



OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools, Thriving Students

Board of Education:
Asset Management Policy
Implementation Update
December 11, 2013

Presenters: David Montes, Mia Settles-Tidwell, & Timothy White

v.6.0

Introduction & Overview: OUSD Strategic Plan



VISION

All students, in EVERY school have access to a well-resourced quality school program with additional resources designated to support students with the highest needs aligned with District-wide and school site strategies.

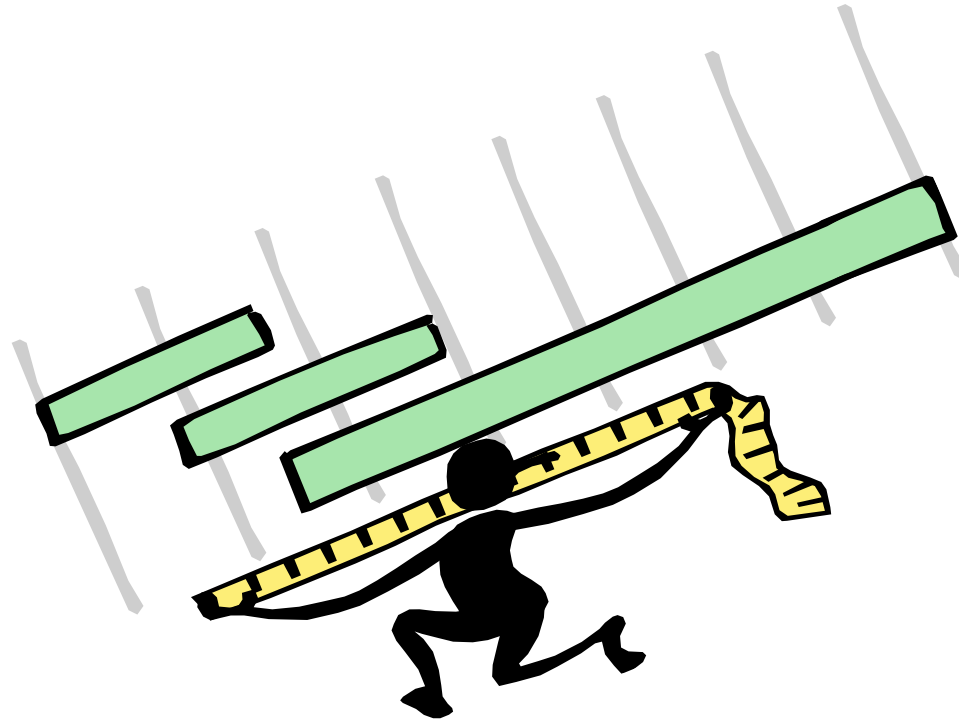


GOALS

- 1. To develop strategies that lead to an informed asset allocation in alignment with District strategies and goals**
- 2. To use programmatic direction, initiatives, and goals to guide facilities planning in creating Full Service Community Schools**

Loading Framework Defined

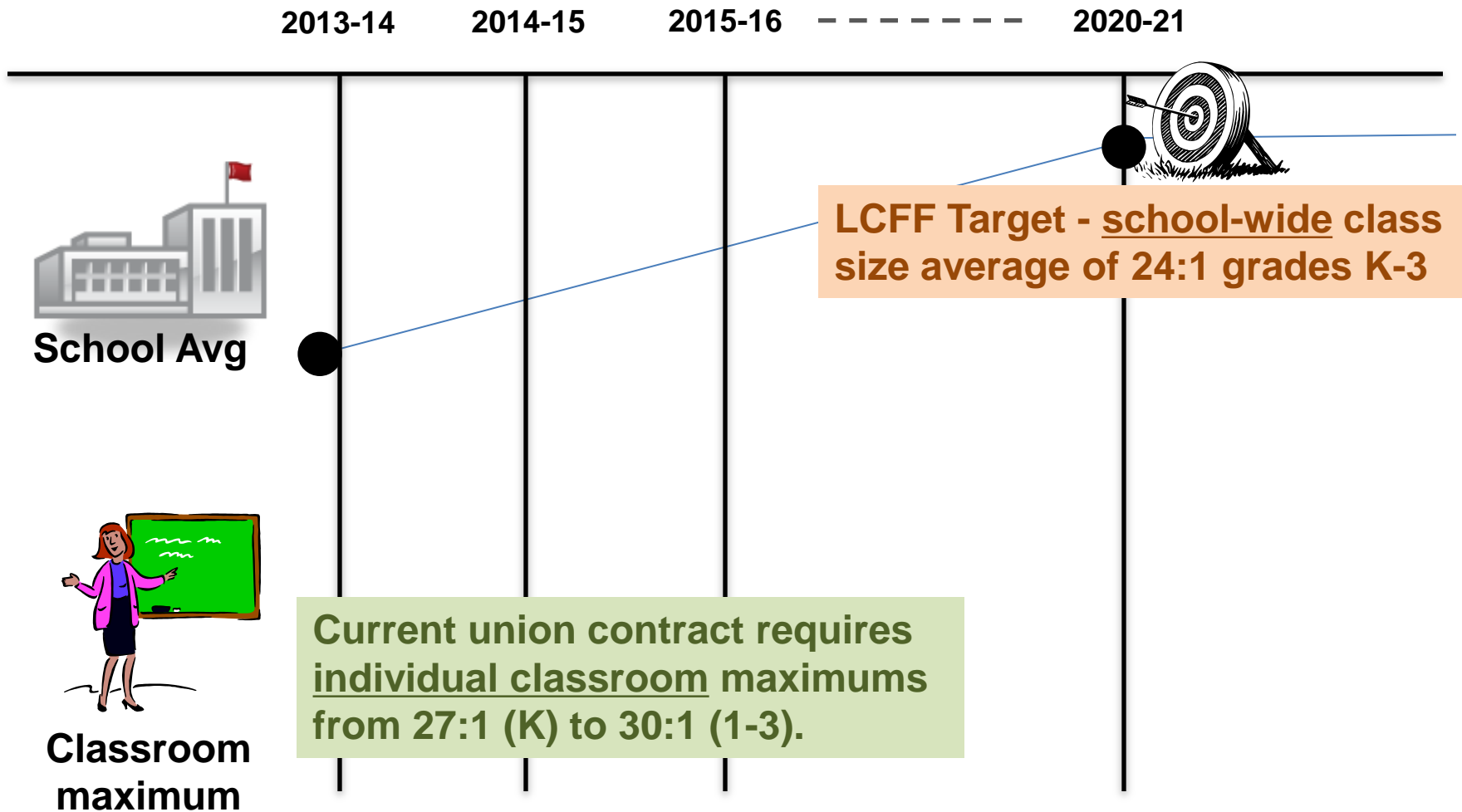
The **Loading Framework** defines how all existing seats, space, and or properties can be made available for a variety of uses.



Loading Framework Usages in OUSD

Categories	Usages
Facilities	To ensure strategic use aligned to District initiatives and programmatic needs, asset allocation
LCFF	To meet Local Control Funding Formula regulations towards class-size reduction in TK-3 at 24:1
Student Assignment Office	To ensure that classroom enrollment does NOT exceed the actual designated classroom space or compromise student class-size maximums
Programs & Services	To ensure that spaces and designs meet the program requirements for Special education, Early Childhood Education & other academic programs that enhance the educational experiences for All students
CBA- External Providers- Grant Applicants	Based in n proposition 39 and our Asset Management Policy-To ensure strategic and informed allocation of limited facility capacity.

LCFF requires annual progress toward school-wide target of 24:1 class-size in grades K-3





What are the key findings with respect to classroom Loading Models?

Working Group Progress Report

❖ Purpose: To develop district-wide loading framework

➤ **Cross- departmental working group**

- General Counsel
- Facilities Department
- Student Assignment
- Quality Schools Development Group
- District Spokesman
- Program for Exceptional Children
- Office of Instruction & Operational Alignment

➤ Scheduled Bi-Weekly meetings

Guiding Question: What are the Components of a Loading Framework?

There are 3 Components of Loading Framework

- Establish Classroom Criteria
- Loading Standards
- Loading Formula



Strategic Plan, Goal Area 4- To provide classrooms in accordance with the OUSD 2013 Design Guidelines

- Newly constructed classrooms must be at least 960 square feet
- Align with OUSD 21st Century Classroom Guidelines
- Effective, comfortable learning environments
- Contain safe, durable, sustainable, and appropriately sized furniture
- Contain permanent and securable storage options
- Facilitate learning through educational technologies

Loading Standards By Grade Level, as informed by:

- LCFF- Local Control Funding Formula
- Class Size Regulations (school-wide)
- Current union contract class size maximums (individual teacher/class)



Grade Range	Loadings
TK - 3	24
4 - 5	31
6 - 8	32
9 - 12	32

DRAFT

Loading Formula for Grades TK - 5

$$\begin{array}{l} \text{Total Classroom Sized Rooms} \\ - \text{ Charter Classrooms} \\ - \text{ Specialty Classrooms} \\ - \text{ Full Service Community Spaces} \\ \hline \left(\text{Net Standard Classrooms} \right) \times \text{Loading Factor} = \text{Site Capacity} \end{array}$$

Note:

- Can be applied at district, regional, classroom levels
- Guides the calculation of site capacity

Total Classroom Sized Rooms Defined as:

- ❖ Classroom sized rooms defined- Any room larger than 720 square feet, excluding specifically programmed spaces (e.g. gym, auditorium, library, etc.)
- ❖ Classroom sized rooms smaller than 720 square feet may be used for certain site-specific requirements (e.g. small group instruction, reading intervention etc.)

Total Classroom Sized Rooms

- Charter Classrooms
- Specialty Classrooms
- Full Service Community Spaces

$$\left(\text{Net Standard Classrooms} \right) \times \text{Loading Factor} = \text{Site Capacity}$$

Based on the 2013 Charter Assignment, Charter Classrooms defined as:

- ❖ Classrooms that have been designated for use by qualified charter programs

Total Classroom Sized Rooms

- Charter Classrooms
- Specialty Classrooms
- Full Service Community Spaces

$$\left(\text{Net Standard Classrooms} \right) \times \text{Loading Factor} = \text{Site Capacity}$$

Specialty Classrooms defined as:

- ❖ Specialty classrooms designed for programs with specific use requirements
- ❖ Program for Exceptional Children Programs (Special Day Classes)
- ❖ Early Childhood Education
- ❖ Wood shop, music, art, computer labs, STEM labs etc.

Total Classroom Sized Rooms

- Charter Classrooms
- **Specialty Classrooms**
- Full Service Community Spaces

$$\left(\text{Net Standard Classrooms} \right) \times \text{Loading Factor} = \text{Site Capacity}$$

Full Service Community Spaces

- ❖ Health Clinics
- ❖ After School Programs
- ❖ Programs that operate through outside funding sources

Total Classroom Sized Rooms

- Charter Classrooms
- Specialty Classrooms
- **Full Service Community Spaces**

$$\left(\text{Net Standard Classrooms} \right) \times \text{Loading Factor} = \text{Site Capacity}$$

Site Capacity is Calculated By:

- ❖ Net Standard Classrooms
- ❖ Net Standard Classrooms multiplied by the established loading factor equals site capacity

Total Classroom Sized Rooms

- Charter Classrooms
- Specialty Classrooms
- Full Service Community Spaces

$$\left(\text{Net Standard Classrooms} \right) \times \text{Loading Factor} = \text{Site Capacity}$$

Loading Formula for grades 6 - 12

Total Classroom Sized Rooms

- Charter Classrooms
 - Full Service Community Spaces
 - Specialty Classrooms
-

Net Standard Classrooms

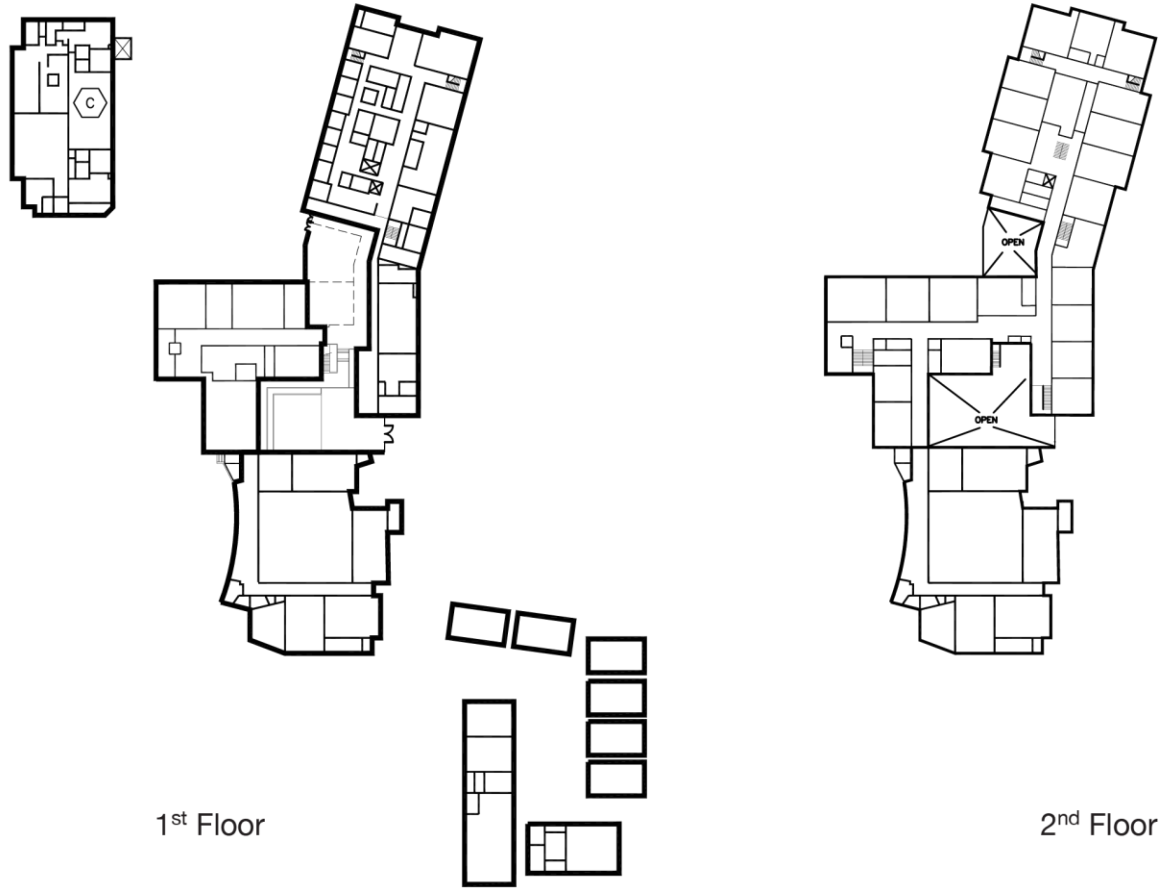
X

Loading
Factor

=

Site
Capacity

Example Calculation : Bret Harte Middle School



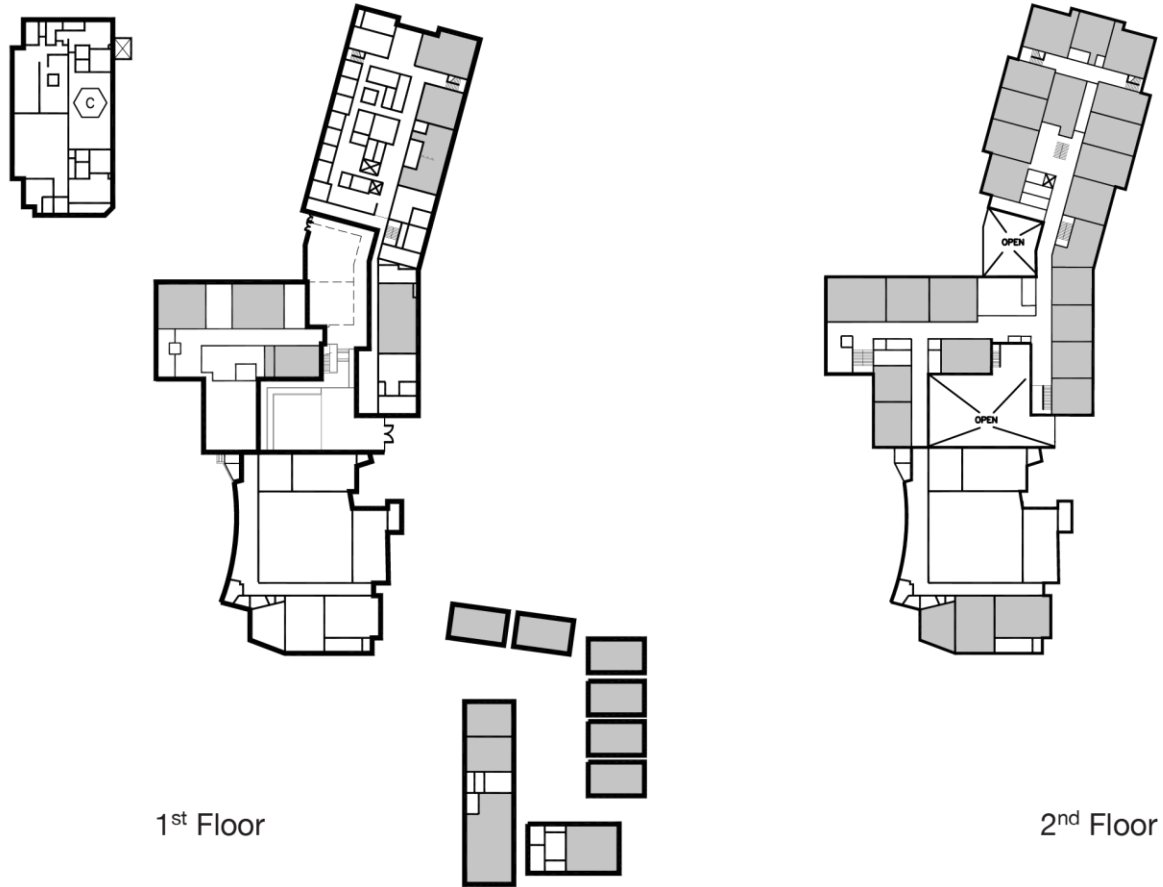
Total Classroom Sized Rooms

- Charter Classrooms
- Full Service Community Spaces
- Specialty Classrooms

Net Standard Classrooms

$$\text{Net Standard Classrooms} \times \text{Loading Factor} = \text{Site Capacity}$$

Example Calculation : Bret Harte Middle School



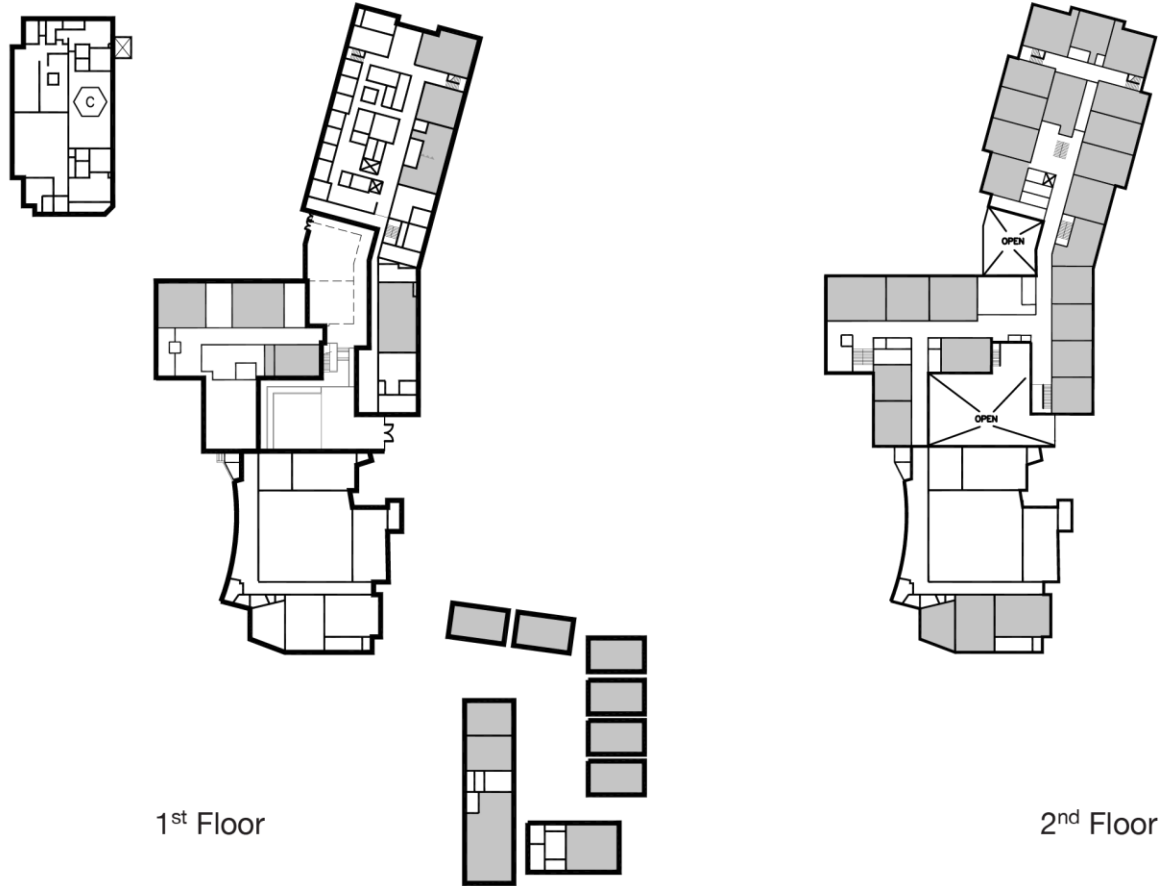
43 Total Classroom Sized Rooms

- Charter Classrooms
- Full Service Community Spaces
- Specialty Classrooms

Net Standard Classrooms

$$\text{Net Standard Classrooms} \times \text{Loading Factor} = \text{Site Capacity}$$

Example Calculation : Bret Harte Middle School



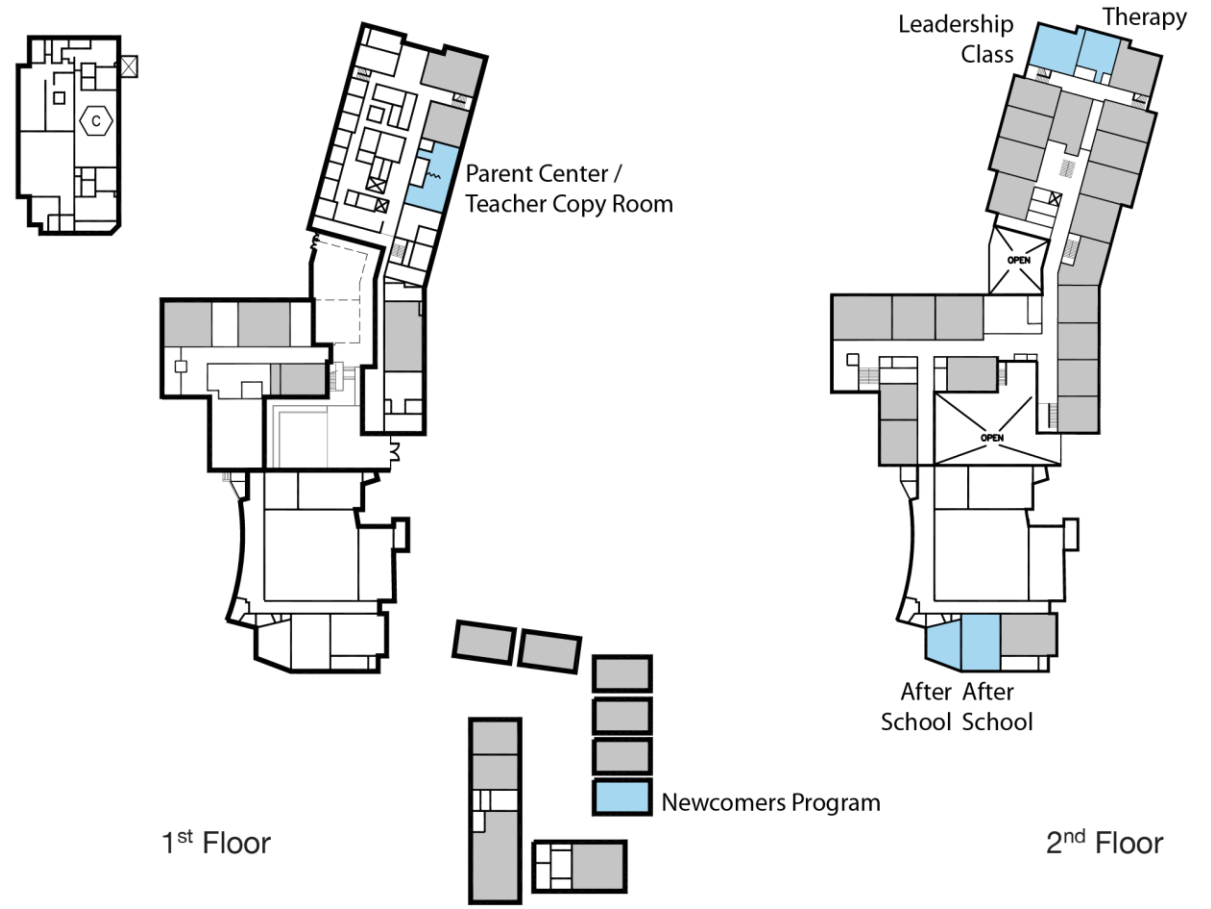
43 Total Classroom Sized Rooms

- **0** Charter Classrooms
- Full Service Community Spaces
- Specialty Classrooms

Net Standard Classrooms

$$\text{Net Standard Classrooms} \times \text{Loading Factor} = \text{Site Capacity}$$

Example Calculation : Bret Harte Middle School



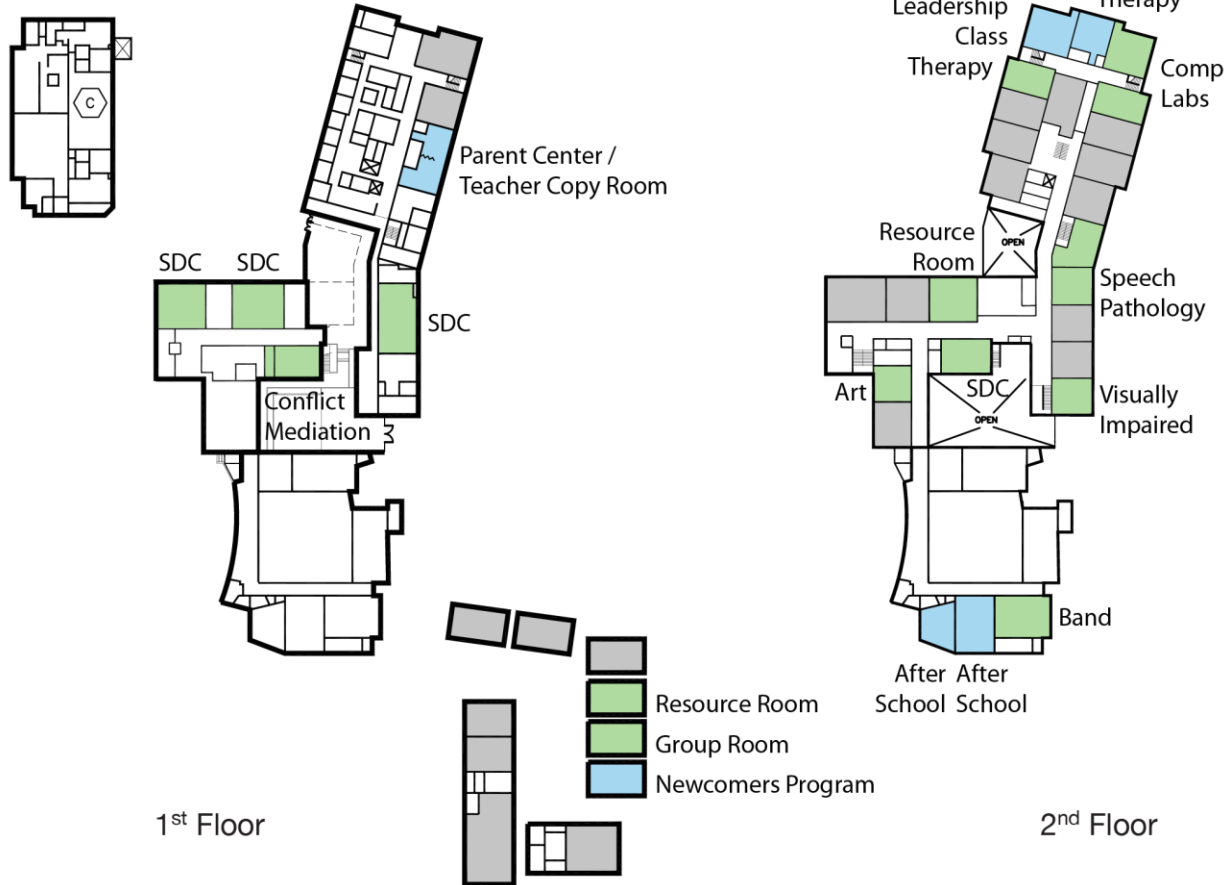
43 Total Classroom Sized Rooms

- **0** Charter Classrooms
- **6** Full Service Community Spaces
- Specialty Classrooms

Net Standard Classrooms

$$\text{Net Standard Classrooms} \times \text{Loading Factor} = \text{Site Capacity}$$

Example Calculation : Bret Harte Middle School



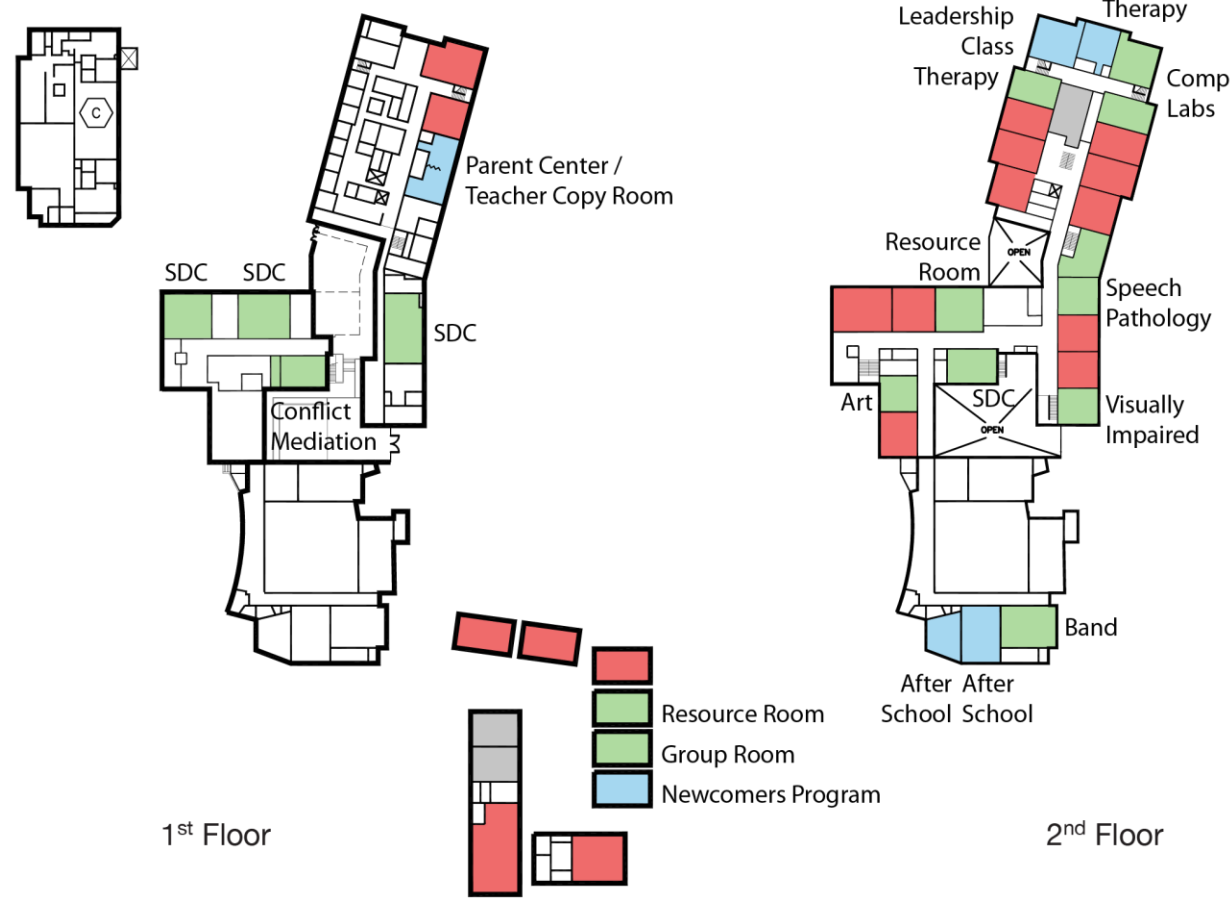
43 Total Classroom Sized Rooms

- **0** Charter Classrooms
- **6** Full Service Community Spaces
- **16** Specialty Classrooms

Net Standard Classrooms

$$\times \text{ Loading Factor } = \text{ Site Capacity }$$

Example Calculation : Bret Harte Middle School



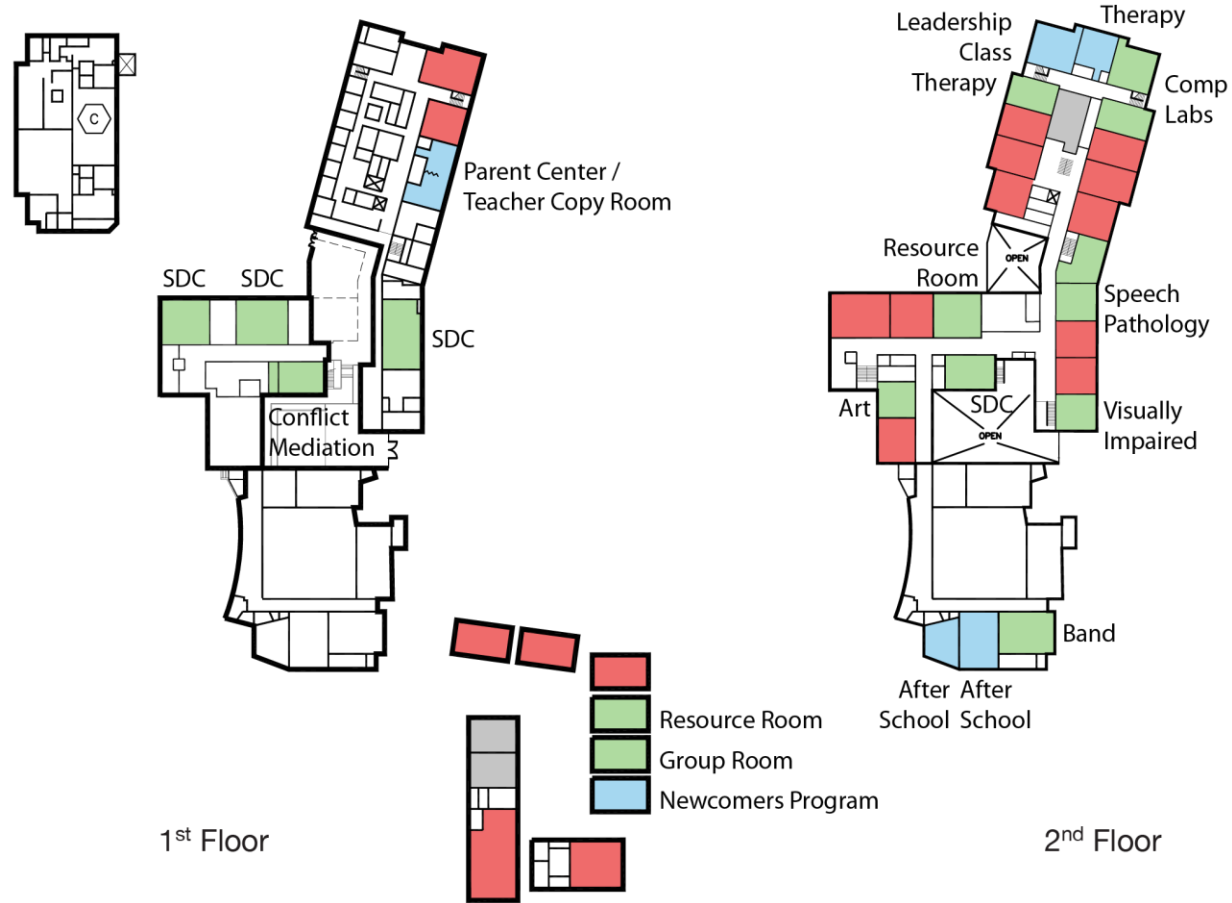
43 Total Classroom Sized Rooms

- **0** Charter Classrooms
- **6** Full Service Community Spaces
- **16** Specialty Classrooms

21 Net Standard Classrooms

x Loading Factor = Site Capacity

Example Calculation : Bret Harte Middle School



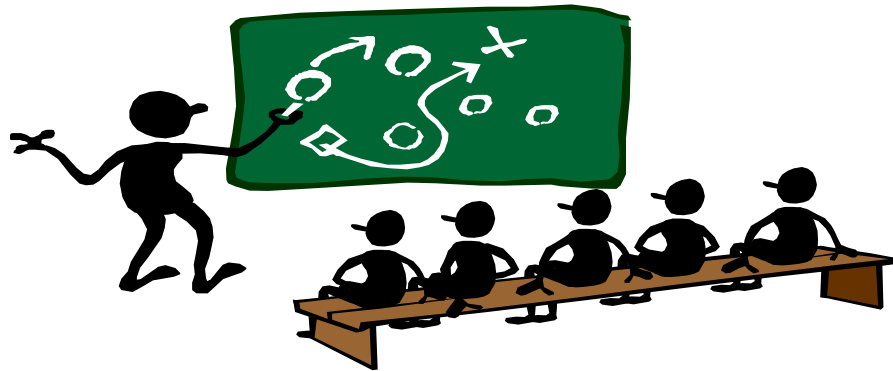
43 Total Classroom Sized Rooms

- **0** Charter Classrooms
- **6** Full Service Community Spaces
- **16** Specialty Classrooms

21 Net Standard Classrooms

$$\begin{array}{r}
 \times \\
 32 \\
 \text{Loading} \\
 \text{Factor}
 \end{array}
 =
 \begin{array}{r}
 672 \\
 \text{Site} \\
 \text{Capacity}
 \end{array}$$

Qualified Diverse Providers



Qualified Diverse Providers- Preliminary Definitions

A. *What constitutes a “Qualified” Diverse Provider?*

- A. May be an education or community-based non-profit organization
- B. May be a charter school operator
- C. Positive assessment of track record of services and/or performance
- D. Basis of assessment to include improvement of measurable outcomes, with a focus on improved outcomes for student performance - aligned to District Priorities and School Balanced Scorecard
- E. Demonstrated interest, skill, and capacity to provide support towards school improvement strategy

B. *What constitutes partnership?*

- A. Agreement to provide specific technical assistance towards school improvement effort
- B. Agreement to share effective practices relevant to school improvement effort
- C. Leveraging of mutual resources, such as access to philanthropy, professional development, facility space, etc., to reinforce diverse provider expertise and/or capacity in order to positively impact school improvement efforts
- D. Mutual agreement in the intended outcomes of the school improvement effort
- E. A policy of shared decision-making

Qualified Diverse Providers: Key Steps in the Process



Time Frame for Development

December 2013 / January 2014

- Vet preliminary definition w/ Cabinet, District site administrator representatives, charter leader representatives

February / March 2014

- Establish detailed criteria for application of definition

March – June, 2014 / 2014-15 school year

- Apply criteria for first round decision-making and engage in a cycle of inquiry to improve definitions and criteria

Identifying opportunity sites for housing District-operated schools & programs



Analysis of Supply & Demand:

- Lack of adequate, appropriate facilities available to meet the entire demand of district operated schools and programs
- Regulations of Prop 39, as well as elements of the Board adopted Asset Management

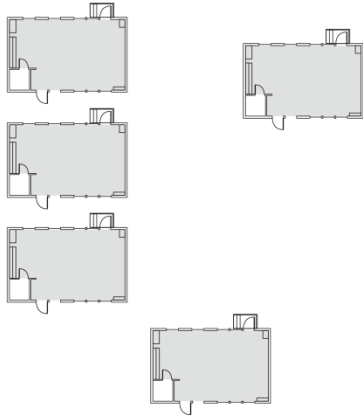
Criteria must be established and may include:

- **Facility Capacity-** Ability to serve projected number or target population
- **Facility Design-** Alignment to intended use, including grade levels to be served
- **Proximity-** The distance of available facility space to target population
- **Amenity Requirements-** Availability of amenities necessary to effectively implement program
- **Shared Facility Use-** Opportunities for mutual benefit and innovation

Appendix

- Includes example **Site Capacity Calculations** for Peralta Elementary & Parker Elementary

Example Calculation : Peralta Elementary School



14 Total Classroom Sized Rooms

- Charter Classrooms
- Specialty Classrooms
- Full Service Community Spaces

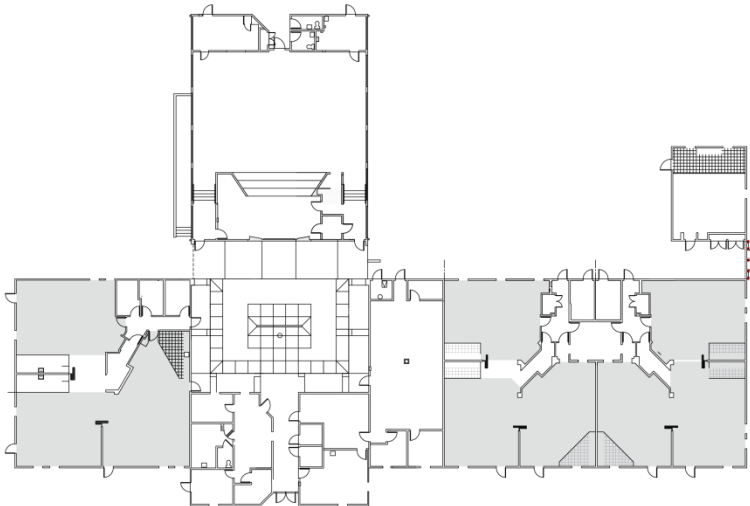
Net Standard Classrooms

x

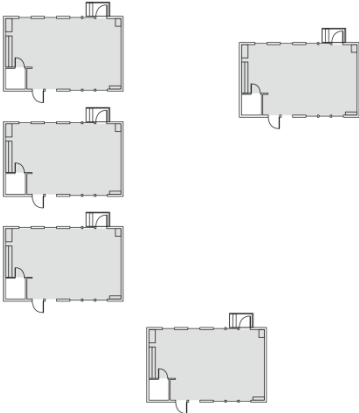
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Factor

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Site
Capacity



Example Calculation : Peralta Elementary School



14 Total Classroom Sized Rooms

- **0** Charter Classrooms
- Specialty Classrooms
- Full Service Community Spaces

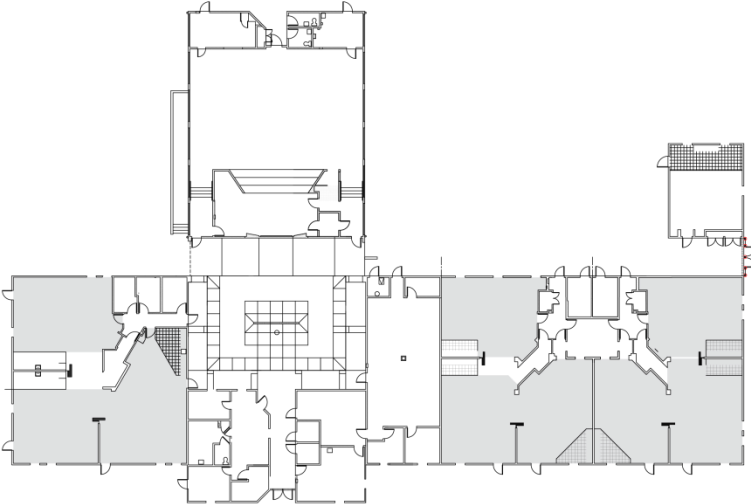
Net Standard Classrooms

x

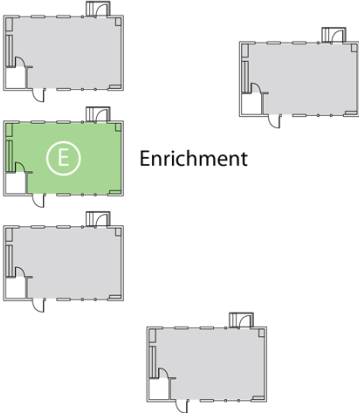
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Site
Capacity

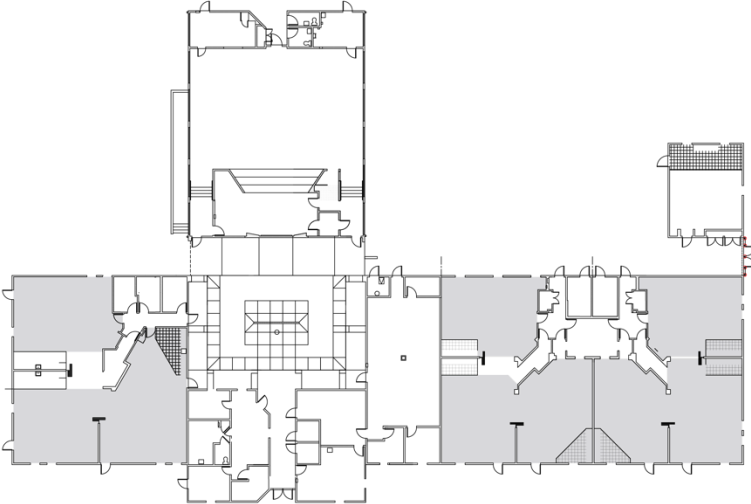


Example Calculation : Peralta Elementary School

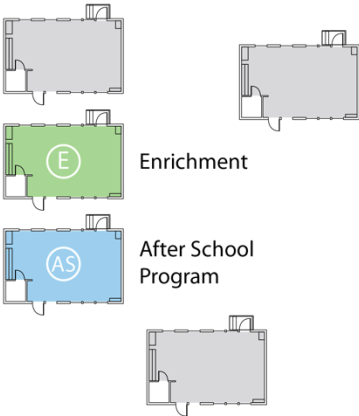


- 14** Total Classroom Sized Rooms
- **0** Charter Classrooms
- **1** Specialty Classrooms
- Full Service Community Spaces

Net Standard Classrooms × Loading Factor = Site Capacity

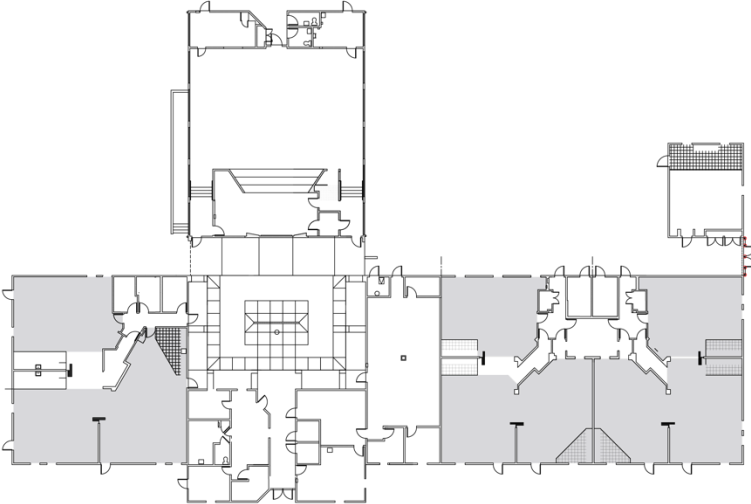


Example Calculation : Peralta Elementary School

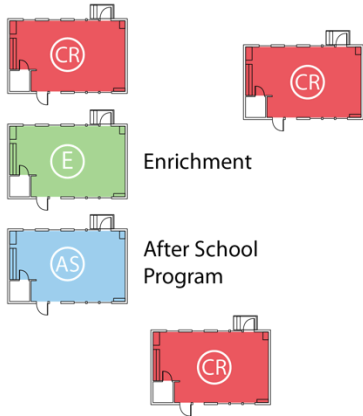


- 14** Total Classroom Sized Rooms
- **0** Charter Classrooms
- **1** Specialty Classrooms
- **1** Full Service Community Spaces

Net Standard Classrooms × Loading Factor = Site Capacity



Example Calculation : Peralta Elementary School



14 Total Classroom Sized Rooms

- **0** Charter Classrooms
- **1** Specialty Classrooms
- **1** Full Service Community Spaces

12 Net Standard Classrooms

x

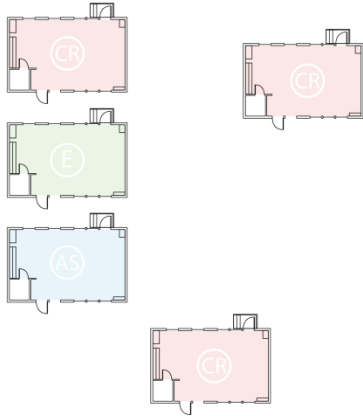
Loading Factor

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Site Capacity



Example Calculation : Peralta Elementary School



14 Total Classroom Sized Rooms

- **0** Charter Classrooms
- **1** Specialty Classrooms
- **1** Full Service Community Spaces

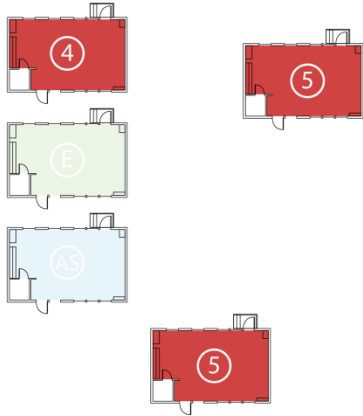
12 Net Standard Classrooms

× Loading Factor = Site Capacity

$$\left(\begin{array}{l} 8 \\ \text{TK - 3} \\ \text{Classrooms} \end{array} \times \begin{array}{l} 24 \\ \text{Loading} \\ \text{Factor} \end{array} \right) = \text{Site Capacity}$$



Example Calculation : Peralta Elementary School



14 Total Classroom Sized Rooms

- **0** Charter Classrooms
- **1** Specialty Classrooms
- **1** Full Service Community Spaces

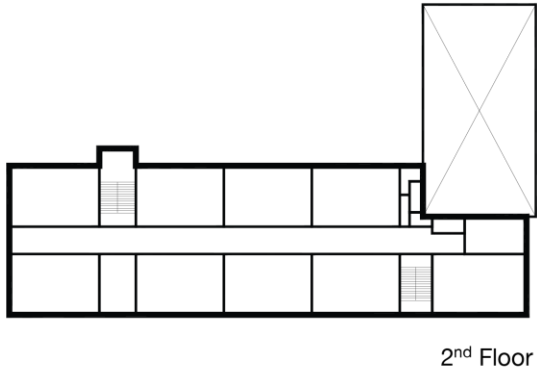
12 Net Standard Classrooms

× Loading Factor = Site Capacity

$$\left(\begin{array}{c} 8 \\ \text{TK - 3} \\ \text{Classrooms} \end{array} \times \begin{array}{c} 24 \\ \text{Loading} \\ \text{Factor} \end{array} \right) + \left(\begin{array}{c} 4 \\ \text{4 - 5} \\ \text{Classrooms} \end{array} \times \begin{array}{c} 31 \\ \text{Loading} \\ \text{Factor} \end{array} \right) = \begin{array}{c} 316 \\ \text{Site} \\ \text{Capacity} \end{array}$$



Example Calculation : Parker Elementary School



Total Classroom Sized Rooms

- Charter Classrooms
 - Specialty Classrooms
 - Full Service Community Spaces
-

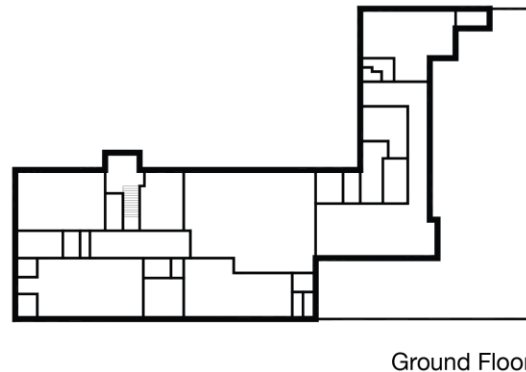
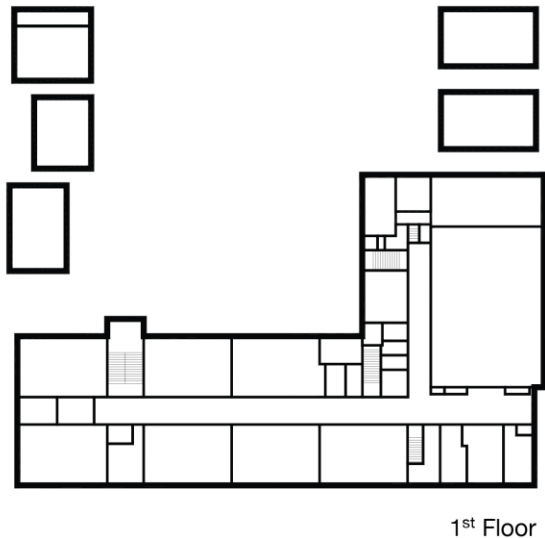
Net Standard Classrooms

X

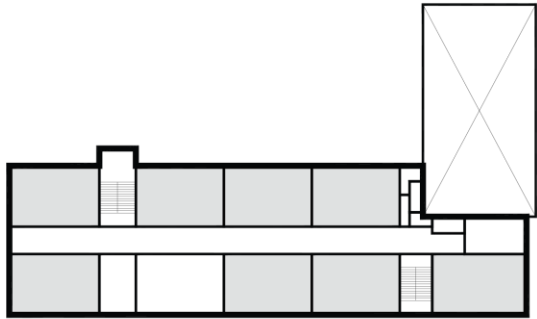
Loading
Factor

=

Site
Capacity



Example Calculation : Parker Elementary School



2nd Floor

20 Total Classroom Sized Rooms

- Charter Classrooms
- Specialty Classrooms
- Full Service Community Spaces

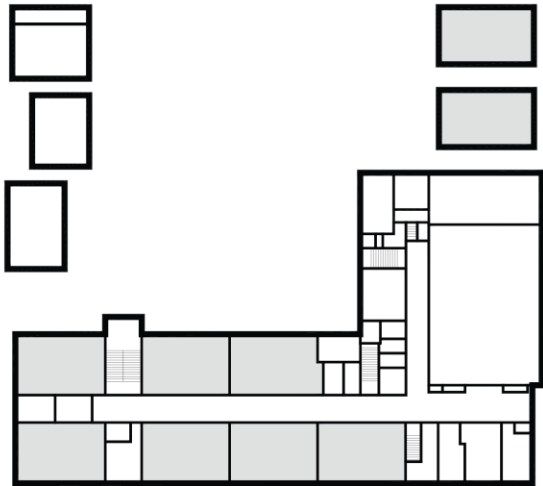
Net Standard Classrooms

x

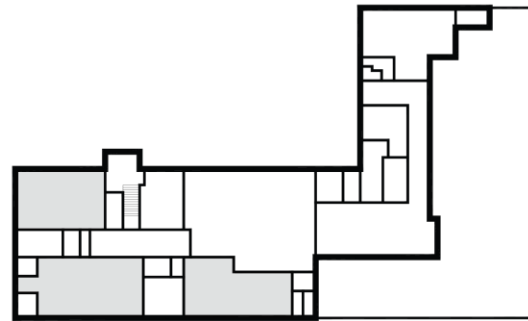
Loading
Factor

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Site
Capacity

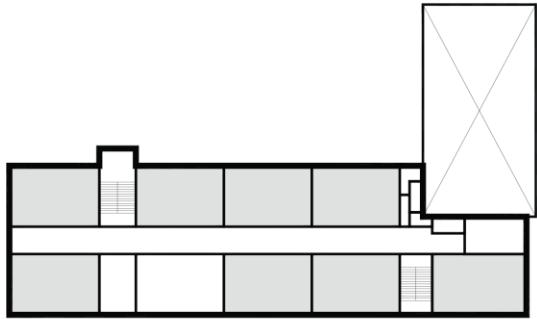


1st Floor



Ground Floor

Example Calculation : Parker Elementary School



2nd Floor

20 Total Classroom Sized Rooms

- **0** Charter Classrooms
- Specialty Classrooms
- Full Service Community Spaces

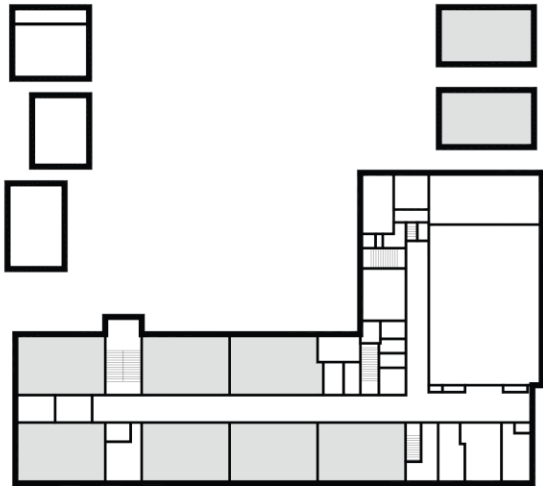
Net Standard Classrooms

x

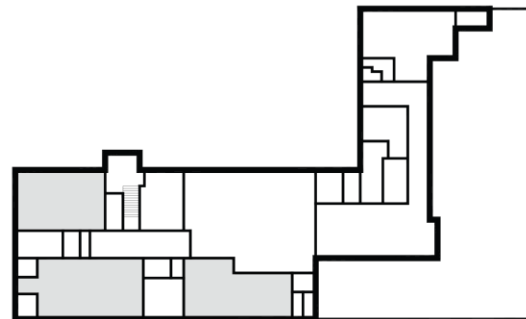
Loading
Factor

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Site
Capacity

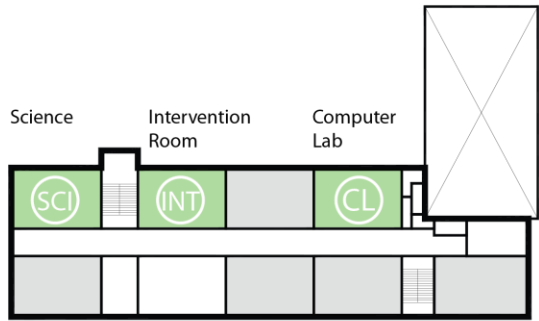


1st Floor



Ground Floor

Example Calculation : Parker Elementary School



2nd Floor

20 Total Classroom Sized Rooms

- **0** Charter Classrooms
- **4** Specialty Classrooms
- Full Service Community Spaces

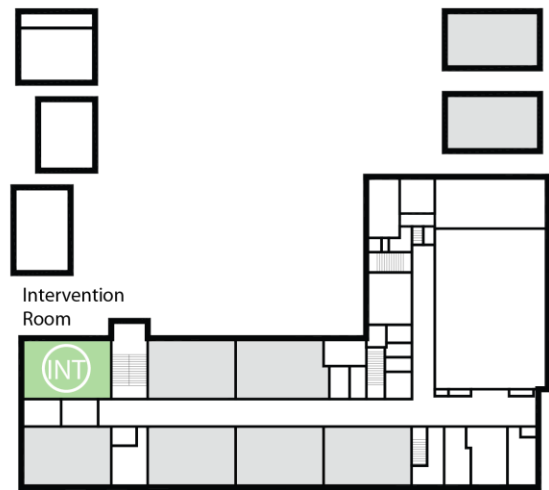
Net Standard Classrooms

x

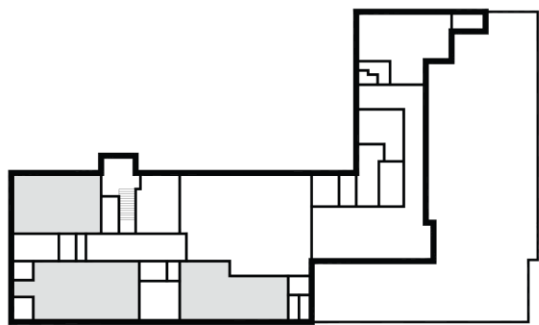
Loading Factor

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Site Capacity

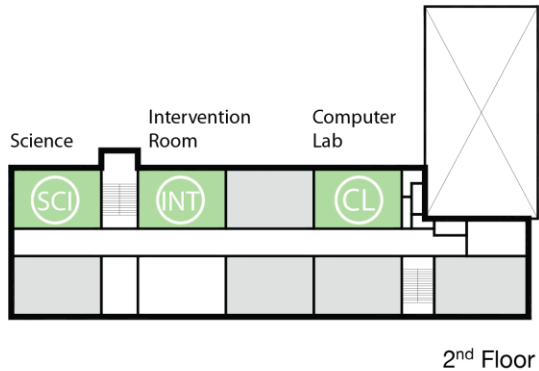


1st Floor



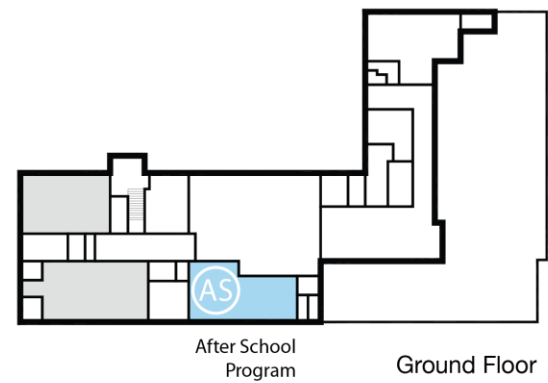
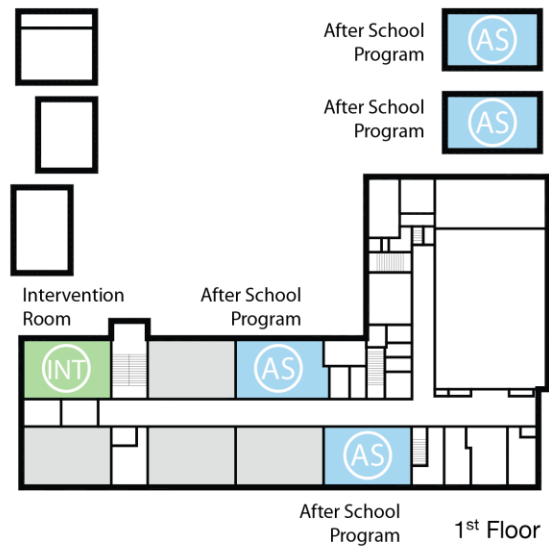
Ground Floor

Example Calculation : Parker Elementary School

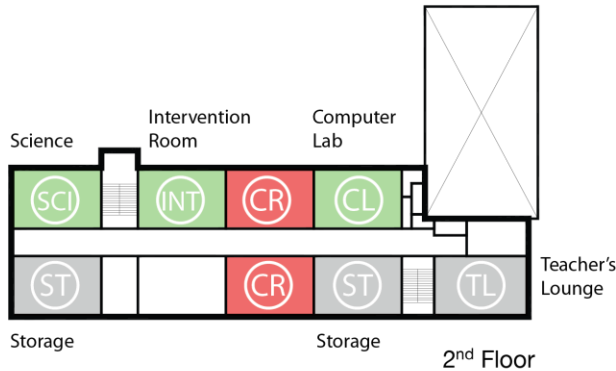


- 20** Total Classroom Sized Rooms
- **0** Charter Classrooms
- **4** Specialty Classrooms
- **5** Full Service Community Spaces

Net Standard Classrooms × Loading Factor = Site Capacity

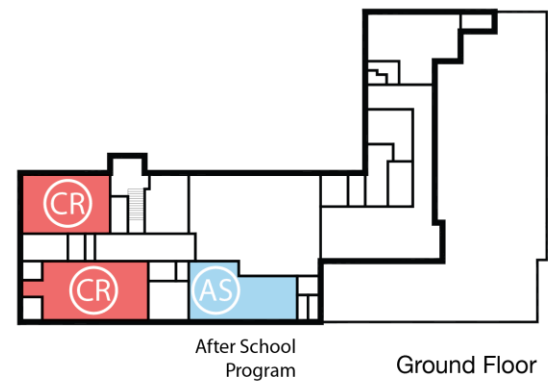
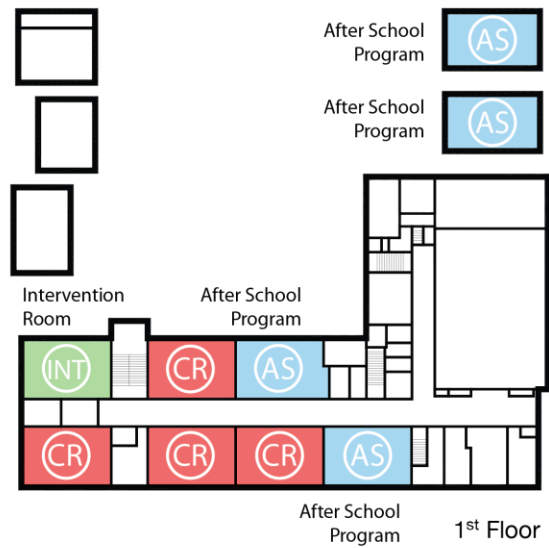


Example Calculation : Parker Elementary School

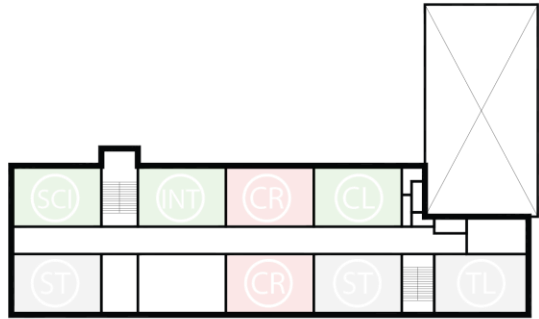


- 20** Total Classroom Sized Rooms
- **0** Charter Classrooms
- **4** Specialty Classrooms
- **5** Full Service Community Spaces

11 Net Standard Classrooms × Loading Factor = Site Capacity



Example Calculation : Parker Elementary School



2nd Floor

20 Total Classroom Sized Rooms

- **0** Charter Classrooms
- **4** Specialty Classrooms
- **5** Full Service Community Spaces

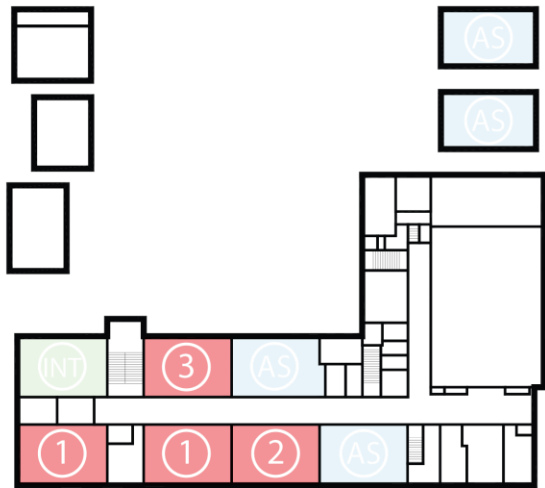
11 Net Standard Classrooms

x

Loading Factor

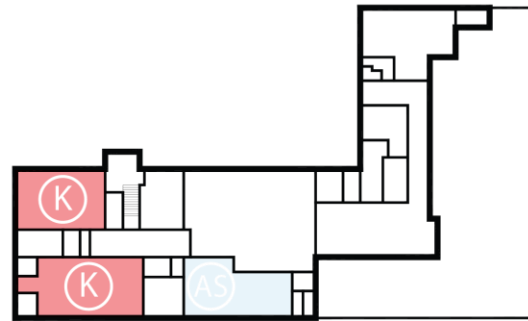
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Site Capacity



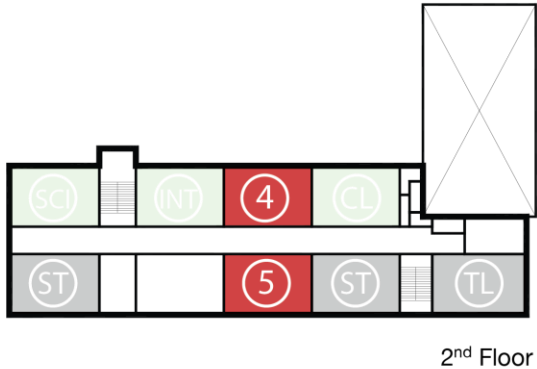
1st Floor

$$\left(\begin{matrix} 6 \\ \text{TK - 3} \\ \text{Classrooms} \end{matrix} \times \begin{matrix} 24 \\ \text{Loading} \\ \text{Factor} \end{matrix} \right) = \text{Site Capacity}$$



Ground Floor

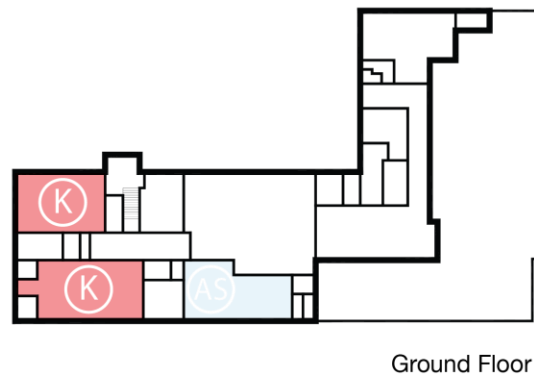
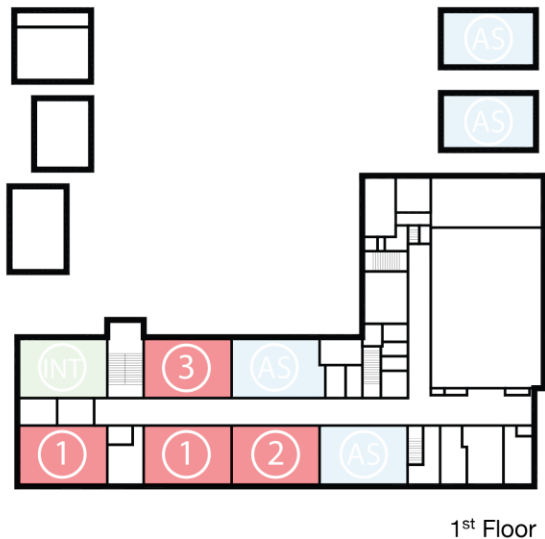
Example Calculation : Parker Elementary School



- 20** Total Classroom Sized Rooms
- **0** Charter Classrooms
- **4** Specialty Classrooms
- **5** Full Service Community Spaces

11 Net Standard Classrooms × Loading Factor = Site Capacity

$$\left(\begin{matrix} 6 \\ \text{TK - 3} \\ \text{Classrooms} \end{matrix} \times \begin{matrix} 24 \\ \text{Loading} \\ \text{Factor} \end{matrix} \right) + \left(\begin{matrix} 5 \\ 4 - 5 \\ \text{Classrooms} \end{matrix} \times \begin{matrix} 31 \\ \text{Loading} \\ \text{Factor} \end{matrix} \right) = \begin{matrix} 299 \\ \text{Site} \\ \text{Capacity} \end{matrix}$$



Thank You!