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OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Board Cover Memorandum

To Board of Education

From Facilities Committee
Valarie Bachelor, Chairperson
Clifford Thompson
Patrice Berry

Meeting Date June 24, 2026

Subject Proposed revisions to the Measure Y Spending Plan to ensure alignment with evolving budget needs for multiple projects responding to market conditions, construction escalation, scope revisions, and safeguarding the long-term health of the bond.

Ask of the Committee Approve the Measure Y Spending Plan Amendment #4, as approved by the Facilities Committee

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; upgraded classrooms, science labs, and technology; improved student safety and security; repairs to bathrooms, electrical systems, plumbing, and sewers; and improvements to energy efficiency and earthquake safety.

On April 14, 2021, the Board adopted the initial Measure Y Spending Plan. The Board subsequently adopted prior amendments to the Spending Plan to respond to evolving project needs, market escalation, and the long-term financial health of the bond program. This proposed action represents the Fourth Amendment to the Measure Y Spending Plan and is intended to further align bond resources with current project delivery needs, districtwide infrastructure priorities, and the adopted 2026 Facilities Master Plan.

This Fourth Amendment also comes on the heels of a successful Measure Y bond sale and refinancing, which strengthened the District's ability to continue advancing major capital projects and districtwide investments. The revised Spending Plan reflects the next phase of implementation by allocating resources to major projects approaching or moving through GMP, DSA approval, and construction, while also supporting emerging priorities such as heat mitigation, HVAC and ventilation improvements, TK expansion, solar and energy infrastructure, portable removal, and deferred maintenance-related needs.

The amendment continues the District's practice of regularly reviewing and updating the Spending Plan so that it remains a dynamic financial roadmap for implementing Board-approved priorities, honoring commitments to school communities and Oakland voters, and responsibly managing bond resources in response to construction market conditions, project scope changes, and district facility needs.

Discussion

The proposed Measure Y Spending Plan Revision represents an important implementation milestone for the District's capital program and the first major use of the adopted 2026 Facilities Master Plan as the District's prioritization framework for bond-funded investments. The Spending Plan continues to serve as the District's dynamic financial roadmap for the Bond Program and the District's Strategic Planning, aligning bond resources with Facilities Master Plan priorities while responding to changing market conditions, project scope refinements, construction escalation, and emerging districtwide needs.

At this stage of the Measure Y program, it is appropriate and necessary to deploy $32.5M of the Measure Y Program Contingency to support major facilities projects that have reached key budget checkpoints, including projects advancing through Guaranteed Maximum Price, DSA approval, and construction phases. These projects reflect prior commitments to Oakland voters, school communities, and the Board of Education. Using contingency at this point allows the District to preserve the core educational scope of these projects, address escalation and unforeseen conditions, and avoid reductions that would undermine the long-term value and intent of the original investments.

The proposed revision also recommends deploying a portion of contingency and earned interest to support districtwide investments in **heat mitigation, HVAC, ventilation, and climate resilience**. These investments respond to urgent and growing needs identified through the Facilities Master Plan and recent Board direction regarding student health, educational equity, and thermal comfort. As climate conditions continue to impact school operations, targeted investments in HVAC, passive cooling, outdoor shade, classroom monitoring, and related infrastructure are necessary to create healthier, safer, and more climate-responsive learning environments.

The determination allocation is guided by several core goals: honoring commitments made to school communities and Oakland voters; using the 2026 Facilities Master Plan to prioritize the highest-need facilities investments; supporting projects that reduce long-term General Fund costs, including energy, enrollment and operational efficiency investments; and maintaining deferred maintenance capacity so the District can address critical building systems as they reach the end of life. Together, these goals balance the need to complete major projects, respond to immediate health and safety needs, and protect the long-term financial integrity of the bond program.

Even after the proposed allocation of contingency to major projects and districtwide priorities, the Spending Plan maintains a healthy remaining contingency balance of $30.3M for future risks, including unforeseen conditions, mandatory infrastructure needs, future heat mitigation and HVAC phases, TK expansion, accessibility, special education program supports, safety investments, and deferred maintenance.

This approach reflects responsible stewardship of public dollars while ensuring the District can continue advancing safe, healthy, joyful, and equitable learning environments across Oakland.

Fiscal Impact

At this time, staff strongly recommends allocating a portion of the Measure Y Program Contingency and earned interest to support major project budget adjustments and targeted districtwide facility investments. **These adjustments are intended to cover Board approved financial commitments and reduce budget delivery risk for major projects that are now advancing through key budget checkpoints, including DSA approval, construction, and Guaranteed Maximum Price phases.** The use of contingency for these purposes was planned at the onset as part of the overall Measure Y program fiscal strategy and reflects the purpose of maintaining a healthy bond contingency over the life of the program: to respond to escalation, unforeseen conditions, regulatory timelines, scope refinements, and other project delivery risks.

The proposed Spending Plan revision prioritizes funding for current major project needs while continuing to maintain a strong remaining Measure Y contingency balance for future cost overruns ($30.3M or 41.2% of the Measure Y contingency), mandatory infrastructure needs, and strategic districtwide priorities. This approach supports the continued delivery of Measure Y's major commitments to Oakland voters and school communities while protecting the long-term financial health of the bond program.

In addition, this revision provides much-needed support for district facilities in light of the Board's decision to reduce the Deferred Maintenance Fund. By directing resources toward passive heat mitigation, HVAC and ventilation improvements, electrical infrastructure, portable removal, TK expansion, and other prioritized facility needs, the District can address urgent health, safety, and operational issues while longer-term deferred maintenance funding strategies are restored. This approach allows the District to responsibly leverage available bond resources, earned interest, and other eligible funding sources to reduce risk, preserve project scope, and maintain safe, healthy, and functional learning environments for students and staff.

Attachment(s)

- Measure Y Spending Plan Revision 4 Presentation
- Measure Y Spending Plan Revision 4 Spreadsheet

2026
MEASURE Y REVISION

SPENDING PLAN AMENDMENT #4 - 2nd Read

Board of Education, June 24, 2026 Meeting
OUSD Facilities Planning & Management

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Agenda

- Ask of the Committee
- Section One: Context & Achievements
- Section Two: Spending Plan Revisions
- Section Three: Major Facilities Project Updates
- Next Steps

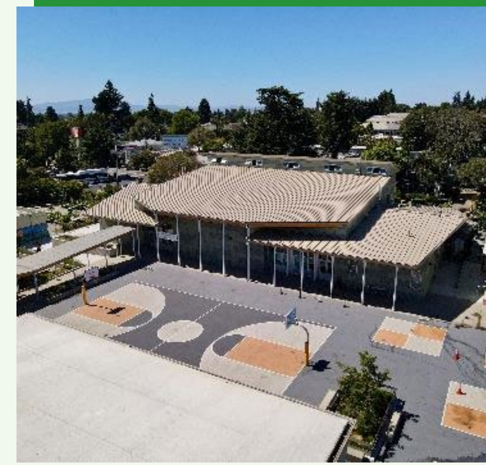
Ask of the Board

Approve the Measure Y Spending Plan Revision #4, as approved by Facilities Committee

OUSD Vision and Mission

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.



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.

Section One

Context and Achievements

Spending Plan Overview

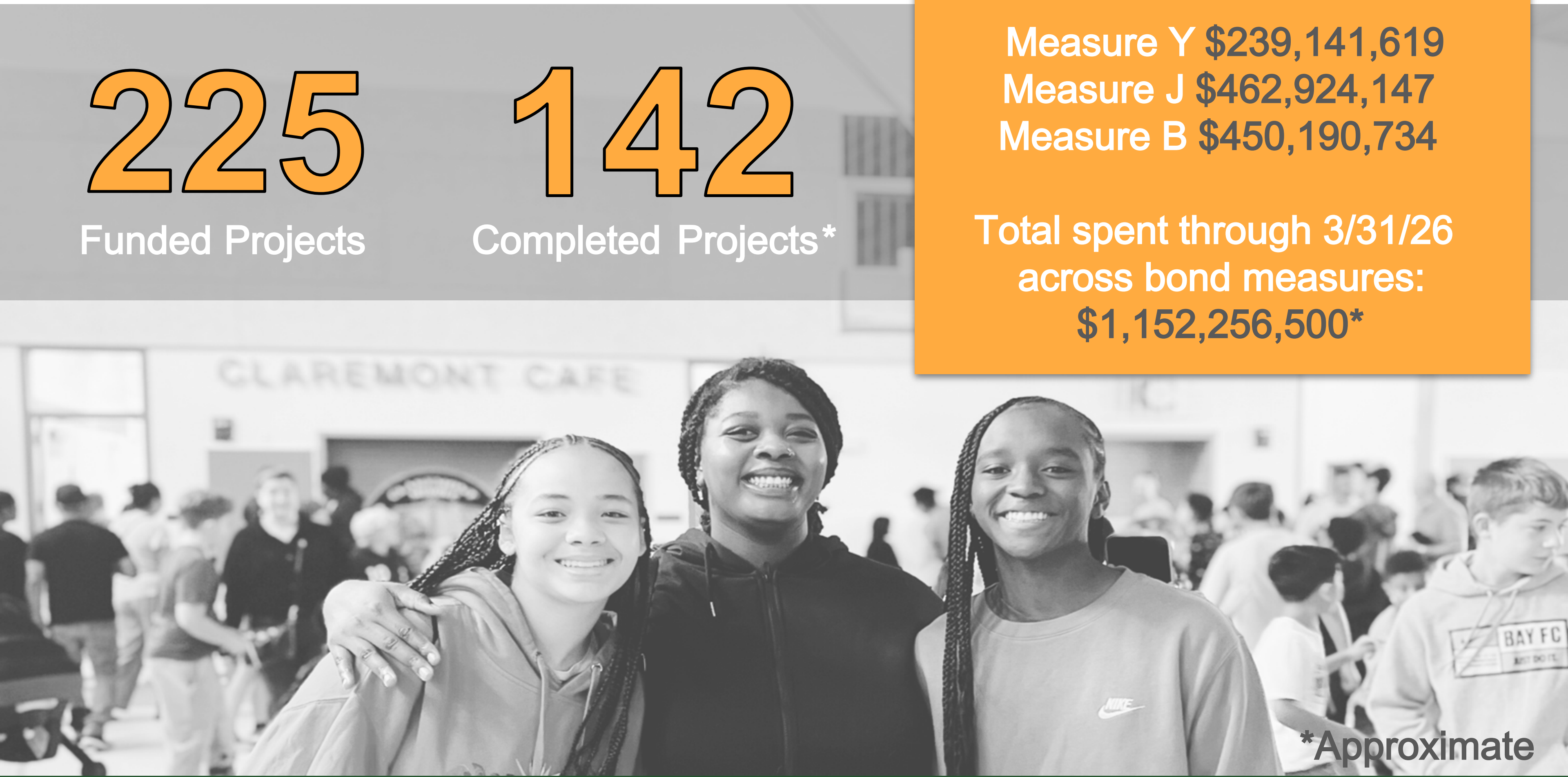
OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

The Capital Spending Plan is a dynamic implementation tool that guides how bond funds are prioritized, sequenced, and managed in alignment with the District's adopted Facilities Master Plan. It translates the District's long-term facilities priorities into a financial roadmap that supports major projects, deferred maintenance needs, and other critical investments across school sites.

The Capital Spending Plan:

- Aligns Measure Y bond resources to the priorities identified in the adopted Facilities Master Plan.
- Provides a **financial roadmap** for sequencing and delivering major capital projects and districtwide investments.
- **Remains dynamic and adaptable**, allowing the District to respond to market conditions, construction escalation, changes in project scope, and evolving District priorities.
- Supports fiscal accountability and transparency through regular review, adoption, adjustment, and monitoring of project budgets and milestones by Facilities Committee, CBOC, and the Board of Education.
- Maintains the financial integrity and long-term health of the Measure Y bond program while balancing community commitments, available resources, and fiduciary responsibilities.

Capital Program Progress to Date (March 2026)



225
Funded Projects

142
Completed Projects*

Measure Y $239,141,619
Measure J $462,924,147
Measure B $450,190,734

Total spent through 3/31/26 across bond measures: $1,152,256,500*

*Approximate

Expanding Our Funding Portfolio to Support Healthy, Safe, and Joyful Schools

PROGRAMS

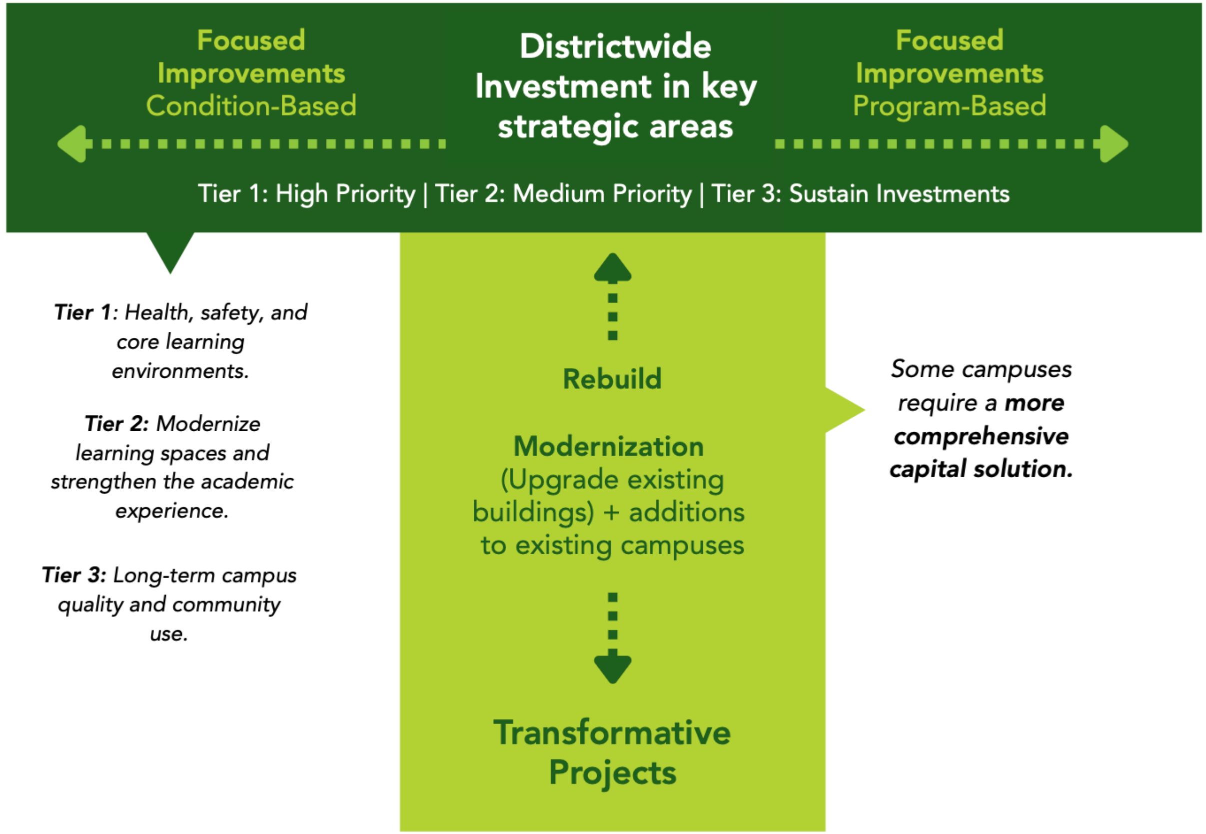
- Appliance Management Incentive Program
- Developer Fees
- Expanded Learning Opportunities Program
- Energy Incentive
- Office of Public School Construction
- PG&E Government and K-12 Program

GRANTS

- CalSHAPE
- CalFire
- Kitchen Infrastructure Training

Facilities Master Plan - T-Shaped Investment Strategy

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students



Tiers of Implementation and Types of Projects under T-Shaped Investment Strategy

Facilities Master Plan - Tiered Districtwide Investments

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Tier 1 – High Investment Area
Prioritize Health, Safety, and Core Learning Environment

Purpose: Invest in infrastructure to keep schools functional, safe, and compliant.

Examples:

- HVAC modernization, heat mitigation, and air quality improvements
- Water quality, plumbing, electrical infrastructure
- Restroom modernization
- Fencing, lighting, seismic, and safety upgrades
- Deferred Maintenance (roofs, floors, etc.)

Tier 2 – Medium Investment
Build Whole-Child Experience, Educational Equity, Long Term Innovation

Purpose: Modernize learning environments to better serve students and support academic success.

Examples:

- TK/Early Childhood expansions
- Specialized Program STEM, arts, CTE, etc.
- Special education space upgrades
- Multipurpose rooms, dining hall, and kitchen modernization
- Technology infrastructure for 21st-century classrooms

Tier 3 – Sustain Investments
Maintain Partnership and Long-Term Sustainability

Purpose: Maintain inspiring, community-connected, and sustainable campuses.

Examples:

- Athletic fields and gym modernizations
- Living schoolyards and shaded outdoor learning spaces
- Energy efficiency, solar, and EV infrastructure

- *Yellow highlights identify areas of increased investments based on district needs and priorities.*

Section Two

Spending Plan Revisions

Budget Check Points for Major Projects

Increase Budget by Re-Prioritizing Spending Plan

Initial Capital Allocation

Initial Allocation for the project based on loose estimates of the overall project costs.

Elmhurst United MS
Skyline HS

Project Definition Phase

This is the phase where we update the scope based on the first engagement with the community and an assessment of updated needs on the campus.

Washington Early Childhood Center

Schematic Design (SD)

Tuning the scope as much as possible to align to the budget allocation. Cost estimate is based on cost per square foot calculations.

Design Development & DSA

DD's last final check before contracting and making fine tuning to overall scope and budget.

Garfield ES

Contracting / Guaranteed Maximum Price (GMP)

Rely on the project contingency to address additional costs and if needed for unforeseen conditions we use the Bond Contingency

McClymonds HS, Fremont HS
Roosevelt MS, CCPA, MLA

Decrease Scope of Project (Value Engineering)

Contingency & Earned Interest Allocation Approach

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Contingency and Earned Interest Allocation are Aligned to Existing Strategic Goals

1. **Honor Commitments to Oakland Voters and School Communities**
   Preserve the core scope and educational intent of projects previously committed to Oakland voters and named school communities in Measure B, J and Y Bond Language that was approved by the Board.

2. **Prioritize Investments Using the Adopted 2026 Facilities Master Plan**

   Align capital investments with the Oakland Unified School District Facilities Master Plan to ensure resources are directed to the updated District's highest-priority facility needs.

1. **Invest in Projects that Both Align to Master Plan and also Offset General Fund Costs**
   Prioritize capital projects, such as solar and other operational efficiency initiatives, **that reduce ongoing utility and operating expenses** and create long-term cost avoidance for the General Fund.

2. **Maintain Deferred Maintenance Support (No Changes)**
   Maintain funding for deferred maintenance to ensure the District has resources to replace systems that reach end of life and are being prioritized in the Comprehensive Maintenance Plan until the Board restores a sustainable annual deferred maintenance program.

Bond Measure Y Contingency

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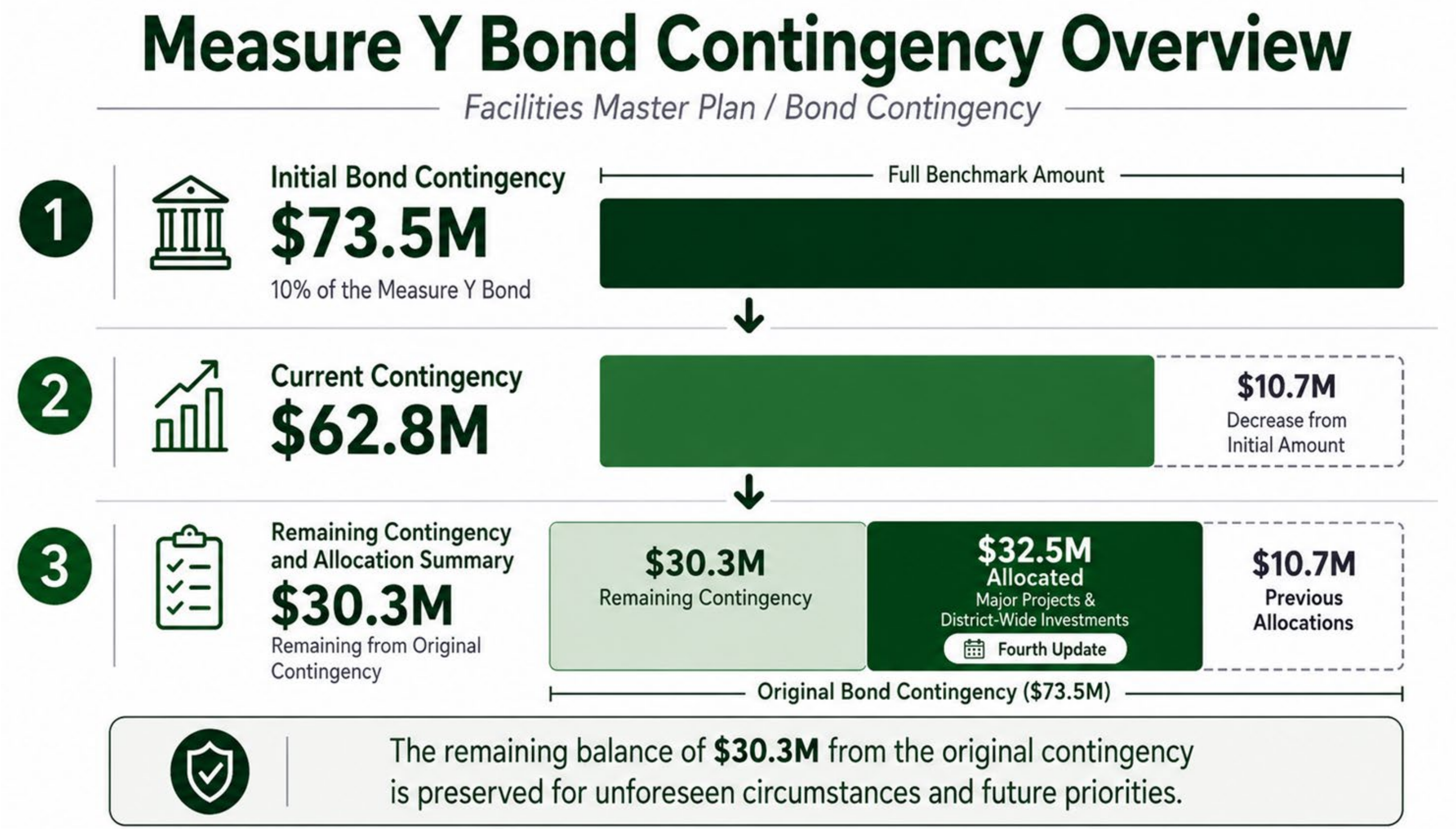
Community Schools, Thriving Students



Bond Measure Y Contingency-Key Takeaway

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Is the overall contingency large enough to support the program after the 3rd draw?
With the bond program roughly three-quarters complete, the remaining $30.3 M contingency represents approximately 16.5% of the estimated remaining program value. Major projects also retain embedded project-level contingencies, consistent with CASBO^-informed best practices.

This is a strong remaining contingency position based on industry standards* that recognize that the bond contingency needs decline as project scope, estimates, bids, and construction progress become more defined. Maintaining $30.3M at this stage provides meaningful protection for unforeseen conditions, escalation, emergency needs, and future Board priorities.

Future Known Priorities for the Remaining $30.3 M

1st Priority	2nd Priority
1. Garfield Project at GMP 2. Mandatory Lighting Upgrades 3. Heat Mitigation and HVAC Phase 2 4. Deferred Maintenance-Electrical 5. TK Expansion and TK Hubs	1. Comprehensive Maintenance Plan Projects 2. Special Education Program Supports 3. Accessibility and Access Investments 4. Safety and Electric Door Locking Systems

**This analysis is informed by AIA guidance on construction contingency management, GFOA best practices for capital project monitoring and reporting, and AACE International cost engineering guidance defining contingency as a reserve for uncertain conditions or events.*
^California Association of School Business Officials. CASBO recommends a 12% and 18% total program contingency and our remaining contingency falls within that range.

Major Facilities Projects Updates

Proposed Major Projects Budget Changes

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Site Specific Named Projects	Status	Approved Measure Y Budget (March 2025)	Proposed Change Measure Y (May 2026)	Proposed Measure Y Budget (May 2026)	Approved Funding Other Capital Funds (March 2025)	Proposed Funding Increased in other Capital Funds (May 2026)	Total Revised Allocation (May 2026)
Major Projects							
Complete Major Projects							
Claremont MS	Closeout	$18,000,000	-$500,000	$17,500,000	$3,271,672	$0	$20,771,672
Laurel CDC	Complete	$15,000,000	-$1,562,657	$13,437,343	$3,500,000	$0	$16,937,343
1000 Broadway Interim Housing	Complete	$4,323,532	$0	$4,323,532	$0	$0	$4,323,532
Dr. Marcus A. Foster Leadership Center	Cloesout	$55,000,000	$0	$55,000,000	$7,000,000	$0	$62,000,000
Active Major Projects							
McClymonds HS	GMP	$95,750,000	$12,250,000	$108,000,000	$0	$0	$108,000,000
Roosevelt MS	Construction	$90,550,000	$6,050,000	$96,600,000	$1,000,000	$0	$97,600,000
Garfield ES (Resolution NO. 2526-0102) Approved	100% DD	$70,700,000	$0	$70,700,000	$0	$34,550,000	$105,250,000
Coliseum College Prep. Academy	GMP	$55,000,000	$6,000,000	$61,000,000	$13,000,000	$0	$74,000,000
Melrose Leadership Academy	GMP	$36,500,000	$2,700,000	$39,200,000	$3,000,000	$0	$42,200,000
Fremont High School	Construction	$0	$0	$0	$15,000,000	$7,800,000	$22,800,000
Washington CDC	New Project - Planning	$0	$0	$0	$2,000,000	$18,020,000	$20,020,000
Future Projects (Draw 4)							
Elmhurst United MS	Planning	$8,504,796	$0	$8,504,796	$1,495,204	$0	$10,000,000
Skyline HS	Planning	$8,504,796	$0	$8,504,796	$1,495,204	$0	$10,000,000
Site Specific Named Projects		**$457,833,124**	**$24,937,343**	**$482,770,467**	**$50,762,080**	**$60,370,000**	**$593,902,547**

Proposed budget changes

McClymonds HS: Modernization, Stadium Project & Turf Field Replacement

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Approved Budget:	$95.75 Million
Proposed Budget Increase:	$12.25 Million
Total Proposed Budget:	$108 Million
Project Status:	DSA approved in April 2026; Board approved Guaranteed Maximum Price Pending
Project Scope:	• Modernized classrooms, breakout spaces, and science labs supporting next-generation teaching and learning • New gymnasium building with locker rooms, training and weight rooms, equipment storage, and modern athletic support spaces • Upgraded campus infrastructure including HVAC, plumbing, electrical systems, ADA accessibility, and enhanced safety and security features • Revitalized campus environment with modern restrooms, collaborative learning spaces, and inclusive outdoor areas for recreation, events, and student gathering
Funding Sources:	Measure Y
Rationale for Budget Increase:	See next slide
Recommendation:	• **Allocate $12.25 Million from Measure Y Contingency**

McClymonds HS: Modernization, Stadium Project & Turf Field Replacement

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Rationale for Requested Budget Increase:

The requested increase to the McClymonds Modernization and Turf Field/Track/Stadium Upgrade Project budget from $95.75 million to $108 million reflects a combination of construction market escalation, extended regulatory review timelines, unforeseen existing conditions, and refinements to project scope that emerged as design and implementation progressed. The Division of the State Architect (DSA) review process took approximately 15 months rather than the anticipated 7 months, resulting in escalation of costs due to increases in labor and materials.

During DSA review and extensive testing, additional existing conditions and required code corrections were identified, including structural conditions, non-code-compliant walls identified during DSA review, and environmental remediation oversight requirements associated with the field work. The revised budget also incorporates a series of infrastructure and operational enhancements that will improve long-term campus functionality, safety, and reliability, including retaining walls, upgraded field lighting, data and communications infrastructure, clock/speaker systems, security system relocation, and related stadium improvements. The proposed increase will be funded through a combination of interest earnings accrued that have been added to the Program Contingency during the extended DSA review period and bond contingency funds.

The updated contractor estimates for the turf field and stadium improvements needed to remediate the soils reflect significantly higher construction costs than originally projected for similar sized fields, particularly as material pricing and market conditions evolved over the course of the extended approval timeline. The longer overall schedule and incorporation of the stadium project now including a field into the broader modernization project also increased project phasing and coordination costs.

McClymonds HS: Modernization, Stadium Project & Turf Field Replacement

OAKLAND UNIFIED SCHOOL DISTRICT
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Project Profile Page
Scan to view project details and reports

CCPA: Expansion/Portable Replacement

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Approved Budget:	$68 Million
Proposed Budget Increase:	$6 Million
Total Proposed Budget:	$74 Million
Project Status:	DSA Approved Increment #1; Awaiting DSA approval from Increment 2; Board approved GMP
Project Scope:	• 14 modernized classrooms with breakout spaces and two state-of-the-art science labs • New gymnasium with training and weight rooms, locker rooms, and equipment storage supporting athletics and physical education • Modern, private restroom facilities integrated into the new classroom and gymnasium buildings • Inclusive outdoor spaces designed for flexible learning, student gathering, recreation, and community event
Funding Sources:	Measure Y $55 Million; Fund 25 (Developer Fees): $13 Million
Rationale for Budget Increase:	• +$5M-Identified IT upgrades, escalation in equipment and permitting costs, and accurate costing of design costs and construction management costs. • +1M-An anticipated $1M is planned to ensure all outstanding items based on construction activity are resolved at Greenman Field and allow OUSD formally close out the project
Recommendation:	**Allocate $6 Million from Measure Y Contingency**

CCPA: Expansion/Portable Replacement

Project Renderings

Project Profile Page

Scan to view project details and reports

Garfield ES: Rebuild and Early Childhood Education Expansion

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Approved Budget	$70.7 Million
Proposed Budget Increase:	No change/Pending DSA Submission
Total Proposed Budget:	$104.5 Million
Project Status:	100% Design Development; Board approved Resolution No. 2526-0102: Revised Scope, Budget, and Funding Plan
Project Scope:	● New PK–5 campus amenities including 30+ classrooms, library, multipurpose room, Family Resource Center, and elimination of temporary portable housing ● Expansion of TK/PK capacity from 3 to 7+ classrooms ● Modernized healthy building systems including upgraded ventilation, monitoring, insulation, and resilient Title 24-compliant design ● **Net Zero Energy-ready** campus featuring all-electric high-efficiency systems, LED lighting, and battery storage ● Play Structures for TK, PK, and for all students at K-5 grade levels ● Staff parking and bicycle parking for students, staff, and families
Funding Sources:	Measure Y: $70.7 Million; OCI: $19 Million; Fund 25 (Developer Fees): $5 Million; Fund 35: $9.8 Million
Rationale for Budget Increase:	My need additional budget to meet NetZero energy usage after heat pump calculations are completed, increase in security fencing and land entitlement.
Recommendation:	NA

Garfield ES: Rebuild and Early Childhood Education Expansion

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Project Profile Page
Scan to view project details and reports

MLA Maxwell: Expansion/Portable Replacement

Approved Budget:	$39.5 Million
Proposed Budget Increase:	$2.7 Million
Total Proposed Budget	$42.2 Million
Project Status:	Awaiting DSA approval; Board approved Guaranteed Maximum Price
Project Scope:	• New middle school building featuring six classrooms, specialized learning spaces, a science lab, and gender-neutral restrooms • Sustainability upgrades including solar panels, battery storage, and new high-efficiency heat pump systems • Campuswide infrastructure improvements including plumbing renovations, fire and life safety enhancements, and seismic retrofitting • Modernized learning environments with upgraded administrative spaces, improved air quality, HVAC systems, and climate-controlled classrooms
Funding Sources:	Measure Y; Fund 25 (Developer Fees): $3M
Rationale for Budget Increase:	Expanded project scope to include heat mitigation improvements to building to reduce energy costs and meet Title 24 requirements.
Recommendation:	**Allocate $2.7 Million from Measure Y Contingency**

MLA Maxwell: Expansion/Portable Replacement

Project Renderings

Project Profile Page

Scan to view project details and reports

Roosevelt MS: Modernization

Approved Budget:	$91.5 Million
Proposed Budget Increase:	$6.1 Million
Total Proposed Budget:	$ 97.6 Million
Project Status:	Building A Alteration - Phase 1, under construction

Project Scope:

- New 3,400 sq. ft. science building providing modern labs and hands-on STEM learning opportunities
- Renovated classrooms, interiors, and shared spaces creating brighter, modernized learning environments
- Upgraded campus systems including HVAC, lighting, fire alarms, sprinklers, and security improvements supporting safety and comfort
- Structural and outdoor improvements including strengthened buildings, gardens, landscaping, and enhanced student gathering and learning spaces

Funding Sources: Measure B, Measure Y

Rationale for Budget Increase:

- A $6.1M for projected design costs in early phase of planning that was lower than industry standard, construction management, Architect/Engineering fees and increase in Inspector fees, DSA fees, move services, furniture, and custodial.

Recommendation: Allocate $6.1 Million from Measure Y Contingency

Roosevelt MS: Modernization

Project Profile Page
Scan to view project details and reports

Fremont HS: Portable, Roof, HVAC Replacement

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Approved Budget $15 Million

Proposed Budget Increase: $7.8 Million

Total Proposed Budget: $22.8 Million

Project Status: Construction

Project Scope:

- Four new permanent modular classrooms and two modern office spaces supporting teaching, learning, and student services
- Elevator modernization to improve campus accessibility and safety for students, staff, and visitors
- Renovated Foothill Boulevard ("Mac Dre") parking lot with expanded parking, upgraded lighting, and EV charging infrastructure supporting safety and sustainability

Funding Sources: Measure J: $18.3 Million; Fund 35: $4.5M

Rationale for Budget Increase:

- Expanded project scope including roofing replacement and heat mitigation improvements.
- Roof is highest ranked issue on Comprehensive Maintenance Plan.
- Additional electrification and mechanical system installations required for full functionality.

Recommendation:

- Allocate $3.3 Million from Measure J (Fremont New Construction Phase 1-4)
- Allocate $4.5 Million from Fund 35 (State Reimbursement-Fremont Project)

Fremont HS: Portable, Roof, HVAC Replacement

Project Profile Page

Scan to view project details and reports

Districtwide Focused Investments

Proposed Measure Y Spending Plan Priorities and Shifts

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Alignment with Facilities Master Plan & District Priorities

- **+$4M Heat Mitigation Strategies** to expand districtwide thermal comfort, ventilation, and climate resilience efforts identified through the Facilities Master Plan **—> Measure Y Program Contingency**
- **+$1.5M Portable Removal & Site Stabilization** for safety, liability, deferred maintenance, and operational impacts at aging and vacant sites **—> Measure Y Program Contingency**
- **+$2.5M Elementary Turf Fields** to improve outdoor play, athletics, recreation, and student wellness opportunities across elementary campuses **—> Measure Y Program Earned Interest**
- **+$12M Solar & Energy Infrastructure** **(Board Approved)** to support the District Sustainability Policy, long-term energy resilience, and reductions to General Fund utility costs **—> Measure Y Program Earned Interest**
- **+$2M TK Expansion** to supports early childhood access, enrollment growth, and implementation of the District’s TK/Early Learning strategy **—> Fund 25-Developer Fees**
- **Maintain Safety Investment across the bond program** in campus security, lighting, fencing, fire/life safety, and student well-being

Demonstrates continued commitment to being strong stewards of public dollars through strategic leveraging of partnerships, grants, sustainability investments, and operational savings opportunities

Heat Mitigation & Climate Resilience

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Expanding Healthy, Safe, and Climate-Responsive Schools

- Proposed **+$4M investment** to expand districtwide heat mitigation, thermal comfort, ventilation, and climate resilience strategies identified through the 2026 Facilities Master Plan
- Aligned with [Resolution No. 2526-0226]() — Protecting Student Health and Educational Equity Through Urgent District Wide Heat Mitigation
- Addresses growing challenges related to:
  - Extreme heat events and urban heat island impacts
  - Aging infrastructure and limited cooling capacity
  - Student wellness, indoor air quality, and classroom comfort
  - Long-term climate resilience and operational reliability
- Investments support a districtwide strategy that includes:
  - HVAC and ventilation improvements
  - Solar shade structures and outdoor greening
  - Classroom heat and air quality monitoring
  - Passive cooling and sustainable campus design strategies

Solar & Energy Resilience Investments

Proposed **+$12M investment in districtwide solar infrastructure** aligned with the 2026 Facilities Master Plan, Sustainability Policy, and Climate Emergency Resolution

Solar investments support:

- Reduce outdoor heat island impacts and support OUSD's and climate policies
- Long-term General Fund savings through reduced energy costs
- Reduced strain on aging electrical infrastructure
- Future cooling and HVAC modernization supports
- Access final round of Federal incentives that will provide approximately $3M to the "Green Revolving Fund."

Proposed solar and battery storage strategy includes new installations, shade structures, and recommissioning existing systems while leveraging federal ITC Direct Pay opportunities and generating an estimated **$22M in lifecycle utility savings**

Operational savings can be reinvested into student learning environments, sustainability initiatives, and long-term facilities improvements

Transitional Kindergarten Expansion and Hub Creation

Investing in Early Learning & Future Enrollment Growth

- **+$2M investment** to support TK expansion aligned with the 2026 Facilities Master Plan and District early learning priorities.
- Expands access to high-quality TK spaces and supports growing enrollment demand across the district and supports the establishment of TK hubs to support families access OUSD early learning opportunities.
- Investments include:
  - Modern early learning classrooms
  - Outdoor play and learning spaces
  - Classroom Restrooms for our youngest scholars
  - Additional play structure installation that is appropriate for 4 year old age scholars.
  - Family-centered support environments
  - Infrastructure upgrades for expanded TK/PK programming
- Supports long-term enrollment growth, educational equity, and future grant and partnership opportunities

Section Four

Next Steps

Next Steps

- [x] Present revised Measure Y Spending Plan to the Measures B, J, and Y Independent Citizens' School Facilities Bond Oversight Committee for recommendation - **June 8, 2026**
- [x] Bring Spending Plan as a Second Read and Final Recommendation to the Oakland Unified School District Facilities Committee - **June 18, 2026**
- [ ] Bring to Spending Plan to the Oakland Unified School District Board of Education for final approval and ratification- **June 24, 2026**

THANK YOU

Preston Thomas, Chief Systems and Services Officer/Deputy Chief of Facilities
Sele Nadel-Hayes, Executive Director, Facilities Planning & Management
Pranita Ranbhise, Executive Director, Facilities Planning & Management
Michael Ezeh, Director, Accounting Director

EVERY STUDENT THRIVES! EVERY STUDENT THRIVES!

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Appendix

OUSD Facilities Funding & Masterplan History

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

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 **Needs Assessment:** The OUSD Masterplan identified $1.5 billion in total facility needs (File #12-1043).

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.

May 2020, **Needs Assessment:** The updated Masterplan revealed that district facility needs had grown to $3.4 billion (File #19-2517).

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.

May 2023, **Market Escalation:** OUSD reported a 28% increase in bond project costs due to shifting market conditions. Total district needs outlined in the Masterplan subsequently rose to approximately $4.4 billion.

March 2025, **Plan Adjustment:** The Board of Education approved Revision #3 (File #23-2330) to the Measure Y Spending Plan. This revision realigned the budget to account for market escalation, scope changes, and the long-term health of the bond.

April 2026, **Funding Draw:** OUSD successfully sold Draw 3 of the bond, raising an additional $185 million to sustain forward momentum on all projects in the current Spending Plan.

Background

Measure Y Passes November 2020

June 2018

Board approved the initial Measure Y Budget List and Allocation

April 2021

Board approved updated Measure Y Budget.
(Refer to File# 21-0581)

March 2022

Board approved Measure Y District Initiative Work Plan.
(Refer to File #22-0223)

June 2023

Board approved Revision 2 to Measure Y Budget.
(Refer to File#23-0668)

March 2025

Board approved Revision 3 to Measure Y Budget.
(Refer to File#24-2330)

Q2 2026

Recommendation to Board to approve Revision 4 to Measure Y Budget.

Q2 2027[1]

Revision 5 regular cycle to respond to market conditions and project needs.

[1] Estimated timeline and subject to change based on changing market conditions and Board priorities.

Expanding Our Funding Portfolio to Support Healthy, Safe, and Joyful Schools

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

By building a diverse portfolio of funds, the Facilities Department can thoughtfully plan, design, and build learning environments that directly support and enhance student outcomes.

OPERATIONS

District Funds
General Funds Dedicated to Facilities Improvements. Supports capital projects benefiting student learning spaces.

Deferred Maintenance
Major repair and replacement of building systems at end of life. Prevents system failures and emergency closures.

Routine Restricted Maintenance Account
Day-to-day, in-house maintenance to keep schools safe, operational, and compliant.

GRANTS

CalSHAPE
Improves air quality, water systems, and energy efficiency.

CalFire
Supports fire prevention and campus safety.

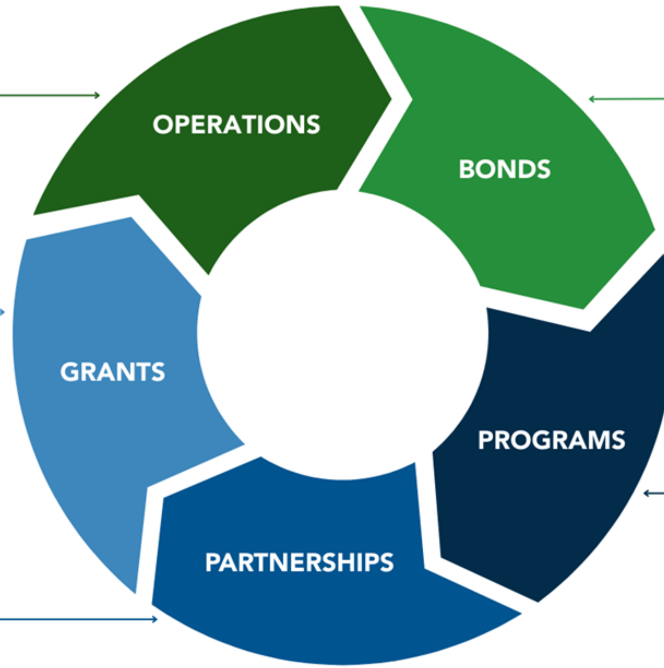
Kitchen Infrastructure Training
Upgrades kitchens and provides staff training.

PARTNERSHIPS

Eat.Learn.Play.
Transforms school spaces that are dignified, joyful places to eat, learn, and play.

KABOOM!
Builds play spaces in communities of color.

Under Armour/FIFA/US Soccer
Expands access to safe, high-quality, athletic spaces that promote youth development, physical activity, and community connection.



VOTER SUPPORTED

Bond Measures B, J, and Y
Addresses school facility issues.

Measure AA/Measure C
Expands early learning and college readiness opportunities, supported by appropriate facilities..

PROGRAMS

Appliance Management Incentive Program
Replaces outdated appliances with efficient models that reduce costs and environmental impact.

Developer Fees
Restricted funding source tied to new development; supports growth-related facilities needs.

Expanded Learning Opportunities Program
Provides facilities spaces for after-school and enrichment programs.

Energy Incentive
Funds energy efficiency projects.

Office of Public School Construction
State reimbursement for eligible modernization and new construction projects.

PG&E Government and K-12 Program
Provides incentives for green energy solutions.