security Enhancements	Investment Summary	\$9,000,000	\$75,571	\$100,000	\$3,000,000	\$2,824,429	\$3,000,000	\$9,000,000
Camera Security Systems	Investment Summary	\$8,803,851	\$1,853,399	\$170,723	\$1,907,000	\$0	\$4,872,729	\$8,803,851
Elementary School Security Cameras	Investment Summary	\$5,000,000	\$127,271	\$0	\$0	\$0	\$4,872,729	\$5,000,000
Middle School Security Cameras	Investment Summary	\$1,907,000	\$0	\$0	\$1,907,000	\$0	\$0	\$1,907,000
High School Security Cameras	Investment Summary	\$1,896,851	\$1,726,128	\$170,723	\$0	\$0	\$0	\$1,896,851
Door Entry Systems	Investment Summary	\$3,677,149	\$65,000	\$0	\$465,000	\$0	\$3,147,149	\$3,677,149
CDC Door Entry Systems	Investment Summary	\$90,000	\$0	\$0	\$90,000	\$0	\$0	\$90,000
Elementary School Door Entry Systems	Investment Summary	\$908,500	\$0	\$0	\$60,000	\$0	\$848,500	\$908,500
Middle School Door Entry Systems	Investment Summary	\$1,815,500	\$0	\$0	\$285,000	\$0	\$1,530,500	\$1,815,500
High School Door Entry Systems	Investment Summary	\$863,149	\$65,000	\$0	\$30,000	\$0	\$768,149	\$863,149
School Site Kitchen and Dining Upgrades	Investment Summary	\$10,500,000	\$0	\$0	\$150,000	\$5,175,000	\$5,175,000	\$10,500,000
Play Surfacing	Investment Summary	\$2,000,000	\$0	\$0	\$1,000,000	\$1,000,000	\$0	\$2,000,000
<b>Subtotal</b>		<b>\$33,981,000</b>	<b>\$1,993,970</b>	<b>\$270,723</b>	<b>\$6,432,000</b>	<b>\$8,999,429</b>	<b>\$16,194,878</b>	<b>\$33,981,000</b>

# Energy Efficiency and Sustainability Investments

Energy Efficiency and Sustainability	Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
<b>Solar Projects</b>	<b>Investment Summary</b>	<b>\$11,024,968</b>	<b>\$156,508</b>	<b>\$0</b>	<b>\$10,868,460</b>	<b>\$0</b>	<b>\$0</b>	<b>\$11,024,968</b>
Solar Phase 2 - Roof Top	Claremont MS	\$732,593	\$50		\$732,543			\$732,593
Solar Phase 2 - DBB	Cole Admin Bldg.	\$1,457,737	\$50		\$1,457,687			\$1,457,737
Solar Phase 2 - DBB	Fremont HS	\$2,027,492	\$50		\$2,027,442			\$2,027,492
Solar Phase 2 - Roof Top	Glenview ES	\$1,161,709	\$0		\$1,161,709			\$1,161,709
Solar Phase 2 - DSA Approval	Horace Mann	\$651,468	\$319		\$651,149			\$651,468
Solar Phase 2 - DSA Approval	OAK @ Howard Campus	\$377,640	\$269		\$377,371			\$377,640
Solar Phase 2 - DSA Approval	Laurel CDC	\$444,016	\$50		\$443,966			\$444,016
Solar Phase 2 - DSA Approval	Madison Park Upper	\$1,458,005	\$319		\$1,457,686			\$1,458,005
Solar Phase 2 - DSA Approval	Stonehurst Campus	\$1,184,176	\$269		\$1,183,907			\$1,184,176
<b>Energy Efficiency Upgrades</b>	<b>Investment Summary</b>	<b>\$7,592,827</b>	<b>\$0</b>	<b>\$2,024,801</b>	<b>\$5,568,026</b>	<b>\$0</b>	<b>\$0</b>	<b>\$7,592,827</b>
Plug Load Reduction	Investment Summary	\$659,000	\$0	\$186,333	\$472,667	\$0	\$0	\$659,000
Energy Efficiency LED Lighting	Investment Summary	\$6,933,827	\$0	\$1,838,468	\$5,095,359	\$0	\$0	\$6,933,827
Water Efficiency	Investment Summary	\$100,000	\$0	\$0	\$100,000	\$0	\$0	\$100,000
Battery Storage	Investment Summary	\$1,050,000	\$1,690	\$0	\$698,310	\$350,000	\$0	\$1,050,000
Switch Gear Upgrades	Investment Summary	\$2,350,000	\$0	\$0	\$2,087,756	\$262,244	\$0	\$2,350,000
EV Charging Station Installations	Investment Summary	\$100,000		\$0		\$100,000		\$100,000
<b>Energy Efficiency and Sustainability</b>	<b>Subtotal</b>	<b>\$22,217,795.00</b>	<b>\$158,198.00</b>	<b>\$2,024,801.00</b>	<b>\$19,322,552.00</b>	<b>\$712,244.00</b>	<b>\$0.00</b>	<b>\$22,217,795.00</b>

# Bond Coordination Investments

- Bond Sales Fees (paid per draw) Total: \$4.84M
- Facilities Master Plan: \$1.35M
- Bond Coordination: \$56M
- **Initial Bond Program Contingency: \$73.5 M**
  - Draw 1: \$ 8,500,000 (Expended)
    - Laurel CDC Project: **-\$3.5M**
    - Cole Administrative Building: **-\$5.0 M**
  - Draw 2: Estimate \$24,000,000
  - Draw 3: Estimate \$10,150,000
  - Draw 4: Estimate \$30,850,000



# Exploring Potential Shifts in Spending Plan

Option	Bond Area	Description	Impact
Option A	Major Projects	Delay Construction Start of Garfield (Major Project) until 2027 and Garfield Funding is Transferred to 1025 Second Ave.	Escalated cost for the project that will reduce the overall scope of the project. There is potential for later increased scope if paired with future District Bonds.
Option B	Contingency	Borrow \$15M early from Bond Program Contingency to the Draw 4 and Bring Forward the 1025 Funding for 2nd Draw	If there are unforeseen conditions on projects (like soil contamination), the Bond Program Contingency would be limited in its ability to provide additional funds to named projects (McClymonds, Roosevelt, CCPA, MLA, and Garfield) This would cause delays in other planned projects or it would force a reduction of scope on other planned projects.
Option C	<b>District Wide Initiatives</b> <ul style="list-style-type: none"> <li>Deferred Maintenance</li> <li>Turf Fields</li> </ul>	Delay Replacement Turf Fields (\$10.5 M) Delay Living School Yard (\$4.4 M)	Escalated cost for each identified project at 3-5% per year of delay. Potential safety issues for that would develop based on delays. Would impact potential funding from ELOP and other district partnerships who are investing funds in these areas. Key expectation from Bond Polling around completion of projects like this. Could impact future partnerships with philanthropy for school yard delays.
Option D	<b>District Wide Initiatives</b> <ul style="list-style-type: none"> <li>Energy Efficiency</li> <li>Classroom Air Quality</li> </ul>	Delay IT projects (\$2.3M) Delay Energy Efficiency LED Lighting (\$7 M) Delay Safety Investments/Playmatting (\$4 M) Delay Ventilation and Air Quality (\$1.7 M)	Escalated cost for each identified project at 3-5% per year of delay. Lost savings from energy efficiency investments and improvements at sites for overall ventilation and air quality. District's will not be able to purchase fluorescent lighting based on state law in 2026. The safety investments would be delayed potentially impacting student safety.
Option E	<b>District Wide Initiatives</b> <ul style="list-style-type: none"> <li>Energy Efficiency</li> <li>Sustainability</li> </ul>	Stop or delay solar projects and energy efficiency projects to the 4th Draw <ul style="list-style-type: none"> <li>Solar Projects (\$10.8M)</li> <li>Energy Efficiency (\$4.2 M)</li> </ul>	Increased expense to general fund for overall utility cost as OUSD would miss the NEM 2 deadline and does not align to climate emergency resolution. District would lose current Department of State Architecture approval on plans for sites.

## Board Discussion:

The staff recommendations do NOT include any other shifts in the spending plan currently? If the Board were to prioritize, shifts to address the lead remediation, what items would be prioritized based on staff options?

Are there any additional options or a combination that the Committee would like staff to explore?

Does the Board require additional information or analysis to identify a prioritization and other alternative strategies?

# Next Steps

1. Present to CBOC: December 2024
1. Bring is back to the Board in January 2025

# THANK YOU

## Any Questions?

Additionally, for more information, please reach out:

Preston Thomas  
Chief Systems and Services Officer

Kenya Chatman  
Executive Director of Facilities

# APPENDIX

# Next Spending Plan Revisions



## January

PM/CM review of spending

PM/CM, Director & Accountant review project spending and adjustments.

## March

PM/CM review of spending

PM/CM, Director & Accountant review project spending and adjustments.

## April

Accounting reports draft Spending Plan

Accounting consolidates all project spending adjustments into a recommended **June Spending Plan**.

## May

First read of June Spending Plan due

Accounting presents the June Spending Plan and consolidates any edits requested.

## June

Approval of June Spending Plan due

Board approval, Accounting disseminates to the Facilities Department

## July

PM/CM review of spending

PM/CM, Director & Accountant review project spending and adjustments.

## September

PM/CM review of spending

PM/CM, Director & Accountant review project spending and adjustments.

## October

Accounting reports draft Spending Plan

Accounting consolidates all project spending adjustments into a recommended **December Spending Plan**.

## November

First read of December Spending Plan due

Accounting presents the June Spending Plan and consolidates any edits requested.

## December

Approval of December Spending Plan due

Board approval, Accounting disseminates to the Facilities Department

### \*2025 Revision 3:

- First Read May
- Approval June

### \*2025 Revision 4:

- First Read November
- Approval December

# Energy Efficiency and Sustainability Investments

Energy Efficiency and Sustainability	Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
<b>Solar Projects</b>	<b>Investment Summary</b>	<b>\$11,024,968</b>	<b>\$156,508</b>	<b>\$0</b>	<b>\$10,868,460</b>	<b>\$0</b>	<b>\$0</b>	<b>\$11,024,968</b>
Solar PPA Phase 1	Highland ES	\$18,924	\$18,924					\$18,924
Solar PPA Phase 1	Hoover ES	\$19,413	\$19,413					\$19,413
Solar PPA Phase 1	Lockwood ES	\$25,456	\$25,456					\$25,456
Solar PPA Phase 1	MLK Jr. ES	\$20,409	\$20,409					\$20,409
Solar PPA Phase 1	Frick MS	\$21,495	\$21,495					\$21,495
Solar PPA Phase 1	Central Kitchen	\$19,177	\$19,177					\$19,177
Solar PPA Phase 1	The Woodland Campus	\$30,258	\$30,258					\$30,258
Solar PPA Phase 1	Settlement	\$1,375,000			\$1,375,000			\$1,375,000
Solar Phase 2 - Roof Top	Claremont MS	\$732,593	\$50		\$732,543			\$732,593
Solar Phase 2 - DBB	Cole Admin Bldg.	\$1,457,737	\$50		\$1,457,687			\$1,457,737
Solar Phase 2 - DBB	Fremont HS	\$2,027,492	\$50		\$2,027,442			\$2,027,492
Solar Phase 2 - Roof Top	Glenview ES	\$1,161,709	\$0		\$1,161,709			\$1,161,709
Solar Phase 2 - DSA Approval	Horace Mann	\$651,468	\$319		\$651,149			\$651,468
Solar Phase 2 - DSA Approval	OAK @ Howard Campus	\$377,640	\$269		\$377,371			\$377,640
Solar Phase 2 - DSA Approval	Laurel CDC	\$444,016	\$50		\$443,966			\$444,016
Solar Phase 2 - DSA Approval	Madison Park Upper	\$1,458,005	\$319		\$1,457,686			\$1,458,005
Solar Phase 2 - DSA Approval	Stonehurst Campus	\$1,184,176	\$269		\$1,183,907			\$1,184,176
<b>Energy Efficiency Upgrades</b>	<b>Investment Summary</b>	<b>\$7,592,827</b>	<b>\$0</b>	<b>\$2,024,801</b>	<b>\$5,568,026</b>	<b>\$0</b>	<b>\$0</b>	<b>\$7,592,827</b>
<b>Water Efficiency</b>	<b>Investment Summary</b>	<b>\$100,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$100,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$100,000</b>
<b>Battery Storage</b>	<b>Investment Summary</b>	<b>\$1,050,000</b>	<b>\$1,690</b>	<b>\$0</b>	<b>\$698,310</b>	<b>\$350,000</b>	<b>\$0</b>	<b>\$1,050,000</b>
<b>Switch Gear Upgrades</b>	<b>Investment Summary</b>	<b>\$2,350,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$2,087,756</b>	<b>\$262,244</b>	<b>\$0</b>	<b>\$2,350,000</b>
<b>EV Charging Station Installations</b>	<b>Investment Summary</b>	<b>\$100,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$100,000</b>	<b>\$0</b>	<b>\$100,000</b>
<b>Subtotal</b>		<b>\$22,217,795.00</b>	<b>\$158,198.00</b>	<b>\$2,024,801.00</b>	<b>\$19,322,552.00</b>	<b>\$712,244.00</b>	<b>\$0.00</b>	<b>\$22,217,795.00</b>

# Health and Safety Investments

Health and Safety Upgrades	Location	Proposed Budget	Spent Draw 1 to Date (2021 - 5/30/2024)	Draw 1 (6/1/2024 - 2025)	Draw 2 (2024 - 2027)	Draw 3 (2026 - 2029)	Draw 4 (2028 - 2031)	Total Funding
<b>Safety and Security Investment</b>	<b>Investment Summary</b>	<b>\$21,481,000</b>	<b>\$1,993,970</b>	<b>\$270,723</b>	<b>\$5,372,000</b>	<b>\$2,824,429</b>	<b>\$11,019,878</b>	<b>\$21,481,000</b>
<b>Other Safety and Security</b>	<b>Investment Summary</b>	<b>\$9,000,000</b>	<b>\$75,571</b>	<b>\$100,000</b>	<b>\$3,000,000</b>	<b>\$2,824,429</b>	<b>\$3,000,000</b>	<b>\$9,000,000</b>
Fire Alarm/ Intrusion Alarm	Various Sites	\$3,000,000			\$1,000,000	\$1,000,000	\$1,000,000	\$3,000,000
Evacuation Maps	District Wide	\$4,000,000	\$75,571	\$100,000	\$2,000,000	\$1,824,429		\$4,000,000
Other Safety and Security	Various Sites	\$2,000,000					\$2,000,000	\$2,000,000
<b>Camera Security Systems</b>	<b>Investment Summary</b>	<b>\$8,803,851</b>	<b>\$1,853,399</b>	<b>\$170,723</b>	<b>\$1,907,000</b>	<b>\$0</b>	<b>\$4,872,729</b>	<b>\$8,803,851</b>
<b>Elementary School Security Cameras</b>	<b>Investment Summary</b>	<b>\$5,000,000</b>	<b>\$127,271</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,872,729</b>	<b>\$5,000,000</b>
ES	Madison Primary	\$127,271	\$127,271					\$127,271
ES	Various Sites	###					\$4,872,729	\$4,872,729
<b>Middle School Security Cameras</b>	<b>Investment Summary</b>	<b>\$1,907,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$1,907,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$1,907,000</b>
MS	Bret Harte Middle School	\$164,000			\$164,000			\$164,000
MS	Elmhurst United Middle School	\$169,000			\$169,000			\$169,000
MS	Frick United Academy of Language	\$220,000			\$220,000			\$220,000
MS	Claremont Middle School	\$225,000			\$225,000			\$225,000
MS	Montera Middle School	\$225,000			\$225,000			\$225,000
MS	Madison	\$225,000			\$225,000			\$225,000
MS	Roosevelt Middle School	\$227,000			\$227,000			\$227,000
MS	Urban Promise Academy	\$225,000			\$225,000			\$225,000
MS	Westlake Middle School	\$227,000			\$227,000			\$227,000
MS	Various Sites	\$0						\$0
<b>High School Security Cameras</b>	<b>Investment Summary</b>	<b>\$1,896,851</b>	<b>\$1,726,128</b>	<b>\$170,723</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$1,896,851</b>
HS	Castlemont	\$334,339	\$334,339					\$334,339
HS	CCPA	\$179,244	\$179,244					\$179,244
HS	Ralph Bunche and Woms	\$150,252	\$150,252					\$150,252
HS	Life Academy/United for Success	\$187,034	\$187,034					\$187,034
HS	Fremont High School	\$154,000	\$99,000	\$55,000				\$154,000
HS	Oakland High School	\$256,637	\$256,637					\$256,637
HS	Oakland International High School	\$114,973	\$114,973					\$114,973
HS	Oakland Technical High School	\$230,696	\$114,973	\$115,723				\$230,696
HS	King Estates Campus - Rudsdale + Sojourner Truth	\$137,855	\$137,855					\$137,855
HS	Skyline High School	\$122,249	\$122,249					\$122,249
HS	Street Academy	\$29,572	\$29,572					\$29,572



# Health and Safety Investments - Cont.

<b>Door Entry Systems</b>	<b>Investment Summary</b>	<b>\$3,677,149</b>	<b>\$65,000</b>	<b>\$0</b>	<b>\$465,000</b>	<b>\$0</b>	<b>\$3,147,149</b>	<b>\$3,677,149</b>
<b>CDC Door Entry Systems</b>	<b>Investment Summary</b>	<b>\$90,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$90,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$90,000</b>
CDC	Emerson	\$30,000			\$30,000			\$30,000
CDC	Manzanita	\$30,000			\$30,000			\$30,000
CDC	Hintil Ku	\$30,000			\$30,000			\$30,000
<b>Elementary School Door Entry Systems</b>	<b>Investment Summary</b>	<b>\$908,500</b>	<b>\$0</b>	<b>\$0</b>	<b>\$60,000</b>	<b>\$0</b>	<b>\$848,500</b>	<b>\$908,500</b>
ES	Grass Valley	\$30,000			\$30,000			\$30,000
ES	Santa Fe	\$30,000			\$30,000			\$30,000
ES	Various Sites	\$848,500					\$848,500	\$848,500
<b>Middle School Door Entry Systems</b>	<b>Investment Summary</b>	<b>\$1,815,500</b>	<b>\$0</b>	<b>\$0</b>	<b>\$285,000</b>	<b>\$0</b>	<b>\$1,530,500</b>	<b>\$1,815,500</b>
MS	Elmhurst United Middle School	\$30,000			\$30,000			\$30,000
MS	Frick United Academy of Language	\$30,000			\$30,000			\$30,000
MS	Claremont Middle School	\$30,000					\$30,000	\$30,000
MS	Various Sites	\$1,725,500			\$225,000		\$1,500,500	\$1,725,500
<b>High School Door Entry Systems</b>	<b>Investment Summary</b>	<b>\$863,149</b>	<b>\$65,000</b>	<b>\$0</b>	<b>\$30,000</b>	<b>\$0</b>	<b>\$768,149</b>	<b>\$863,149</b>
HS	CCPA	\$0						\$0
HS	Ralph J. Bunche	\$250,000					\$250,000	\$250,000
HS	Madison	\$25,000	\$25,000					\$25,000
HS	Oakland High School	\$15,000	\$15,000					\$15,000
HS	Oakland Technical High School	\$25,000	\$25,000					\$25,000
HS	Skyline High School	\$0						\$0
HS	McClymonds	\$30,000			\$30,000			\$30,000
HS	Various Sites	\$518,149					\$518,149	\$518,149
<b>School Site Kitchen and Dining Upgrades</b>	<b>Investment Summary</b>	<b>\$10,500,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$150,000</b>	<b>\$5,175,000</b>	<b>\$5,175,000</b>	<b>\$10,500,000</b>
<b>Play Surfacing</b>	<b>Investment Summary</b>	<b>\$2,000,000</b>			<b>\$1,000,000</b>	<b>\$1,000,000</b>		<b>\$2,000,000</b>
<b>Subtotal</b>		<b>\$33,981,000</b>	<b>\$1,993,970</b>	<b>\$270,723</b>	<b>\$6,432,000</b>	<b>\$8,999,429</b>	<b>\$16,194,878</b>	<b>\$33,981,000</b>