: i am OUSD 🌳

Board of Education Retreat
Saturday, January 20th

Today's Outcomes

Rational Outcomes:

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

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

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

Relational Outcomes:

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

Blueprint for Quality Schools

More Than a Plan, a Vehicle for Change

BLUEPRINT
FOR
QUALITY SCHOOLS

The OUSD **Blueprint for Quality Schools** is a planning process that will help OUSD students to have more equitable access to schools and programs they need to thrive. Some options that may be considered include:
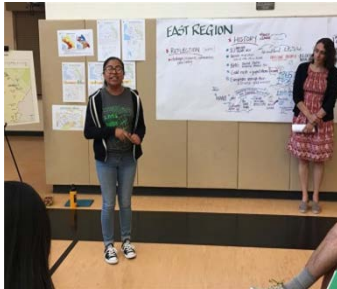
- **Prioritizing upgrades to buildings and programs**
- **Expanding, merging, or closing schools**
- **Changing configurations of schools and central office**

Community input through the Blueprint Advisory Group and Community Dialogues will help inform options.

Keeping in Mind **Our Constraints:**
- California is 47th in per pupil funding in the nation
- Budget still recovering from funding cuts
- Declining enrollment in OUSD

Blueprint for Quality Schools – Timeline

April 24
Board Launches Blueprint for Quality Schools

May 26
Community Kickoff Meetings

June
Community Engagement Retreats

Aug/Sept
Blueprint Advisory Committee Meetings 1&2

Sept 14-16
Community Dialog 1

Oct 3-5
Options Planning Workshop

Oct 26 & Nov 15
Blueprint Advisory Committee Meetings 3&4

Dec 6-9
Community Dialog 2

Jan 10-12
Recommendations Workshop

Jan 31
Blueprint Advisory Committee Meeting 5

Feb 14, 2018
Board Receives Blueprint

June 2018
Board Makes Final Decisions

Participants:
- Community
- Blueprint Advisory Group
- Blueprint Leadership
- Team
- Board

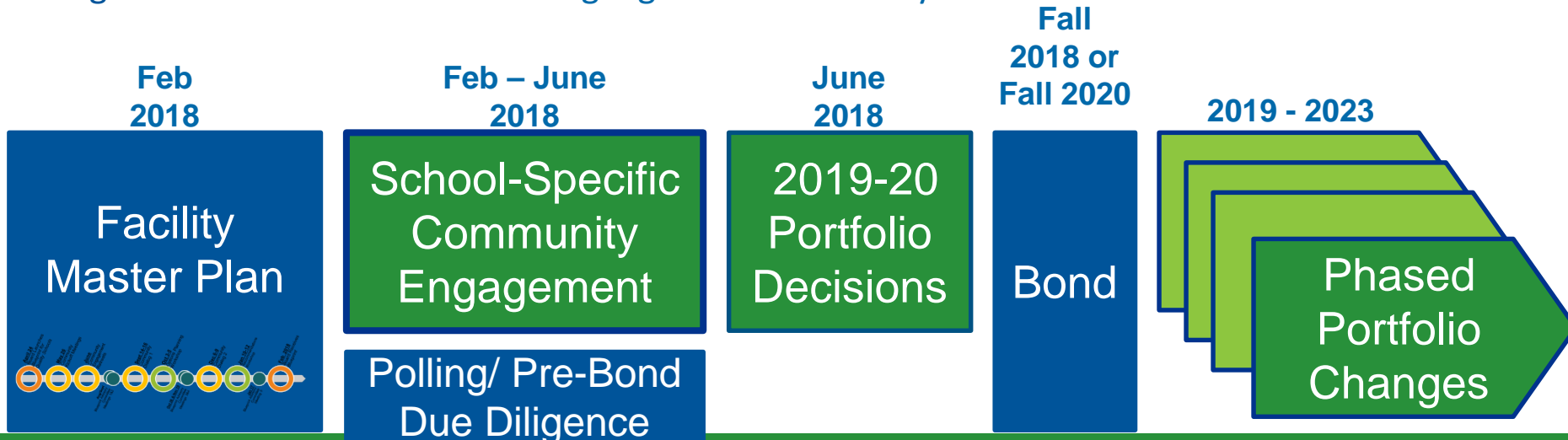# Highlights from Recommendations Retreat

- Visioning Exercise
- Equity Conversation
- Developing Parameters to Guide Decision Making
- Facilities Needs Prioritization
- Enrollment and Feeder Pattern
- Early Work on Determining a Sustainable School Size
- Discussion around the Components of a Quality School
- Presentation and Q&A on Similarly Sized Districts

Next Steps after February

Key Board Decision Points:

- February – Begin polling potential bond ballot language
- March/April -- Board reviews polling results
- May -- Board votes on whether to place bond on ballot & language
- June – Portfolio Change Decisions for 2019-20
- August – Deadline to file ballot language with the County

Feb 2018

Facility Master Plan

Feb – June 2018

School-Specific Community Engagement

Polling/ Pre-Bond Due Diligence

June 2018

2019-20 Portfolio Decisions

Fall 2018 or Fall 2020

Bond

2019 - 2023

Phased Portfolio Changes

Feb. 14 Board Presentation

Three components of the Blueprint for Quality Schools Report:

- Facilities Master Plan
- Community Engagement Action Plan
- Decision Making Frameworks

Facilities Master Plan

MASTER PLAN

- ✓ 1. Community Involvement
- ✓ 2. Enrollment Projections, Capacity, and Utilization Study
- ✓ 4. Review OUSD Strategic Plan, Asset Management Plan, and Technology Master Plan
- ✓ 7. Update Educational Specifications and Standards
- ✓ 8. Digital Facilities Master Plan
- ✓ 9. Cost Matrix
- ✓ 13. Draft Master Facilities Plan
- ✓ 14. Best Practices for New Facility Construction
- ✓ 19. Deliverables

ASSESSMENT

- ✓ 5. Facility Condition Assessment
  6. Educational Adequacy Assessment
- ✓ 15. Increase Sustainability, Energy Resource & Water Conservation
- ✓ 18 .Deferred Maintenance Plan

ADA

- ✓ 10. ADA Self-Evaluation
- ✓ 11. ADA Transition Plan
- ✓ 12. ADA Database and Mapping

OTHER

- ✓ 3 State Funding Eligibility
- ✓ 16 Real Estate Consulting
- ✓ 17 Transportation and Parking

Facilities Master Plan (cont.)

EDUCATIONAL FRAMEWORK

- 100+ Objective Measures yield Educational Adequacy Rating

Informed planning

- District-Defined Values

Focuses facilities on educational mission.

- Objective, Standards-Based

Stands up to scrutiny

- Common Yardstick

Ensures Districtwide Equity

- Educational deficiencies integrated with Condition Assessment findings

Actionable findings

Decision Making Frameworks

Facilities

For example:

- Aiming for sustainable school size across the District in the next five years
- Noting capacity and utilization prior decision making
- Prioritizing the Educational Adequacy of the school building. (Is the building adequate to support its academic program.)

Programmatic

For example:

- Focus on changes that will pay for themselves
- Start with strong leaders and motivated community
- Engage Diverse SRA regions, electoral districts and feeder patterns
- Prioritize underutilized facilities and/or schools that need to grow to a sustainable operational size
- Use school performance to inform strategy for change.

Community Engagement Action Plan

- Following Director Gonzalez's example, Board Members host engagements with schools and/or regions to discuss
- The district's vision/challenge statement
- The sustainable school size goal
- Returning to neighborhood feeder patterns or maintaining choice
- School challenge statements (How do we…?)
- SWOT analysis of options

Decision Making Framework

Step 1

Is the school a sustainable size or
an exception to the 80% rule?
If so, then proceed to Step 2.

Step 2

Work with communities to create options
that satisfy the data requirements outlined in
the framework below

Sustainable
School
Size

**Educational
Adequacy**

**School
Performance**

Options

Condition

Utilization

Sustainable Size of Schools

- Economics of schools learning group was dedicated to providing the below **outcomes: given the deadline that is approaching, this analysis will focus on minimum size of schools**
  - Analysis for minimum size of OUSD schools for elementary, middle, and high schools
  - Analysis for central office restructuring to optimize the management of centrally-provided services to schools
- Recommended number of students per school depends on benchmark used; analysis suggest minimum size of school is the below for ~80% of schools:

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

Educational Adequacy

| Educational Adequacy Category	Examples	weight	Assessment Scores (out of 100%)			Recommended investment strategies		
			Average Score	Min	Max	Minor renovations/ enhancements	Major renovations	New construction
Educational Program	SPED, STEM, Art, Music, CTE, PE/fields/courts	25%	24%	0%	69%			
Healthy Environment	Accessibility, SPED equity, Dining, restrooms, thermal comfort, daylight, noise, bike racks, etc.	15%	76%	55%	93%			
Relationships and colloboration	Project-Based and Outdoor learning spaces, Community access	15%	19%	0%	50%			
Safety and Security	Seismic, Pedestrian, Hazards, Campus Security	15%	64%	48%	84%			
Instructional Technology	Electrical, Network infrastructure, Wifi, Classroom AV	10%	51%	27%	68%			
Furnishings and Equipment	Flexible furniture, classroom FFE, SPED Life Skills, Plumbing	5%	53%	28%	76%			
Location	Proximity to students, site acreage, parking, OUSD climate survey data	5%	58%	31%	92%			
Operational Efficiency	School size, classroom size, core spaces, portables, design, utility, cost/sf	10%	74%	46%	95%			

- The consultant team recommends prioritizing portable investments like furniture and technology when prioritizing educational adequacy enhancements for small renovation projects.

- Major renovations should include budget for such items (technology and furniture) while adding investments into more permanent structures like major building components and spaces.

- Finally, new construction efforts should budget for all listed items and be guided by specifications developed for each unique construction project.

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BLUEPRINT FOR **QUALITY SCHOOLS**

Condition

- All schools should receive investment in priority 1-2 deficiencies and the first two years of priority life cycle items (see slide 6)

- Enhancements (Educational Adequacy and Priorities 3-5 deficiencies) should not be prioritized for capital spending in a new bond until priority condition items are identified and accounted for (see slide 5) unless a facility is being closed or rebuilt

- Consider major renovations or replacements to buildings with FCI scores above 50%, and strongly recommends such actions for facility above 66%, and that relatively low educational adequacy scores prioritize schools for such actions

$2+ Billion
Facility Needs
(Existing Bldgs)

396

937

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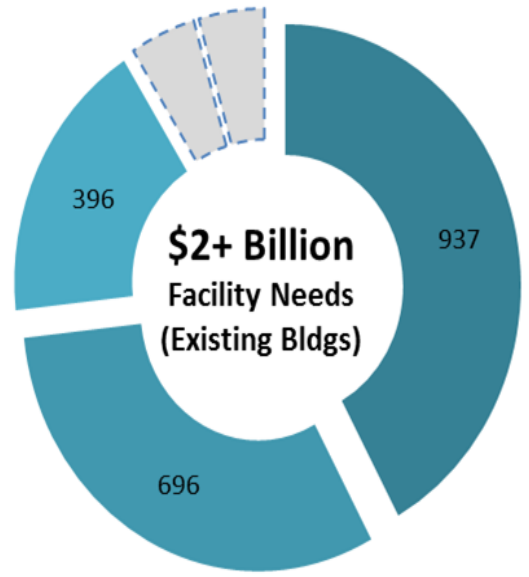
- 5-Year Repairs
- Seismic
- Educational Adequacy
- ADA (pending)
- Program and Technology

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BLUEPRINT
FOR
QUALITY SCHOOLS

Utilization

Count of Schools by Utilization Range				
	0-50%	51-80%	80-120%	>120%
ES	4	20	16	1
MS	3	3	3	0
HS	1	6	3	1
OTHER (e.g., K-8)	3	3	2	3
Total	**11**	**32**	**24**	**5**

- Options should prioritize facility utilizations between 80-120% of the identified capacity using current OUSD classroom loading standards.

- Options should consider strategies to increase enrollment or consolidate programs when facility utilization is less than 80% of identified capacity; particularly if near/below 50%.

- Options should consider strategies to limit enrollment or expand capacity for facilities over 120% of identified capacity.

BLUEPRINT FOR **QUALITY SCHOOLS**

Board Policy Implications

Next Steps:

What are the implications to policy and resolution changes to ensure alignment and implementation?

- **Quality School Development Policy (BP 6005)**
- **Blueprint Work Plan Resolutions**